

PeopleSoft®

EnterpriseOne JDE5
Workforce Management Foundation
PeopleBook

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Workforce Management Foundation PeopleBook
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Overviews

The J.D. Edwards Workforce Management Foundation system provides a shared database for human resources, payroll, and benefits data. The integrated system provides an effective way to manage this data.

This section provides overview information about the industry environment and about how the Workforce Management Foundation system operates.

Industry Overview

In recent years, an increasing number of companies have discovered the benefits of an integrated human resources and payroll system that provides a shared database for human resources, payroll, and benefits data. Interfaces between these systems can be costly and hard to maintain and can often require a separate support staff. The Workforce Management Foundation system provides the solution to streamlining the human resources, payroll, and benefits functions.

The Workforce Management Foundation system does the following:

- Eliminates double entry by using a shared database that can be accessed by multiple departments. For example, when an employee is hired through the human resources department, both payroll and benefits personnel can access the applicable data such as name, address, salary, and benefit elections. This eliminates the need for the payroll and benefits departments to reenter data required by their respective systems.
- Eliminates the need for costly maintenance of interfaces among systems.
- Reduces timing problems because data is available to all authorized users after it has been updated in the database.
- Provides for consistent data because data is entered once and then shared among departments.
- Provides system security to limit use to authorized users. OneWorld offers a variety of security options such as field-level and form-level security. For example, the benefits department might be allowed access to benefits-related fields only and might not have access to non-benefits related fields such as Job Title and Supervisor.

Idea to Action: The Competitive Advantage

The following examples present typical problems with tracking human resources, payroll, and benefits information, the J.D. Edwards solution to each problem, and the return on investment from using the J.D. Edwards Workforce Management Foundation system.

Your company needs to track separate benefit plans for union and nonunion employees.

The Group Plan DBA feature enables your company to group a set of DBAs that are unique to union members, such as union membership dues. Using benefit groups, you can set up a union group so that the eligibility and participation requirements within a union are applied specifically to union members only. You can eliminate errors during data entry by using job and union reports. Using this system, benefit plans are clearly organized and easily administered. HR time and resources can be dedicated to other projects.

During consolidations, the merging companies have difficulties managing the consolidation of benefits packages for the employees of each company.

By maintaining two sets of benefits packages, your company can track the eligibility of employees under each package separately. Your company can set up different benefits plans and groups for each package. When your company uses Employee Master Mass Changes, the appropriate benefit group can be assigned to many employees at once. To enroll employees in newly consolidated plans or to enroll the acquired employees into existing plans, you can use the Batch Enrollment or Self-Service Open Enrollment features. Using the HR Call Center function, you can route phone calls regarding benefits or information about the consolidation from employees to the appropriate person in the HR department. Plans are better organized and more easily administered. Using web-enabled applications saves HR resources and associated costs.

Your company needs to provide information to employees about what benefits they are enrolled in and how much your company contributes toward those benefits.

OneWorld provides a simple process by which the HR department can create a benefits statement that contains appropriate information about pay, deductions, benefits, and accruals (PDBAs) and about taxes. You can run this report as frequently as needed to compile the PDBA and tax totals of your employees based on payroll history records for a specified time. The system provides accurate and detailed information to employees about their benefits and thus saves HR resources from spending time compiling this information manually. Employees can review their statements to ensure that enrollment information is correct. When the employees realize the value of the employee-sponsored benefits, they will have greater company loyalty and higher job satisfaction.

Your company needs to know exactly how much you owe to a benefit provider.

Because the Human Resources, Benefits, Payroll, and Accounts Payable systems are integrated, companies can designate at the benefit plan level that an Accounts Payable voucher should be generated based on the employee deductions and employer contributions made for a certain benefit. When you run payroll, all deductions and employer contributions for the benefit are summed up in one total and made into a voucher. The voucher amount is then logged in the Accounts Payable system. Using the Workforce Management Foundation system increases the accuracy of monies paid to benefits vendors. HR saves time by not having to manually compute payment amounts.

Your company needs to keep track of dependents and beneficiaries within the plan.

Dependents and beneficiaries are tracked on the Dependent/Beneficiary Entry form, which has fields for designating full-time student status and date of birth. Also, dependents and beneficiaries who are attached to specific plans can be listed with the employee they are associated with on the Dependent/Beneficiary by Employee form. Several standard reports help determine whether dependents have become ineligible in the plans.

Your company needs to provide information to employees about benefit enrollment.

Employees can use the Employee Self-Service feature to learn about their benefits, view their benefit options, enroll in benefit plans, review and make changes to their existing benefit elections, and perform "what if" scenarios to determine the total cost of elections. The Employee Self-Service feature saves HR staff from spending time explaining and distributing enrollment forms and providing enrollment confirmation.

Your company needs a system that accommodates exceptions to standard eligibility requirements.

Using Enrollment with Overrides, you can add to any benefit plan and make the changes effective at any time. If a one-time change in the amount of a deduction or benefit is needed, the change can be reflected in One-time DBA Overrides in Time Entry. The system reduces the time needed to manually override or correct benefits deductions or subsidies during payroll processing. It also eliminates the need to track employees with special circumstances manually.

Your company acts as the plan administrator for your own retirement and pension plans, so you are required to track fund allocations and to prove a nondiscriminatory plan.

Using Fund Allocation Setup and Allocations by Employee, you can list all funds available within a retirement plan. You can specify whether employees are owners or officers of the company, whether they are considered highly compensated, and whether they should be included in "look-back year" statistics. This information helps ensure that statistics compiled for nondiscrimination testing are accurate. The system makes fund allocation easy to administer and maintain, thus reducing the need for paying third-party administrators for this service. You are also assured that plan and participation data are accurately reported.

Your company needs to know whether employees are eligible for benefits when they are working part time or are on flexible schedules.

Using Enrollment Parameters, you can set up the conditions under which time eligibility is tested. If the Continuing Eligibility Tables feature is set up with minimum hours requirements, the system will review an employee's scheduled hours to determine whether he is eligible for the plan. If the employee drops below the hours requirements, he will be placed in a new benefit status based on how the eligibility rules are set up.

When you are self-administering benefit plans based on factors such as income and age, your company needs to ensure that the premiums charged are in accordance with the factors associated with the plan.

You can set up your own calculation tables that define the appropriate premiums to charge for each age or income bracket. You can update these tables in one place when rates change, and the system will automatically update all deductions for employees enrolled in the plan. You can increase the accuracy of premiums being deducted for age-based benefit plans. The HR staff no longer needs to rely on manual tracking to determine when age-based rate increases are necessary.

Your company needs to maintain separate pay structures for union and nonunion employees because union contracts often contain specific clauses regarding compensation.

The Union Rate Table allows your company to maintain compensation plans designed specifically for union members and to track those plans separately for the nonunion compensation plans. Compensation plans are better organized, which leads to time and cost savings during the administration of the plans.

Consolidations often require mass layoffs due to the duplication of work structures.

Using Termination Workflow, you can expedite the processing of termination paperwork by automatically generating final timecards, payments for paid time off, COBRA and HIPAA letters, and final checks. As laid-off employees search for new jobs, they need employment verifications to take with them or to be sent to new employers. Using Employee Self-Service, these employees can electronically request employment verification. The workflow process will transfer the request to the appropriate HR or Payroll authority for confirmation and mailing. Using the electronic system will save time and streamline processes, resulting in cost savings.

After a merger, your company wants to consolidate the separate payroll and human resources systems.

Using the Alternate Employee Number field, you can keep track of employee numbers that might have existed in another system while assigning a new number in OneWorld. Additionally, unique data that was tracked in a former system can now be tracked in OneWorld using category codes. To enter all employees into OneWorld, you can use the Quick Hire feature. The consolidation of systems reduces duplicated effort and improves accuracy and consistency of data. You do not need to pay maintenance and service fees for other systems.

Your company maintains multiple systems that do not share a database. Therefore, information common to more than one system can be inaccurate and inconsistent.

Integration of Employee Master among the Human Resources, Payroll, Benefits, and Address Book systems means that data is entered once and shared with other systems. Quick Hire allows for default information to be entered and enables fast, accurate employee entry. Accounts Payable Integration provides for a shared database among the Payroll, Benefits, and General Accounting systems, so you can generate vouchers for wage attachments and benefits when the payroll is processed. The consolidation of systems reduces duplicated effort and improves accuracy and consistency of data. You do not need to pay maintenance and service fees for other systems.

When a large number of employees is hired at one time, your company has the logistical problem of entering all the new employees into the system.

Using the Quick Hire function, you can enter the employees into the system rapidly with a "heads-down" entry method. You can set up Quick Hire so that information that is common to all employees in a group can be supplied automatically to each employee's record. Quick Hire saves time, which means fewer person-hours per project and reduced compensation costs.

Enrolling new employees in benefit plans can be a disorganized and inefficient process that leads to inaccurate and incomplete information.

When you use New Hire Workflow, the process of hiring an employee is documented and followed step-by-step electronically. Tasks and approvals are automated, and rules within Workflow designate the order of the steps. The system streamlines the new-hire process when you set up requirements for how the process will be performed. Waiting time for the completion of certain steps is reduced. New employees can use Employee Self-Service to complete and submit certain new-hire forms such as the W-4. Workflow increases efficiency and saves time so that HR resources can be dedicated to other projects.

When large groups of employees are hired at one time, your company has difficulty keeping track of what company property was issued to whom and when.

Using HRM Employee Setup, HR can document what items are needed for each employee and can set up the workflow to notify the appropriate personnel of those needs. When an employee terminates, the Company Property report runs during Termination workflow to alert HR if outstanding pieces of company property exist that need to be collected before the employee's departure. Keeping track of this information electronically saves time and improves accuracy of information.

Federal regulations require most companies to notify their state when they hire a new employee. Your company has difficulty keeping track of all the information required to comply with this regulation.

OneWorld provides a standard report that captures the record of each newly hired employee and organizes it into report format based on the requirements of this new-hire regulation. Using this system leads to more accurate and timely compilation of data.

Keeping track of the skills and accomplishments of each employee and having access to that information at the time that such skills are needed is a difficult management issue.

Managing the departure of employees is difficult. Your company needs to understand trends behind turnover statistics.

Your company has international locations. You need to maintain strict confidentiality of employee personal information.

Your managers must complete accurate performance appraisals that reflect the skills and performance achievements of the employees.

Paper-based employee files quickly become overloaded, and notes are attached to documents. Paper-based files are accessible only at the site in which they are physically housed.

Your company needs to keep track of who works when.

Your company needs to complete and track the scores of skills, personality, and employment tests to evaluate applicants before hiring them and employees before promoting them.

Using Competency Management, you can maintain a bank of employee skills and accomplishments and also search for specific skills. The system allows time and cost savings and uses employee resources better. Lengthy research and tracking efforts are not needed, and efficiency is increased because you can search for specific skills and experience within the workforce.

Using the Change Reason Codes throughout the system, especially at the time of a job change, transfer, or termination, you can identify trends in reasons for departure. Also, the Employee Turnover report is a standard report that OneWorld offers to provide information about changes in the workforce. The system saves time and improves the effectiveness of recruiting and retention measures by identifying trends in turnover statistics.

The Data Protection Standards fields on the Employee Master designate which employees are covered by the Privacy regulations and the date such coverage came into effect. The system ensures compliance with international data regulations.

Competency Management enables managers to log the skills and accomplishments of each employee and the competencies required by the job. You can develop job descriptions from the competencies required for the job, and from the job descriptions you can make performance evaluations. Because you can respond quickly to a market or organization change by reallocating resources, your company can continue to remain competitive. The system improves accuracy and consistency in evaluations and increases employee morale.

You can set up Supplemental Data for any item or process that you want to track. You can attach additional text or objects to the employee record within Supplemental Data and throughout the system. Any user with the security rights to access these items can review notes or referenced documentation that is attached to a record. The system saves space within a paper personnel file and improves HR efficiency by providing one place to look for all similar information.

On the Employee Payroll Revisions form is a field for Work Schedule. The values within this field are user defined, so you can set up each schedule available to your employees and attach that schedule to the employee record. Efficiency is improved because you can quickly access schedules to learn who is currently on shift. You also save time researching schedules.

Your company can set up Supplemental Data for tests taken and scores achieved. You can then access this information through Multi-Skill search to determine what applicant or employee is qualified for a certain task. Competency Management tracks achievements such as passing tests or becoming proficient in a certain skill. The system saves time by storing information electronically. Tracking and comparing results is easier, more accurate, and more standardized.

Your company needs to keep track of the reporting relationships of field employees.

You can easily look up, change, and review reporting relationships using the Employee and Supervisor Relationships tree. You can save time researching reporting relationships. You can easily and accurately build organizational charts. Because you can quickly enter changes, the structure stays current.

Processing a termination is inefficient and prone to error.

Termination Workflow automates the processes involved in a termination. When termination workflow is enabled, notification is sent to all appropriate personnel as soon as the termination date is reflected on the employee record. HIPAA and COBRA letters are generated based on the benefits information that is already in the system. A company property report is run to alert authorities if there are outstanding items to collect. Paid time-off balances are totaled and readied for payment. A final timecard is generated and a final check is issued. Auto-generation of termination paperwork improves the accuracy of such information because it relates directly to the information in the database. Also, HR doesn't have to spend time researching and manually creating documents.

HR and Payroll departments are often overwhelmed with requests for employment verifications and reference checks.

When you use Employee Self-Service Employment Verifications, the request and submittal of employment verifications is quick and easy. Employees make the request through the company intranet and are able to view the data and salary information that the system generates for employment verifications. Employees complete verification information and specify the preferred method of submission. Workflow then notifies the appropriate HR or Payroll person to review the system-generated information and then to forward the verification to the person who is requesting the information. HR doesn't have to complete manual employment verification letters. Employees can review the data that is system generated.

Your company must maintain compliance with OSHA and Workers' Compensation regulations and must compile information about improving the safety of the workplace.

OneWorld's Safety and Health functionality provides an easy forum for entering, maintaining, updating, and reporting on work-related injuries and illness. The system includes a Supplemental Database so that additional details and company-specific information can be tracked. The system also includes standard OSHA-approved reports that compile the information that already exists within the system. Using OneWorld, you can save time and research effort that is usually spent compiling data. You are also assured of compliance with OSHA and other regulatory requirements.

Your company needs to create, implement, and maintain a compensation planning system. Employees need to feel confident that they are fairly paid for their skills and to understand how their pay rates are determined and what their potential for salary growth is.

Compensation Administration is streamlined in OneWorld by using Pay Grades, which defines a range of pay for similar jobs, and Pay Steps, which allows pay progression within a grade. Companies often set up the system to automatically enter a pay rate or range for an employee based on the job filled. The Job Evaluation feature enables HR professionals to rate jobs on the same scale to determine an equitable pay structure. Future increases can be calculated in "what if" scenarios and can be scheduled for future effectiveness using Pay Rate Information and Salary Planning. You use Salary Change Workflow, which activates an electronic approval process, to approve and implement salary changes. Position Control tracks how the changes affect the budget. The OneWorld System saves time by automating processes of creating and maintaining compensation plans.

Your company needs to review this year's budget and estimate one for next year. This effort is time-consuming and often based on guesswork.

You ensure appropriate pay rates for employees. Employee morale is improved by promoting fair pay practices, and the result is decreased turnover and increased job satisfaction.

Keeping up with the data needed to maintain Affirmative Action plans is an immense project.

From Create Next Year's Budget, your managers can establish a new budget based on the existing position structure and can build in an automatic base salary increase. From Cross Year Budget Comparison, you can determine whether trends exist within the budget from one year to the next to help evaluate the forecast for next year. From Work with Position Activity, your managers can review the activity that has occurred within a position for the previous year. From Position Control, your managers can review the positions that are under their budget and can then review how much one person's budgeted and actual salary affects the total budget for the department. You can save time with the automated budgeting measures, and you can increase the accuracy of the budget information.

To ensure compliance with Affirmative Action plans, you can track data that is updated annually for existing employees, former employees, and applicants. Ethnicity, gender, veteran status, and disability status are all items that you can track. You can use this information and reasons for change, turnover statistics, date changes, and other country-specific data changes within the Employee Master to compile statistics needed for Affirmative Action plan reports. These reports include Workforce Analysis, Affirmative Action Exception, and Hired Applicants by EEO Job Category. The system saves time and research effort that is usually spent compiling data.

The process of submitting paper timecards is time-consuming and prone to error. Your company has difficulty ensuring employee compliance with timecard deadlines.

Employees can complete timecards and submit them electronically using Employee Self-Service. These electronic timecards are held in a temporary workfile pending review or approval before they are posted to the payroll system for processing. Employees and supervisors can review the previous timecards for reference. The system relieves HR and Payroll from the task of compiling and entering timecards manually.

Providing employees with copies of previous paystubs, which may be needed for loan applications or other income verification, is time-consuming for HR and Payroll.

Employees can easily use Employee Self-Service to view previous paystubs online. They can then print the stubs for their own reference or forward copies to their loan processor. This system results in cost savings through the use of online paystubs. Time and material cost savings result when employees can view and print the information they need through Self-Service instead of using payroll or HR staff resources to copy and mail the paystub.

Workforce Management Foundation Overview

The Workforce Management Foundation system provides a versatile, cost-effective, and time-saving solution for managing your employee information and accounting for employee time worked. You use this system to track information that workforce management users typically share. If you are not using the J.D. Edwards Payroll system, you can use Workforce Management Foundation as a stand-alone time accounting system.

You can use this system to do the following tasks:

- Track employees and employee job information
- Enter time for employees
- Manage your worldwide labor expenses and billings
- Track job costs by creating journal entries for the general ledger
- Streamline your hiring processes
- Set up the deductions, benefits, and accruals (DBAs) that you use during payroll processing and benefits administration

System Integration

The Workforce Management Foundation system contains the central databases for all information that human resources and payroll users typically share. For example, you use the foundation system to track the following information:

- Complete employee information
- Job information
- Pay type, deduction, benefit, and accrual (PDBA) information
- Time accounting information

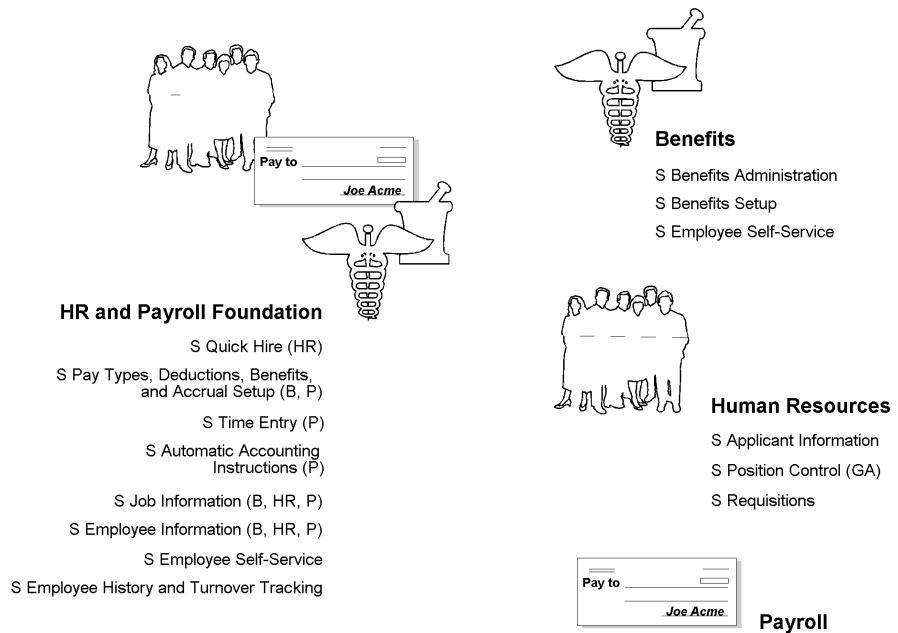
An integrated, central database means that, when the human resources clerk updates an employee's information, the employee's payroll information is also updated. A central database accomplishes the following:

- Eliminates redundant data entry
- Maintains current and accurate information across all your business operations
- Improves communication among departments

Both human resources and payroll users can enter information into the Workforce Management Foundation system. However, to prevent unauthorized access to confidential information, you can set up system security that allows users to access only the information that they need for their jobs. Typically, your system administrator sets up system security during system implementation. The system administrator can set up security for an entire form or for individual fields on a form.

The following graphic shows how the Workforce Management Foundation system supports human resources, benefits administration, and payroll:

HR and Payroll System Integration



Key

- B = Integrates with Benefits
- HR = Integrates with Human Resources
- P = Integrates with Payroll
- GA = Integrates with General Accounting

To simplify your processes and facilitate communication within your organization, the Workforce Management Foundation system also integrates with the following J.D. Edwards systems:

Address Book	The Address Book system contains employee names, addresses, and tax IDs.
General Accounting	If you are using the foundation system for stand-alone time accounting (that is, you are creating timecards, but not processing them using J.D. Edwards Payroll), you can set up the foundation system to integrate with the General Accounting system. This integration allows you to update general ledger transactions and account balances. The foundation system can create and post transactions to the general ledger using the automatic accounting instructions (AAIs) that you define. You can use full detail on your labor accounts and summarize your liabilities and cash accounts.
Job Cost	You can use the Workforce Management Foundation system to enter labor and equipment time by day. Then, you can use the Job Cost system to analyze the labor and equipment costs for a job.
Service/Contract Billing	You can use the Workforce Management Foundation system to enter labor and equipment time by job (business unit). Then, you can use the Service/Contract Billing system to do the following: <ul style="list-style-type: none"> • Bill customers for the labor and equipment expenses associated with the job

- Bill customers for payroll burden expenses
- Bill customers for contract time associated with the job

Equipment/Plant Maintenance

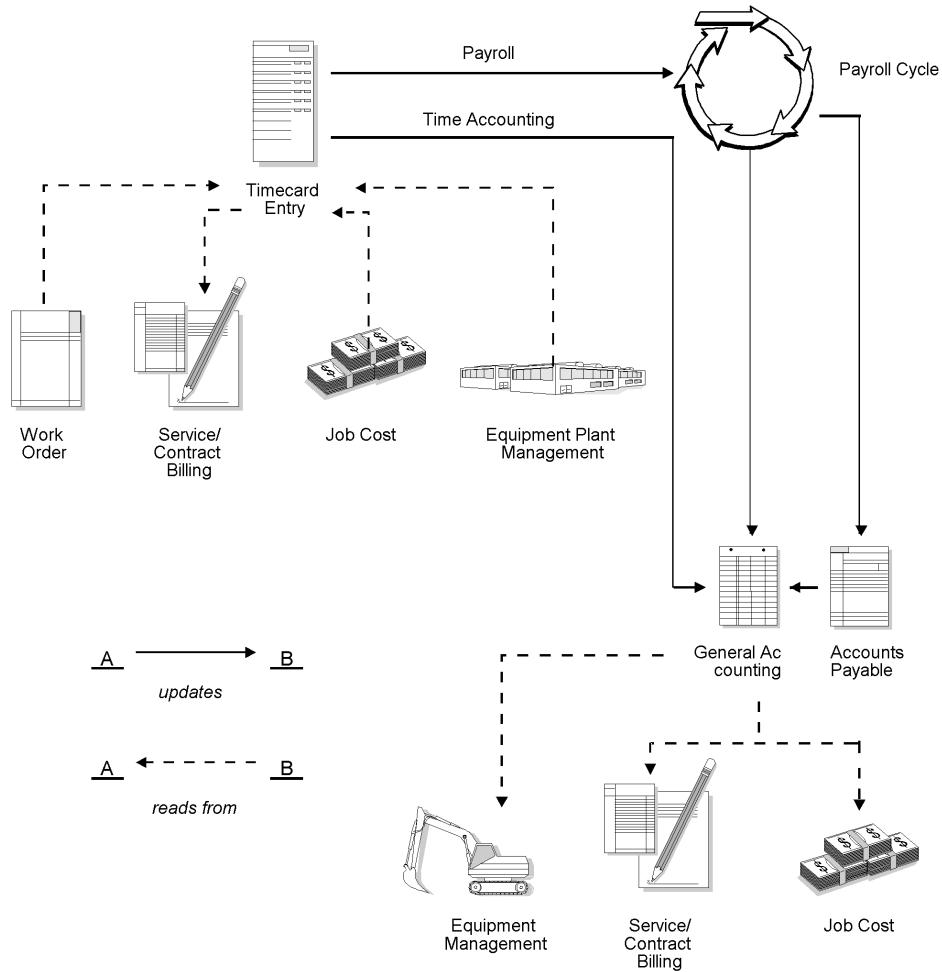
You can use the Workforce Management Foundation system to enter labor and equipment time. Then, you can use the Equipment/Plant Maintenance system to do the following:

- Charge a job for use of equipment
- Track labor for equipment maintenance
- Track labor for work orders

Work Orders

You can use the Workforce Management Foundation system to enter labor and equipment time against a work order. You can use the Work Orders system to identify specific costs of a task or to track equipment repair costs. You can create work orders for small projects and service calls.

The following graphic shows how Workforce Management Foundation integrates with other J.D. Edwards systems:



System Features

The Workforce Management Foundation system provides the following:

- *Comprehensive employee information*
- *Integrated employee history and turnover analysis*
- *Complete job information*
- *Complete time accounting*
- *Parent/child relationship reporting*
- *Self-service*
- *Enterprise Workflow Management*
- *Employee Quick Hire*

You can also perform convenient functions such as the following:

- Future data changes
- Mass changes

Comprehensive Employee Information

You can use your Workforce Management Foundation system to track comprehensive employee information such as the following:

- Employee pay status
- Government-required information, such as Equal Employment Opportunity (EEO) job category for jobs in the United States
- Department
- Tax area
- Benefit group

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

- Job skills
- Education
- Work experience
- Foreign language competency
- Professional licenses
- Government-required information, such as EEO reporting for employees who work in the United States

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

Integrated Employee History and Turnover Analysis

You can set up your system so that each time you add or change employee information, the system automatically creates a historical record of the new information.

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

You can use history and turnover information to perform the following tasks:

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

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

Complete Job Information

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

You can use job information to perform the following tasks:

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

Complete Time Accounting

You can enter as much or as little timecard information as your organization needs. You can simplify time entry in the following ways:

- Define default job information at the employee or group level
- Automatically create overtime pay from regular hours
- Upload time entry information from a third-party source to create timecards

Parent/Child Relationship Reporting

You can document the structure of your organization and report on the parent/child relationships among employees. For example, a report for top management might show a broad organizational structure, such as branch offices that report to the main headquarters. Individual departments might need a report that shows each employee who reports to a single manager.

Self-Service

Self-service allows employees to complete tasks online through a company intranet site. Self-service reduces the handling of documents between employees and the human resources department by allowing employees to access information, forms, and services through

desktop computers. For example, employees can use self-service to review and update personal data and enroll in benefits online. When employees update information through self-service, the changes made by the employee can be posted to a temporary workfile, where a company representative can review the changes before posting them to the employee database.

Some types of information that employees can enter and review through self-service include the following:

- Name and address
- Emergency contacts
- Verification-of-employment letter requests
- Paid time off
- Benefits enrollment
- Dependents and beneficiaries
- Timecards

You can set up a self-service site on your organization's intranet. You can have a system administrator set up only the information that is appropriate for your organization's self-service site.

Managers, supervisors, or administrators can use self-service to review and update the following information online:

- Upcoming employee reviews
- Requests for verification-of-employment letters
- Employee setup process

An individual who is set up in the system to access these programs can review employees who have upcoming review dates, process verification-of-employment letters, and initiate the employee setup process. The employee setup process is a Workflow-based process that sends a series of approvals and work orders to set up a new hire's equipment.

Enterprise Workflow Management

Enterprise Workflow Management is a OneWorld system that provides a way of automating tasks, such as notifying a manager that a requisition is waiting for approval, using an e-mail-based process flow across a network. Workflow can send messages and approval forms to employees as a part of the process. Workflow can also message one person or a group of people, or it can escalate a message that hasn't been answered within a certain time frame to another employee's mailbox. You can set up each Workflow process to meet your business needs.

Some tasks that you can automate using Workflow include the following:

- Terminating an employee
- Approving a requisition
- Changing an employee's salary
- Initiating new employee setup
- Reviewing upcoming employee reviews by supervisor
- Processing verification-of-employment letters

- Approving a W-4 form for an employee in the United States

When you hire an employee or change an employee's salary, you can set up Workflow to send a message to the appropriate manager for an approval when you enter a salary that exceeds a predetermined amount. You can also use Workflow to initiate a setup process for a new employee. Workflow sends messages to a list of people for approvals so that all paperwork and equipment setup is completed by the employee's start date.

Workflow can also help terminate an employee by terminating the employee's benefits and creating a final paycheck.

You can use Workflow to automatically notify supervisors and human resource personnel about upcoming performance reviews, verification-of-employment letters, requisition approvals, and more.

Employee Quick Hire

The New Hire Setup Workflow process can be customized to meet the needs of your organization. Processing options on the Managers Employee Setup form allow you to easily customize the process. For example, your organization might choose to require approval at the process level or at the task level, or you might choose to escalate certain tasks if the designated individuals do not complete the tasks in an appropriate time frame.

When adding an employee using the employee quick hire application, an e-mail message is automatically sent to the employee's supervisor, requesting the supervisor to identify the setup tasks necessary for the employee. OneWorld determines which supervisor to e-mail based on the entry in the Supervisor field in OneWorld.

When the tasks have been identified for the new employee and the Employee Setup Record has been approved, OneWorld initiates the New Hire Setup Workflow process, which e-mails the individuals in your organization responsible for completing the necessary tasks.

Using Manager Self-Service, the new employee's manager accesses OneWorld and enters the setup tasks that are necessary for the employee. The setup tasks can also be supplied automatically based on the employee's job type.

Important Tables and Descriptions

The following list includes the important tables in the Workforce Management Foundation system:

Address Book Master (F0101)	Contains name and address information for all employees. This information has a search type of E (Employee).
Employee Master (F060116)	Contains detailed information about employees, such as salary, pay grade, birthdate, and job type.
Employee Additional Information (F060120)	Contains additional information about each employee.
Employee International Data (F060117)	Contains country-specific information about each employee.

Future Employee Master Data Changes (F06042)	Contains future changes to employee master records.
Job Information (F08001)	Contains information for job ID and for the job evaluation. The job ID is the combination of the job type and job step.
HR History (F08042)	Contains employee history records for each employee master field.
Supplemental Database Setup (F00090)	Contains data types and their respective column headings. Use these data types to specify the types of supplemental information that you want to track for jobs, employees, applicants, and requisitions.
Supplemental Data (F00092)	Contains multiple values with a specific type of data for individual applicants, employees, jobs, and requisitions.
System Options (F05001)	Contains default information that applies to all records in the system. This table also contains default information that applies to specific modules.

Employee Information

Before you can analyze and report on employee information, you must create a record for each employee. This record contains personal, company, job, tax, and pay information about the employee. You also need to enter certain employee information so that employees can receive their payments.

After you create a record of employee information, you can do the following:

- Make changes, corrections, or updates
- Review the information as necessary
- Terminate the employee
- Rehire the employee
- Process a timecard for the employee
- Process the employee in a payroll

To simplify the process of managing employee information, you can set up your system for employee self-service. Employee self-service enables employees to update certain information in their employee records, such as addresses and emergency contacts.

Hiring Employees

When you hire an employee, you must add an employee record to the Employee Master table (F060116) that contains personal, company, job, and pay information for the employee. The information in the employee record can be used to analyze and report on your employees and to meet government reporting requirements. You can add employee records to the database using either of two methods:

- Adding employee records one at a time
- Adding multiple employee records

The following table describes the similarities and differences between the methods:

Adding employee records one at a time	This method displays a series of forms that you need to complete to hire an employee. This method is preferable if you hire individuals with very diverse employee information so that hiring in groups is not applicable. You can add new employee and terminated employee (rehire) records to the Employee Master table (F060116).
Adding multiple employee records	This method uses the Employee Quick Hire program. It saves data entry time because you add records in groups based on similar job information. You can add new employee, terminated employee (rehire), and applicant records to the Employee Master table (F060116).

Adding Employee Records One at a Time

You add an employee record to the database when you hire an employee who is new to the organization. When you add an employee record, the system updates the following tables:

- Employee Master Information (F060116)

- Employee Additional Information (F060120)
 - Employee International Data (F060117)
 - Employee Jobs (F060118)
 - Address Book Master (F0101)
-

Note

When you add a new employee record to the database, you complete a series of forms. As you complete each form, the next form appears. You can use the Back button to return to a previous form, where you can review or change information before saving the employee's record. The system saves the new record only after you complete the entire sequence of forms.

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

Before You Begin

- Review the processing options for each program in this series of tasks. They define how much information you must enter. For example, processing options for organizational assignments define whether the Job Information table supplies default job information when you add or change employee information.
- In the Address Book system, review the processing options for Address Book Revisions to ensure that the tax ID is set to appear.

Entering Basic Employee Information

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

► To enter basic employee information

From the Employee Management menu (G05BE1), choose Employee Information.

1. On Work With Employee Information, click Add.

PeopleSoft®

Select Workspace: Active Foundation

Active Foundation

Employee

Employee Number: 12346
Employee Tax ID:

Alternate Employee No: []
Security Business Unit: 1 Financial/Distribution Company
Home Company: 00001 Financial/Distribution Company
Check Route Code:
Pay Frequency: S Semi-Monthly
Pay Status: A Active
Employee Benefit Status: A Active
Benefit Group: SALARY Salary Employee Benefit Participation Date: []

Original Hire Date: 01/03/05 Date Started: []
Leave Begin Date: [] Leave End Date: []
Expected Recall Date: [] Termination Date: []
Date Pay Starts: [] Date Pay Stops: []

Data Protection Standards
Data Protection Code: []
Data Protection Date: []

Upon Termination
Move to Applicant Pool:
Country of Employment
Country: USA

2. On Employee, complete any of the following employee identification fields that are not already supplied by the system:
 - Security Business Unit
 - Home Company
 - Pay Frequency
 - Pay Status
 - Original Hire Date
 - Date Started
 - Country
3. To enter benefits information, complete any of the following fields that are not already supplied by the system:
 - Employee Benefit Status
 - Benefit Group
 - Participation Date
4. To include additional employee identification information, complete the following optional fields:

- Alternate Employee No
 - Check Route Code
5. Complete the following fields if the system displays them for your country of preference:
- Data Protection Code
 - Data Protection Date

These fields might not appear, depending on the employee's country code.

6. Click Continue.

The Address Book Revision form appears.

After you enter basic employee information, you must enter address book information. See [Entering Address Book Information](#).

Entering Address Book Information

After you complete the preceding form, you must enter address book information. The system automatically displays the Address Book Revision form.

Address book information includes information such as the employee's name, address, tax identification number, and phone number. Entering address book information creates a record for the employee in the Address Book system. After you enter address book information for an employee, you can use that information to locate the employee in the database when you do not know the employee number.

To successfully enter a new applicant as an employee, you need to change the Search Type field to either an E (employee) or an S (subcontractor).

Note

If an Address Book record exists for this employee, the system automatically supplies the existing Address Book information.

After you enter address book information, continue the current process by completing the next form. If you need to return to Address Book Revision, click Back.

See Also

- ❑ *Entering Address Book and Mailing Information* for instructions for completing the Address Book Revisions form

Entering Employee Personal Information

After you complete the preceding form, you must enter employee personal information.

Personal information includes items such as marital status, gender, and birth date. Use this information to track employee-specific information for reporting and analysis.

► To enter employee personal information

The screenshot shows the PeopleSoft Personal workspace. At the top, there is a navigation bar with links for Portal, WWW, Intranet, Training, and a sign-in/out area. Below the navigation bar is a toolbar with icons for Cancel, Back, Cont, Form, and Tools. The main area is titled "Personal". It contains several input fields for employee personal information:

Employee No.	12346	Brown, Susan	
Preferred Name			
Birth Name			
Name - Employee			
Additional Name			
Salutation		Suffix	
Ethnic Code	03	Gender	<input type="radio"/> F <input checked="" type="radio"/> M
Marital Status	M	Country Of Birth	
Date of Birth	3/12/56	Life Ins. (Annual Salary 1)	
Alien Reg. No		Life Ins. (Annual Salary 2)	
Currency Code		Employee Age (As of Jan 1st)	
Language			
1st Nationality-Citizenship			
2nd Nationality			
3rd Nationality			

1. On Personal, complete the following fields:

- Ethnic Code
- Gender
- Date of Birth

2. Complete any of the following optional fields:

- Preferred Name
- Birth Name
- Name - Employee
- Additional Name
- Salutation
- Suffix
- Marital Status
- Life Ins. (Annual Salary 1)

- Life Ins. (Annual Salary 2)
3. Complete the following fields if the system displays them for your country of preference. (These fields might not appear, depending on the employee's country code.)
- Country Of Birth
 - Alien Reg. No
 - Currency Code
 - Employee Age (As of Jan 1st)
 - Language
 - 1st Nationality-Citizenship
 - 2nd Nationality
 - 3rd Nationality
4. Click Continue.

Continue the current process by completing the next form. If you need to return to employee personal information, click Back.

Entering Organizational Assignment Information

After you complete the preceding form, you must enter organizational assignment information.

Organizational assignment information includes detailed information about the employee's work assignment, such as job type, job step, and home business unit.

► To enter organizational assignment information

The screenshot shows the PeopleSoft Organizational Assignment screen. At the top, there is a navigation bar with links for Portal, WWW, Intranet, and Training. Below the navigation bar, the workspace is set to "Active Foundation". The main area is titled "Organizational Assignment" and contains several sections:

- Employee Information:** Fields include Employee No. (12346), Date Started (01/03/05), Supervisor (7500), Home Business Unit (9), Mentor, and Team.
- Position Details:** Fields include Position ID, Job Type/Step (IM-1), Job Title (MIS Manager-North America), Union Code, EEO Job Category (002), Date in Current Position (01/03/05), Date in Current Job, Locality, and Shift Code.
- Employment Status:** Fields include Employment Status, Date Pay Starts (01/03/05), Date Pay Stops, and Last Competency Review Date.
- Job Competency:** Fields include Organizational Business Unit, % Competency Achieved (0.00), and Last Competency Review Date.
- Performance Appraisal:** Fields include Perf. Appraisal Level (0.000), Last Review Type, Next Review Type, Last Review Date, and Next Review Date.

1. On Organizational Assignment, complete any of the following fields that are not already supplied by the system:
 - Supervisor
 - Home Business Unit
 - Mentor
 - Team
 - Position ID
 - Job Type/Step
 - Locality
 - EEO Job Category
 - Employment Status
 - Date Pay Starts
2. To enter job competency information, complete the following fields:
 - Organizational Business Unit

- % Competency Achieved
 - Last Competency Review Date
3. To enter performance appraisal control information, complete the following fields:
- Perf. Appraisal Level
 - Last Review Type
 - Last Review Date
 - Next Review Type
 - Next Review Date
4. Complete the following optional fields:
- Job Title
 - Union Code
 - Shift Code
 - Date Pay Stops
5. If you want to assign competencies to the employee, choose Competency Info from the Form menu.
- The Competency Info option is available only if competency management software is enabled in your system.
- See *Assigning Competencies to Employees* for additional information.
6. If you want to compare the employee's competencies with the competencies that are required for a particular job, on Organizational Assignment choose Gap Analysis from the Form menu.
- The Gap Analysis option is available only if competency management software is enabled in your system.
- See *Reviewing Gap Analysis Online* for additional information.
7. Click Continue.
- If you set the processing options for Organizational Assignment (P0801ORG) to use default job information from the Job Master, the system displays Job Default Window.

Employee Information - [Job Default Window]

	NEW	OLD
Job Type/Step	A1 President	DA-3 Financial Analyst
Employee Information		
Pay Frequency	Semi-Monthly	Bi-Weekly
Benefit Group	EXEC	Executive Benefit Group
Organizational Assignment		
Union Code		
EEO Job Category	001	Officials and Managers
Basic Compensation		
Pay Class	S Salaried	S Salaried
Pay Grade/Step	S7	
Overtime Exempt	Y YES	Y YES

- If the Job Default Window appears, review the information on this form, make any necessary changes, and then click OK.

Continue the current process by completing the next form. If you need to return to Employee Organizational Assignment, click the Back arrow.

Processing Options for Organizational Assignment (P0801ORG)

Defaults

- Job Information Add
0 = Do not use default data.
1 = Use default data.
- Job Information Change
0 = Do not use default data.
1 = Use default data.
- Job Default Window
0 = Always Use Default Job Information
1 = Only Use Defaults to Overwrite Blanks
- Job Category Add
0 = Do not use default data.
1 = Use default data.
- Job Category Change
0 = Do not use default data.
1 = Use default data.
- Business Unit/Job ID Information
Add
0 = Do not use default data.
1 = Use default data.
- Business Unit/Job ID Information
Change
0 = Do not use default data.
1 = Use default data.

Entering Basic Compensation Information

After you complete the preceding form, you must enter compensation information.

Basic compensation information includes pay information, such as salary, hourly rate, pay class, and pay grade.

► To enter basic compensation information

The screenshot shows the PeopleSoft Basic Compensation form. At the top, there's a toolbar with icons for Portal, WWW, Intranet, Training, and other navigation options. Below the toolbar, the title 'Active Foundation' is displayed, along with 'Personalize', 'Change Role', and 'Sign Out'. The main form area is titled 'Basic Compensation' and contains several sections:

- Employee Information:** Fields include Employee No. (12346), Home Business Unit (9 Corporate Administration), Job Type/Step (1M-1 MIS Manager), Pay Frequency (S Semi-Monthly), Position ID, and Locality.
- Pay Class:** Fields include Pay Class (S), Pay Grade/Step, Salary (50000), Pay Rate Source (3 None), Pay Period Salary, Hourly Rate, and Compa-Ratio.
- Hours and Rates:** Fields include Std Hrs/Day (8.00), Pay on Std Hours, Std Hrs/Year (2080.00), Overtime Exempt (Y), Std Days/Year (260.00), FTE (1.00), and Default Auto Pay Type.
- Compensation Review:** Fields include Review Type, Last Comp Review Date, Next Comp Review Date, Tier/Ranking (0), and Last Tier/Ranking Review Date.

1. On Basic Compensation, if the employee is in the salaried pay class, complete the following field:
 - Salary
2. If the employee is in the hourly pay class, complete the following field:
 - Hourly Rate
3. Complete the following fields:
 - Std Hrs/Day
 - Pay on Std Hours
 - Std Hrs/Year
 - Std Days/Year

- Default Auto Pay Type
 - FTE
4. Complete the following fields if your processing options are not set up to use the default job information:
- Pay Class
 - Pay Grade/Step
 - Overtime Exempt
5. Click Continue.

The system uses the value that you entered in the Country field on the Employee form to determine if a country-specific form appears next.

Continue the current process by completing the next form. If you need to return to Basic Compensation, click Back.

Processing Options for Basic Compensation (P0801CMP)

Process

1. Workflow - Salary Threshold

0 = Default

2. Workflow - Salary Percent Change Threshold
-

Entering Country-Specific Information for an Employee

After you complete the preceding form, you must enter country-specific information.

When you enter country-specific information, the system displays fields for only the information that applies to the country code that you entered for the employee. Many of these fields are user-defined fields that you can customize to meet the specific needs of your organization. The following steps apply to an employee in the United States.

Country-specific information includes information that is required only in the country in which the employee works. For example, in the United States, country-specific information includes I-9 status.

► To enter country-specific information for an employee

The screenshot shows a PeopleSoft application window titled "National and Fiscal Data - USA". The window has a toolbar with "Cancel", "Back", "Finish", "Form", and "Tools" buttons. The main area contains several input fields:

- Employee No.: 12346
- First Name Initial: S
- Middle Name Initial: L
- Tax Area (Work): 06
- Tax Area (Residence): 06
- School District Code: [empty]
- Region: [empty]
- Standard Occ Class: [empty]
- Residency Status: [empty]
- Marital Status (Federal): M
- Marital Status (Local): M
- EIC Status: M
- Source of SUI/SDI Reporting: [empty]
- Tax Method: [empty]
- Marital Status (Resident): M
- Worker's Comp: [empty] [empty] No Workers' Comp C
- I9 Status: [empty]
- Disability: N
- Veteran: N
- Disabled Veteran: N

1. On National and Fiscal Data - USA, if you set the processing options for Employee Information to require a tax area, complete the following fields:
 - Tax Area (Work)
 - Tax Area (Residence)

Note

If you use the GeoCoder, the system uses the employee address information to determine the GeoCode for the Tax Area (Residence) field, and uses the GeoCode from the employee's home business unit as the GeoCode for the Tax Area (Work) field. The system automatically populates these fields if there is only one possible GeoCode available for the field. If you are using the GeoCoder to interactively assign tax area information and the fields remain blank, or if you use the batch GeoCoder, see *Assigning Tax Area Information using the GeoCoder* for additional information.

2. To enter additional tax information, complete the following fields:
 - School District Code
 - Work Tax Area Source
 - Marital Status (Federal)
 - Marital Status (State)

- Marital Status (Local)
 - Marital Status (Resident)
 - Source of SUI/SDI Reporting
 - EIC Status
 - Tax Method
 - Worker's Comp
 - S C
-

Note

When you enter information for employees in Missouri, you must enter A, H, J, or S in the Marital Status (State) and Marital Status (Resident) fields. If you enter any other codes in this field for employees in Missouri, the system processes information as if the fields were populated with S.

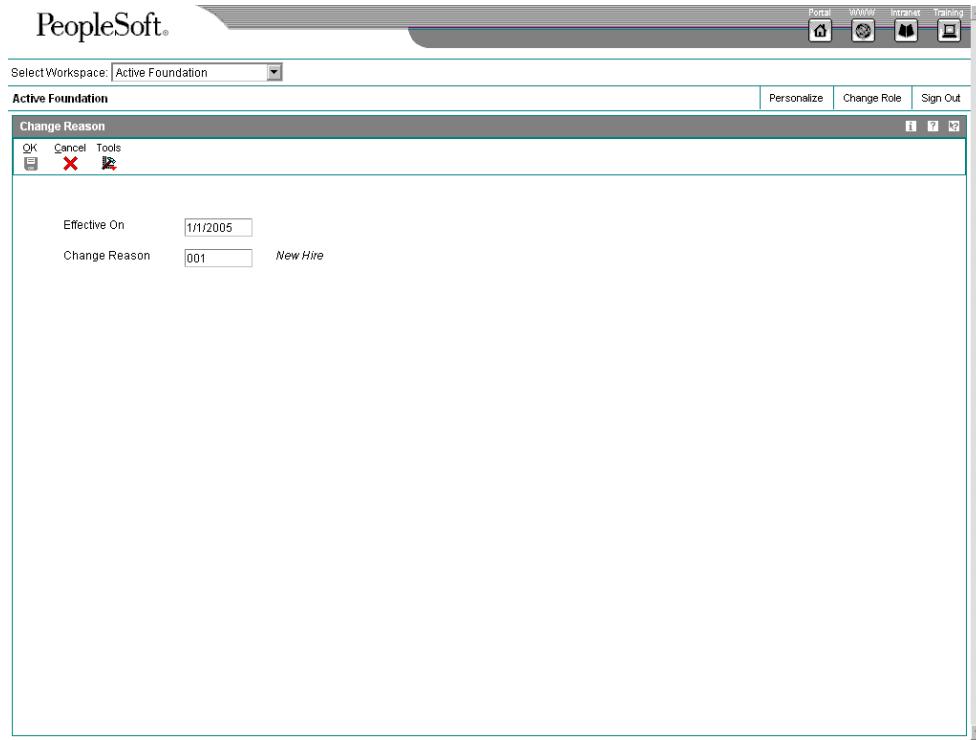
3. To enter government reporting information, complete the following fields:
 - I9 Status
 - Disability
 - Disabled Veteran
 - Veteran
4. Enter any of the following additional fields:
 - Residency Status
 - Region
 - Standard Occ Class
5. To add the current employee record to the Employee Master table (F060116), click Finish.
6. Continue the current process by completing the next form.

Entering Employee History Information

After you complete the preceding form, you can enter employee history information. You enter this information only if your system is set up to track employee history.

You can set up your system to track employee history when you enter a record for a new employee or change existing employee information. You specify the data items for which you want to track history. Then, each time you change the information in those data items, the system updates the Employee History table (F08042).

► To enter employee history information



On Change Reason, complete the following fields and click OK:

- Effective On
- Change Reason

If you click Cancel on the Change Reason form, the system does not create a history record. However, the current employee record is saved in the Employee Master table (F060116).

Depending on your country of preference, the system might provide an employee tax form.

Entering Tax Withholding and Override Information

After you complete the preceding form, you can enter tax withholding and override information for a new employee or change existing employee information.

You enter tax withholding and override information to indicate the number and type of exemptions that employees claim on their withholding allowance forms. Quantum for Payroll Tax, the tax calculation program that integrates with the J.D. Edwards Payroll system, uses this information to calculate employees' taxes each pay period. The system provides the tax area and tax type for federal income tax (tax type A) with no exemptions and no override withholding amount. If the employee has any exemptions, you must enter the number of exemptions. The system uses the number of federal exemptions to calculate all taxes unless you enter separate override records for state and local taxes.

Quantum for Payroll Tax currently supports percentage or flat amount overrides of federal and state tax calculations for non-supplemental pay. These flat or percentage amount overrides can be taken in addition to the taxes that the system calculates or they can replace the tax amounts that the system would calculate.

When an employee receives supplemental pay along with non-supplemental pay in the same payment, and that employee has tax amount overrides, the system uses the tax overrides when calculating the tax amount to be withheld from the employee's non-supplemental pay and uses the federal supplemental tables to calculate tax for supplemental pay. However, when an employee who has tax override amounts receives a payment containing only supplemental pay, the system disregards the federal tax overrides and taxes the employee using the applicable federal supplemental pay tax rates supplied by Quantum for Payroll Tax. The following examples illustrate the differences in tax results when an employee receives supplemental pay and has tax overrides. Please note that the numbers in the following examples are for illustration purposes only, and are not intended to reflect actual tax amounts as defined by governmental taxation authorities.

Example 1

Employee A has no tax overrides and receives regular gross pay of 2307.33 USD. The resulting tax amount for the payment is 475.33 USD. This example is used to illustrate what the tax amount might be for an employee with no tax overrides and no supplemental pay. If you compare the amounts in this example to those in the following examples, you can see how tax overrides and supplemental pay can affect tax results.

Example 2

Employee A has an additional tax override for 10 USD. The employee receives regular gross pay of 2307.33. The resulting tax amount for the payment is 485.33 USD, which includes the 475.33 USD which is associated with the regular pay, along with the additional 10 USD entered as an override. In this example, the tax override amount is used to calculate the final tax amount.

Example 3

Employee A has no tax overrides and receives regular gross pay of 2307.33 USD along with 250 USD of supplemental pay on the same payment. The resulting tax amount is 544.08 USD, which includes the 475.33 USD associated with the regular pay, along with 68.75 USD, which is the tax amount associated with the supplemental pay.

Example 4

Employee A has an additional tax override for 10 USD. The employee receives regular gross pay of 2307.33 USD along with 250 USD of supplemental pay on the same payment. The resulting tax amount is 554.08 USD, which includes the 475.33 USD associated with the regular pay, the 10 USD tax override, and the 68.75 USD associated with the supplemental pay.

Example 5

Employee A has an additional tax override of 10 USD. The employee receives supplemental pay of 250 USD. The resulting tax amount for the payment is 68.75 USD. In this example, the additional tax override of 10 USD is ignored because the supplemental pay is generated as a single payment.

Caution

If you enter a flat dollar override of 0 (zero) for the Federal A tax, "Statutory Exempt" appears on the employee's year-end tax forms. To prevent the system from calculating federal income taxes without indicating that the employee is exempt from tax, enter 99 for the employee's number of exemptions.

► **To enter tax withholding and override information**

1. On Work With Employee Information, complete the following field and click Find:
 - Employee No
2. Choose the employee record and choose Tax Overrides from the Row menu.
3. On Employee Tax Overrides, complete the following field for the Federal A tax type:
 - Fe Ex
4. Complete any of the following optional fields:
 - Additional Federal Withholding
 - F T
 - E O
5. To enter an override for a state or local tax, move the cursor to the first blank row and complete the following fields:
 - Tax Area Overridden
 - Tax Type
 - F T
 - E O
6. Complete one or both of the following optional fields for state or local taxes:
 - Fe Ex
 - Tx Cr
7. Repeat steps 5 and 6 for as many tax types as necessary.
8. To add an additional local residence tax, move the cursor to the next blank line, complete the following fields, and then click OK:

- F T
- E O

If you set system options to track requisition information, the system displays the Employee Assignment form. Use the Employee Assignment form to update position and requisition information when you add an employee or change an employee's job.

Updating Position and Requisition Information

When your system options are set to display the Employee Assignment form, the Employee Assignment form appears after the previous form. You enter the employee's home business unit, job type, or position ID so that the system updates requisition activity and headcount automatically. This is important for forecasting and budgeting.

► To update position and requisition information

Address Number	7703	Bellas, Debbie
Home Business Unit	9	Corporate Administration
Position ID	A1	
Job Type	A1	President
Job Step		
Effective Date		
Requisition No. to be Filled		
Filled Requisition Status		
Requisition No. to Detach		
Detached Requisition Status		

On Employee Assignment, complete the following fields and click OK:

- Effective Date
- Requisition No. to be Filled
- Filled Requisition Status
- Requisition No. to Detach

- Detached Requisition Status

If the employee fills a requisition with a new position assignment, the system automatically fills the requisition and updates the Requisition Information table (F08102). If the position change opens a requisition, the system updates the Requisition Activity table (F08105) and the Employee Master table (F060116).

This task completes the current process.

Processing Options for Employee Information (P0801)

Defaults Tab

Use these processing options to define the defaults for the following fields: Security Business Unit, Tax Area (Residence), and Tax Area (Work).

1. Security Business Unit

1 = Updates the Address Book

0 = Does not update the Address Book

Use this processing option to define whether the system updates the Address Book record for the employee with the security business unit that you enter on the Employee form (P0801EMP).

2. Tax Area

1 = Fields not required

0 = Fields required

Use this processing option to define whether the Tax Area (Residence) and Tax Area (Work) fields are required fields when you add or change an employee record. The J.D. Edwards Payroll system uses the tax area fields to calculate payroll taxes for employees. Valid values are:

- 1 Tax area fields are not required. Choose this option only if you are not using the J.D. Edwards Payroll system to process payroll for employees.
- 0 Tax area fields are required. If you are using the J.D. Edwards Payroll system, choose this option.

Versions Tab

Use these processing options to define the versions that the system uses for Organizational Assignment and Basic Compensation forms.

1. Organizational Assignment Version

Blank = default version

Use this processing option to define the version of the program that you want to use when you add or change information on the Organizational Assignment form (P0801ORG). If you leave this field blank, the system enters the default version, ZJDE0001.

A version is a set of user-defined specifications. When you define a version for Organizational Assignment, you can set processing options that control the type of job information that you want the system to default onto the Organizational Assignment form (P0801ORG) when you add or change an employee record.

2. Basic Compensation Version

Blank = default version

Use this processing option to define the version of the program that you want to use when you add or change information on the Basic Compensation form (P0801CMP). If you leave this field blank, the system enters the default version, ZJDE0001.

A version is a set of user-defined specifications. When you define a version for Basic Compensation, you can set processing options that control information that the system needs when you have activated the salary change workflow process.

Termination Tab

Use these processing options to define default codes that are supplied to various records when an employee is terminated.

1. Candidate Req Status

Use this processing option to define the user defined code (08/CN) for the candidate requisition status that you use to indicate that an employee record is no longer attached to a requisition. This candidate requisition status must have DET entered in the special handling code field. When you terminate an employee, the system uses the code that you define in this processing option to update the candidate requisition status for all of the requisitions that the employee filled.

2. Requisition Status

This processing option applies only if you have set up your system options (P05001S) to automatically create a new requisition when an employee is terminated. Use this processing option to define the user defined code (08/RS) for the requisition status that you want to assign to the new requisition. If you leave this processing option blank, the system will not create a new requisition when you terminate an employee.

3. Organizational Structure Type

Use this processing option to define the user defined code (01/TS) for the organizational structure type that you use to indicate the parent/child relationship between terminated employees and their supervisors. The system uses the termination date to update the parent/child relationship. If you leave this processing option blank, the system will not update the parent/child relationship between the terminated employee and the supervisor.

4. Applicant Status

Use this processing option to define the user defined code (08/AS) for the applicant status that you want to assign to terminated employees who will be

returned to the applicant pool for future hiring considerations. If you leave this field blank, the system does not assign an applicant status to the terminated employee.

Adding Employee Records Using Employee Quick Hire

You can use Employee Quick Hire to add multiple employee records when you hire groups of individuals that have common job information. Using Employee Quick Hire reduces typing errors and data entry time. You can define the common job information as default information that the system supplies for each employee record that you add. You must also set your processing options to define certain default information and processes related to Employee Quick Hire.

Setting Up Default Information for Employee Records

Before you add employee records for individuals with similar job information, you set up the job information as default information to reduce data entry time. Then when you add employee records, Employee Quick Hire supplies the default information. For example, if you are hiring 50 production employees for the same business unit who have the same supervisor, you set up the Job Type, Business Unit, and Supervisor fields as default information.

You can change the default information for each group of employees that you are about to enter records for.

► To set up default information for employee records

From the Employee Quick Hire menu (G05BE11), choose Employee Quick Hire.

1. On Employee Quick Hire, choose Defaults from the Form menu.

The screenshot shows the 'Pending Employee Defaults' dialog box. It contains the following configuration fields:

Field	Value	Activation Status
Security Business Unit	1	<input checked="" type="checkbox"/>
Home Business Unit	9	<input checked="" type="checkbox"/>
Home Company	00001	<input checked="" type="checkbox"/>
Date Pay Starts	01/01/2005	<input checked="" type="checkbox"/>
Date Started	01/01/2005	<input checked="" type="checkbox"/>
Job Type		<input type="checkbox"/>
Job Step		<input type="checkbox"/>
Supervisor	7500	<input checked="" type="checkbox"/>
Check Route Code		<input type="checkbox"/>
Locality		<input type="checkbox"/>
Participation Date		<input type="checkbox"/>

2. On Pending Employee Defaults, complete any of the following fields:

- Security Business Unit
- Home Business Unit
- Home Company
- Date Pay Starts
- Date Started
- Job Type
- Job Step
- Supervisor
- Check Route Code
- Locality

3. Click the option next to each field that you completed and click OK.

This activates the field and allows the system to recognize the field as a default value.

If you activate a blank field, the system overwrites the field for each record entered in the Employee Quick Hire form (W060116QA).

Now you are ready to add employee records. Proceed to the task *Adding Employee Records for Applicants, Rehires, and New Hires*.

Adding Employee Records for Applicants, Rehires, and New Hires

Perform this task after you set up default information for employee records.

After you offer employment to individuals who have common job information, you can use Employee Quick Hire to add multiple employee records to the Employee Master table (F060116) with minimal data entry. You can add employee records for applicants, rehires, and new hires.

To add employee records for applicants, you select the applicants from the Applicant Master table (F08401). Employee Quick Hire automatically copies the applicant's information to the Employee Quick Hire form.

You can add employee records for rehires or groups of terminated employees if they have applicant records in the Applicant Master table (F08401). When you select the record in Employee Quick Hire, the system searches the individual's information in the Employee Master table for a termination date with the associated Tax ID, Employee Number, or Alternate Number. When the system finds this search criteria it copies the information from the record to the Employee Quick Hire form.

If the system does not find a termination date for the individual in the Employee Master table, it issues an error and stops the process. The system also searches for a duplicate employee number. This process prevents the system from duplicating employees and employee numbers in the database.

To add employee records for new hires, you enter employee information in the required fields on the Employee Quick Hire form. The default information and processing options that you already defined minimize the number of fields that you need to enter. Also, if your processing options are set appropriately, a new hire record is created automatically in the Managers Employee Setup program (P08710) for self-service.

The following scenarios are examples of situations in which you might use Quick Hire:

- Your company has acquired another company and you need to enter the newly acquired employees into OneWorld. Using Quick Hire, you can enter the new employees in groups based on their supervisor. You might decide to specify the start date, supervisor, business unit, home company, and locality as default information.
- Your company uses seasonal employees and rehires many of the same employees each year. Using Quick Hire, you can select the employees that are eligible for rehire from the terminated employee database and activate their employee records. In addition, you might choose to specify the date that pay starts and the supervisor as default information.

When you add employee records with Employee Quick Hire, you can set an Employee Quick Hire processing option to specify whether the new employee information updates the Employee Master (F060116), Address Book (F0101), Requisition Activity (F08105), and Applicant Master (F08401) tables as you complete the process. Or you can set the processing option to store the new employee information in the Quick Hire Transaction table (F060116Z). Storing the information in this table allows you to review and revise the employee records before running the Process Pending Employees report (R060116P) to update the tables.

Setting the processing option to directly update the Employee Master and other tables updates the Human Resources History table (F08042). Setting the processing option to use

the Quick Hire Transaction table (F060116Z) does not update the Human Resources History table until you run the Process Pending Employees report (R060116P).

You can also set a processing option to activate the new hire process. This process automatically updates the Address Book table (F0101) and the Employee Setup Master table (F08710).

You can set processing options to automatically supply various types of information that will reduce the time required to use the Quick Hire process. For example, you can set a processing option so that the system supplies all the job information related to a specific job type when you enter the job type on Quick Hire.

You can also set an Employee Quick Hire processing option so that the system copies the applicant's supplemental data to the new employee record. If you do this, you also need to set a processing option in Processing Options for Applicant Information.

Adding employee records using Employee Quick Hire includes the following procedures:

- *Adding employee records for applicants*
- *Adding employee records for rehires*
- *Adding employee records for new hires*

Before You Begin

- Set up default information for every new group of individuals that you hire with similar job information. See [Setting Up Default Information for Employee Records](#).
- If you need to initiate the employee setup process after you add employee records, set the processing options for Employee Quick Hire on the Action tab to activate the new hire process.
- If you want the system to automatically supply a range of information for job type, job category codes, business unit, or supplemental data, set the processing options for Employee Quick Hire on the Defaults and Versions Tabs correctly.

► **To add employee records for applicants**

From the Employee Quick Hire menu (G05BE11), choose Employee Quick Hire.

When you use Employee Quick Hire to add employee records for applicants, the system copies applicant information from the Applicant Master table (F08401) to the Employee Quick Hire form.

1. On Employee Quick Hire, choose Applicant from the Form menu.

The screenshot shows the PeopleSoft interface for managing applicants. At the top, there's a navigation bar with links for Portal, iWorld, Intranet, and Training. Below that is a toolbar with icons for Select, Find, Close, Generate Letters, Row, Form, and Tools. A search bar labeled 'Applicant Number' with a placeholder '*' is present. The main area is titled 'Work With Applicants' and contains a grid of applicant records. The grid has the following columns: Applicant Number, Alpha Name, Appl Status, Status Date, Appl Date, Home Business Unit, Position ID, Job Type, Job Step, and Date Avail. The first row (8001) has a checked checkbox in the first column and is highlighted in yellow. The second row (8004) and third row (8006) have unchecked checkboxes.

	Applicant Number	Alpha Name	Appl Status	Status Date	Appl Date	Home Business Unit	Position ID	Job Type	Job Step	Date Avail.
<input checked="" type="checkbox"/>	8001	Hogan, Betsy G.	10	06/30/05	06/03/05	9	2H-2	2H-2		06/30/05
<input type="checkbox"/>	8004	Torres, Elizabeth M.	01	07/1/05	07/08/05	9	3P-1			08/02/05
<input type="checkbox"/>	8006	Johnson, Robert	71		04/20/05	9	1M-1			04/20/05

2. On Work With Applicants, complete the following field and click Find:
 - Applicant Number
3. Choose applicant records and click Select.
A check mark appears for each selected row.
4. Click Close to return to the Employee Quick Hire form.
Applicant information from the Applicant Master table (F08401) and the Address Book table (F0101) appear on the Employee Quick Hire form. The system also supplies values from the Pending Employee Defaults form.
5. Complete the following fields on the Employee Quick Hire form to update employee information:
 - Date Started
 - Date Pay Starts
 - Chg Rsn
6. Complete any other fields needed to update employee information and click OK.

Note

If you use the GeoCoder, the system uses the employee's address information to determine the GeoCode for the Tax Area (Residence) field, and uses the GeoCode from the employee's home business unit to determine the GeoCode for the Tax Area (Work) field. The system automatically populates these fields if there is only one

possible GeoCode available for the field. If you are using the GeoCoder to interactively assign tax area information and the fields remain blank, or if you use the batch GeoCoder, see *Assigning Tax Area Information using the GeoCoder* for additional information.

If your processing options for the Employee Quick Hire program (P060116Q) are set to update the Quick Hire Transaction table (F060116Z), review the employee information and, if correct, proceed to the task *Working with New Employee Information* to update the Employee Master, Applicant Master, Address Book, and Requisition Activity tables.

► To add employee records for rehires

From the Employee Quick Hire menu (G05BE11), choose Employee Quick Hire.

When you use Employee Quick Hire to add employee records for rehires, the system copies the applicant's information from the Applicant Master table (F08401) to the Employee Quick Hire form.

1. On Employee Quick Hire, choose Rehire from the Form menu.
2. On Work With Employee Information, complete the following fields to help narrow your search and then click Find:

- Home Company
- Home Business Unit

3. Choose applicant records and click Select.

A check mark appears for each selected row.

4. Click Close to return to the Employee Quick Hire form.

The employee information from the Applicant Master table (F08401) and the Address Book table (F0101) appear on the Employee Quick Hire form. The system also supplies values from the Pending Employee Defaults form.

5. Complete the following fields to update employee information:

- Date Started
- Date Pay Starts
- Chg Rsn

6. Complete any other fields needed to update employee information and click OK.

Note

If you use the GeoCoder, the system uses the employee's address information to determine the GeoCode for the Tax Area (Residence) field, and uses the GeoCode from the employee's home business unit as the GeoCode for the Tax Area (Work) field. The system automatically populates these fields if there is only one possible GeoCode available for the field. If you are using the GeoCoder to interactively assign tax area information and the fields remain blank, or if you use the batch GeoCoder, see *Assigning Tax Area Information using the GeoCoder* for additional information.

7. If your processing options for the Employee Quick Hire program (P060116Q) are set to update the Quick Hire Transaction table (F060116Z), review the employee information and, if correct, proceed to the task *Working with New Employee Information* to update the Employee Master, Applicant Master, Address Book, and Requisition Activity tables.

► To add employee records for new hires

From the Employee Quick Hire menu (G05BE11), choose Employee Quick Hire.

To add employee records for new hires, you enter job information on the Employee Quick Hire form that is not provided as default information. The system automatically supplies values for the default fields as you tab through each field.

1. On Employee Quick Hire, if the new Hire processing option is set to enable the Employee Setup program (P08710), complete the following required fields:
 - Employee Number
 - Supervisor
 - Date Started
 - Job Typ
 - Job Step
2. If the New Hire processing option is not set to enable the Employee Setup program, complete the following required (gray) fields that are not supplied by default values:
 - Search Type
 - Alpha Name
 - Employee Tax ID
 - Pay Freq
 - Pay
 - Annual Salary
 - Hourly Rate
 - Home Business Unit
 - Security

- Co
- Country of
- EEO Job
- Ethnic
- Gender
- Res. Tax Area
- Work Tax Area
- Original
- Date
- Date Pay

Note

If you use the GeoCoder, the system uses the employee's address information to determine the GeoCode for the Tax Area (Residence) field, and uses the GeoCode from the employee's home business unit to determine the GeoCode for the Tax Area (Work) field. The system automatically populates these fields if there is only one possible GeoCode available for the field. If you are using the GeoCoder to interactively assign tax area information and the fields remain blank, or if you use the batch GeoCoder, see *Assigning Tax Area Information using the GeoCoder* for additional information.

3. To record job information, complete any of the following fields that are not already supplied by a default value:
 - Employee
 - Supervisor
 - Job Typ
 - Job Step
 - S h
 - Loc
 - Emp St
 - R C
 - Part. Date
 - B S
 - Pay Grade
 - Grade
 - F L
 - WCI Code
 - Benefit Group
 - S C
 - Union Code

4. To record tax information, complete any of the following fields that are not already supplied by a default value:
 - I9
 - MS TX
 - MS ST
 - Pay St
 - R S
 - T S
 - SUI Rpt
 - T M
 - Stat. Code
 - Lc St
5. Complete any of the following fields for reporting purposes:
 - Vet
 - Dis Vet
 - Disb
6. To record personal information, complete any of the following fields that are not already supplied by a default value:
 - Birth Date
 - Address Line 1
 - Address Line 2
 - Address Line 3
 - Address Line 4
 - City
 - ST
 - Postal Code
 - Country
 - Prefix
 - Phone Number
 - Salu
 - Suff
 - Mailing Name
 - Contact Name
 - Area Code
 - Phone Number
7. Complete any of the following fields for administrative purposes and click OK:
 - Check Route

- P C
- Req No.
- Candidate Req. Status
- E M
- Remark 1
- Days Year

Processing Options for Employee Quick Hire (P060116Q)

Defaults Tab

These processing options specify the defaults that are applied during employee quick hire.

1. Security Business Unit

1 = Default Security Business Unit

0 = Do not default

Use this processing option to specify whether the system automatically supplies the security business unit from the Address Book table (F0101). Valid values are:

1 Supply the security business unit.

0 Do not supply the security business unit. Blank means the same as 0.

If you complete the Security Business Unit field on the Pending Employee Defaults form (W060116QB), and this processing option is set to 1, the system uses the value from the Pending Employee Defaults form.

If you enter 0, you will need to manually enter the security business unit when you add an employee record.

2. Tax Areas

1 = Fields not required

0 = Fields required

Use this processing option to specify whether the Residence Tax Area and Work Tax Area fields are required when you add or change an employee record. The J.D. Edwards Payroll system uses the tax area fields to calculate payroll taxes for employees. Valid values are:

1 Tax area fields are not required. Enter this value only if you are not

using the J.D. Edwards Payroll system to process payroll for employees.

- 0 Tax area fields are required. Enter this value if you are using the J.D. Edwards Payroll system. Blank means the same as 0.

3. Job information

1 = Default Job Information

0 = Do not default

Use this processing option to specify whether the system automatically supplies the Employee Quick Hire form (W060116QA) with certain job information when you complete the Job Type field. The system retrieves information in the following job information fields from the Job Information table (F08001): Pay Type, Pay Frequency, WCI Code (Workers Comp Insurance Code), SC (Sub Class-Workers Comp), Benefit Group, and Union Code. Valid values are:

- 1 Supply job information.
- 0 Do not supply job information.

4. Job Category Codes

1 = Default Category Codes

0 = Do not default

Use this processing option to specify whether the system automatically supplies values for job category codes. Valid values are:

- 1 Supply default job category codes.
- 0 Do not supply default job category codes.

5. Emergency Contact Type

Enter UDC Code

Use this processing option to specify the user defined code for a contact type in the Address Book Who's Who table (F0111). The contact name and phone number entered on the Quick Hire form (W060116QA) update the Employee Master and Address Book tables with the type of contact you specify. If you leave this processing option blank, the system uses E (emergency contact) as the default.

To see the valid codes, click the visual assist.

6. Business Unit/Job ID Cross Reference

1 = Default Business Unit/Job ID

Information

0 = Do not default

Use this processing option to specify whether the system automatically supplies values for the business unit/job ID information for the new employee. Valid values are:

1

Use default business unit/job ID information.

0

Do not use default business unit/job ID information.

Versions Tab

These processing options specify the versions that are used during employee quick hire.

1. Applicant Information Version

Use this processing option to specify the version that the system uses for transferring applicant information. If you specify a version and the applicants for whom you are adding records on the Work With Applicants form (W08401B) have supplemental data, the system transfers the supplemental data along with the applicants' information to the new employee records. If you leave this processing option blank, the system uses the default version, ZJDE0001, which does not transfer supplemental data.

Note: For the system to transfer an applicant's supplemental data, you must also set a processing option to transfer supplemental data in the processing options for the Applicant Information program (P08401).

2. Address Book MBF Version

Use this processing option to specify the version that the system uses for the Address Book Master Business Function (MBF). If you are using interoperability

transactions, you might want to specify a version that updates the Address Book table (F0101). If you leave this processing option blank, the system uses the default version, ZJDE0001.

Note: If you specify an Address Book MBF version, you must also set a processing option to indicate the interoperability outbound transaction in the processing options for the Address Book Master Business Function (P0100041).

3. Address Book Search Form Version

Use this processing option to specify the version to use for the Address Book Search form. If you leave this processing option blank, the system uses the default version, ZJDE0001.

Action Tab

These processing options specify whether to update the master files and whether to activate the new hire process during employee quick hire.

1. Update Master Files

1 = Update Employee Master and Address Book

0 = Update Pending Employee Worktable

Use this processing option to specify whether the system updates the Employee Master (F060116), Requisition Activity (F08105), Applicant Master (F08401), and Address Book (F0101) tables when you add employee records with Employee Quick Hire. If you do not enter 1, the system updates the Quick Hire Transaction table (F060116Z) only. Valid values are:

- 1 Update the Employee Master and Address Book tables.
- 0 Update the Quick Hire Transaction table only.

If the processing option is set to 1, the system updates the Human Resource History table (F0842).

If the processing option is set to 0, you can review and revise the employee information before the system updates the databases. After reviewing and revising, you need to run the Process Pending Employees program (R060116P) to update the databases.

2. New Hire

1 = Enabled

0 = Disabled

Use this processing option to specify whether to activate the new hire process. Valid values are:

- 1 Activate the new hire process.
- 0 Do not activate the new hire process.

When the new hire process is activated (the processing option is set to 1), the following fields are required:

- o Alpha Name
- o Supervisor
- o Start Date (Effective Date)
- o Job Type and Step

In addition, the following will occur:

1. For each record added to the Unedited Quick Hire Transaction table (F060116Z), an address book record is added to the Address Book table (F0101). The address book records are added with a search type of N.
 2. For each record added to the Unedited Quick Hire Transaction table (F060116Z), a record is added to the Employee Setup Master table (F08710).
 3. Workflow notifies the supervisor with an e-mail.
-

Working with New Employee Information

When you hire a new employee into an organization, you need to perform many tasks to prepare for the new employee and to ensure that any preliminary employment activities are completed. These tasks might vary depending on the employee's location and job duties. For example, an administrative assistant might need to have a telephone, computer, network signon, ID badge, parking sticker, and building key to start working. A hospital nurse might need to have an ID badge, parking sticker, and locker assignment, and to have completed a blood test and attended safety orientation prior to starting work. Most new employee setup tasks require management approval, and these approvals were done by routing a paper approval form.

The OneWorld New Hire Employee setup program automates and streamlines the initiation of these tasks by sending e-mail messages through workflow to the individuals responsible for completing these tasks.

When you add employee records with Employee Quick Hire, you can set an Employee Quick Hire processing option to specify whether the new employee information updates the Employee Master (F060116), Address Book (F0101), Requisition Activity (F08105), and Applicant Master (F08401) tables as you complete the process. Or you can set the processing option to store the new employee information in the Quick Hire Transaction table (F060116Z). Storing the information in this table allows you to review and revise the information before running the Process Pending Employees report (R060116P) to update the other tables.

If your Employee Quick Hire processing option is set to update the Quick Hire Transaction table (F060116Z), you must complete one or more of the following tasks after you add the employee records:

- *Running the Process Pending Employees report*
- *Revising new employee records*
- *Purging pending employee information*

The Process Pending Employees report updates the Employee Master and Address Book tables after you review and revise the new employee records.

You can add, change, or delete the new employee records from the Quick Hire Transaction table (F060116Z). Revising new employee records is mandatory if you find errors in the Process Pending Employees report. You must correct the errors and rerun the report to update the Employee Master and Address Book tables with the new employee information.

After you update the Employee Master and Address Book tables with batches of new employee records, you need to purge the information from the Quick Hire Transaction table occasionally to free up space in the table. Purging the table deletes the pending employee records so that you can continue to add new employee records. You can run this process if you are experiencing performance problems with Employee Quick Hire or if you want to avoid scrolling through many processed employee records to view the ones that you are looking for.

Understanding the Relationship Between Quick Hire and New Hire Employee Setup

The Quick Hire program integrates with the New Hire Employee Setup program by automatically generating the setup record and initiating a workflow process. For the two programs to integrate, you must set your processing options appropriately on the Quick Hire form. The following steps are performed when you integrate the Quick Hire program with the New Hire Employee Setup program to initiate the New Hire Setup Workflow process:

1. When an employee record is added to the Employee Master table through Quick Hire, OneWorld automatically generates the New Hire Employee Setup record.
2. An e-mail message is automatically sent to the employee's supervisor, requesting the supervisor to identify the setup tasks necessary for the employee. OneWorld determines which supervisor to e-mail based on the entry in the Supervisor field in OneWorld. If this field is left blank, a message will not be generated.
3. Using Manager Self-Service, the new employee's manager accesses OneWorld and enters the setup tasks that are necessary for the employee. The setup tasks can also be supplied automatically based on the employee's job type.

4. When the tasks have been identified for the new employee and the Employee Setup Record has been approved, OneWorld initiates the New Hire Setup Workflow process, which e-mails the individuals in your organization who are responsible for completing the necessary tasks. For example, if the manager has indicated that the new employee will need a network signon, security badge, and building key, you can direct the workflow process to e-mail the IT Manager, Security Manager, and Facilities Manager, respectively.

The New Hire Setup Workflow process can be customized to meet the needs of your organization. Processing options on the Managers Employee Setup form allow you to easily customize the process. For example, your organization might choose to require approval at the process level or at the task level, or you might choose to escalate certain tasks if the designated individuals do not complete the tasks in an appropriate time frame.

Running the Process Pending Employees Report

From the Employee Quick Hire menu (G05BE11), choose Process Pending Employees.

The Process Pending Employees report updates the Employee Master and Address Book tables.

If the system finds errors or incomplete employee records, error messages are routed to your message center and the databases are not updated with the new employee information.

If you receive error messages, you must correct employee records with the Employee Work File Revisions program (P060116P) and rerun the report to update the Employee Master and Address Book tables with the new employee records. Your entire batch of records is not updated to the Employee Master and Address Book tables until the report runs successfully. When the report runs successfully, your batch is marked as processed, and Employee Master and Address Book tables are updated with the new employee information.

Processing Options for Process Pending Employees Report (P060116P)

Defaults Tab

1. Security Business Unit

1 = Default

0 = Do Not Default

Use this processing option to specify whether the system automatically supplies the security business unit from the Address Book table (F0101). Valid values are:

- 1 Supply the security business unit.
- 0 Do not supply the security business unit. Blank means the same as 0.

If you complete the Security Business Unit field on the Pending Employee Defaults form (W060116QB), and this processing option is set to 1, the system uses the value from the Pending Employee Defaults form.

If you enter 0, you will need to manually enter the security business unit when you add an employee record.

2. Tax Areas

1 = Not Required

0 = Required

Use this processing option to specify whether the Residence Tax Area and Work Tax Area fields are required when you add or change an employee record. The J.D. Edwards Payroll system uses the tax area fields to calculate payroll taxes for employees. Valid values are:

- 1 Tax area fields are not required. Enter this value only if you are not using the J.D. Edwards Payroll system to process payroll for employees.
- 0 Tax area fields are required. Enter this value if you are using the J.D. Edwards Payroll system. Blank means the same as 0.

3. Job Information

1 = Default

0 = Do Not Default

Use this processing option to specify whether the system automatically supplies the Employee Quick Hire form (W060116QA) with certain job information when you complete the Job Type field. The system retrieves information in the following job information fields from the Job Information table (F08001): Pay Type, Pay Frequency, WCI Code (Workers Comp Insurance Code), SC (Sub Class-Workers Comp), Benefit Group, and Union Code. Valid values are:

- 1 Supply job information.
- 0 Do not supply job information.

4. Job Category Codes

1 = Default

0 = Do Not Default

Use this processing option to specify whether the system automatically supplies values for job category codes. Valid values are:

- 1 Supply default job category codes.
- 0 Do not supply default job category codes.

5. Country Code

Enter UDC Code

Use this processing option to specify the country code.

6. Contact Type

Enter UDC Code

Use this processing option to specify the user defined code for a contact type in the Address Book Who's Who table (F0111). The contact name and phone number entered on the Quick Hire form (W060116QA) update the Employee Master and Address Book tables with the type of contact you specify. If you leave this processing option blank, the system uses E (emergency contact) as the default. To see the valid codes, click the visual assist.

7. Home Phone Type

Enter UDC Code

Use this processing option to specify the user defined code for a home phone type in the Contact Phone table (F0115). The phone number entered on the Quick Hire form (W060116QA), updates the Employee Master and Address Book tables as the type of home phone number you specified with the code.

8. Work Phone Type

Enter UDC Code

Use this processing option to specify the user defined code for a work phone type in the Contact Phone table (F0115). The phone number entered on the Quick Hire form (W060116QA), updates the Employee Master and Address Book tables as the type of work phone number you specified with the code.

9. Business Unit/Job ID Cross Reference

1 = Default

0 = Do Not Default

Use this processing option to specify whether the system automatically supplies values for the business unit/job ID information for the new employee. Valid values are:

1

Use default business unit/job ID information.

0

Do not use default business unit/job ID information.

Versions Tab

1. Applicant Information

Use this processing option to specify the version that the system uses for transferring applicant information. If you specify a version and the applicants for whom you are adding records on the Work With Applicants form (W08401B) have supplemental data, the system transfers the supplemental data along with the applicants' information to the new employee records. If you leave this processing option blank, the system uses the default version, ZJDE0001, which does not transfer supplemental data.

Note: For the system to transfer an applicant's supplemental data, you must also set a processing option to transfer supplemental data in the processing options for the Applicant Information program (P08401).

2. Address Book MBF

Use this processing option to specify the version that the system uses for the Address Book Master Business Function (MBF). If you are using interoperability transactions, you might want to specify a version that updates the Address Book table (F0101). If you leave this processing option blank, the system uses the default version, ZJDE0001.

Note: If you specify an Address Book MBF version, you must also set a processing option to indicate the interoperability outbound transaction in the processing options for the Address Book Master Business Function (P0100041).

Actions Tab

1. Update Master Files

1 = Update

0 = Do Not Update

Use this processing option to specify whether the system updates the Employee Master (F060116), Requisition Activity (F08105), Applicant Master (F08401), and Address Book (F0101) tables when you add employee records with Employee Quick Hire. If you do not enter 1, the system updates the Quick Hire Transaction table (F060116Z) only. Valid values are:

- 1 Update the Employee Master and Address Book tables.
- 0 Update the Quick Hire Transaction table only.

If the processing option is set to 1, the system updates the Human Resource History table (F0842).

If the processing option is set to 0, you can review and revise the employee information before the system updates the databases. After reviewing and revising, you need to run the Process Pending Employees program (R060116P) to update the databases.

2. Purge Processed Records

1 = Purge

0 = Do Not Purge

Use this processing option to allow the system to delete records automatically after they have been successfully updated in the master tables. If you do not have the records deleted automatically, you can delete them later by running the Purge Pending Employees program (P060116PP). Valid values are:

- 1 Delete successfully processed records.
 - 0 Do not delete processed records.
-

Revising New Employee Records

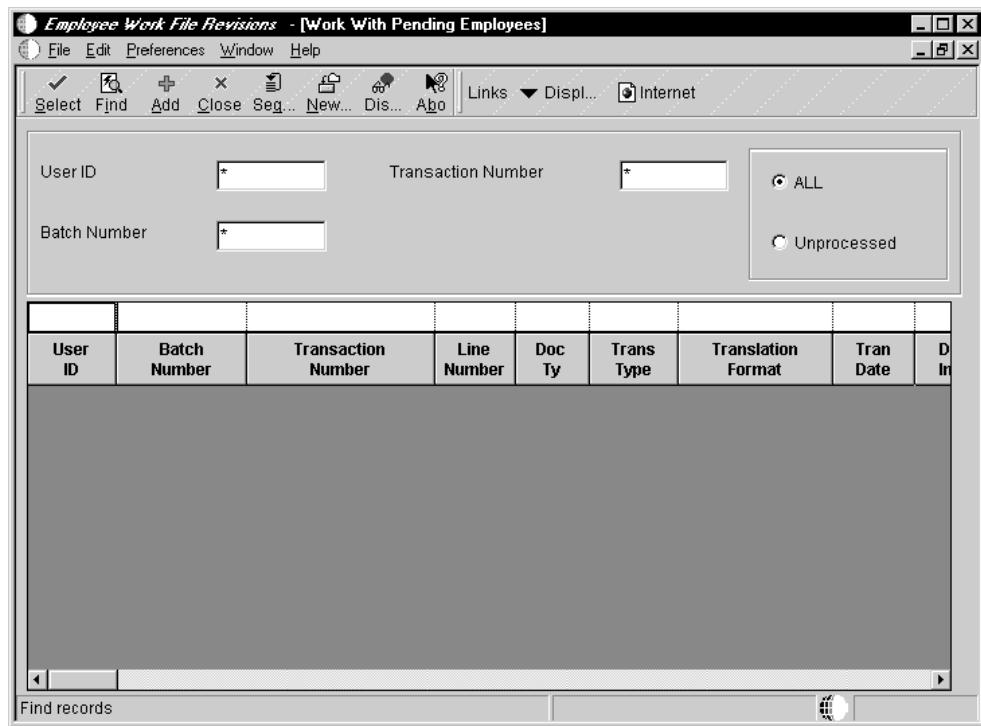
To ensure accuracy of your new employee records, you can add, change, or delete records from the Quick Hire Transaction table (F060116Z) before or after running the Process Pending Employees report.

If you entered the incorrect information when you added employee records, you can revise the records that you just added or correct any errors in the new records as indicated in the Process Pending Employees report.

If you run the Process Pending Employees report, you need to correct the errors in the Quick Hire Transaction table (F060116Z) and then rerun the report to update the Employee Master and Address Book tables with the corrections. Your entire batch of records is not updated to the Employee Master and Address Book tables until the report runs successfully. When the report runs successfully, your batch is marked as processed, and the Employee Master and Address Book tables are updated.

► To revise new employee records

From the Employee Quick Hire menu (G05BE11), choose Employee Work File Revisions.



1. On Work With Pending Employees, complete the following fields:
 - User ID
 - Batch Number
 - Transaction Number
2. Click one of the following options and click Find:
 - All
 - Unprocessed
3. If you need to add a record, click Add.
4. Choose a record or a group of records that need changes and click Select.
5. On Pending Employee Revisions, change the appropriate fields.
6. Click OK.
7. Rerun the Pending Employee report and repeat this task as many times as necessary until your batch runs successfully.

Purging Pending Employee Information

From the Employee Quick Hire menu (G05BE11), choose Purge Pending Employees.

After you update the Employee Master and Address Book tables with batches of new employee records, you need to purge the information from the Quick Hire Transaction table

occasionally to free up space in the table. Purging the table removes the information so that you can continue to add new employee records. You can run this process if you are experiencing performance problems with Employee Quick Hire or if you want to avoid scrolling through many processed employee records to view the ones that you are looking for.

Assigning Tax Area Information using the GeoCoder

In order for employee payroll taxes to calculate correctly, each employee is assigned a tax area, also known as a GeoCode, for their work location and their residence. Using the GeoCoder, you can allow the system to determine automatically which GeoCode to assign to an employee's work tax area and residence tax area. You can also use the GeoCoder to assign a GeoCode to the payroll tax area for each business unit in your organization automatically.

The GeoCoder uses the employee's address, city, state, province (if applicable), and postal code to determine which GeoCode to use for the employee's residence tax area. The GeoCoder uses the GeoCode that is assigned to the employee's home business unit to populate the employee's work tax area. You can set up the GeoCoder to assign tax area information interactively, or you can process batch versions of the GeoCoder to assign tax area information to groups of employees or business units simultaneously.

If you assign tax areas using batch processes, to ensure that the correct GeoCode is used for each employee's work tax area, J.D. Edwards recommends running the Cost Center Tax Area Processing program (R079052) before you process the GeoCoder Employee Batch Processing program (R070103). The Cost Center Tax Area Processing program assigns a GeoCode to each cost center, or business unit, using the address, city, state, and postal code associated with each cost center. This GeoCode is then used to populate the employee's work tax area when you run the GeoCoder Employee Batch Processing program. You might want to process each of these programs before each payroll cycle to ensure that all employee payroll history is updated to the correct tax area.

You can also use the GeoCoder to assign tax area information when an employee's address is changed using self-service. See *Saving Self-Service Employee Personal Information* for additional information about using the GeoCoder and self-service.

Note

You must use Quantum for Payroll Taxes to calculate employee payroll taxes and to use the GeoCoder.

Before You Begin

- ❑ Activate the GeoCoder for the Human Resource Management system. See *Setting up the GeoCoder* for instructions.
- ❑ Verify that the Tax Area processing option for the Employee Information program (P0801) is set to allow the tax area fields to be left blank during employee entry. See *Processing Options for Employee Master* for more information.
- ❑ Enter employees into the system. See *Employee Information* for instructions.

Assigning Tax Areas Interactively

You can interactively assign tax areas to employee records and to business unit records using the GeoCoder. When you assign employee tax areas interactively, the GeoCoder assigns the correct work and residence tax area information to the employee at the time that you enter the employee's information into the system. Similarly, when you enter or update business unit constants, the GeoCoder assigns a tax area to the business unit.

The GeoCoder uses the employee's address information to determine the correct GeoCode for the residence tax area. Similarly, the GeoCoder uses the address information associated with a business unit to assign the correct GeoCode to the Tax Area - Payroll field in the business unit constants. The GeoCode from the employee's home business unit is used to populate the employee's work tax area.

If there is only one possible tax area, given the address information, the system automatically populates the Tax Area (Work) and Tax Area (Residence) fields during employee entry. When assigning tax area information to business units, the Tax Area - Payroll field is automatically updated. If there are multiple tax areas that might be valid for the employee or business unit, the system displays the possible choices when you select the visual assist on any of the tax area fields.

You can use the GeoCoder interactively to assign employee tax areas when you enter employee records one at a time or when you enter groups of employees using Quick Hire.

See Also

- *Adding Employee Records One at a Time*
- *Adding Employee Records Using Employee Quick Hire*
- *Setting Up Business-Unit Constants*

► To assign tax areas interactively

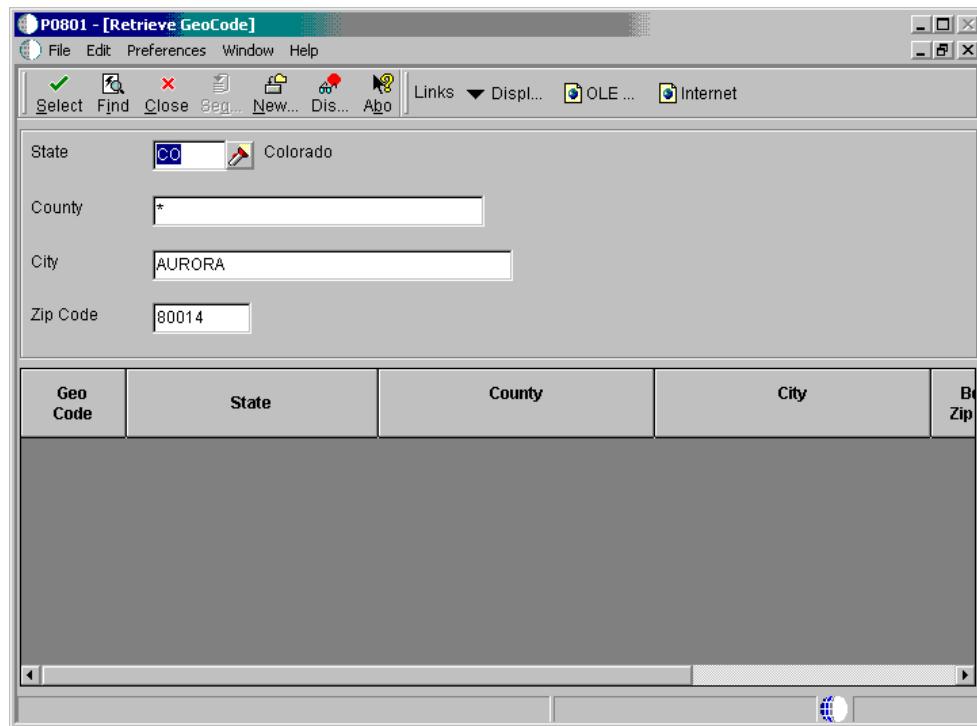
To access the Retrieve GeoCode form and complete this task, click the visual assist button for the Tax Area (Work) or Tax Area (Residence) fields during the employee entry process, or when you change an employee's address information. Alternatively, click the visual assist button for the Tax Area - Payroll field during entry or maintenance of business unit constants.

Note

Before you access this form, you must enter all of the employee's or business unit's address information, including city, county, state, province (if applicable), postal code, and country code. If this information is incomplete when you access this form, the system cannot retrieve the correct GeoCodes.

1. On Retrieve GeoCode, verify that the following fields contain the correct information:

- State
- County
- City
- Zip Code



2. Select the record in the detail area that includes the correct GeoCode, and then click Select.

Assigning Tax Areas using Batch Processes

You can assign tax area information to employees and business units using batch versions of GeoCoder programs. When you assign tax areas using the batch process, you do not have to enter tax area information at the time that you enter employee or business unit records into the system. After you enter business unit records into the system, you can run the Cost Center Tax Area Processing program (R079052) to assign tax areas to each business unit. Similarly, after you enter employee records into the system, you can run the GeoCoder Employee Batch Processing program (R070103) to assign work and residence tax areas to the employee.

This program automatically populates the work and resident tax areas for each employee in the system. Or, depending on how you set the processing options, you can populate only the resident tax area. The GeoCoder Employee Batch Processing program populates the resident tax area using the employee's address information, and populates the work tax area with the GeoCode from the Business Unit Constants for the employee's home business unit. Because the tax area from the business unit is used to update the employee's work tax area, J.D. Edwards suggests updating business unit tax area information before updating employee tax area information.

If there are multiple GeoCodes that are valid for an employee or business unit tax area, the system produces an exception report that lists all of the valid GeoCodes for the specified employee or business unit. In these situations, you must choose the correct GeoCode and manually enter it in the employee or business unit record.

To update business unit tax areas, from the Employee Management menu (G05BE1), choose Cost Center Tax Area Processing. To update employee tax areas, choose GeoCoder Employee Batch Processing.

Processing Options for the Cost Center Tax Area Processing Program (R079052)

Process Tab

Use this processing option to select the processing mode for this program.

Update Business Unit (Required)

Blank = print report

1 = Update Business Unit Master

Use this option to specify the processing mode for Cost Center Tax Area Processing (R079052). You can run this report in proof mode to produce a report without updating the Business Unit Master table, or you can run this report in final mode to produce a report and update the Business Unit Master table. Valid values are:

Blank

Proof Mode - Print report only.

1

Final Mode - Print report and update table.

Processing Options for the GeoCoder Employee Batch Processing Program (R070103)

Process Tab

1. Update Tax Area in Employee Master (Required)

blank = No

1 = Yes

Use this option to determine the processing mode for the GeoCoder Employee Batch Processing program (R070103). You can run this program in proof mode and print a report only, or you can run this program in final mode and produce a report and update the tax areas in the Employee Master table. Valid values are:

Blank

Proof Mode - Print report only.

1

Final Mode - Print report and update tabl

2. Employee Type (Required)

blank = Address Book Number

A = Address Book Number

S = Social Security Number

O = Third Employee Number

Use this option to indicate which number is used as the employee's identification number.
Valid values are:

Blank or A

Address Number (Default)

S

Social Security Number

O

Other Third Party Numbe

3. Validate Tax Area (Required)

blank = Resident and Work

1 = Resident only

Use this option to determine which tax areas the GeoCoder automatically assigns, and which fields the program updates in the Employee Master table when the program is run in final mode. You can assign GeoCodes to the employee's work and resident tax areas, and update both fields in the Employee Master table, or you can assign a GeoCode to the resident tax area only, and update only the resident tax area in the Employee Master table. Valid values are:

Blank

Resident and Work Tax Areas

1

Resident Tax Area Only

Entering Additional Employee Information

You can use the Workforce Management Foundation system to track detailed information about your employees. Use this information to analyze and report on your employees and to meet government reporting requirements. Additional employee information includes user defined information, such as information that is unique to your organization or your industry.

Entering Payroll Information for Employees

You must enter payroll information for employees before you can process a payroll for them. You enter payroll information to identify information that the system needs in order to calculate an employee's pay. This information includes items such as the following:

- Geographic information
- Labor distribution information
- Wage attachment payees
- Pay cycle code

► **To enter payroll information for employees**

From the Employee Management menu (G05BE1), choose Employee Information.

1. On Work With Employee Information, complete the following field and click Find:
 - Employee No
2. Choose the employee record and choose Payroll from the Row menu.

The screenshot displays the PeopleSoft Employee Payroll Revisions interface. At the top, there's a navigation bar with links for Portal, MyNet, Intranet, and Training. Below that is a toolbar with icons for OK, Cancel, Form, Tools, and a refresh symbol. The main area is titled "Employee Payroll Revisions". It contains several sections: "Employee Identification" (Employee ID: 12346, Name: Brown, Susan), "Payroll Processing" (Pay Cycle Code, Employee Classification Status [N], Work Schedule, Record Type [2], Pre-Note Code, Wage Attachment Payee, Vacation Factor, Max/Min Net Pay, Labor Distribution Method [0], Labor Distribution Multiplier [1.0000], Distribution Rate [180.000], Pay Cycle Bypass Count), and "Geographic Tax Data" (Home State, Home City, Work State, Work City, Work County). The "Payroll Processing" section has a green checkmark icon.

3. On Employee Payroll Revisions, complete the following fields:
 - Pay Cycle Code
 - Employee Classification Status
4. To enter geographic tax information, complete the following fields:
 - Home State
 - Home City
 - Work State
5. To enter labor distribution instructions, complete the following fields:
 - Labor Distribution Method
 - Labor Distribution Multiplier
 - Distribution Rate
6. Complete any of the following additional fields and click OK:
 - Work Schedule
 - Record Type

- Pre-Note Code
- Wage Attachment Payee
- Vacation Factor
- Max/Min Net Pay
- Date of Next Raise
- Business Unit - Last Worked

Entering Additional Benefits Information for Employees

Additional benefits information includes information related to the following:

- Benefits eligibility
- Nondiscrimination testing (NDT) (Available in a future release)
- Benefits participation

To track additional eligibility information that is specific to your organization, you can enter eligibility codes. Eligibility codes are one-digit codes that you can use to track any type of additional eligibility information that your organization needs.

If your organization offers 401(k) plans as part of its employee benefit package, the government requires that you perform nondiscrimination testing. You use nondiscrimination testing to demonstrate that your organization's highly compensated employees do not take unfair advantage of 401(k) contributions. You enter this information only if you are using your OneWorld system in conjunction with the Workforce Management systems for WorldSoftware.

To specify whether employees are participating in certain benefit plans, you enter participation information.

Before You Begin

- Set up eligibility codes in UDC 05/YB.

► To enter additional benefits information for employees

From the Employee Management menu (G05BE1), choose Employee Information.

1. On Work With Employee Information, complete the following field and click Find:
 - Employee No
2. Choose the employee record and then select Eligibility/NDT from the Row menu.

Employee No.		McDougle, Cathy	
Eligibility			
Eligibility Code 001	<input checked="" type="checkbox"/>	Eligibility Code 002	<input type="checkbox"/>
Eligibility Code 003	<input type="checkbox"/>	Eligibility Code 004	<input type="checkbox"/>
Eligibility Code 005	<input type="checkbox"/>	Eligibility Code 006	<input type="checkbox"/>
Eligibility Code 007	<input type="checkbox"/>	Eligibility Code 008	<input type="checkbox"/>
Eligibility Code 009	<input type="checkbox"/>	Eligibility Code 010	<input type="checkbox"/>
Non Discrimination Testing			
Owner/Officer	<input type="checkbox"/>	Lookback Year-Top 20%	<input type="checkbox"/>
Lookback Year-Highly Paid	<input type="checkbox"/>	Determination Year-Top 20%	<input type="checkbox"/>
Determination Year-Top 100	<input type="checkbox"/>	Determination Year-Top 10	<input type="checkbox"/>
Determin. Year-Highly Paid	<input type="checkbox"/>	Minimum Hours Eligibility	<input type="checkbox"/>
Unused	<input type="checkbox"/>	Unused	<input type="checkbox"/>
Participation			
Pension	<input type="checkbox"/>	Oregon Insurance	<input type="checkbox"/>

3. On Eligibility, NDT, and Participation, complete the following field to specify user-defined eligibility information:
 - Eligibility Code 001
4. To enter participation information, complete the following fields and click OK:
 - Pension
 - Oregon Insurance

Entering User Defined Information for Employees

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

J.D. Edwards provides user-defined category codes and user-defined dates that facilitate tracking this information. You define these codes and dates when you set up your system. You can use this information for reporting and analysis purposes. For example, you can set up geographic data codes that you use to prepare unemployment reports.

When you define category codes and dates, you enter a name (label) for the information that you want to track. For example, you might enter drivers-license expiration date for user defined date field 1.

When you enter employee information, you attach a value from a category code or a date to the employee.

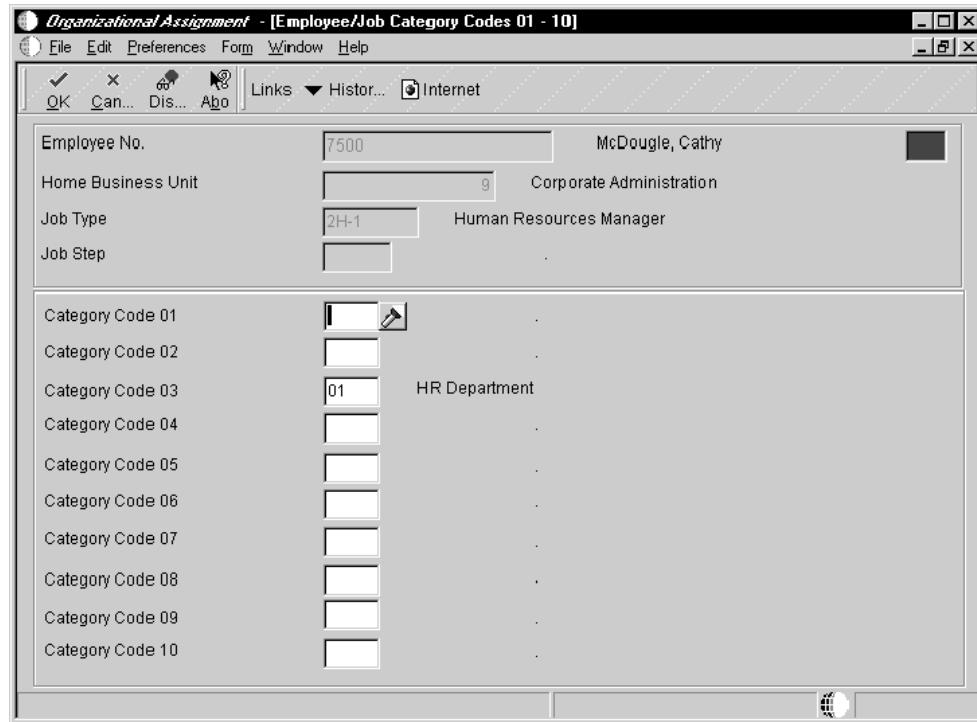
► To enter information in category codes

From the Employee Management menu (G05BE1), choose Employee Information or Organizational Assignment.

Note

You use Work With Employee Information to access category codes 11 through 20. You use Work With Organizational Assignment to access category codes 1 through 10. Category codes 1 through 4 are reserved for Time Entry information.

1. On Work With Employee Information or Work With Organizational Assignments, complete the following field and click Find:
 - Employee No
2. Choose the employee record and then choose the applicable user-defined category codes option from the Row menu.



3. On either the Employee/Job Category Codes 01 - 10 form or the User Defined Category Codes 11 - 20 form, complete any applicable fields and click OK.

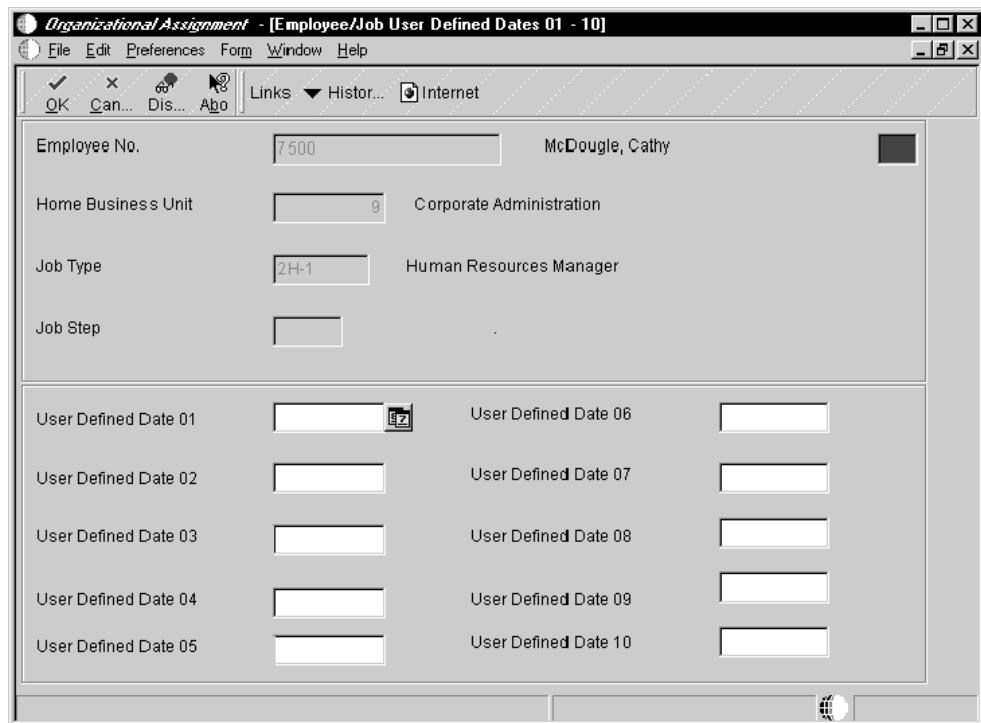
► To enter user defined dates

From the Employee Management menu (G05BE1), choose Employee Information or Organizational Assignment.

Note

You use Work with Employee Information to access user defined dates 11 through 20. You use Work with Organizational Assignments to access user defined dates 1 through 10.

1. On Work with Employee Information or Work With Organizational Assignments, complete the following field and click Find:
 - Employee No
2. Choose the employee record and then choose the applicable user-defined dates option from the Row menu.



3. On either User Defined Dates 11 – 20 or Employee/Job User Defined Dates 01 – 10, complete any applicable fields and click OK.

Understanding Employee Compensation

The type of compensation information that you must enter for each employee and how the system calculates salaries or hourly rates depends on the pay rate source that you have set up in your system options.

The pay rate sources that you can choose from in system options include the following:

- Pay Rate table
- Pay Grade Step table
- None (no default pay rate source)

The pay rate source that you choose depends on the nature of your work force and the planning and budgeting requirements of your organization. The pay rate source also affects how the system calculates salary and hourly rates for employees.

To understand how the pay rate source affects salary and hourly calculations, you first need to understand how the system identifies the following components:

Salary The amount of money that the employee earns in one year.

Hourly rate The amount of money that an employee earns in one hour.

Standard hours per year The number of hours per year that an employee works.

The following equations explain how the system calculates a salary and hourly rate:

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

The following three scenarios describe, for each default pay rate source, the interaction among annual salary, hourly rate, and standard hours per year.

- *Scenario 1: The Pay Rate table as the default pay rate source*
- *Scenario 2: The Pay Grade Step table as the default pay rate source*
- *Scenario 3: No pay rate source as the default pay rate source*

Scenario 1: The Pay Rate Table as the Default Pay Rate Source

If your chosen pay rate source is the Pay Rate table, you need to set up Pay Rate tables on the Union Rates Master Revisions program (P059121). The compensation information you enter in this program is copied to the forms you use when hiring employees.

To use the information in the Pay Rate table when you add an employee record, you complete the Job Type, Job Step, and Union Code fields, and leave the Salary and Hourly Rate fields blank. The system automatically supplies the salary and hourly rate values for the corresponding Job Type, Job Step, and Union Code found on the Pay Rate table.

On the Basic Compensation form, the system supplies a default value for standard hours per year, which you can override if necessary. Overriding the standard hours per year does not affect an employee's hourly rate.

The following list provides the guidelines for changing the values on the Basic Compensation form (W0801CMPB):

Hourly rate You cannot change the hourly rate for an employee. The system supplies the default hourly rate from the pay rate table.

Standard hours per year When you change the standard hours per year for an employee, the hourly rate does not change.

The system recalculates the annual salary for the employee.

If you use Employee Multiple Job to change the standard hours per year, you can delete

the employee's salary to cause the system to recalculate the pay period gross salary and the annual salary for the employee.

Full-time equivalents (FTE)

When you change the FTE field for the employee on the Basic Compensation form, you must also remove the value entered for standard hours per year. The system adjusts the employee's standard hours per year. The hourly rate remains the same.

Overriding the Default Pay Rate Source

To override the Pay Rate table as the default pay rate source when you add an employee record, you must enter either a salary or an hourly rate for the employee and do one of the following:

- Leave the Union Code field blank
- Enter a union code that is not included in the Pay Rate table

See Also

- *Scenario 3: No Pay Rate Source as the Default Pay Rate Source* for information about salary and hourly rate calculations
- *Understanding Pay Rate Source Setup* for more information about the Pay Rate table
- *Setting Up Pay Rate Table Information* for more information about the Pay Rate table
- *About Pay Rate Source Setup* for more information about the Pay Rate table

Scenario 2: The Pay Grade Step Table as the Default Pay Rate Source

If your chosen pay rate source is the Pay Grade Step table, you must use the Pay Grades Step Table (P082003) and Pay Grades By Class (P082001) programs to set up pay grades and pay grade steps. The compensation information you provide in these programs is copied to the forms you use when hiring employees.

When you hire an employee, do not enter the Job Type or Job Step fields on the Organizational Assignment form (P0801ORG). Enter the Pay Grade and Pay Step fields on the Job Default form (P08JD), and leave the Salary, Hourly Rate, and Standard Hours Per Year fields blank. The appropriate salary, hourly rate, and hours per year automatically populate the Basic Compensation form from the Pay Grade Step table.

The following list provides the guidelines for changing the values on the Basic Compensation form (W0801CMPB):

Pay grade step

When you change the employee's pay grade step, the system replaces the employee's hourly rate, salary, and standard hours per year with the corresponding information from the Pay Grade Step table.

Hourly rate

You cannot change the hourly rate for an employee. The system supplies the default hourly rate from the table.

Standard hours per year

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

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

Overriding the Default Pay Rate Source

To override the Pay Grade Step table as the default pay rate source when you hire an employee, you must enter either a salary or hourly rate for the employee and leave the Pay Grade Step field blank.

See [Scenario 3: No Pay Rate Source as the Default Pay Rate Source](#) for information about salary and hourly rate calculations for such employees.

See Also

- [Understanding Pay Rate Source Setup](#) for more information about pay grade tables
- [Setting Up Pay Grades](#) for more information about pay grade tables
- [About Pay Rate Source Setup](#) for more information about pay grade tables
- [Setting Up Pay-Grade Steps](#) for more information about pay grade tables

Scenario 3: No Pay Rate Source as the Default Pay Rate Source

If your organization consists of employees whose salaries and hourly rates are based on a pay range rather than specific amounts for a job or pay grade step, you can choose not to use a default pay rate source.

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

The following list provides the guidelines for changing the values on the Basic Compensation form (W0801CMPB):

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

The following list provides the guidelines for changing the values on the Basic Compensation form (W0801CMPB):

Hourly rate	Changing the hourly rate for an employee has no effect on standard hours per year. The system recalculates the annual salary for the employee, based on the new hourly rate and the standard hours per year for the employee.
Standard hours per year	When you change the standard hours per year for an employee, the system recalculates the salary, based on the new standard hours per year and the employee's hourly rate.
FTE	Changing the FTE field for an employee has no effect on salary and hourly rate calculations.

See Also

- Before entering compensation information, you must choose a default pay rate source. See *Setting Up System Options*.
- See *Understanding Pay Rate Source Setup* for additional information about choosing a default pay rate source..
- About Pay Rate Source Setup* for additional information about choosing a default pay rate source.

Entering Employee Instructions

After you enter employee information, you can enter instructions that apply to your employees, based on the needs of your company and employees.

The information that you enter provides instructions to the system and your department about how to process individual employees or groups of employees for reporting or payment purposes.

Entering Employee Deduction, Benefit, and Accrual Instructions

After you set up your deductions, benefits, and accruals (DBAs), you enter DBA instructions to assign DBAs to employees. You can enter DBAs at the following levels:

- One-time DBA override in Time Entry
- Employee DBA instructions
- Group DBAs
- DBA setup

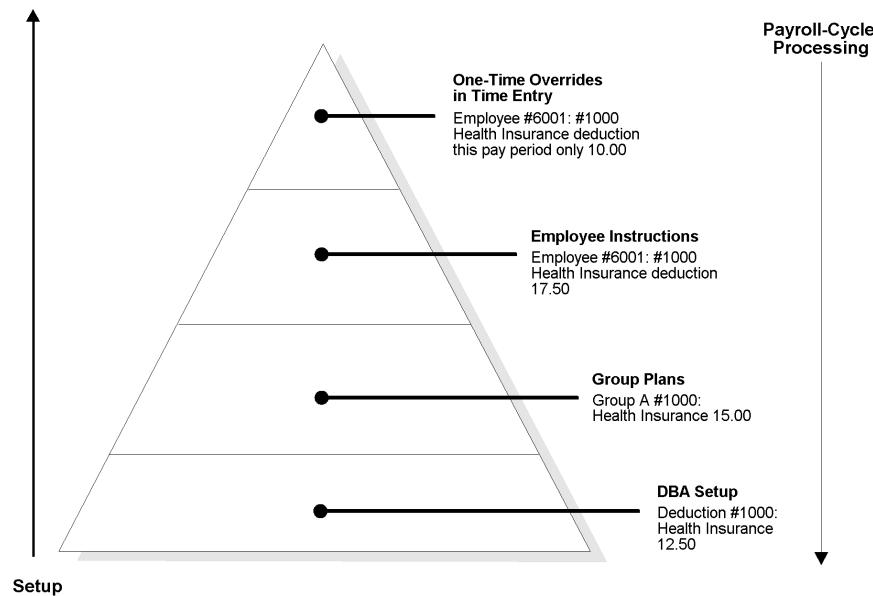
After you assign DBAs, the system calculates them during the payroll cycle in the same search sequence.

You enter DBA instructions at the employee level to define and maintain DBAs unique to an individual employee. A DBA assigned at the employee level overrides DBA amounts or rates that are defined at the group or DBA setup level, unless the DBA is a table method DBA.

To help you understand how to assign DBAs, the following graphic illustrates the order in which the system manages DBA setup and DBA calculations:

To help you understand assigning DBAs, the following table illustrates the order in which the system handles DBA setup and DBA calculations:

DBA calculations	During the payroll-cycle processing, the system first calculates one-time DBA overrides. If there are no DBA overrides, then the system searches for DBAs that apply to the individual employee or employee groups. If no employee-specific DBAs or group plan DBAs exist, the system calculates any general DBAs.
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The information that you enter on the DBA Instructions form represents the third level of DBA assignment, the employee level.

When you assign DBA instructions at the employee level, you can do the following:

- Enter exceptions by employee for a group of DBAs
- Enter overrides for DBA amounts, dates, and limitations
- Set up start and stop dates for a DBA
- Set up DBAs to calculate only when an employee works in a specified assignment
- View expired or cleared DBA transactions

To simplify the management of DBAs among employees, you can use benefit groups to avoid entering identical lists of DBAs for each employee. The system refers to groups of DBAs as group plans. Group plans are defined by union codes or group codes. The system automatically assigns group plans to the employee when you enter a Union Code on the Organizational Assignment form (W0801ORGA) when hiring the employee.

You can use the Employee DBA Inquiry form to review existing DBAs assigned to an employee before adding more DBAs. You can also review the DBA itself before assigning it to an employee.

Although you can use this form to assign all DBAs for an employee, maintaining the lists requires considerable effort. For this reason, J.D. Edwards recommends that you assign the

majority of an employee's DBAs in a group plan and that you use DBAs for an individual employee only for exceptions to the group plans.

You can override a DBA in a group plan on the DBA Instructions form, as well as add DBAs to an employee record.

If you are using the HR-Benefits module, the system automatically assigns DBA codes to an employee record when you enroll the employee in benefit plans. The DBA codes for these benefit plans appear on Employee DBA Instructions.

Note

If you want a DBA to calculate only when an employee works in a specified assignment, you enter an assignment number for that DBA on the DBA Instructions form. When calculating the DBA, the system uses all timecards associated with that assignment as the basis of calculation for the DBA. For example, if the employee works 40 hours during the pay period, but only 20 hours were worked in the specified assignment, the system uses all pay associated with the 20 hours worked in the assignment as the basis of calculation for the DBA.

If you want to set up DBAs that use other DBAs as the basis of calculation to calculate only when an employee works in a specified assignment, you would only enter the assignment number on the initial DBA. For example, you want DBA 4999 and DBA 5000 to calculate for an employee only when they work in a specified assignment, and DBA 5000 is based on DBA 4999. You would only enter the assignment number on DBA 4999 on the DBA Instructions form. The system would use all pay associated with the specified assignment number as the basis of calculation for DBA 4999, and would use DBA 4999 as the basis of calculation for DBA 5000.

See *Employee Assignments* for more information about how to use assignment numbers.

See Also

- Understanding Deductions, Benefits, and Accruals* for more information
- Setting Up Deductions, Benefits, and Accruals* for more information
- Setting Up Group Plan DBAs* for more information
- About Deductions, Benefits, and Accruals* for more information
- Setting Up Deductions, Benefits and Accruals* for more information
- Setting Up Group Plan DBAs* for more information.

► **To enter employee deduction, benefit, and accrual instructions**

From the Employee Management menu (G05BE1), choose Employee DBA Instructions.

Employee DBA Instructions - [Work With Employee DBA Instructions]

File Edit Preferences Window Help

Select Find Close Seg... New... Dis... Abo Links Disp... OLE... Internet

Employee Identification	7500	McDougle, Cathy		
Effective On	1/7/05	<input checked="" type="radio"/> Active <input type="radio"/> Terminated <input type="radio"/> All		
Address Number	Employee Tax ID	Alternate Employee No	Alpha Name	Date Term.
7500	261554789		McDougle, Cathy	

Find records Row:1

1. On Work With Employee DBA Instructions, complete one of the following fields:
 - Employee Identification
 - Effective On
 2. Click one the following options to narrow your search and click Find:
 - Active
 - Terminated
 - All
 3. On Work With Employee DBA Instructions, choose one or more records and click Select.
- The Employee DBA Instructions form appears, which displays information for the employee record first selected.

Employee DBA Instructions - [Employee DBA Instructions]

File Edit Preferences Form Row Window Help

OK Find Del... Can... New... Dis... Abo Links EE D... Previo... Next OLE... Internet

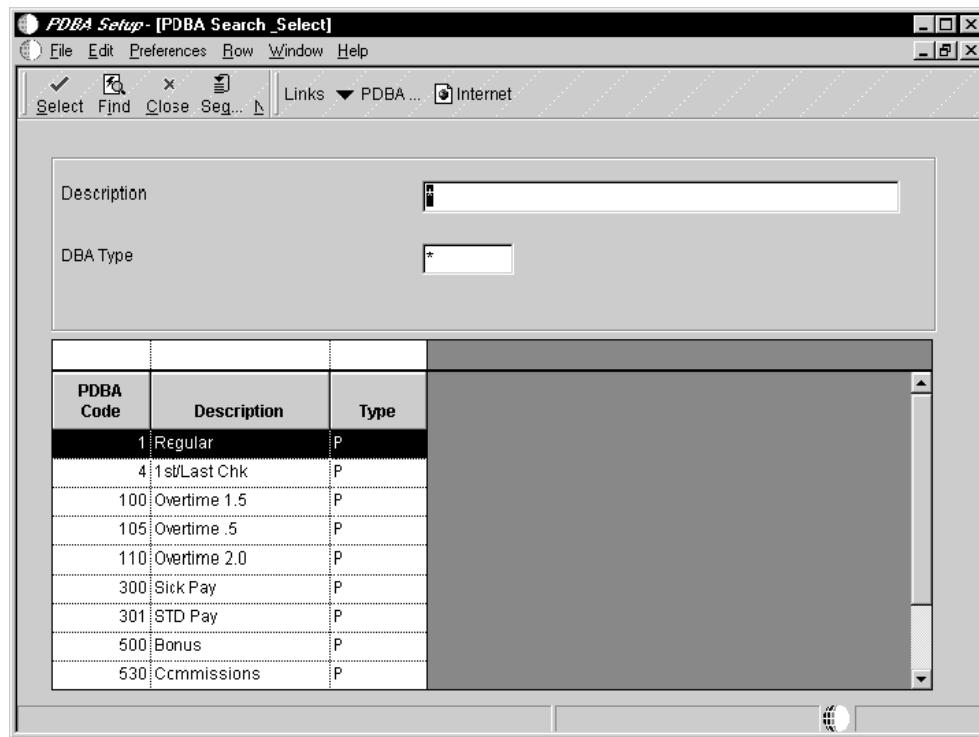
Employee Identification	7600	McDougle, Cathy
Effective On	27/08/01	
Benefit Group	EXEC	
Job Type/Step	ZH-1	Human Resources Manager <input type="checkbox"/> Cleared Items

#	PDBA Code	DBA Type	Calc Method	Description	Assignment Number	Override Flag	Amt/Rt Level 1	Amt/Rt Level 2
	1008	B	\$	Health/Co				
	1011	B	%	LTD Coverage				
	1016	D	\$	LTD Coverage				
	1017	D	\$	STD Coverage				
	1020	D	\$	Dental EE+1				
	1102	D	C	Child support			250.0000	
	1120	D	\$	Child support			10.0000	
	1320	D	\$	United Way			5.0000	

Row:2

Work With Employee DBA Instructions Employee DBA Instructions

4. To review DBAs already assigned to employees, choose EE DBA Review from the Form menu.
5. On Work With Employee DBA Review, review the information and click Close.
6. To review a deduction, benefit, or accrual before assigning DBA instructions, click the visual assist for the following field:
 - PDBA Code



7. On PDBA Search & Select, choose a DBA and then choose PDBA Recap from the Row menu.
8. On Pay Type Recap, review the information and then click Cancel.
The PDBA Search and Select form appears.
9. Choose a DBA and click Select.
The Employee DBA Instructions form appears again with the DBA code.
10. On Employee DBA Instructions, continue assigning a DBA by completing the following optional fields:
 - Amt/Rt Level 1
 - Amt/Rt Level 2
 - Pay Start Date
 - Pay Stop Date
11. If you are integrating Payroll with Accounts Payable and you need to activate voucharing for this employee, complete the following field:
 - Voucher Flag
12. To specify a payee for the voucher, complete the following field:
 - Payee No

13. Review the default information in the following fields and, if necessary, enter or change the information:
- DBA Type
 - Calc Method
 - Explanation - Remark
 - Assignment Number
 - Override Flag
 - Group Code
 - Table Code
 - Amount Due
 - Prior DBA
 - Ded Per 1
 - Nbr Per
 - Union Code
 - Job Type
 - Job Step
 - Limit \$ Pay Period
 - Limit Monthly
 - Limit \$ Quarterly
 - Limit \$ A/L1
 - Limit \$ A/L2
 - Limit % Period
14. Click OK.

15. To obtain the next employee record, click Next and repeat steps 4-14.

16. When you are finished assigning DBA instructions to employees, click OK.

If any of the DBAs that you entered are for wage attachments, the system displays the Wage Attachment Revisions form. See [Entering Wage Attachments for Employees](#) in the *Payroll Guide*.

Related Task

Deleting a DBA Instruction	When you need to remove a DBA instruction from an employee record, use caution to avoid deleting a DBA that has already accumulated history information. After a DBA has been active and amounts have been withheld from an employee's compensation, removing
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the DBA could result in errors on year-end forms.

When deleting a DBA instruction, if the DBA has history information, the system generates a warning message indicating that history information exists. If you receive this message, cancel the deletion procedure.

Entering Labor Distribution Instructions

You enter labor distribution instructions for individual employees to automate the process of distributing an employee's work time to multiple general ledger accounts. You can enter labor distribution instructions for hourly and salaried employees.

Labor distribution instructions simplify time entry. If you enter distribution instructions for an employee who is not set up for autopay, you can obtain the instructions when you enter timecards manually. The system uses the labor distribution instructions that you enter when it creates timecards for autopay employees.

The following are examples of practical applications of labor distribution instructions:

- If an employee always spends 80% of the time processing payroll and 20% managing other staff, then you can allocate the time 80% to G/L account Regular Pay and 20% to G/L account Regular Pay-Managers using labor distribution instructions.
- If an employee spends 5 hours per week performing administrative duties and 35 hours performing regular salaried duties, you can allocate the amount to two different G/L accounts.
- In the previous example, you can specify the start and stop dates of the instructions. These dates control when the labor distribution instructions can be used. If you entered a timecard on a different date, the instructions would not apply, and you could not copy them in time entry.
- If you are entering a batch of timecards for employees whose time needs to be allocated identically, you can assign labor distribution instructions to one employee in the batch and then copy the instructions to all of the other employees in the batch. An example of this would be in a hospital setting where a group of general nurses works on a unit part of the time and also works in the HR Department in Occupation Health evaluating employees' on-the-job injuries the rest of the time.
- When an employee works for a business unit or company other than the home company, you can override the position ID so that budget allocations reflect the position ID of the business unit or company where the employee performed work. This feature is useful in the public sector and in organizations in which budget tracking by position is critical to maintain or justify the appropriate workforce.

You use labor distribution instructions to complete the following procedures:

- Distribute time to multiple general ledger accounts
- Distribute time by either percentage or number of hours
- Set effective dates for distributions
- Create a template for time entry
- Define job type information when the employee has more than one job
- Override position ID and AAI accounts for an employee

► **To enter labor distribution instructions**

From the Employee Management menu (G05BE1), choose Employee Labor Distribution.

1. On Work With Labor Distribution Instructions, click Add.

Pay Code	Pay Description	Hours/ Percent	Account Number	Pay Start Date	Pay Stop Date	WCI Code	WCI Class	Hourly Rate	Bi Rate
<input checked="" type="checkbox"/> 1	Regular	20.00	9.8118			8810		80.00	9.8115

2. On Labor Distribution Instructions, complete the following fields:
 - Employee Identification
 - Percent or Hours
 - Pay Code
 - Account Number
3. If an employee has more than one job, complete the following fields:
 - Job Type
 - Job Step
 - Home Business Unit
4. To override default job, pay, or tax information, complete any of the following optional fields:
 - Pay Start Date

- Pay Stop Date
 - WCI Code
 - WCI Class
 - Hourly Rate
 - Billing Rate
 - Burden Rate
5. Click OK to save the record.

Processing Options for Employee Labor Distribution (P050151)

Defaults Tab

1. Worker's Compensation Code

1 = From the Employee Master File
regardless of the EE Labor
Distribution Entry.

2 = From the Employee Master file only

if the field is left blank.

3 = From the Data Dictionary if the field

is left blank. (Default)

Use this processing option to specify the default Worker's Compensation Code for Employee Labor Distribution. Valid values are:

- 1 The Worker's Compensation Code is from the Employee Master file regardless of the Employee Labor Distribution entry.
- 2 The Worker's Compensation Code is from the Employee Master file only if the Employee Labor Distribution field is blank.
- 3 The Worker's Compensation Code is from the Data Dictionary only if the Employee Labor Distribution field is blank. (Default)

Understanding Split Time

In addition to labor distribution instructions, J.D. Edwards offers a Split Time feature that automatically allocates time entry charges to various accounts during time entry. Split Time is activated in the processing options for the Time Entry Master Business Function (P050002A). When the Split Time feature is activated, it sets up a hierarchy for the system to search to find the appropriate account number as follows:

- The system first searches for labor distribution instructions at the employee level. If it finds them, it picks up the percentage or number of hours set up, as well as the account number assigned to each amount. If the labor distribution instructions are using the hours method instead of the percentage method, the system will prorate the hours to determine the amount of the split. The system applies these amounts to all pay types entered on the Time Entry form regardless of the pay type set up in the labor distribution instructions.
- If no labor distribution instructions are set up, the system searches the Position Control program and selects the allocation, if any, that was defined in the Position Control program.
- If no labor distribution instructions are set up and no account allocations are defined in the Position Control program, the system proceeds to the automatic accounting instructions and uses the account information defined there.

The Split Time feature was designed for clients who want to avoid setting up numerous automatic accounting instructions. It is intended for those employees who typically charge their time to more than one area. All pay types are split according to the instructions that the system finds. Split Time and labor distribution instructions were not designed to work together. When Split Time is activated, the system includes labor distributions in the hierarchy when searching for the account numbers used to allocate labor charges. When Split Time is not activated, the labor distribution instructions must be manually copied during time entry for non-autopay employees.

When Split Time is activated and the employee also has labor distribution instructions, every pay type entered on the timecard is split according to the labor distribution instructions that are set up for the employee. Therefore, if pay type 1 is set up to be split between two accounts on the labor distribution instructions, then the time is split between the accounts selected on labor distribution instructions.

Examples: Activating Split Time

The following are examples of how the system allocates labor charges among accounts based on labor distribution instructions or the Split Time feature.

Example 1: Labor distribution instructions set up at the employee level using the percentage method. Split Time is activated.

Pay Code	Description	Hours or Percent	Account #
1	Regular	60	9.8115
1	Regular	40	9.8118

On the Time Entry Revisions form, when 40 hours is entered for pay code 801, the system automatically supplies the following allocation on the Time Entry form because the Split Time feature is activated:

Pay Code	Description	Hours	Account #
801	Vacation	24	9.8115
801	Vacation	16	9.8118

For any pay code entered (including pay code 1) on the Time Entry form, the system supplies the hours and account number from the labor distribution instructions. The system does not supply the pay code or change the pay code that was entered.

If the Split Time processing option is not activated, when time is entered you must copy the labor distribution instructions for the employee from the Form menu. The time is then allocated according to the labor distribution instructions. Only the pay type set up on the labor distribution instructions is allocated on the Time Entry form.

Example 2: Labor distribution instructions are set up at the employee level using the percentage method. Split Time is not activated.

On the Time Entry Revisions form, when 40 hours is added for pay code 801, the system does not allocate time charged to pay code 801 because the labor distribution instructions were set up to allocate charges to pay code 1 and the Split Time feature is not activated:

Pay Code	Description	Hours	Account #
801	Vacation	40	9.8118

When you add 40 hours for pay code 801 on the Time Entry form and then select copy labor distribution instructions, the system will prompt you for the number of hours to charge and allocate those hours of regular pay based on the labor distribution instructions:

Pay Code	Description	Hours	Account #
1	Regular	24	9.8115
1	Regular	16	9.8118
801	Vacation	40	9.8118

The vacation pay code is not split because the labor distribution instructions specified only regular pay (pay code 1).

The following are suggestions for using the labor distribution instructions and the Split Time feature:

- Use Split Time when you want every pay code split according to either labor distribution instructions or position control.
- Enter a batch of timecards with the Split Time feature activated, and then deactivate Split Time and enter additional timecards.

Entering Automatic Deposit Instructions

You enter automatic deposit instructions for any employee who wants all or part of each payment deposited directly in a bank account. When you enter automatic deposit instructions, the system creates a pre-note record that is sent to the bank for verification. The pre-note information can be created during the first payroll cycle in which the employee is processed after the automatic deposit instructions are entered into the system, or you can create pre-note transactions outside of the payroll cycle. See *Creating Pre-Note Transaction Records* for more information.

Using automatic deposit instructions, you can perform the following functions:

- Set up a combination of automatic deposit, check, or cash payments
- Set up multiple bank accounts for an employee
- Start and stop automatic deposits by period
- Start and stop automatic deposits by date
- Set up a remainder code to automatically process any money remaining when an employee chooses different ways to distribute a payment

Before You Begin

- Set up the processing options that provide the originating bank number, service class code, and standard entry class.

► To enter automatic-deposit instructions

From the Auto Deposit Information menu (G05AD), choose Auto Deposit Instructions for Employee.

1. On Work With Automatic Bank Deposit Instructions, complete the following field and click Find:
 - Employee Identification
2. Choose an employee and click Select.

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3. On Automatic Bank Deposit Instructions, complete the following fields:

- Bank Account
- Bank Trnst No.
- M C
- Tr Cd
- Amount or Percent

4. Complete the following optional fields:

- Pay Start Date
- Pay Stop Date

The system supplies values for the following field on the Employee tab:

- Pre-Note Flag

The system supplies values for the following fields on the Bank Information tab:

- Originating Bank
- SCC

- SEC
5. Review the values supplied by the system for the following fields:
 - F P
 - Ded Per 1
 - Ded Per 2
 - Ded Per 3
 - Ded Per 4
 - Ded Per 5
 6. To create additional automatic bank deposit instructions, repeat steps 3-5.
 7. When you are finished entering instructions, click OK.

Processing Options for Employee Auto Deposit Instructions (P055011)

Bank Info.

1. Originating Financial Organization No.
- 2 .Service Class Code
3. Standard Entry Class
4. Off Set Begin Deposit Date
 - 0 - Do not default the Begin Deposit Date
 - 1- Default the Begin Deposit Date
5. Off Set Begin Deposit Date
Enter the number of days offset for the Pay Start Date.

Creating Pre-Note Transaction Records

From the Auto Deposit Information menu (G05AD), choose Auto Deposit Pre-Note Bank File.

When employees decide to have their payroll payments automatically deposited in their bank accounts, they must provide information about the bank accounts to their employer. The employer must verify that the bank information is accurate before payments are actually deposited into those accounts. The process of verifying employee bank information is called pre-noting.

Pre-noting is a method of electronically testing the accuracy of an automatic deposit bank account before transferring actual funds to the account. If there are problems with the bank account information, the bank provides feedback to the employer to notify them of any errors. Typically, new accounts are pre-noted during the first payroll cycle in which the employee is processed after they have submitted their bank account information. During the payroll cycle that the bank information is pre-noted, the employee receives an actual paycheck rather than an automatic deposit.

The pre-note process consists of the following steps:

5. Employees provide bank account information to the payroll department.
6. The bank information is entered into the system.

7. The bank information is electronically sent to a regional National Automatic Clearing House Association (NACHA) facility.
8. NACHA consolidates all transactions for daily routing to all member banks.
9. Member banks receive and verify that the auto deposit instructions submitted via NACHA are accurate. If errors are discovered, the originator of the test is notified of the problem for correction and retesting.

Note

This pre-note cycle typically requires ten days from the time NACHA receives the transaction.

The Pre-Note Trigger program allows you to generate pre-note transactions as soon as you enter automatic deposit instructions into the system. Generating the pre-note transaction before the employee is paid expedites the verification process and increases the probability that employees receive their first payment via an automatic deposit rather than a live check. Expediting the verification process reduces the number of live checks that an organization must distribute.

For example, if you hire an employee who is not scheduled to begin working for your organization for several weeks, you can process the employee's pre-note transaction before they begin working. By completing the pre-note process ahead of time, the employee's first payment can be generated as an automatic deposit rather than a live check.

When you create the pre-note transaction using the Pre-Note Trigger program, the system assigns a start date to the employee's automatic deposit information. This start date is determined by adding the number of days that you enter in the processing options for the Auto Deposit Instructions program (P055011) to the system date. J.D. Edwards recommends using a value of 10 days or more to ensure that the pre-note process is completed before funds are deposited into the accounts. If the employee is paid before the start date that is associated with their automatic deposit instructions, the employee will receive a live check rather than an automatic deposit.

In addition to pre-noting new automatic deposit instructions, you must also pre-note bank information when an employee changes existing automatic deposit instructions. The system uses the value in the Pre-Note Flag and Transaction Code fields on the Automatic Deposit Instructions form to determine which records to include in the pre-note process. If the Pre-Note Flag field is set to P, all automatic deposit instructions for the employee are included in the pre-note process. If the Pre-Note Flag field is set to N, only automatic deposit records with a value of 23, 28, 33, or 38 in the Transaction Code field are included in the pre-note process.

Note

If an employee changes the amount that they want deposited into a bank account, the system does not change the value in the Transaction Code field to a pre-note value. The system only changes this value if the bank account information changes.

After you enter or change automatic deposit instructions for employees, you must generate the pre-note file to send to NACHA. If your organization has multiple business units that use unique bank information, you can create separate NACHA files for each business unit. To do this, you must set up automatic deposit tape file information for each business unit. See *Setting Up Business-Unit Constants* for instructions.

See Also

- ❑ *Entering Automatic Deposit Information Using Self-Service*

- Setting Up Business-Unit Constants*

Before You Begin

- Set the company options for Company 00000 to determine how the system creates automatic deposit bank tapes. See *Setting Up Company Options* for instructions.
- Set up debit account information for each entity in your organization for which you create automatic deposit and pre-note files. See *Setting Up Debit Account Information for Automatic Deposits* in the Payroll Guide for instructions.
- Create an export folder for the NACHA file. Contact your system administrator for assistance.

Processing Options for the Auto-Deposit Pre-Note Bank File Program (R055011)

Company Options Tab

These processing options are used to determine what processing information is included in the pre-note transaction file.

1. Enter Effective Deposit Date

Use this processing option to specify the date on which funds are to be deposited into an employee's bank account. If you leave this option blank, the system date is used.

Note: If you enter an offset number in the Offset Effective Deposit Date processing option, the system adds the number of days that you enter in that processing option to the date that you enter in this field to determine the effective deposit date. If you leave this field blank and enter an offset number, the system adds the number of days that you enter in that processing option to the system date to determine the effective deposit date

2. Off Set Effective Deposit Date

Use this processing option with the offset formula to determine the date on which funds should be deposited into an employee's bank account. If you enter a number in this field, the system adds that number of days to the date in the Effective Deposit Date processing option to determine the deposit date for the funds. If that processing option is left blank, the offset days are added to the system date to determine the deposit date. For example, if you enter 1 in this field, and you leave the Enter Effective Deposit Date processing option blank, the deposit date that the system uses is the system date + 1. If you leave this option blank or enter 0, the date that you enter in the Enter Effective Deposit Date processing option is used.

Note: This feature works only if the date in the Enter Effective Deposit Date processing option is entered using MMDDYY format, as required by NACHA

3. Enter Trace Number (7 pos.)

Use this processing option to specify the trace number, which is assigned by the ODFI, and is used for the creation of automatic deposit and pre-note transaction records. This number, which can be up to 15 characters in length, is used in conjunction with the batch number, transmission date, and file ID modifier to identify records within a file

Optional Items Tab

These processing options are used to define optional information that is to be included in the pre-note transaction file.

1. Enter Tape Processor's Name if different from Company Name. If left blank, it will default to Company Name.

Use this processing option to identify the name of the ACH operator or sender. Typically, this is the name of your company or the entity for which you are creating an automatic deposit or pre-note transaction file

2. Descriptive Date

Use this processing option to specify the date description that you want to appear to the receiver of the automatic deposit or pre-note transaction file. This 6-character code is used for descriptive purposes only and does not control the timing of fund deposits. Examples of possible entries for this processing option are 011305, 01 05, JAN 13, or JAN 05.

Note: If you are using the Offset Descriptive Days processing option, you must enter this date using the MMDDYY format

3. Off Set Descriptive Date

Use this optional processing option if you want the offset date formula to determine the date for the descriptive date. If you enter a number in this field, the system adds this number to the date that is entered in the Descriptive Date processing option. For example, if you enter 2 in this field, the actual descriptive date that is used in the pre-note transaction file is the date that is entered in the Descriptive Date processing option + 2. If you leave this option blank or if you enter 0, the date in the Descriptive Date processing option is used.

Note: To use this feature, the date in the Descriptive Date processing option must be entered using the MMDDYY format

4. Reference Code for Auto Deposits

Use this processing option to identify user-defined information that is specific to your organization. This processing option is optional

5. Company Entry Description (10 pos.)

Use this processing option to specify a 10-character description of the purpose of the file that you are sending. This code is used for information purposes only and does not affect the processing or calculation of automatic deposit or pre-note transaction records. Examples of codes that you might use are REG SALARY, BONUS PAY, or HOLIDAY

6. Enter if Pre-Note is to be run in update or proof mode.

0 - Proof mode

1 - Update mode (updates F060116 or F065016)

This option is used for Pre-Note only.

Use this processing option to determine the mode of processing when running the pre-note transaction program. When you run this process in proof mode, the system creates a report to display the changes that will be made. When you run this process in update mode, the system updates the F060116 and F065016 tables, changing the Pre-Note flag and adding the Auto Deposit Start Date. Valid values are:

0

Proof Mode

1

Update Mod

Revising Employee Information

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

You have many options for changing an employee's salary. One option is using Enterprise Workflow Management. Workflow is an electronic message delivery system that streamlines the process of getting an approval for a salary change. Workflow automates tasks, such as notifying a manager that a salary change is waiting for approval, using an e-mail-based flow across a network.

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

When an employee arranges to be absent from work for an extended period of time, such as to care for a newborn, you can enter leave-of-absence information for the employee.

When an employee stops working for your organization, you need to terminate the employee. You can do this manually or with the help of Workflow.

Changing Employee Salaries

You might need to change salaries for an employee or a group of employees. For example, you might give an employee a raise to complement a promotion, or you might increase all salaries because of inflation. You can change employee salaries using any of the following methods:

Workflow is an electronic message delivery system that you can use to process salary changes automatically. The Workflow process includes obtaining approval for salary

increases over a specified limit and updating the Employee Master table (F060116). Workflow is designed to save time and reduce errors to salary changes.

Changing salaries using salary planning is helpful if you want to calculate salary changes for employees using a third-party source, such as a spreadsheet. You can export employee information to a spreadsheet, calculate salary changes, and reimport the information into the HR and Payroll systems. Using salary planning allows you to calculate salary change scenarios before updating the Employee Master table (F060116).

You can also change an employee's salary using pay rate information. This is preferable if you are changing an employee's hourly, billing, or piecework rate. You can also change the employee's salary. You can specify the change as a monetary amount or as a percentage of the employee's current pay rate, and you can enter a change that takes effect on a future date. You use pay rate information to update only one employee record at a time. Information entered in the Pay Rate Information program (P060131) updates the Employee Master table (F060116).

Alternatively, you can change employee salaries as follows:

- | | |
|------------------------------------|--|
| Individual employee changes | You can manually change the Salary field on the Basic Compensation form.

See <i>Correcting Employee Information</i> for information about how to change an employee's salary manually. |
| Future date changes | If a salary change will not take effect until a future date, you can enter information using the Future Data EE Master Revisions form.

See <i>Processing Future Changes</i> for more information about changing salaries for a future date. |
| High-volume changes | You can reduce data entry time by changing salaries for groups of employees using the Employee Master Mass Changes form.

See <i>Processing Mass Changes</i> for more information about changing salaries for groups of employees. |

Changing an Employee's Salary Using Workflow

Enterprise Workflow Management automates the process of changing an employee's salary by notifying the appropriate supervisors for salary approval and updating the database with the salary change.

The process of using Workflow to change a salary usually involves more than one supervisor or manager. For example, the employee's supervisor might originally enter the salary change information. But after the supervisor enters this request, the supervisor's manager must approve the change for it to become effective. You can set a salary threshold in your processing options for Basic Compensation so that Workflow obtains approval for a certain percentage or flat-monetary salary increase.

Note

The system initiates Workflow when you enter a salary change that is greater than or equal to the salary threshold or the percent that you define in the processing options for the Workflow Salary Change program. If you leave the processing options blank, Workflow will not function.

Initiating a salary change is completed by a manager. Approving a salary change is a procedure that a manager does after receiving a message about a salary change. Please note which tasks apply to you.

You can review the salary change in the Salary field on the Basic Compensation form.

Before You Begin

- ❑ Create a congratulatory letter if needed. See [Mailmerge Workbench](#).
- ❑ Choose a version and set up your processing options for Basic Compensation.
- ❑ Verify that the Workflow process EEMAST1 is activated in the Process Master. See [Activating or Deactivating a Workflow Process](#) for more information.

► To initiate a salary change

From the Employee Management menu (G05BE1), choose Basic Compensation.

If you are a supervisor or manager who is responsible for initiating a salary change, you can send a message to the person who is responsible for approving the change.

When you initiate a salary change, the pending salary change remains in the supervisor's queue until the supervisor approves or rejects the salary change. When the supervisor approves or rejects the change, Workflow sends you a message.

1. On Work With Basic Compensation, complete the following field and click Find:
 - Employee Identification
2. Choose the row containing the employee's record and click Select.

The screenshot shows the PeopleSoft Basic Compensation form. At the top, there are tabs for Portal, WWW, Intranet, and Training. Below the tabs, the workspace is set to 'Active Foundation'. The main area is titled 'Basic Compensation' and contains several sections:

- Employee Information:** Employee No. 7500, Name McDougle, Cathy; Home Business Unit 9, Corporate Administration; Job Type/Step 2H-1, Human Resources Manager; Pay Frequency Bi-Weekly; Position ID 2H-1, Human Resources Manager; Locality Headquarters (default).
- Pay Class:** Salaried.
- Pay Grade/Step:** S6, Pay Rate Source None.
- Salary:** 50,000.00, Pay Period Salary 1,923.08.
- Hourly Rate:** 24.038, Compa-Ratio 0.87.
- Time-Based Fields:** Std Hrs/Day, Pay on Std Hours; Std Hrs/Year 2080.00, Overtime Exempt Y; Std Days/Year, FTE 1.00; Default Auto Pay Type.
- Compensation Review:** Review Type A, Annual Review; Last Comp Review Date 01/01/04; Next Comp Review Date 01/01/05; Tier/Ranking 2; Last Tier/Ranking Review Date 01/01/04.

3. On Basic Compensation, complete the following field and click OK:
 - Salary

A delay might occur after you click OK. The delay indicates that the workflow process has been activated. A message appears to confirm that your changes have been submitted for approval and are pending review.

Processing Options for Basic Compensation (P0801CMP)

Process

1. Workflow - Salary Threshold

0 = Default

2. Workflow - Salary Percent Change Threshold
-

► To approve a salary change

From the Workflow Management menu (G02), choose Employee Queue Manager.

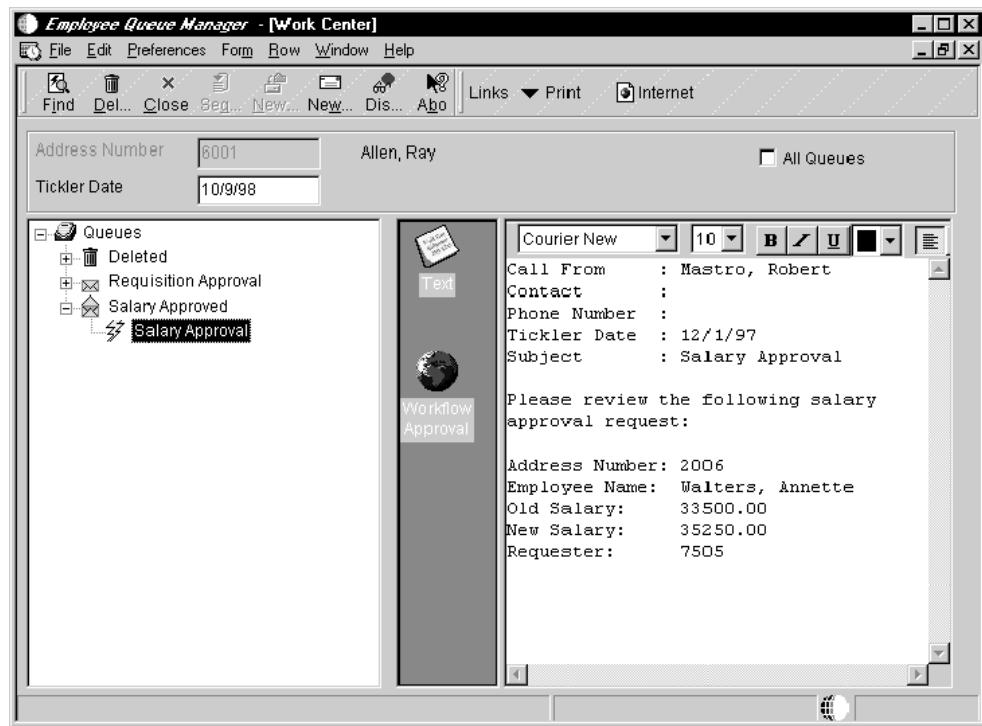
If you are a supervisor who is responsible for approving salary changes, you can approve a salary change after you receive a salary change message in your Workflow queue.

After an employee enters salary change information, Workflow sends the request to your queue for review. You can accept or reject the request. The salary change does not take effect until you respond to the request.

Note

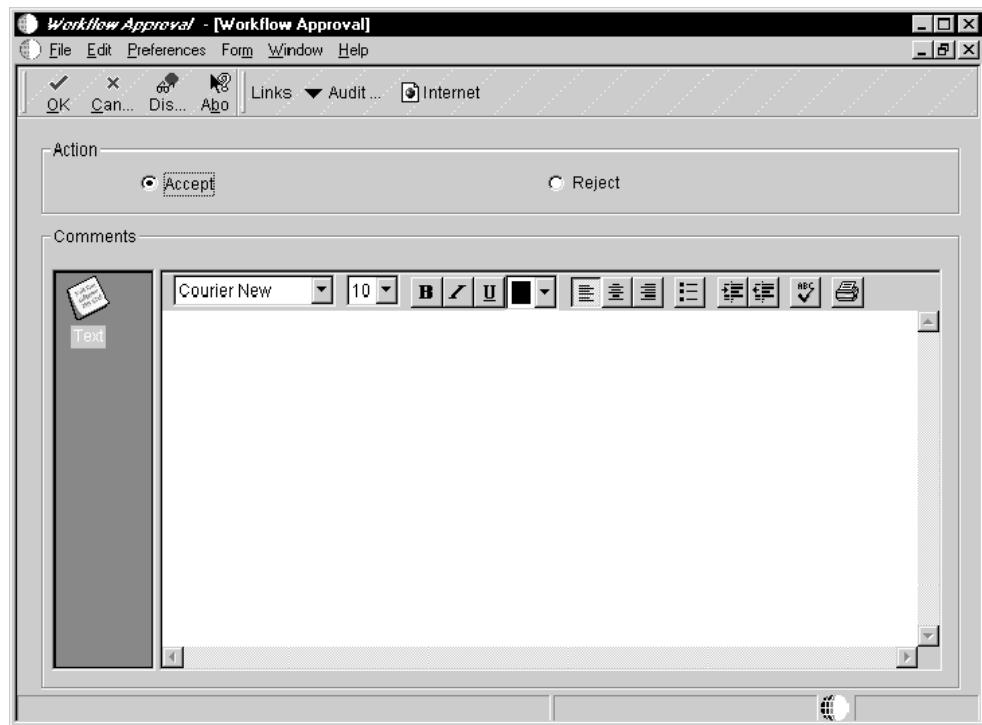
If more than one approval is needed for a salary change, the change will not take effect until all supervisors respond.

1. On Work With Employee Queue Manager, complete the following field:
 - Skip To Name
2. To narrow your search, complete the following field and click Find:
 - Search Type
 - Code 1
3. Choose the employee and click Select.
4. On Work Center, click the Salary Approval icon in the left queue.



All salary requests pending approval appear in the right queue.

5. To approve or reject a salary change, click the Workflow Approval icon in the middle of the form, and then click the Workflow Approval icon in the right section of the form.



6. On Workflow Approval, click one of the following options to accept or reject the salary change request, add text if applicable, and click OK.
 - Accept
 - Reject
7. On Work Center, click Close.

Changing Employee Salaries Using Salary Planning

With Salary Planning, you can calculate salary changes for employees using a third-party spreadsheet such as Excel or Lotus. Salary Planning imports the information to update the Salary or Hourly Rate fields on the Basic Compensation form and the Employee Master table (F060116).

If you have your Position Budget option activated in System Options, Salary Planning verifies that your salary changes for positions are within the budgeted salaries.

See Also

- *Setting Up System Options* for more information about setting up position budget editing

► To change employee salaries using salary planning

From the Employee Management menu (GO5BE1), choose Basic Compensation.

1. On Work With Basic Compensation, choose Salary Planning from the Form menu.

Home Business Unit	Alpha Name	Annual Salary	Hourly Rate	Compa Ratio	FTE	Job Typ	Job Step	Pay Grade	P/C	Pa Fr
3 Donovan, Andrew	3 Donovan, Andrew	13,520.00	6.500	0.78	1.00	OP-2		H2	H	S
9 Abbott, Dominique	9 Abbott, Dominique	38,000.00	18.269	0.97	1.00	0A-3		S4	S	S
9 Abrams, Brooke	9 Abrams, Brooke	60,000.00	28.846	1.05	1.00	1M-3		S6	S	S
9 Aiken, Gwen	9 Aiken, Gwen		13.000		1.00	8R-1	5		H	B
9 Allen, Ray	9 Allen, Ray	75,000.00	36.058	1.17	1.00	A1		S7	S	S
9 Anderson, Jeanette	9 Anderson, Jeanette	53,040.00	25.500	1.10	1.00	1M-2		S5	S	B
9 Ato, Connie	9 Ato, Connie	38,250.00	18.389	0.98	1.00	2H-2		S4	S	S
9 Broun, Susan	9 Broun, Susan	50,000.00	24.038		1.00	1M-1		S	S	S
9 Brown, Susan	9 Brown, Susan	50,000.00	24.038		1.00	1M-1		S	S	S
9 Chamberlain, Carol M.	9 Chamberlain, Carol M.	32,000.00	15.385	0.82	1.00	9S-2		S4	S	S

2. On Salary Planning, complete the following fields and click Find:
 - Address Number
 - Effective Date
 - Change Reason
3. Choose an employee or a group of employees, right-click, choose Export, and then the third-party document used for calculating your salary planning information.
4. On Export Assistant, choose the following field:
 - Establish a Hot-Link
5. Choose whether to Export to an Existing workbook or to a New Workbook and specify a range of cells.
6. Click Continue.

The third-party document appears with the information from the Salary Planning form.

7. Calculate any necessary changes and then save and close the file.
8. On Salary Planning, choose the same employee or group of employees as you did in step 3.
9. Right click, and then choose Import and the third-party source used for calculating salary planning information.
10. On Open, enter a range of cells and click Open.

Updated employee salary information is imported into the Basic Compensation form.

Changing an Employee's Salary Using Pay Rate Information

You can change an employee's salary using pay rate information. This is preferable if you are changing an employee's hourly, billing, or piecework rate because you directly enter the change in the rate. You can specify the change as a monetary amount or as a percentage of the employee's current pay rate, and you can enter a change that takes effect on a future date. For example, suppose you enter a future effective date after you enter a pay rate change. When the future date occurs, the system automatically updates the employee's pay rate information. If the effective date falls between pay cycles, the employee will see the new rate in the payment for the first pay period after the effective date.

You use pay rate information to update only one employee record at a time. Information entered in the Pay Rate Information program (P060131) updates the Employee Master table (F060116).

► To change an employee's salary using pay rate information

From the Employee Management menu (G05BE1), choose Pay Rate Information.

1. On Work With Pay Rate Information, complete the following field and click Find:
 - Employee Identification
2. Choose the employee record and click Select.

3. On Pay Rate Revisions, review the current rates in any of the following fields of the Current Rate column:
 - Annual Salary
 - Hourly Rate
 - Billing Rate
 - Burden Rate
 - Piecework Rate
4. To define a future pay change as a percent or flat amount increase, click either the Flat or the Percent option in the Method area.
5. Complete as many of the fields as necessary in the Planned Increase column for each rate that you are changing.
Add a monetary amount or a percentage to each field, depending on the method you have chosen.
6. Complete as many of the following fields as necessary in the Effective Date column for each rate that you are changing:
 - Next Raise Date
 - New Burden Rate Date

- New Piece Rate Date
7. Complete the following field:
- Chg Rsn
8. If you do not have the J.D.Edwards Payroll system, complete the following field:
- Current Pay Effective Date
9. Review the new rates in the New Rates column and click OK.

Correcting Employee Information

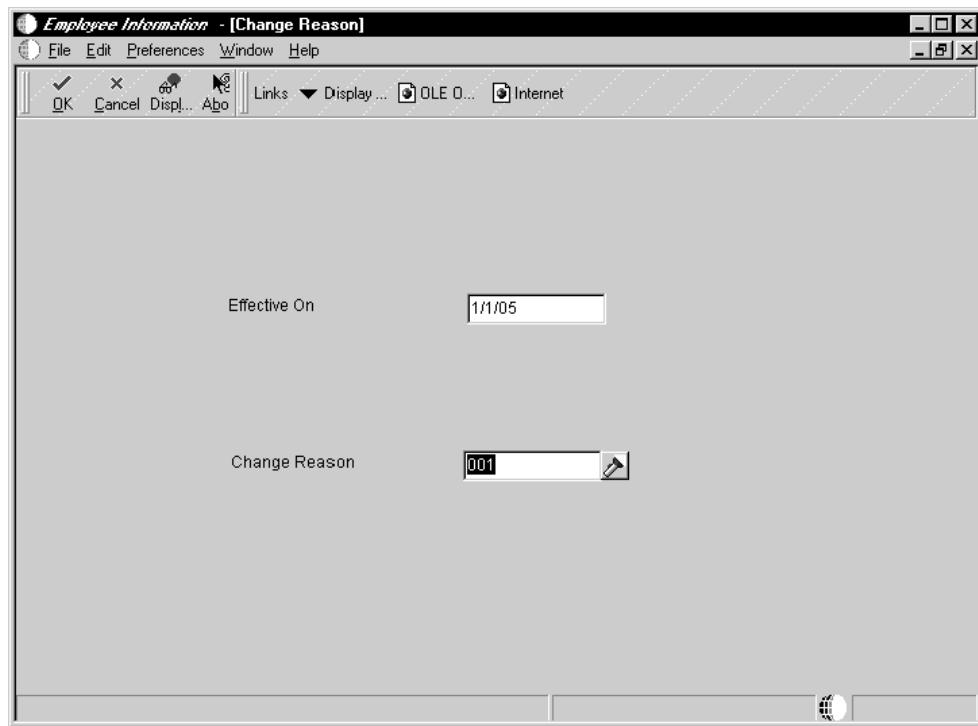
You can review employee information and update it as necessary. For example, when an employee receives a promotion, you typically update the employee's salary, job type, and pay grade.

If you are tracking employee history and turnover information, the system creates a history record every time you change employee information. After correcting employee information, you typically remove the incorrect entries from the employee's history and turnover records.

► To correct employee information

From the Employee Management menu (G05BE1), choose Employee Information.

1. On Work With Employee Information, complete either of the following fields to locate the employee whose information you need to change:
 - Home Company
 - Home Business Unit
2. Click one of the following options and click Find:
 - Active
 - Terminated
 - All
3. Choose the employee record, and choose a menu option from the Row menu.
4. Make the necessary changes on the appropriate form and click OK.



5. If a Change Reason form appears, complete the following fields and click OK:
 - Effective On
 - Change Reason

See Also

- Correcting Employee History*

Processing Future Changes

You can enter future changes for an individual employee that will take effect on a future date. For example, if an employee will change from one business unit to another on a certain date, you can enter the new information prior to the employee actually changing business units.

You can enter future changes only for information that the system stores in the Employee Master table (F060116). When you set up your system, you can limit the data items (fields) that you allow the update program to change. You can enter changes for a group of employees. For example, you might enter a mass change for all employees whose business unit 32 is changing to business unit 459.

After entering future changes, you must update the Employee Master table for your changes to take effect. You have the following options for updating changes:

- If you are using the J.D. Edwards Payroll system, you can allow the final update step of the payroll cycle to automatically update changes.
- You can request a batch job to update the changes.

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

You can enter the following types of future changes:

- Changes to employee information prior to the effective date of the change
- Multiple changes to the same data item with different effective dates
- Changes to employee records that are included in a current payroll cycle (locked records)

The future change process updates one or both of the following tables depending on how your processing options are set up:

- Future Employee Master Data Changes table (F06042)
- Employee Master table (F060116)

Before You Begin

- Choose the data items (fields) that you want the update program to change. See *Choosing Fields for Future Data Revisions*.

► To process future changes

From the Employee Adv & Technical Operations menu (G05BE3), choose Future Data EE Master Revision.

The screenshot shows the PeopleSoft Future Data EE Master Revisions interface. At the top, there's a toolbar with buttons for OK, Find, Delete, Cancel, Future Data Update, Form, and Tools. Below the toolbar, there are input fields for Employee No. (with a dropdown arrow), Data Item (set to ANPA), Supervisor, and Effective On Date (set to 07/01/05). To the right of these fields is a group of radio buttons: All Records, Unprocessed Records (which is selected), and Processed Records. The main area is titled "Records 1 - 3" and contains a grid with columns: Employee Identification, Employee Name, Eff. On Date, Data Item, Data Item Description, and Future Value. The grid shows three records: Kilmer, Jessica (Employee ID 8015, Eff. On Date 07/01/05, ANPA, Supervisor, Future Value 6001); Edwards, Angela (Employee ID 8012, Eff. On Date 07/01/05, ANPA, Supervisor, Future Value 6001); and a third record with a checked checkbox in the Employee Identification column and a search icon in the Employee Name column. A "Customize Grid" link is at the top right of the grid area.

Employee Identification	Employee Name	Eff. On Date	Data Item	Data Item Description	Future Value
8015	Kilmer, Jessica	07/01/05	ANPA	Supervisor	6001
8012	Edwards, Angela	07/01/05	ANPA	Supervisor	6001
<input checked="" type="checkbox"/>	<input type="text"/>				

1. On Future Data EE Master Revisions, to review any unprocessed future changes for an employee before you enter any additional future changes, complete the Employee Identification field and then select the following option:
 - Unprocessed Records
2. To narrow the list of changes that appears, complete one or both of the following fields and click Find:
 - Data Item
 - Effective On Date
3. To enter a future change for an employee, complete the following fields in the detail area:
 - Eff. On Date
 - Data Item
 - Future Value
 - Chg Rsn
4. To enter a future change for another employee, repeat steps 1-3.

You can enter future changes for as many employees as necessary, and enter different effective dates and data items for each change.

5. When you have finished entering changes, click OK.
6. After you enter future changes, complete the steps to update the Employee Master record.

If you enter a future value for the annual salary, the system recalculates the hourly rate during the future data update for salary employees. If you enter a future value for hourly rate, the system recalculates the annual salary. See [Updating Employee Master Records](#).

Processing Mass Changes

You process mass changes to change similar information for groups of employees at one time. For example, you could process mass changes in either of the following situations:

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

When you are preparing to enroll employees in benefit plans, the mass change feature provides a convenient method for entering or updating the benefit group assignment for many employees.

When you process mass changes, you complete the following procedures:

- Identify employees in the data selection values

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

After you enter mass changes, you must update the Employee Master table for your changes to take effect. You can update changes in the following ways:

- If you are using the J.D. Edwards Payroll system, you can allow the final update step of the payroll cycle to automatically update changes.
- You can request a batch job to update the changes.

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

The mass change process updates one or both of the following tables, depending on how your processing options are set up:

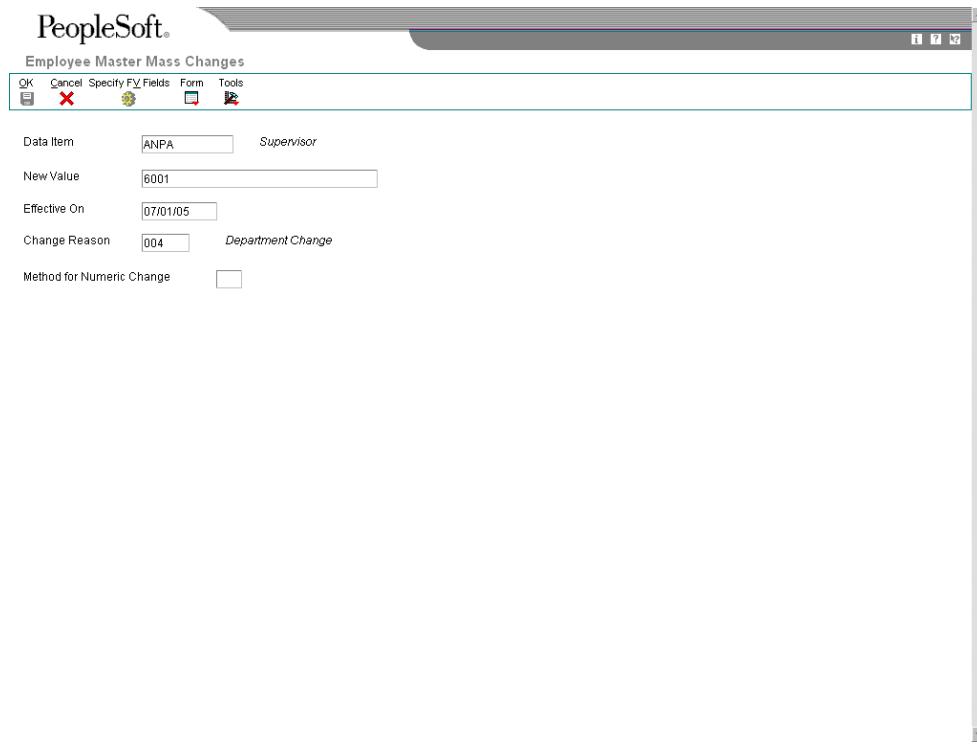
- Future Employee Master Data Changes table (F06042)
- Employee Master (F060116)

Before You Begin

- Choose the data items (fields) that you want the update program to change. See *Choosing Fields for Future Data Revisions*.

► To process mass changes

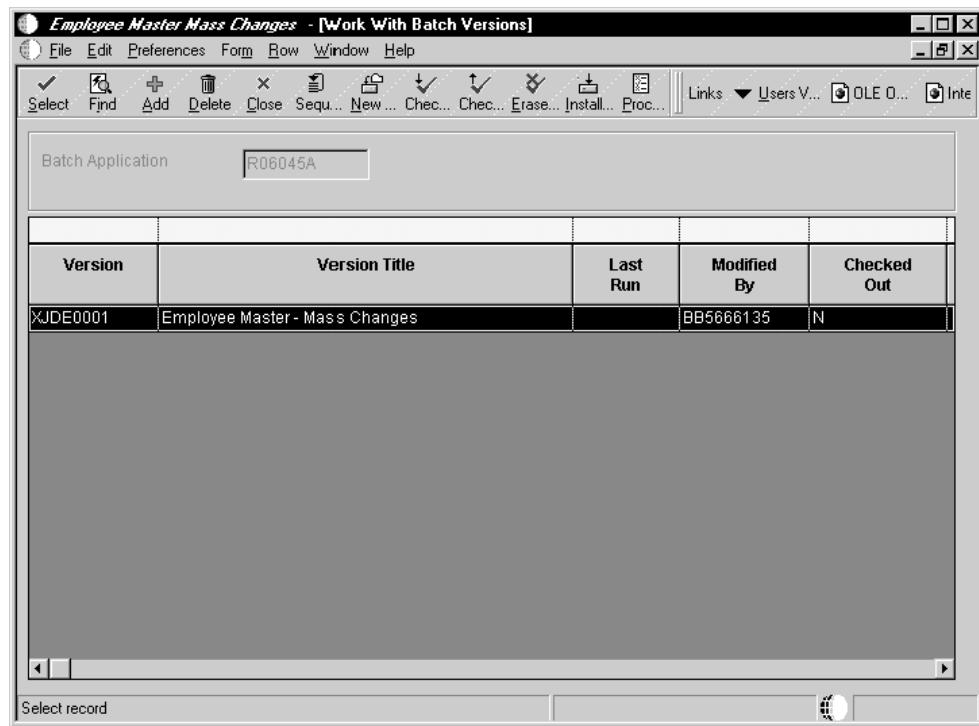
From the Employee Adv & Technical Operations menu (G05BE3), choose Employee Master Mass Changes.



1. On Employee Master Mass Changes, complete the following fields:
 - Data Item
 - New Value
 - Effective On
 - Change Reason

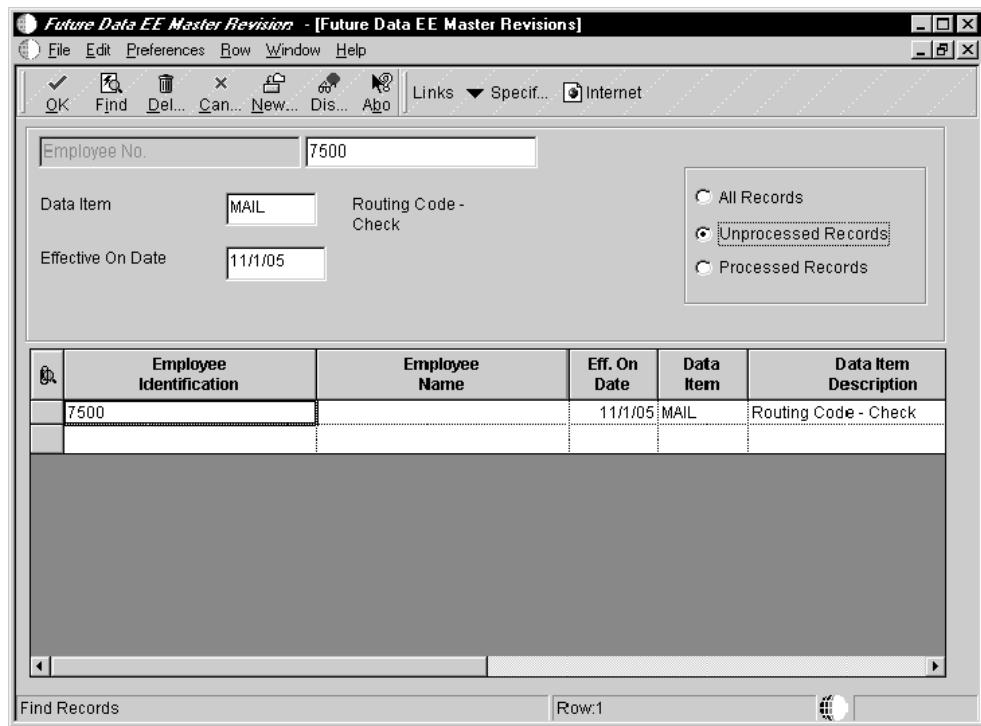
When you enter the New Value data, you can click Get UDC to access the user defined code table associated with the data item that you entered.

2. If you are revising a rate field, complete the following additional field and Click OK:
 - Method for Numeric Change



3. On Work With Batch Versions, choose a version, click Select, choose your data selection and data sequence, and click Submit.

When the version has completed processing, the system displays Batch Revisions again. When you exit that form, the system displays Future Data EE Master Revisions.



4. On Future Data EE Master Revisions, change the values in any of the following fields, if necessary:
 - Eff. On Date
 - Future Value
 - Chg Rsn
5. Click OK.

After you enter mass changes, update the Employee Master record. See [Updating Employee Master Records](#).

Processing Options for Employee Master Mass Changes Report (R06045A)

Report Tab

Use this processing option to specify whether you want to update the Future Data EE Master Revision table (F06042) when you run the report.

1. Update F06042.

1 = Yes

0 = No (Default)

Use this processing option to specify whether you want to update the Future

Data Employee Master Revision file (F06042) when you run the report.

Valid values are:

- 0 Do not update the file (default).
- 1 Update the file.

2. Print Report.

1 = Yes (Default)

0 = No

Use this processing option to specify whether you want to print the report.

Valid values are:

- 0 Do not print the report.
- 1 Print the report (default).

Updating Employee Master Records

On the Employee Adv & Technical Operations menu (G05BE3), choose Future Data Employee Master Update.

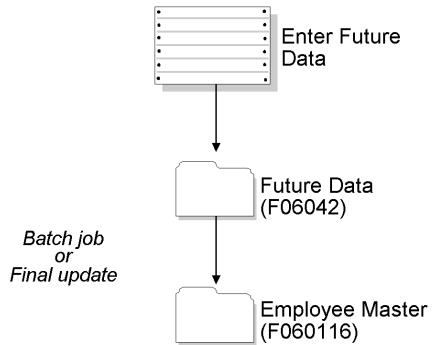
After you enter mass or future changes for one or more employees, you can do one of the following:

- Allow the system to update the Employee Master table during the final update step of the payroll cycle. This method applies only if you are using the J.D. Edwards Payroll system.
- Manually submit the Employee Master Update program to apply changes to the information in the Employee Master table.

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

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

The following graphic illustrates how the system processes data changes.



Processing Options for Future Data Employee Master Update (R06394)

Default Tab

Default

1. Enter the Pay Period Ending Date that you would like the Future Values Records (in F06042) to be "tagged" with..... (Today's Date Will be used if left blank)

Pay Period Ending Date

Process Mode:

0 = Proof Mode

1 = Final Mode

Entering Leave-of-Absence Information

When an employee arranges to be absent from work for an extended period of time, such as to care for a newborn, you can enter leave-of-absence information for the employee.

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

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

► To enter leave-of-absence information

From the Employee Management menu (G05BE1), choose Employee Information.

1. On Work With Employee Information, to locate the employee for whom you need to enter leave-of-absence information, complete the following fields:
 - Home Company

- Home Business Unit
2. To help narrow your search, choose one of the following options and click Find:
 - Active
 - Terminated
 - All
 3. Choose the employee record and click Select.
 4. On Employee, complete the following fields:
 - Pay Status
 - Leave Begin Date
 - Leave End Date
 5. Click OK and review the Employee Status Flag field for a color change.

Terminating an Employee

A terminated employee is an employee who no longer works for your organization.

Entering termination information allows you to do the following:

- Keep your employee information current
- Report on terminated employees
- Prevent the employee from receiving payments (if you are using the J.D. Edwards Payroll system)

You have two options for terminating an employee. You can manually terminate an employee or, if Enterprise Workflow Management is enabled, you can simplify the termination process by using Workflow.

The initial task for terminating an employee is the same for both options. The two options occur with the administrative tasks after you terminate an employee. If you choose to terminate an employee manually, you need to manually perform the following tasks associated with terminating an employee:

- Contact supervisors and benefits administrators
- Calculate the employee's unpaid time, vacation, holiday, and sick accruals

If you use Workflow to terminate an employee, Workflow can automatically notify the appropriate parties of the termination with electronic messages and process any unpaid time and accruals.

Workflow can be set up to complete one or any combination of the following administrative tasks automatically after you terminate an employee. For example, Workflow can be set up to pay or not pay for vacation accruals and to notify certain people.

- Notify the HR manager to set up an exit interview.
- Notify the appropriate managers and supervisors of the termination.

- Notify the IT manager of the termination so that technical tasks, such as deleting the employee's e-mail address, are completed.
- Determine whether the employee has unprocessed checks.
- Determine whether the employee has outstanding time.
- Calculate the employee's unpaid sick, holiday, or vacation accruals.
- Calculate declining balances owed.
- Notify the benefits administrator if the employee has an FSA account or a retirement plan that will be closed.
- Send a copy of the Work With Enrollment with Eligibility form and the Batch Enrollment report (R083800) to the benefits administrator. The Work With Enrollment with Eligibility form confirms the benefits that the employee has before the termination. The Batch Enrollment report confirms that the program disengaged the employee from payroll deductions, benefits, and accruals as part of the termination process.
- Create a COBRA letter if the employee is eligible for COBRA benefits.
- Create a HIPAA letter if the employee is eligible for HIPAA benefits.
- Create and send a copy of an Employee Property report (R080400) to the employee's supervisor if the employee has company property.

Before You Begin

- ❑ If you use Workflow to terminate an employee, set your processing options for termination workflow (P05W01) to activate or deactivate certain Workflow subprocesses. These processing options must be accessed through the Interactive Versions program (P983051).
- ❑ Verify that TERMEMP01 and TERMEMP03 are activated in the Process Master (P98800). Depending on how you set your processing options for termination workflow (P05W01), you might also need to verify that the following optional processes are activated or deactivated: TERMNTFY01, TERMTIME, TERMBEN01, TERMUPDATE, TERMEMP05, TERMNTFY01, TERMABNOT, TERMEMP08. See [Activating or Deactivating a Workflow Process](#).
- ❑ If you choose to terminate an employee using Workflow, see [Understanding Workflow Setup](#) to verify that Workflow is set up appropriately for your business needs.
- ❑ If you want to use Workflow to help terminate an employee, see [About Workflow Setup](#) to verify that Workflow is setup appropriately for your business needs.

► To terminate an employee

From the Employee Management menu (G05BE1), choose Employee Information.

1. On Work With Employee Information, to locate the employee whom you need to terminate, complete the following field and click Find.
 - Employee No
2. Choose the employee record and click Select.
3. On Employee, complete the following fields:
 - Pay Status

- Termination Date
4. Complete the following fields, if applicable:
 - Expected Recall Date
 - Employee Benefit Status
 5. To allow the employee to become an eligible applicant for your organization after termination, select the following option:
 - Move to Applicant Pool
 6. Click OK.

If you are using Workflow, a small form appears stating that the termination is pending.

Completing a Termination Using Workflow

Using Enterprise Workflow expedites the termination process and reduces some of the miscommunication that can occur during the termination process. In a typical termination process, payroll staff must manually calculate any benefits, such as vacation or sick accrual, due the employee. This requires accurate data from the benefits department. Timely and accurate communication among the Benefits, Human Resources, and Payroll departments is necessary to ensure that the final payment due the employee is precise.

If you use Workflow to help terminate an employee, after you initiate the termination, Workflow completes the subsequent administrative tasks associated with terminations. Most tasks are dependent on how your system is set up. For example, Workflow electronically notifies either one person or a group of people on a distribution list about a termination, if you define your notification process appropriately.

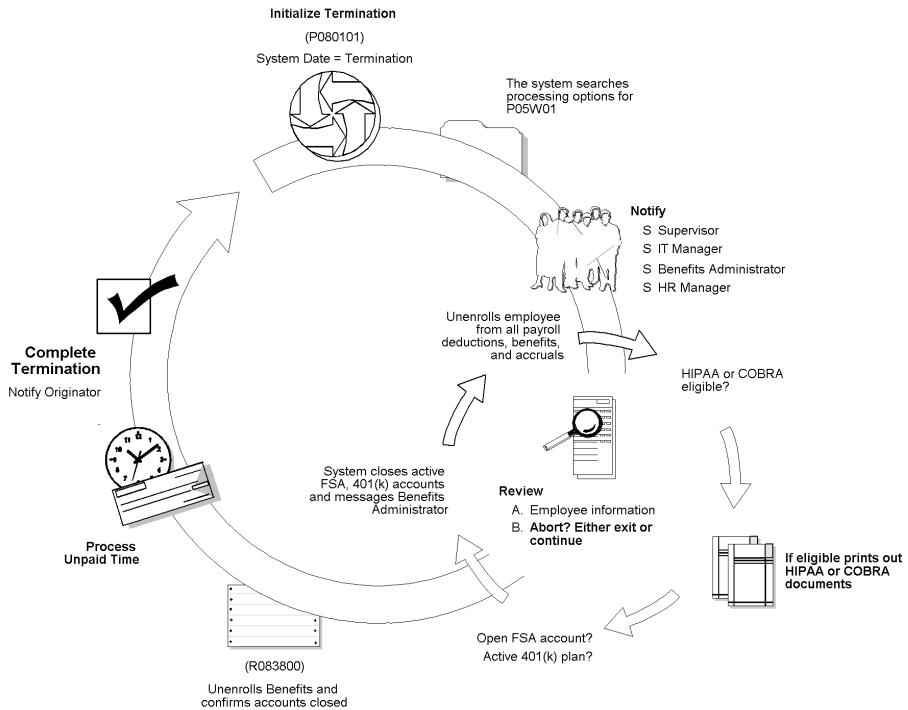
Understanding Termination Using Workflow

After you initiate the termination, Workflow completes the following processes:

- Notifies the appropriate parties
- Reviews timecards and benefits information
- Sends approval message to originator
- Processes the payment
- Completes the termination

The following graphic presents the process that Workflow completes after you initiate a termination:

Terminating an Employee Using Workflow



Notification of the Appropriate Parties

Workflow notifies a person or a group of people, as defined during set up, about a termination.

Workflow might notify the following people about a termination:

- The employee's immediate supervisors
- The IT manager
- The HR manager (to set up an exit interview)

Review of the Timecards and Benefits Information

Depending on which of the following items the system administrator set in the processing options for termination workflow (P05W01), Workflow searches for certain employee information and completes the following processes:

Pays vacation accrual	Pays out vacation and holiday accruals through time entry.
------------------------------	--

Pays sick accrual	Pays out sick accruals through time entry.
Sends time entry notifications	Sends the time entry records to the originator or the designated person. The time entry records might contain unpaid time.
Sends batch enrollment	Sends Batch Enrollment that unenrolls the employee from all DBAs. A batch enrollment report confirms all actions. A message with the program attached is sent to the person being notified. The person must manually run the program from there.

Workflow sends the Work With Enrollment With Eligibility form to the benefits administrator confirming all the employee's benefits before the termination. If the employee has an active FSA, 401K, or RRSP account, Workflow informs the benefits administrator that the employee's FSA, 401K, or RRSP accounts are closing and then closes the account automatically using Batch Enrollment.

Batch Enrollment also disengages the employee's other benefits, deductions, and accruals. A Batch Enrollment report (R083800) is created confirming all the actions and is sent to the benefits administrator.

Workflow also searches for the following employee information:

- Declining balance owed
- COBRA and HIPAA eligibility

If a declining balance is owed, the system creates a record in the Deduction/Benefit/Accrual Ledger File table (F0609) so that the balance is deducted from the employee's last paycheck.

If the employee is eligible for HIPAA or COBRA benefits, Workflow creates a HIPAA or COBRA letter and sends the letter to the benefits administrator.

Approval of the Termination

If you are a supervisor or a manager who is responsible for approving terminations, you can approve a termination after receiving a termination message in your Workflow queue.

If Workflow is set up to pay sick time, vacation, or holiday accruals, or if the employee has unpaid time and unprocessed checks, Workflow sends a message to the originator's Workflow queue. When opening the Time Entry Workflow icon, the originator is prompted to review the employee's time entry record. The originator can approve or abort the termination process, or skip to time entry to review and adjust the employee's timecard.

Processing the Payment

After Workflow receives the originator's approval, the system sends the employee's timecard to payroll to create a payment for the employee. If a payroll lockout occurs, the system puts the process on hold, sends a message to the originator, and creates the payment after the payroll concludes.

Note

The Employee Master table (F060116) is not updated until the time entry record has been approved. If no time entry record needs to be approved, the Employee Master is updated during the payroll process.

Completion of the Termination

After Workflow processes a payment, if you have the Send Completion Messages processing option set correctly in the processing options for termination workflow (P05W01), the system sends a message to the originator confirming the termination.

Approving the Termination

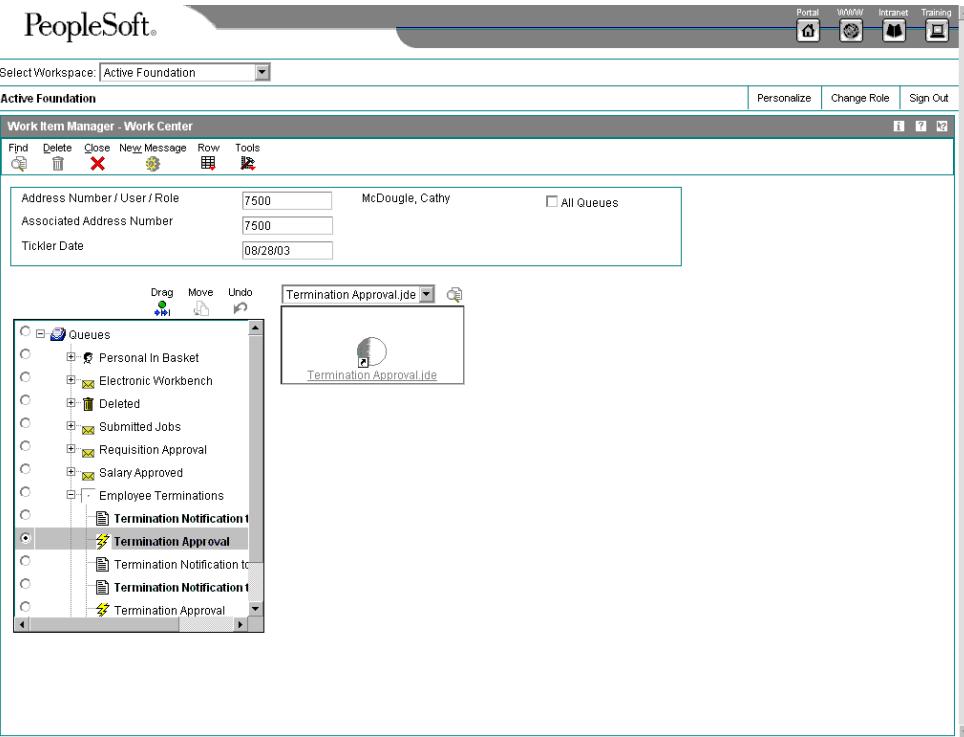
After the termination Workflow has notified the appropriate parties and reviewed the employee timecards and benefits information, the system sends a request to a manager to approve the termination. The manager can review the termination information and then either approve or abort the termination process. The manager might also elect to review or adjust the employee's timecard information before approving the termination.

► To approve the termination

From the Workflow Management menu (G02), choose Employee Queue Manager.

1. On Work With Employee Queue Manager, complete the following fields:
 - Skip To Name
 - Search Type
2. To narrow your search, complete one or more of the following fields and click Find:
 - Code 1
 - Code 2
 - Code 3
 - Code 4
3. Choose a record and click Select.
4. On Work Center, click the Employee Terminations icon in the left queue.

The tasks that you need to accomplish to complete the termination appear under the icon.



5. Click Termination Approval and review the employee termination request in the right queue.
6. To approve or reject a termination request, click the OneWorld icon.
7. Click the Termination Approval icon in the right cue.
8. On Termination Approval, review the status of the following fields under the Status heading:
 - Unprocessed Checks
 - Unpaid Time
 - Unpaid Sick, Vacation, Holiday Accrual
 - Unpaid DBA's
 - Payroll Lockout
9. Choose one of the following options under the Action heading. The termination does not proceed until you respond.
 - Continue
 - Abort
 - Skip Time Entry
 - Wait for Payroll Lockout

If the Pre-Payroll Lockout field is marked, you might want to continue with the termination process, or wait until the payroll completes.

If you click Wait for Payroll Lockout, the system temporarily stops the termination process until a payroll completes. If you click Continue, the system continues the termination. If you click the Abort option, the Abort form appears. If you click Skip Time Entry, the employee's time entry record appears on the Time Entry Revisions form.

If you click Wait for Payroll Lockout and then click OK, you might want to click the Reverify option at a later time to refresh the form and display any status changes. For example, if an employee is in a payroll lockout, you might click this option to verify whether the Pre-Payroll lockout status is still checked.

If you click Continue and then click OK, Workflow continues the termination process and processes a payment. See [Processing the Payment](#).

If you click Abort and then click OK, the Abort form appears.

10. Click Abort to abort the termination process.
11. If you click Skip Time Entry and then click OK, the Time Entry Revisions form appears.
12. On Time Entry Revisions, make time entry adjustments and click OK.

Processing Options for HRM Termination Workflow (P05W01)

EE Termination Tab

Use these processing options to define the defaults that the program will use at each step of the workflow process. The first four options define portions of the communication process. Options five through seven stipulate whether JDE Time Entry, HRM Payroll, and HRM Benefits software is installed. Options eight through ten indicate how accrued benefits in the areas of sick time, vacation and holidays will be addressed.

1. Send Batch Enrollment

Use this processing option to specify whether Workflow sends the Batch Enrollment report (R083800) to the designated recipient. Valid values are:

- 0 Do not send the Batch Enrollment report to the designated recipient.
- 1 Send the Batch Enrollment report to the designated recipient.

2. Send Completion messages

Use this processing option to specify whether Workflow sends a completion message to the designated recipient(s) when the termination is complete. Valid values are:

-
- 0 Do not send a completion message to the designated recipient(s).
 - 1 Send a completion message to the designated recipient(s).

3. Send Enrollment with Eligibility

Use this processing option to specify whether Workflow sends the Work With Enrollment With Eligibility form to the designated recipient. This form displays the employee's benefits before the termination. Valid values are:

- 0 Do not send the form to the designated recipient.
- 1 Send the form to the designated recipient.

4. Send time entry notifications

Use this processing option to specify whether Workflow sends a notification message to the designated recipient of any unpaid time or unprocessed checks that the employee has as of the termination date. Valid values are:

- 0 Do not send a notification message to the designated recipient.
- 1 Send a notification message to the designated recipient.

5. Time Entry is installed

Use this processing option to specify whether the Time Entry system is installed. Valid values are:

- 0 The Time Entry system is not installed.
- 1 The Time Entry system is installed.

6. HRM Payroll Installed?

Use this processing option to specify whether the Payroll system is installed.

Valid values are:

- 0 The Payroll system is not installed.

-
- 1 The Payroll system is installed.

7. HRM Benefits Installed?

Use this processing option to specify whether the Benefits module is installed so that Workflow can send the Batch Enrollment report and the Work With Enrollment With Eligibility form as specified in other processing options for termination workflow. Valid values are:

- 0 The Benefits module is not installed.
- 1 The Benefits module is installed.

8. Pay Sick Accrual

Use this processing option to specify whether the system pays the terminated employee for any accrued sick time. Valid values are:

- 0 The system does not pay the terminated employee for accrued sick time.
- 1 The system pays the terminated employee for accrued sick time.

9. Pay Vacation Accrual

Use this processing option to specify whether the system pays the terminated employee for any accrued vacation time. Valid values are:

- 0 The system does not pay the terminated employee for accrued vacation time.
- 1 The system pays the terminated employee for accrued vacation time.

10. Pay Holiday Accrual

Use this processing option to specify whether the system pays the terminated employee for any accrued holiday time. Valid values are:

- 0 The system does not pay the terminated employee for accrued holiday
-

time.

- 1 The system pays the terminated employee for accrued holiday time.
-

Working with the Supplemental Database

You might need to store information about a contact that has no place reserved for it in the standard master tables. J.D. Edwards refers to this additional information as supplemental data. Each supplemental database is identified by a code that is specific to a system. For example, for the Address Book system, the supplemental database code is AB. Depending on what kinds of supplemental data you maintain, you can set up more than one database for a system.

If your company is multinational, you can set up a language override code that allows you to write and view supplemental data in a language other than English. For example, you can assign a Spanish Language Code and enter address book information in Spanish.

Supplemental database code information is stored in the Supplemental Database Setup table (F00090).

The Address Book system does not require that you use supplemental data.

Before You Begin

- If you have renamed a key field on the Supplemental Database Setup form, you must add your new data dictionary alias to the appropriate user defined codes table--Valid Alphanumeric Aliases (00/S2) or Valid Numeric Aliases (00/S1). See *Adding a User Defined Code* in the *OneWorld Foundation Guide*.

Entering Supplemental Data

Supplemental data is information that is not included in the standard master tables. Supplemental data might include the following information:

- Products purchased
- Annual sales
- Annual volume
- Billing contracts
- Delivery method
- Request for proposal
- Internal rating
- Emergency Contacts
- Job skills
- Work history

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

- Narrative

- Code
- Program

You enter text for data types that are narrative format. You typically use this format for general information, such as notes, comments, plans, or other information that you want to track about an employee, customer, or supplier. For example, if your company works with suppliers, you might use narrative format to write notes about the quality of the supplier products.

When you enter supplemental information for data types that you have designated as code format, you type the appropriate supplemental information in specific fields. You typically use code format to track categories, amounts, and dates. For example, if your company works with suppliers, you might use code format to track product type, cost, effective sales date, and so on.

You can add attachments to data types that are code format. However, if you use WorldSoftware and OneWorld software in a coexistence environment, generic text (either for narrative data types or attachments for code data types), do not transfer between the systems. You must manually enter generic text in each system.

Program-format data types allow you to group programs in a manner that is convenient for you. For example, you can set up a program-format data type that allows you to access Requisition Activity when you are entering supplemental data for applicants.

The supplemental data that you enter is stored in the Supplemental Data table (F00092).

Entering Supplemental Data in Code Format

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

To ensure consistency of data entry, code fields are typically associated with user defined code tables. Any value that you enter in one of these fields must be defined in the associated user defined code table.

► To enter supplemental data in code format

Depending on which system you are currently using, use one of the following navigations to enter supplemental data in code format:

From the Item Supplemental Data/CIF menu (G4124), choose Supplemental Data by Item or Supplemental Data by Item/Branch.

From the Employee Supplemental Data menu (G05BSDE1), choose Employee Supplemental Data Entry.

From the Business Unit Supplemental Data menu (G09312), choose Supplemental Data.

From the CIF Supplemental Data menu (G01312), choose Supplemental Data.

From the Supplemental Data menu (G1318), choose Data Entry.

1. On Work With Supplemental Data, complete the following field:

- Supplemental Database Code

The system completes this field if you entered a database code in the processing option for the Supplemental Data program.

2. On Work With Supplemental Data, complete one or more of the following applicable fields and click Find:

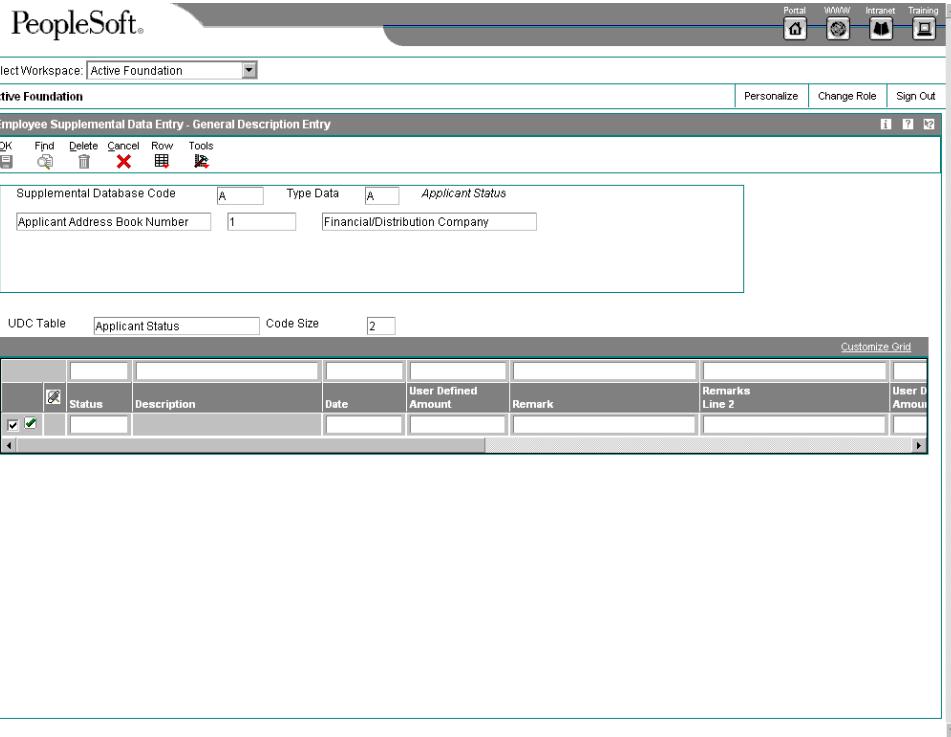
- Item Number
- Branch/Plant
- Business Unit
- Address Number

You specified the key fields for the Work With Supplemental Data form when you set up the database code. See *Defining a Supplemental Database*

The system displays the available types of supplemental data. A checkmark in the row header of a supplemental data type indicates that code format data already exists in that data type. A C in the Data Mode column indicates that the data type is in code format.

Employee Supplemental Data Entry - Work With Supplemental Data						
Select	Find	Copy	Close	Form	Row	Tools
<input checked="" type="checkbox"/>		A	Applicant			
<input type="checkbox"/>		A1	Prior Employment	C	A	
<input type="checkbox"/>		A2	Interview Notes	N	A	
<input type="checkbox"/>		B	Skills	C	A	
<input type="checkbox"/>		E	Education	C	A	

3. To determine whether narrative information is associated with a data type, move the cursor to the row header for that data type. If narrative information exists, a paper clip icon appears.
4. Choose a row in the detail area that contains a C in the Data Mode column, and then click Select.



The column headings in the detail area vary, as defined in the setup for each data type.

5. On General Description Entry, complete the following fields if your data type is associated with a user defined code table:
 - User Def Code
 - Effective Date
6. Complete any of the fields that apply to the data type. For example, the following fields might have been set up for the data type:
 - User Defined Amount
 - Remark
 - Remarks Line 2
 - User Defined Amount #2
 - Addl Date
 - Ending Date
 - User Def Days

Depending on the data that you entered on the Data Type Revisions form, your column headings might be different.

Note

If you leave the Ending Date field blank and you did not enter a 1 in the Supplemental Data processing option, the system automatically uses the ending effective date from the Address by Date table (F0116).

7. Click OK.

You can review your data type setup from the Work With Supplemental Data form by choosing a data type, and then choosing Data Type Revisions from the Row menu. You can change the names of the column headings. You also can delete information associated with the fields in the UDC Headings/Validation and Remarks Headings/Validation areas.

Note

J.D. Edwards recommends that you use the Supplemental Data Setup program to add or change information associated with the fields in the UDC Headings/Validation and Remarks Headings/Validation areas of the Data Type Revisions form. If you change the information associated with the UDC Headings/Validation and Remarks Headings/Validation from the Supplemental Data program, the next time that you look at the record, you get an error because the system is validating the data against another UDC.

Entering Supplemental Data in Narrative Format

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

► To enter supplemental data in narrative format

Depending on which system you are currently using, use one of the following navigations to enter supplemental data in narrative form:

From the Item Supplemental Data/CIF menu (G4124), choose Supplemental Data by Item or Supplemental Data by Item/Branch.

From the Employee Supplemental Data menu (G05BSDE1), choose Employee Supplemental Data Entry.

From the Business Unit Supplemental Data menu (G09312), choose Supplemental Data.

From the CIF Supplemental Data menu (G01312), choose Supplemental Data.

From the Supplemental Data menu (G1318), choose Data Entry.

1. On Work With Supplemental Data, complete the following field:

- Supplemental Database Code

The system completes this field if you entered a database code in the processing option for the Supplemental Data program.

2. On Work With Supplemental Data, complete one or more of the following applicable fields, and click Find:

- Item Number
- Branch/Plant
- Business Unit
- Address Number

You specified the key fields for the Work With Supplemental Data form when you set up the database code. See *Defining a Supplemental Database*.

3. Choose a row in the detail area that contains an N in the Data Mode column and click Select.
4. On Media Objects, choose New and then Text from the File menu. .
5. Enter the text and choose Save & Exit from the File menu.

When Work With Supplemental Data reappears, the system displays a paper clip icon to the left of each row that has narrative text.

Processing Options for Supplemental Data by Item (P00092)

Processing

1. Select the Supplemental Database Code for the system you would like to create a central information index for.
 2. Enter a '1' if the system should not assign an ending effective date when the field is left blank.
-

Copying Supplemental Data

To save time and reduce data entry errors, you can copy supplemental data to other records. For example, if you need to enter supplemental data for a similar address book number, you can copy information from one address book number record to another address book number. After you copy the data, you can revise it as necessary. .

When you copy supplemental data, consider the following rules:

- You can copy supplemental data within the same supplemental database code. For example, you have two address book supplemental database codes, AB and SU. Within database code AB, you can copy information from one data type to another data type. If you have information in database AB that you also want in database SU, you must manually enter the information in both databases.
- You can copy data in code format only. You cannot copy narrative text.
- You can copy information from one code-format data type to a different code-format data type. For example, if you have a code-format data type for skills and another code-format data type for professional licenses, you can copy one employee's skills information into another employee's professional licenses data type.

Before You Begin

- ❑ Determine the employee number of the employee whose data you are copying and the employee to whom you are copying the data.
- ❑ Verify that the data type in the database from which you are copying and the data type in the database to which you are copying are the same.

► To copy supplemental data

Depending on which system you are currently using, use one of the following navigations to copy supplemental data:

From the Item Supplemental Data/CIF menu (G4124), choose Supplemental Data by Item or Supplemental Data by Item/Branch.

From the Employee Supplemental Data menu (G05BSDE1), choose Employee Supplemental Data Entry.

From the Business Unit Supplemental Data menu (G09312), choose Supplemental Data.

From the CIF Supplemental Data menu (G01312), choose Supplemental Data.

1. On Work With Supplemental Data, complete the following field:

- Supplemental Database Code

The system completes this field if you entered a database code in the processing option for the Supplemental Data program. .

2. On Work With Supplemental Data, complete one or more of the following applicable fields, and click Find:

- Item Number
- Branch/Plant
- Business Unit
- Address Number

3. In the detail area, choose the row that contains the supplemental data to copy.

4. Click Copy.

5. On General Description Entry, complete one of the following applicable fields to which you are copying supplemental data:

- Item Number
- Branch/Plant
- Business Unit
- Address Number

6. Click OK.

Reviewing Supplemental Data

You can review supplemental data for specific data types in various formats (displays). For example, you can review supplemental data by data type when you want to review a specific type of supplemental data for multiple items, such as training information for your employees or a specific type of supplemental data for multiple business units. You can also review supplemental data by item when you want to review the master information about an item and the supplemental information with which it is associated, such as the complete information for a specific employee, work order, or business unit. ..

The system provides two tabs on the Work With Supplemental Data Profiles (Key1) or (MCU/Key1) form. Each tab represents a different order in which the system sorts and displays the columns in the detail area of the form.

Data Type Sort first by data type, and then by short item number.

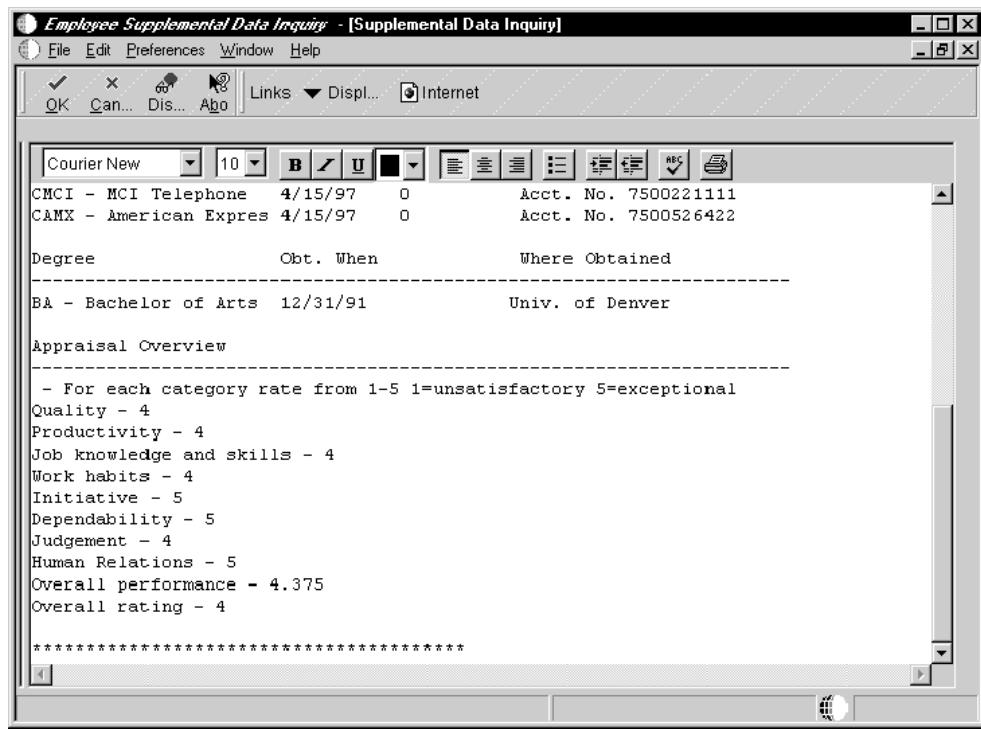
Item Number Sort by short item number, and then by data type.

You can rearrange the order in which the system displays the columns in the detail area. In addition, you can save your changes as a new format. As you add formats to the form, the system adds tabs with the names that you define for the formats. You can also use the Preferences menu, and then choose Grid and Sequence to change the sort sequence for tabs.

► **To review supplemental data for a specific employee**

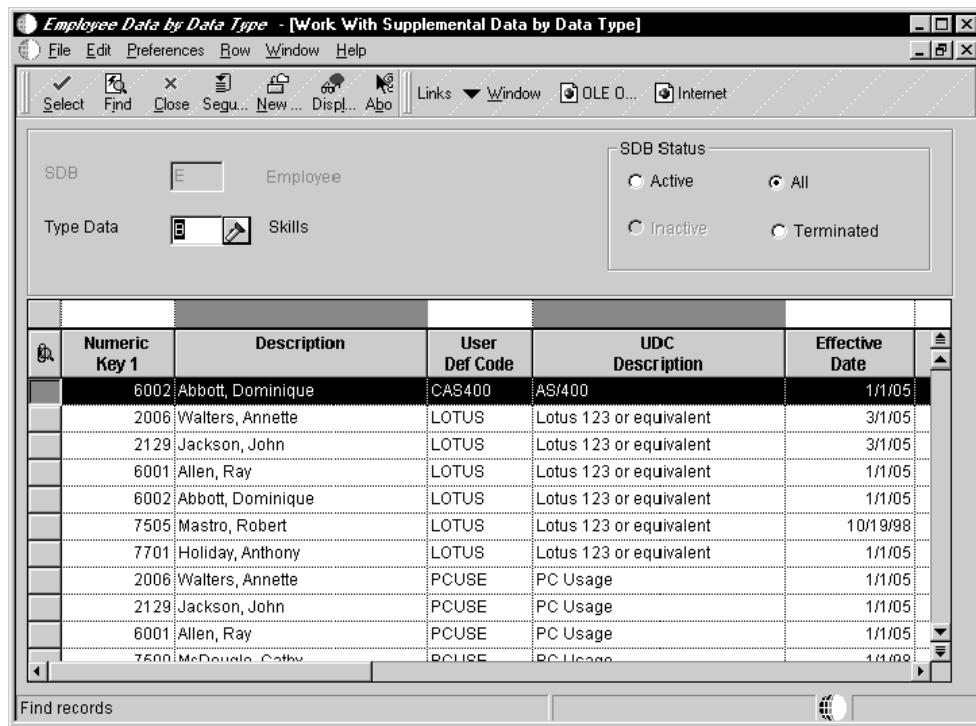
From the Employee Supplemental Data menu (G05BSDE1), choose Employee Supplemental Data Inquiry.

1. On Work With Employee Information, to locate the employee record, complete any of the following fields:
 - Employee No
 - Home Company
 - Home Business Unit
2. Select one of the following options and click Find:
 - Active
 - Terminated
 - All
3. Choose the employee record, and then choose Supp. Data Inquiry from the Row menu.



4. On Supplemental Data Inquiry, review the information.
- **To review supplemental data by data type**

From the Employee Supplemental Data menu (G05BSDE1), choose Employee Data by Data Type.



1. On Work With Supplemental Data by Data Type, complete the following optional field:
 - Type Data
2. To narrow your search, select one of the following options:
 - Active
 - All
 - Terminated
3. Click Find.

Working with Multiskill Search

You can search your supplemental database for records that meet criteria that you define. You typically use this type of search when you are looking for a person to fill a vacancy within your organization.

For example, you can search for all employees and applicants who meet the following criteria:

- Have an MBA degree
- Speak French
- Are certified public accountants

- Know RPG programming

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

The criteria that you enter can be based on either an AND condition or an OR condition. This means that you can search for people who meet either all of the criteria or some of the criteria. For example, you can search for people who meet the following criteria:

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

The system processes search criteria in the order in which you list them. When any of the criteria that you specify are based on an OR condition, the order in which you enter the search criteria is important.

Example: Entering Search Criteria

In this example, you are searching for people who know C programming and have a degree in either mathematics or computer science. To locate that group of people, enter the following search criteria in the order listed:

C programming

AND

Degree in computer science

OR

C programming

AND

Degree in mathematics

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

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

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

► To work with multiskill search

From the Employee Supplemental Data menu (G05BSDE1), choose Supplemental Data Multiskill Search.

PeopleSoft®

Select Workspace: Active Foundation

Active Foundation

Supplemental Data Multiskill Search - Supplemental Data Multiskill Search

And/Or		SDB	Data Type	Field	OP	Search value		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	E	E	KY	EQ	MBA		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	A	E	KY	EQ	MBA		
OR								
<input type="checkbox"/>								
Records 1 - 2								
	Address Number	SDB Code	Alpha Name	Home Business Unit	Home Business Unit Description	Job Type	Job Step	Job Type/Step Description
<input checked="" type="radio"/>	6001	E	Allen, Ray	9	Corporate Administration	A1		President
<input type="radio"/>	6200	A	Marx, Wade		9 Corporate Administration	50PM		Project Manager

1. On Supplemental Data Multiskill Search, to limit the search, complete the following optional fields:
 - Home Business Unit
 - Job Type/Step
2. To enter the search criteria, complete the following fields and click Search:
 - And /Or
 - SDB Code
 - Type Data
 - Data Item
 - Op
 - Search value

The records that meet the search criteria appear in the grid on the bottom half of the form.
3. To inquire further on a record, choose the record and click Master.

Understanding Parent/Child Relationships

To provide executives and managers with a summary of the reporting relationships within your organization, you can define an organizational structure. An organizational structure shows the flow of information within your organization. The organizational structure that you define can vary from business to business, or even from department to department within your business.

You can use an organizational structure to show reporting relationships among employees and supervisors. These relationships are called parent/child relationships.

You can define two types of parent/child relationships:

- A relationship in which an employee address can appear multiple times
- A relationship in which an employee address can appear only once

After you define a parent/child relationship, you can periodically review and revise that relationship to reflect staff additions or turnover.

See Also

- Creating Parent/Child Relationships by Employee*
- If you have the Human Resources system, you can also define parent/child relationships by position. See *Working with Parent/Child Relationships by Position*.

Creating Parent/Child Relationships by Employee

When you define organizational structures, you create hierarchies of relationships between parents and children. For example, a large business might have headquarters in one city and several regional offices that are subsidiaries of the headquarters. You can define an organizational structure in which you set up the regional offices as children, or subsidiary business units, of the headquarters. The regional offices can in turn be parents, or higher-level business units, of local offices. For each office, you can set up an organizational structure by employee, with upper-level managers as parents of mid-level managers, and mid-level managers as parents of employees.

Each employee can have only one immediate supervisor. The system prevents you from entering a manager as a subordinate of an employee.

You use one of the following modes to define an organizational structure by employee:

- Enter child positions for a higher-level parent
- Enter a parent position for subordinate child positions

After you create parent/child relationships, you can revise these relationships as necessary to reflect changes within your organization. To access the processing options for Address Parent/Child Revisions, you must go through Interactive Versions.

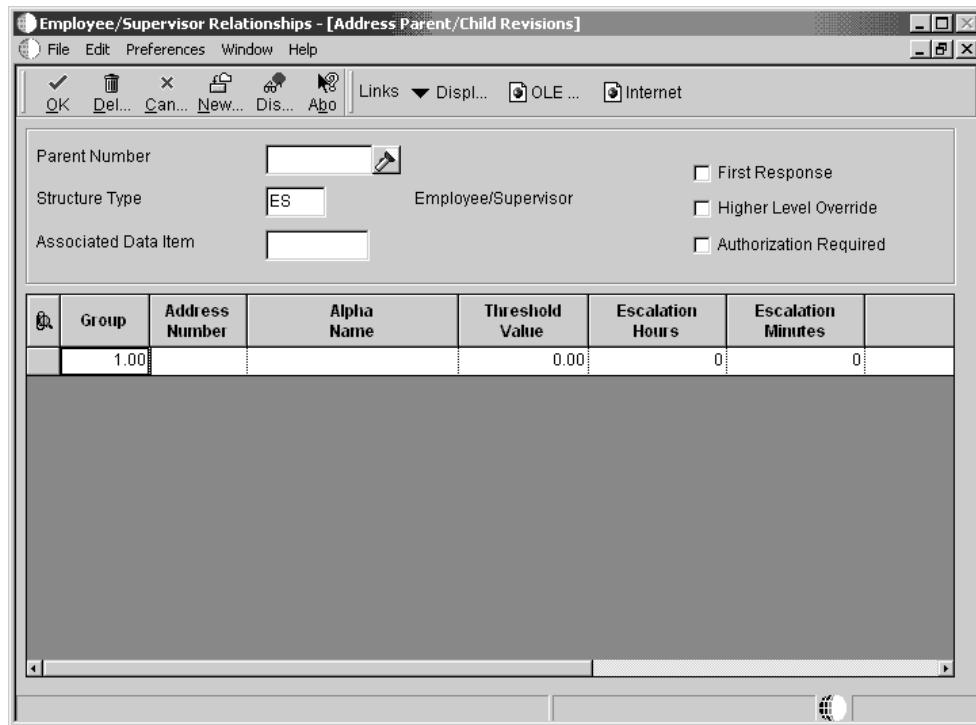
Before You Begin

- Set up parent/child structure types in user defined code table 01/TS. See *Understanding User Defined Codes*.

► To create parent/child relationships by employee

From the Employee Management menu (G05BE1), choose Employee/Supervisor Relationships.

1. On Work With Distribution Lists, to review existing parent/child relationships, complete the following field and click Find:
 - Parent Number
2. To create a new parent/child relationship, click Add.



3. On Address Parent/Child Revisions, complete the following fields:
 - Parent Number
 - Structure Type
 - Address Number
4. Complete the following optional fields and click OK:
 - Remark
 - Begin Eff Date
 - End Eff Date

Processing Options for Address Parent/Child Revisions (P0150)

Process

- 1.) Enter a '1' to display workflow information.

Processing Options for Parent/Child Relationships (P02150)

Defaults

- 1.) Enter the default Structure Type
- 2.) Enter the Version of Organizational Structure Revisions to call. If left blank version ZJDE0001 will be used.

Reviewing Employee Information

Reviewing employee information is a necessary task for Human Resources personnel. The Employee Profile program centralizes employee information in a few inquiry-only forms. Locating information with Employee Profile is a quick way to locate an employee's personal, company, job, and history information.

Employees can review their own information by accessing Employee Personal Profile from the Employee Self-Service menu. Managers can review this information by accessing Managers Workbench from the Manager Self-Service menu.

► To review employee information

From the Employee Management menu (G05BE1), choose Employee Profile.

The screenshot shows a Windows application window titled "Employee Profile - Work With Employees". The window has a menu bar with File, Edit, Preferences, Row, Window, and Help. Below the menu is a toolbar with icons for Select, Find, Close, Seg..., New..., Dis..., Abo, Links, EE Pr..., OLE..., and Internet. The main area has two search fields: "Home Company" and "Home Business Unit", both with asterisks indicating required fields. To the right of these fields is a "Employees" section with radio buttons for "Active" (selected) and "All" and "Terminated". Below this is a grid table with columns: Address Number, Alpha Name, Employee Tax ID, Sex, MS TX, Emp St, and Co. The table contains several rows of employee data, with row 7500 highlighted. At the bottom of the grid is a status bar showing "Row:22".

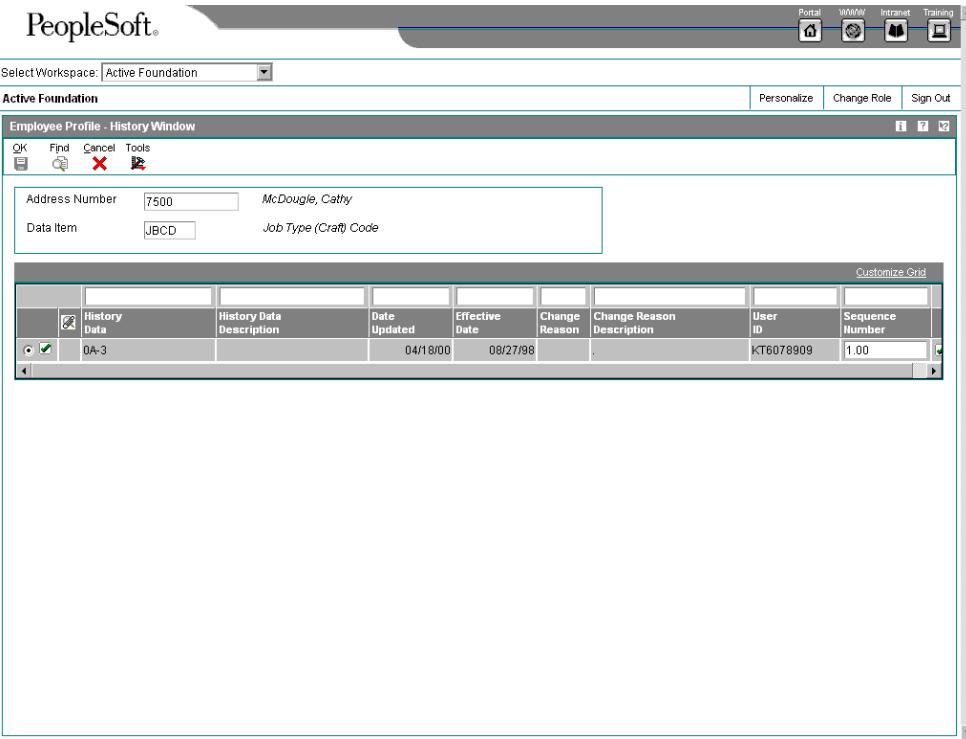
Address Number	Alpha Name	Employee Tax ID	Sex	MS TX	Emp St	Co
5651	Rothchild, Abigail E.	565156515	F	M		00200
6001	Allen, Ray	798525841	M	S		00001
6002	Abbott, Dominique	476438269	F	M		00001
6832	Ato, Connie	683268328	F	S		00001
7500	McDougle, Cathy	261554789	F	M		00001
7504	Meade, Jane	750475047	F	M		00001
7505	Mastro, Robert	215554789	M	S		00050
7506	Mayeda, Donald	516554710	M	S		00050
7510	Moralez, Jesus	217454719	M	S		00001
7550	Cuesta, Jason	755075507	M	M		00050

1. On Work With Employees, to narrow your search for selecting an employee, click an option in the Employees area, complete the following optional fields, and click Find:
 - Home Company
 - Home Business Unit
2. Choose an employee record and click Select.

The screenshot shows the PeopleSoft Employee Profile and Job Information screen. At the top, there's a navigation bar with links for Portal, WebCenter, Intranet, and Training. Below that is a toolbar with icons for Home, Help, Print, and Refresh. The main title is "Employee Profile - Employee Profile and Job Information". A sub-header shows "Employee No. 7500" and "McDougle, Cathy". There are three tabs at the top of the form: Personal (selected), Company, and Job. The Personal tab contains the following data:

Gender	<input type="text" value="F"/>	Female
Ethnic Code	<input type="text" value="01"/>	White (Not of Hispanic Origin)
Language	<input type="text" value="E"/>	English
Marital Status	<input type="text"/>	Default value
Disability	<input type="text" value="N"/>	No
Date of Birth	<input type="text" value="06/18/46"/>	

3. On Employee Profile and Job Information, review employee information under the Personal, Company, and Job tabs.
4. To access history information for any field, click in any field and choose History Tracking from the Form menu.



5. On History Window, click Find and then review history for the data item.

Running Employee Reports

You can run either of two types of employee reports:

- Current employee reports
- Employee supplemental data reports

Run current employee reports to review the most recent changes made to employee master records.

You can run a supplemental data report, one of the current employee reports category, to review current, auxiliary information associated with your employees. You can review this information by individual employee, all employees, and supplemental data type.

See Also

- ❑ *Working With Point-In-Time Employee reports*

Running the Employee Roster Report

From the Employee Management menu (G05BE1), choose Employee Roster.

The Employee Roster report lists all employees or selected groups of employees entered in the Payroll system. You run this report to verify that the following employee information has been entered correctly:

- Home company

- Business unit
- Basic dates
- Group plan
- Workers compensation
- Federal and state tax exemption
- Job type and job step
- Pay status
- EEO status

See Also

- R064011, *Employee Roster* in the *Reports Guide* for a report sample

Processing Options for Employee Roster (R064011)

Address

1. Enter '1' to print address information
-

Running the Employee Roster with Rate Report

From the Employee Management menu (G05BE1), choose Employee Roster with Rate.

The Employee Roster with Rate report contains the same information as the Employee Roster report plus the following information:

- Salary amounts
- Person who last changed the payroll data and the date that the change occurred
- Work and residence tax areas
- Employment status
- Termination/change status
- Contract employee information
- Earned income credit status
- Residence status
- Tax method
- Pay frequency and class
- FLSA (Fair Labor Standards Act) exemption status

See Also

- R064021, *Employee Roster with Rate* for a report sample

Processing Options for Employee Roster with Rate (R064021)

Employee No

1. Enter 'A' to print Address Book number, 'S' for Social Security number or 'O' for Third number

Running the Update Employee Master Age Report

From the Employee Adv & Technical Operations menu (G05BE3), choose Update EE Master Age as of.

The Update Employee Master Age As Of report updates each employee's age in the Employee Age field on the Personal form (W0801EMPD). The system calculates the new value based on each employee's Date of Birth value and the date specified in your processing options.

See Also

- R083495, *Update EE Master Age as of* for a report sample

Processing Options for Update Employee Master Age As Of (R083495)

Date:

1. Enter the as of date to be used when calculating employees age.

Running Employee Supplemental Data Reports

You can run reports to review employee supplemental information in the following ways:

- As an individual employee summary
- As a summary of all your employees and their related profile data
- By supplemental data type

Running the Employee Supplemental Data Report

From the Employee Supplemental Data menu (G05BSDE1), choose Employee Supplemental Data Report.

To review complete supplemental information for one or more employees, run the Employee Supplemental Data report. This report compiles all of an employee's supplemental data into an easy-to-read, resume-style format.

The report includes a summary of data stored in the following tables for each of the employees that you select:

- HRM Supplemental Data Types (F08090)
- Human Resources User Defined Codes (F08092)
- Human Resources General Description-Narration (F08093)
- Employee Master (F060116)

The information that prints on this report is the same information that you can review on Employee Supplemental Data Inquiry (P0801).

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

See Also

- R080410A, *Employee Supplemental Data* for a report sample

Processing Options for Employee Supplemental Data (R080411)

Processing

1. Enter a '1' if you wish to bypass printing the Tax ID. (Default of blank will print the number.)
 2. Enter a '1' if you wish to bypass printing the Asking Salary. (Default of blank will print the number.)
 3. Enter a '1' if you wish to bypass printing any extended narrative associated with the data.
-

Running the Employee Data by Data Type Report

From the Employee Supplemental Data menu (G05BSDE1), choose Employee Data by Data Type Report.

Run the Employee Data by Data Type report to review all employees who have information in a particular supplemental data type category, such as language skills. The information that prints on this report is the same information that you can review online using the Employee Supplemental Data Entry program (P00092).

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

This report includes a summary of data as it applies to certain employees from the following tables:

- Supplemental Database Data Type (F00091)
- Supplemental Data (F00092)
- Employee Master (F060116)

See Also

- R080400, *Employee Data by Data Type* for a report sample

Processing Options for Employees Data by Data Type Report (R080400)

Narrative

1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text.
-

Working with Point-In-Time Employee Reports

Similar to currently available employee reports, you can run point-in-time employee reports to review changes that have been made to the employee master record. The primary difference is that in the point-in-time report group, a view of an employee's record, or any group of employee records, can be produced as of a specific date. For example, you might need to produce a report to satisfy a governmental inquiry that includes the top 10 salaried employees for each business unit, as of a specific date, including each employee's surname, job, position, and mailing address, and the name of the person to whom each reported.

Preparing Data for Point-In-Time Reports

To prepare data for reports, you must verify the integrity of the data in the HR History table (F08042), build a new Point-In-Time Employee Master table (F0601161), and then review your data selection. After these tasks have been completed and possible errors fixed in employee records, you can run any of the point-in-time reports.

If errors exist in the HR History table, running the HR History Data Integrity Check will automatically produce an error report. You must fix errors listed in this report to include the records in a subsequent report. To correct data or add missing data to employee records, you use the Update Employee History program (P050420).

The Build/Delete Point-In-Time Employee Master program creates a new Point-In-Time Employee Master table (F0601161), based on the existing Employee Master table (F060116), that includes two new data fields: Effective Date and Version. The additional fields allow multiple records for employees, covering different points in time, to exist in the table. A combination of data from the Employee Master table and the HR History table (F08042) is used to build the point-in-time records.

When employee records for a specific date are not available in the HR History table, the program uses the next earlier date available. If an earlier date is not available, the program provides an exception report that lists the next date available for each record.

Verifying the Integrity of the HR History Data

From the Point-in Time Employee Master menu (G05B31), choose HR History Data Integrity Check.

Run HR History Data Integrity Check (R08042D) to review all employee records in the HR History table to ensure that each record includes an associated effective date. The new table that you will build in the next task, *Building a New Point-In-Time Employee Master Table*, will not include records that do not have an associated effective date.

When selected employee records do not contain all the data needed for point-in-time reporting, the HR History Data Integrity Check automatically generates a report that includes the employee records with missing data.

You use the Update Employee History program (P050420) to enter the missing data listed on the error report. Then you rerun HR History Data Integrity Check to ensure that no more errors occurred. When you build a new Point-In-Time Employee Master table, the system will not include any records with incomplete data. Only employees who have an original hire date that is equal to or earlier than the date that you select will be included in the new table.

Although not a required task, verifying the integrity of the data and entering corrections as needed ensures that all applicable data will be included in your point-in-time reporting.

See Also

- ❑ *Correcting Employee History*, for procedures to correct HR History data

Building a New Point-In-Time Employee Master Table

From the Point in Time Master menu (G05B31), choose Build/Delete Point in Time EE Master.

After you verify the integrity of your employee record data, and before you review your data selection, use the Build/Delete Point-In-Time Employee Master program to create a new Point-In-Time Employee Master table (F0601161) that the system will use to generate point-in-time reports. This table is a mirror image of the Employee Master table (F060116) with two

additional fields: Effective Date and Version. These additions allow you to generate multiple employee records for multiple points in time.

When selected employee records are not available for the specified date, the system selects data for the next earlier date. If no earlier data is available, the system automatically generates an exception report that includes the employee records with missing data, the date, and values from the next earlier date. Possible circumstances that could cause this situation are:

- Historical records have been archived and no longer exist in the HR History table.
- Data was not tracked in history prior to a specified date.
- HR History has been purged or initialized.

By resetting a processing option, you can also use the Build/Delete Point-In-Time Employee Master program to delete data from the Point-In-Time Employee Master table. Do this to remove point-in-time versions that are no longer useful and to reduce the size of the Point-In-Time Employee Master table.

Note

This process requires at least one minute per employee record. When working with a large number of employee records, you might want to consider this time requirement before you begin.

Before You Begin

- Verify that point-in-time information has been included appropriately in your data. See [Verifying the Integrity of the HR History Data](#).

Processing Options for Build/Delete Point in Time EE Master (R060116U)

Parameters

1. Effective Date
2. Version Name
3. Build/Delete
 - 0 or Blank = Build
 - 1 = Delete

Reviewing the Data Selection

After you build the Point-In-Time Master table, and before you generate a point-in-time report, you should review the records that you have selected to ensure that they include the correct group of employee records and the correct data. Using the Point-In-Time Master, you can:

- View existing batches
- Create or delete batches
- Select a batch to view more detail

► To review the data selection

From the Point in Time Employee Master menu (G05B31), choose Point In Time Employee Master.

1. On Work With Point in Time Employee Master, complete the following fields and click Find:
 - Effective Date
 - Version Name
 - User ID
2. To ensure that the desired records have been included, choose a version and click Select.
3. To ensure that the desired data has been included, choose an individual employee record and click Select.

The screenshot shows the PeopleSoft interface with the title 'Point in Time Employee Master - Revise Point in Time Employee Master'. The window contains several input fields and tabs. At the top, there are fields for 'Employee No.' (6033) and 'Effective Date' (12/31/9). Below these, a 'Select Tab' dropdown is set to 'Employee'. Under the 'Employee' tab, there are fields for 'Employee Tax ID' (603360336), 'Pay Frequency' (S), 'Alternate Employee No.', 'Pay Status' (0), 'Business Unit' (1), 'Check Route Code', 'Benefit Group' (HRLY), 'Country Code' (US), and 'Employee Benefit Status' (A).

4. On Revise Point in Time Employee Master, review the data on each of the tabs. Add or change missing data if necessary so that the record will be included in your point-in-time report. When finished, click OK.
5. On Change Reason, enter the date and the reason for the changes that you entered. Use Database Correction for the Change Reason if you do not know the reason that data was wrong or missing, and then click OK.
6. If records were missing or if you discovered inaccurate data in selected records, repeat the tasks listed below before running point-in-time reports:

- Verifying the integrity of the HR History data
- Building a new Point-In-Time Employee Master table
- Reviewing the data selection

Before You Begin

- Create a new Point-In-Time Employee Master table. See [Building a New Point-In-Time Master Table](#).

Processing Options for Point in Time Employee Master (R060116D)

Update
Point in Time Employee Master and
HR History
0 = No
1 = Yes (F060116S)
2 = Yes (F060116S and F08042)

Running Point-In-Time Reports

The system provides several point-in-time reports. To create your own custom reports, use the Report Director Templates program (P91400) and choose the Point-in-Time EE Reporting template. The Report Director Templates program offers an automated approach for creating user-defined reports using the Point-In-Time Master table.

Before You Begin

- Prepare data for point-in-time reporting. See [Preparing Data for Point-In-Time Reports](#).

Running a Point-In-Time Employee Roster Report

From the Point In Time Employee Master menu (G05B55631), choose Point in Time Employee Roster.

After you review your data selection, use the Point In Time Employee Roster report to review all or selected groups of employees, as of a specific date, that are entered in the Payroll system. You can run this report to analyze employee information, prepare responses to governmental inquiries, or verify that the following employee information has been entered correctly:

- Home company
- Business unit
- Basic dates
- Group plan
- Workers' compensation
- Federal and state tax exemption
- Job type and job step
- Pay status
- EEO status

Processing Options for Point in Time Employee Roster (R064011D)

Address

1. Enter '1' to print address information

Point in Time

Effective Date:

Version Name:

Running the Point-In-Time Employee Roster with Rate Report

From the Point in Time Employee Master menu (G05B31), choose Point in Time Employee Roster with Rate.

After you review your data selection, use the Point-In-Time Employee Roster with Rate report to review all or selected groups of employees, as of a specific date. This report is useful in preparing information in response to a governmental inquiry, analyzing employee information, and ensuring accurate data entry. In addition to the reporting parameters of the Point-In-Time Roster report, this report contains the following information:

- Salary amounts
- Person who last changed the payroll data and the date that the change occurred
- Work and residence tax areas
- Employment status
- Termination/change status
- Contract employee information
- Earned income credit status
- Residence status
- Tax method
- Pay frequency and class
- FLSA (Fair Labor Standards Act) exemption status

Processing Options for Point in Time Employee Roster with Rate (R064021D)

Employee No

1. Enter 'A' to print Address Book number, 'S' for Social Security number or 'O' for Third number

Point in Time

Effective Date:

Version Name:

Creating Custom Point-In-Time Reports

After reviewing the selected data in your Point-In-Time Employee Master table, use the Report Director Templates program (P91400) to create custom, point-in-time reports that might be required to meet your needs. The Director helps you create a report by guiding you step-by-step through the design process.

The Report Director uses templates that contain default criteria. When you choose the Point-in-Time EE Reporting template in the Director, the Director presents the default criteria through Director forms. You can modify the OneWorld templates and create your own templates or programs.

The Point-in-Time EE Reporting template provides smart fields that enhance your report writing capabilities and reduce the amount of time required to create a custom report. Smart fields are predesigned components of logic and processing that you can select for a particular field, rather than writing code to create the desired functions. Available smart fields include:

- Amount Variance. Used to include the specific amount between the salary levels of employees that you have selected for a point-in-time version in a new report.
- Salary Percent Variance. Used to include the specific percentage difference between the salary levels for a selected employee group.
- Salary Midpoint. Used to include the midpoint salary levels for a selected employee group.

These Smart Fields work in conjunction with the Director's processing options to specify the desired functions.

See Also

- *Working with Director Templates* for information about Report Directors
- *Working with Smart Field Templates* for information about smart fields
- *Adding or Modifying Director Templates* for information about director templates

Creating Mass Mailing Letters

From the Employee Management menu (G05BE1), choose Employee Letters - Mass Mailing.

To prepare for mass mailing projects and frequent communication to selected groups of employees, you can use the Employee Letters - Mass Mailing program (R08451). You can create multiple report versions to address specific groups of employees or for repetitive mailing projects. For example, you can send a letter offering a new company benefit to all of the employees who share the same company code.

You can sort employee records to select the group desired. This selection process uses data from the Employee Master table (F060116).

A processing option determines which letter template the system will use. The data selection determines which employees will receive the letter.

Creating Employee Letters

When you need to send written information to employees, you can use the mailmerge features of your J.D. Edwards OneWorld software to efficiently produce letters for small, infrequent mailings or large, mass mailing projects. For example, you can quickly generate a letter to a group of employees who will be included in a new marketing campaign. Or you can generate a mass mailing to all employees to announce a new benefit option.

You use the Print Employee Letters program (P08452) to create one letter or a batch of personalized letters. You can use a letter from an existing sample, create your own, or replace custom information as each letter is printed.

You use the Employee Letters - Mass Mailing program (R08451) to prepare to send letters to a large number of people or to preselected groups of people.

You can use MailMerge Workbench to add or change text in the business documents included with OneWorld, to create entirely new documents, and to delete documents.

Before You Begin

- ❑ Create or customize letters that you can use with the merge process. See [MailMerge Workbench](#).

Preparing Employee Letters

The Print Employee Letters program automates the process of printing customized letters that you want to send to people who are listed in the employee master table. You can select employees from a table, specify a form letter, and print customized copies for each recipient. You can also sort employee records and select a specific group for which you want to print letters.

You can use either of two approaches to customize the content of letters that you will print for specific individuals:

- Enter direct changes to a selected form letter just before you print it.
- Edit an existing form letter or create a new letter using MailMerge Workbench.

► To prepare an employee letter

From the Employee Management menu (G05BE1), choose Print Employee Letters.

1. On Print Employee Letters, click Find to display all employees.

The screenshot shows the PeopleSoft Print Employee Letters interface. At the top, there's a toolbar with icons for Portal, WWW, Intranet, and Training. Below the toolbar, a navigation bar shows 'Select Workspace: Active Foundation' and links for Personalize, Change Role, and Sign Out. The main area is titled 'Print Employee Letters - Print Employee Letters'. It has a toolbar with Find, Close, GenerateLetter, Row, and Tools buttons. Below the toolbar, there are two input fields: 'Employee Identification' and 'Employee Name', both with dropdown arrows. To the right of these fields are 'Mailing Date' (set to 06/01/05) and 'Employee Letter Document' (set to EECASDAY). A large grid table below is titled 'Records 1 - 10' and 'Customize Grid'. The columns are labeled: Employee Name, Employee Number, Employee Tax ID, Home Business Unit, Home BU Description, Co, Company Name, and Position ID. The grid lists 10 employees with their details. For example, the first employee is Abbott, Dominique, with Employee Number 6002 476438269, Employee Tax ID 00001, Home Business Unit 9 Corporate Administra, Home BU Description Financial/Distributio, Co 0A-3, Company Name Financial/Distributio, and Position ID 0A-3. Other employees listed include Abrams, Brooke; Aiken, Gwen; Allen, Ray; Anderson, Jeanette; Ato, Connie; Beck, Jeremy; Bellas, Debbie; Bennett, Jody; and Bretton, Josephine.

2. If you want to print a date other than the current system date on your letter, complete the following field:
 - Mailing Date

If you set up letter to use this value, this date will print on your letter.

3. Complete the following field to choose the desired letter template.
 - Employee Letter Document
4. To create multiple letters, click Find, and then select multiple employee records from the table.
5. To create a single letter, complete the following fields, click Find, and then choose the employee record:
 - Employee Identification
 - Employee Name
6. Choose Generate Letter from the Row menu.

Depending on the setup options you choose when you set up the mailmerge application and your letter, a Print form might appear.

7. If a Print form appears, verify that the OLEQUE option has been selected, and then click OK.

The system displays a copy of your letter, including the merged information. You can modify the letter if necessary.
8. On MailMerge, choose Print from the Form menu.

The system might display a Print dialog form, which will require that you perform step 9.
9. If a Print form appears, verify that the form contains the correct information and click OK.

Self-Service

Employee Self-Service

Self-service allows employees to complete tasks online through a company intranet site. Self-service reduces the handling of documents between employees and the human resources department by allowing employees to access information, forms, and services through desktop computers. For example, employees can use self-service to review and update personal data and enroll in benefits online. When employees update information through self-service, the changes made by the employee can be posted to a temporary workfile, where a company representative can review the changes before posting them to the employee database.

Employees can use self-service to perform the following functions online:

- Change name and address
- Change emergency contact information
- Request a verification-of-employment letter
- Request paid time off
- Review benefits information and enroll for new benefits
- Review and change dependents and beneficiaries information
- Review timecards

The type of information that is available on your self-service website is defined by your company. For example, your company might allow employees to make address changes but not benefits changes.

See Also

- Entering a W-4 Form*
- Revising a W-4 Form*

Working with Personal Information Using Self-Service

You can use Employee Self-Service to review and change personal information online. As personal circumstances change, use this approach to review or change the current status of personal information, obtain documentation regarding employment, or review your paid time off. You must have a OneWorld signon to access Employee Self-Service.

Requesting a Verification-of-Employment Letter

OneWorld's Self-Service Verification of Employment (VOE) enables employees to submit requests online to verify salary and employment information. Concurrently, they can review the salary and employment information associated with their employee records.

Using processing options, the employer controls the user level. An employee can review information at the employee user level and make changes allowed for employees. An HR person can review information at the HR user level and perform functions that are allowed only at an administrative level.

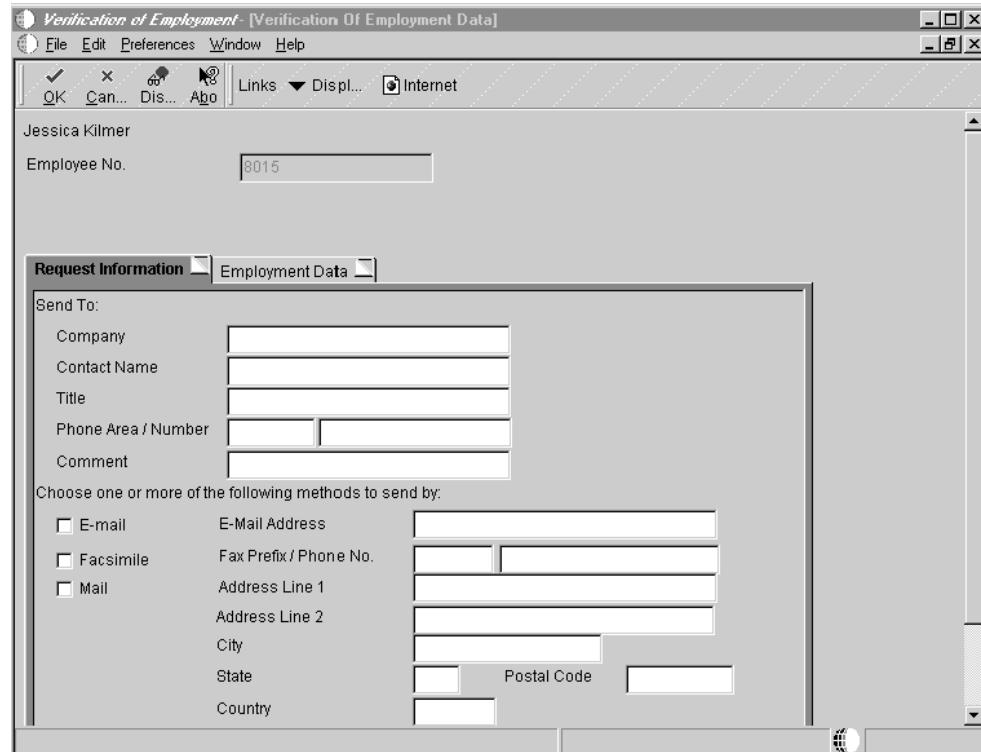
After an employee has submitted a request for employment verification, a workflow process is started. The workflow process forwards the request to a designated HR person. The person then reviews the employment and salary information that the system has generated, makes any necessary revisions, and then forwards the information directly to the party previously specified by the employee.

Employees can use self-service to request that a verification-of-employment letter be sent to a creditor or loan officer. After requesting the letter, employees can review the progress of the request. The human resources administrator can print or e-mail the completed letter.

► To request a verification-of-employment letter

From the Employee Self-Service menu (G05BESS1), choose Verification of Employment.

1. On Work With Verification Of Employment Requests, complete the following field and click Add:
 - Employee No.



2. On Verification Of Employment Data, complete the following field on the Request Information tab:
 - Contact Name
3. Complete the following optional fields:
 - Company
 - Title

- Phone Area / Number
 - Comment
4. Complete one or more of the following contact method fields:
- Mail
 - Facsimile
 - E-mail
- For release B73.3.1, the Facsimile contact method is not available.
5. Complete the following fields that apply to the contact method you have chosen:
- E-Mail Address
 - Fax Prefix / Phone No.
 - Address Line 1
 - Address Line 2
 - State
 - City
 - Postal Code
 - Country
6. Click the Employment Data tab.

Verification of Employment - [Verification Of Employment Data]

File Edit Preferences Window Help

OK Cancel Disp... Abo Links Disp... Internet

Jessica Kilmer
Employee No. 8015

Request Information **Employment Data**

Date Started	2/1/98		
Job Type/Step Description	Administrative Assistant		
Continued Employment	0 High		
Pay Frequency	B		
Pay Class(H/S/P)	H		
Date Of Last Raise		Amount Of Increase	
Date of Next Raise		Pay Period Salary	2,140.00
Comment			
	Current Year	One Year Prior	Two Years Prior
Base	8,560.00		
Overtime			
Commission			
Bonus			
Other			

7. Review the following pay information fields:

- Date Started
- Job Type/Step Description
- Continued Employment
- Pay Frequency
- Pay Class(H/S/P)
- Date Of Last Raise
- Amount Of Increase
- Date of Next Raise
- Pay Period Salary
- Comment

8. Review the following pay information fields for the current year, one year prior, and two years prior.

- Base
- Overtime

- Commission
 - Bonus
 - Other
9. Click OK.
- The Work With Verification Of Employment Requests form appears. Your letter is pending review.
10. To review the status of your request, repeat step 1, but click Find instead of Add.
11. Review the following field for the request:
- Revd Flag

Processing Options for the Review Requests for Verification of Employment Program (P05003)

User Level

1. User Level:

- 1 or blank Employee
 - 2 HR Clerk
 - 3 HR Administrator
- (Option 3 will not send a request through Workflow.)

Workflow Setup

1. Address Number of VOE request processor (HRM):

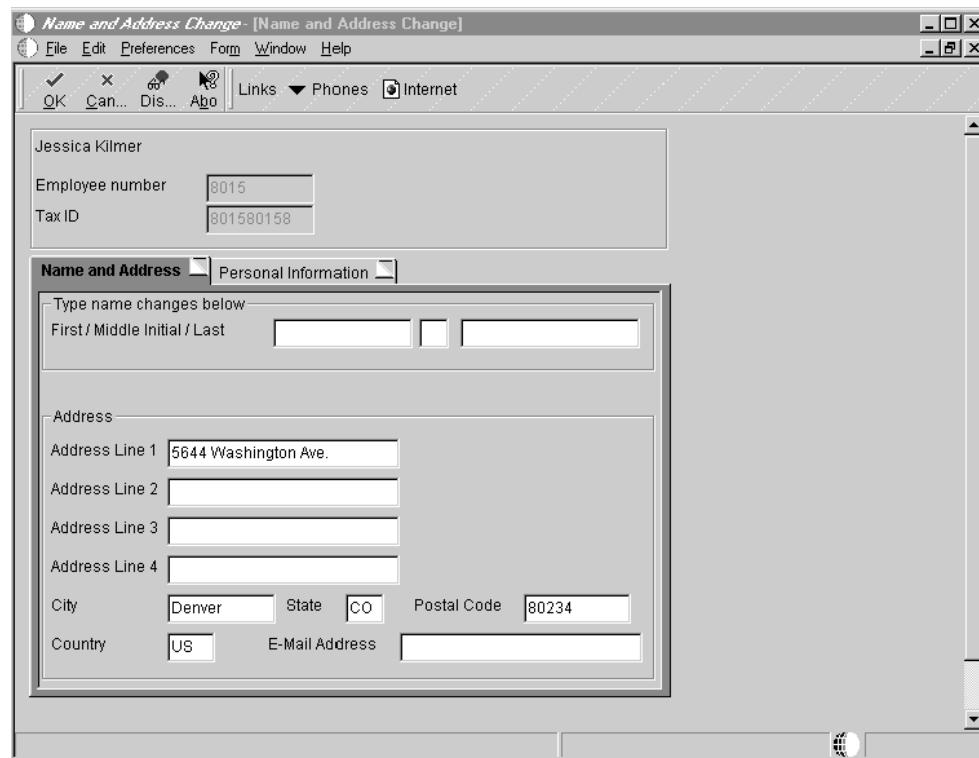
Changing Name and Address Information

You can use self-service to update your name, address, and telephone number. The human resources administrator does not need to manually enter that information. The changes made by the employee can be posted to a temporary workfile, where a company representative can review the changes before posting them to the employee database. The system administrator might have attached a personal photo on this application for you to view.

► To change name and address information

From the Employee Self-Service menu (G05BESS1), choose Life Events. From the Life Events menu (G05LE1), choose one of the following life event menu items: Marriage, Divorce, Moving. Then choose Name and Address Change.

Alternatively, from the Employee Self-Service menu (G05BESS1), choose New Hire/Rehire Events. From the New Hire/Rehire Events menu (G05EE1), choose Name and Address Change.



1. On Name and Address Change, to enter name and address information, complete the following fields on the Name and Address tab:
 - First / Middle Initial / Last
 - Address Line 1
 - Address Line 2
 - Address Line 3
 - Address Line 4
 - City
 - State
 - Postal Code
 - Country
 - E-Mail Address
2. Click the Personal tab.
You can view your personal photo if the system administrator has set this up.
3. Click OK.

Processing Options for Name and Address Change (P05101)

Workflow Setup

1. Address Number of HRM/Payroll person or a Distribution List who will update Payroll files (i.e. Vertex, GeoCode for Resident Tax Area) if either City or State or Postal Code has changed

Changing Emergency Contact Information

You can use self-service to update your emergency contact information. The human resources department does not need to manually enter that information because self-service automatically updates the employee database.

► To change emergency contact information

From the Employee Self-Service menu (G05BESS1), choose Life Events. From the Life Events menu (G05LE1), choose one of the following life event menu items: Marriage, Divorce, Moving. Then choose Emergency Contacts and Phones. Alternatively, from the Employee Self-Service menu (G05BESS1), choose New Hire/ Rehire Events. From the New Hire/ Rehire Events menu (G05EE1), choose Emergency Contacts and Phones.

1. On Work With Emergency Contacts, choose an emergency contact record and click Select.

The screenshot shows a Windows application window titled "Emergency Contacts and Phones - [Phones]". The window has a standard Windows title bar with icons for minimize, maximize, and close. Below the title bar is a menu bar with "File", "Edit", "Preferences", "Window", and "Help". A toolbar below the menu bar contains icons for "OK", "Del...", "Can...", "New...", "Dis...", "Abo", "Links", "Displ...", and "Internet". The main area of the window is divided into sections: "Type Contact information below:" containing "Contact Name" and "Relationship" fields; and "Type Phone Changes and Additions below:" containing a table with columns "Prefix", "Phone Number", "Phone Type", and "Description". At the bottom left of the main area, there is a red box highlighting the "Cancel form" button. The bottom of the window features a standard Windows-style taskbar with buttons for "Cancel form" and "OK".

2. On Phones, review the following fields, enter corrections, and click OK:

- Contact Name

- Relationship
- Prefix
- Phone Number
- Phone Type

Reviewing Employee Personal Profile Information

Use the Employee Personal Profile program (P060116) to review information that currently exists in your company's records. The information that you can review is in the following categories:

- Personal
- Company (Self-Service)
- Job (Self-Service)

The information in this location is for review only; you cannot change any of the fields. If you find information that is not accurate, or if you want to add information, you can contact HR to request changes or additions.

Managers can review this information from the Manager's Workbench. The HR administrator can review this information by accessing Employee Profile from the Employee Management menu.

Before You Begin

- Ensure that the Human Resource field in the processing options for Employee Personal Profile has been set to the HR administrator's address number. The Enrollment tab of the processing options is not functional for this application. Do not enter or change the value for this tab.

► To review employee personal profile information

From the Employee Self-Service menu (G05BESS1), choose Employee Personal Profile.

1. On Employee Profile and Job Information, review the data on the Personal tab.
2. Click each of the subsequent tabs and review the information.
3. If you find information that requires correction or you desire to have new information added, click Contact HR.
4. On Send Internal Mail, complete the following fields:

- Subject
- Phone Number

The system provides the default address number of the HR administrator in the Send To field, as specified by the processing option. The system provides your name as the default in the Call From field, which is not available for change.

5. Use the text area of the form to communicate detailed information that you want to provide to HR. When finished, click OK.

Workflow sends your message to the HR administrator for action on your request.

Processing Options for Employee Personal Profile (P060116)

Enrollment Tab

This processing option specifies the default that is applied for an enrollment option that is used in another application. This processing option is not functional for this application and should not be changed.

Benefits Enrollment

E = Enroll with Eligibility

O = Enroll with Overrides (Default)

Use this processing option to specify whether to enroll an employee with eligibility for benefits or with overrides. Valid values are:

- O** Enroll with overrides (default).
 - E** Enroll with Eligibility.
-

Human Resource Tab

This processing option specifies the default that is applied for sending an email message to the appropriate Workforce Management representative.

Address Number

Use the processing option to specify the address book number that is used to retrieve the e-mail address that is stored in the Remark field on the Who's Who Address Book form.

Reviewing Pay Stubs Using Employee Self-Service

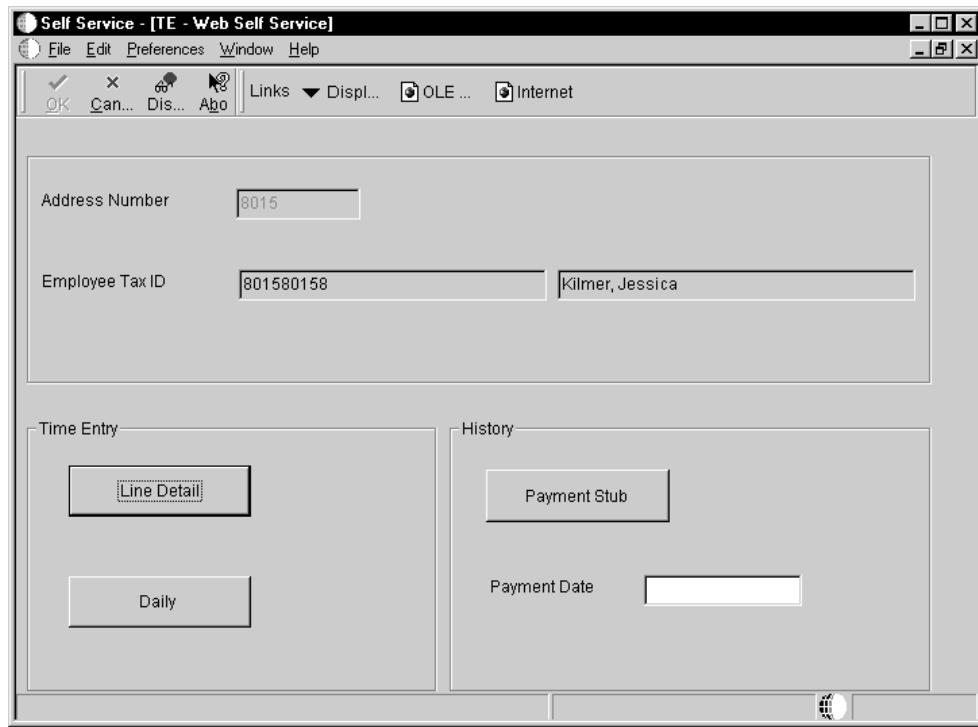
Use Employee Self-Service to review the accuracy of your pay stubs and ensure that they are complete.

The Self-Service Time Entry program (P051191) allows you to review your pay stubs.

► **To review pay stubs using self-service**

From the Time Entry menu (G05BT1), choose Self-Service.

Alternatively, begin with these steps if you have entered a timecard with Time Entry Self-Service from the Employee Self-Service menu.



1. On TE - Web Self-Service, to review previous check stubs, complete the following optional field and click Payment Stub in the History area:
 - Payment Date

Self Service - [Work With Pay Stub History]

File Edit Preferences Form Window Help

Select Find Close Seg... New... Dis... Abo Links Pay St... OLE... Internet

Employee Identification		8015	Kilmer, Jessica		
From Check Date		*	Through Check Date		+
Address Number	Alpha Name	Employee Tax ID	Alternate Number	Check Date	
8015	Kilmer, Jessica	801580158		1/19/	
8015	Kilmer, Jessica	801580158		2/24/	
8015	Kilmer, Jessica	801580158		2/10/	
8015	Kilmer, Jessica	801580158		1/27/	
8015	Kilmer, Jessica	801580158		1/13/	
8015	Kilmer, Jessica	801580158		6/17/	
8015	Kilmer, Jessica	801580158		6/3/	
8015	Kilmer, Jessica	801580158		5/20/	
8015	Kilmer, Jessica	801580158		5/6/	

2. On Work With Pay Stub History, click Find.
3. Choose your pay stub and click Select.

Self Service - [Pay Stub History Information]

File Edit Preferences Form Window Help

Close Seg... New... Dis... Abo Links Print OLE... Internet

Address Number		8015	Kilmer, Jessica		Route			
Check Date		2/24/00	Pay Period Ending Date		2/18/00	Check No.	2018	
Seq.	Pay Type	Pay/Accrual Description	Hours	Hourly Rate	Gross Pay	YTD Amount	DBA Code	De Des
1	P	Regular	64.00	26.750	1,712.00	8,132.00		Gross Wage
2	P	Sick Pay	8.00	26.750	214.00	214.00		Federal Inc
3	P	Vacation	8.00	26.750	214.00	214.00		Federal FIC
4	A	Sick			5.34	21.36		Federal Med
5	A	Vac Imm Avl			6.67	26.68		CO Departm
6		* Sick Taken/Available *						Dental EE
7		* Vacation Taken/Available *						3002 Life Ins.
8								4002 Med- EE+1
9								7000 401(k)

Gross Pay 2,140.00 - Deductions 806.01 = Net Pay 1,333.99

4. On Pay Stub History Information, review the copy of your pay stub.
5. To print the information, choose Print from the Form menu.

On-Demand Benefits Statement

From the Employee Self Service menu (G05BESS1), choose View Current Elections.

You can use the View Current Elections program (P05410, version ZJDE0010) to automatically display your current benefit elections. The View Current Elections program uses a process flow script to display the benefits confirmation statement from your most recent benefits open enrollment. You can view this form any time throughout the year.

Entering Automatic Deposit Information Using Self-Service

You enter automatic deposit information when you want all or part of your payment each pay period to be deposited directly into your bank account. You can choose to receive part of your payment in check form and the rest in automatic deposit form. You also can divide your payment among multiple accounts. Typically, the automatic deposit information that you enter is reviewed and approved by a payroll representative before the information takes effect. You will receive a message from the payroll representative that indicates whether the information that you entered has been approved.

You can also revise any existing automatic deposit information that you or a payroll representative entered previously.

When you use self-service to enter or update automatic deposit information, the new deposit information is processed in the next payroll cycle, and the pre-note test is eliminated.

► To enter automatic deposit information using self-service

From the Employee Self-Service menu (G05BESS1), choose Auto Deposit Instructions.

PeopleSoft®

1. On Revise Automatic Deposit Instructions, click one of the following options:
 - Dollar1
 - Percent1
2. Complete the following fields:
 - Amount or Percent
 - Routing Number
 - Account Number
3. To indicate the type of account, click one of the following options:
 - Checking1
 - Savings1
4. Repeat steps 1-3 for as many accounts as you want to have a portion of your payment deposited.
5. If, after completing steps 1-4, any additional portion of your payment is unallocated, click one of the following options:
 - Remainder Auto Deposit
 - Remainder Check
6. Click the following option:

- Remainder Auto Deposit
7. Complete the Routing Number and the Account Number
 8. Click one of the following options in the Remainder Amount group box:
 - RemChecking
 - RemSavings
 9. Click OK.

The system displays a message that indicates that the information you entered has been submitted to a payroll representative for approval.

Working with Competency Information Using Self-Service

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. These qualifications, such as C programming skills, CPA license, or fluency in French, are called *competencies*.

Your organization uses competency management to track the competencies that you possess and to compare these competencies with those that are required for your job. Tracking competencies helps managers and human resources representatives determine the competencies that you need in order to satisfy the requirements of your current job, as well as a job that you hope to obtain in the future. Competency management also helps you and your manager create clear career goals and performance objectives for you.

To simplify the process of maintaining competency information for employees, you can use self-service to enter and revise your own competency information.

Entering Competency Information Using Self-Service

Because you typically know your professional background more thoroughly than anyone else in your organization knows it, you can enter your own competency information, and the system submits it to someone else, such as your manager or a member of the human resources department, for approval. For example, others might not be aware that you are working on an advanced degree or a professional certification that is not directly related to your current job. Self-service allows you to update your competency information as you acquire each competency. You can also revise your existing competency information.

After you enter competency information, the appropriate person receives a Workflow message that indicates that competency information is waiting for approval. That person must then review the information and enter your level of proficiency in each competency.

Entering competency information using self-service includes the following tasks:

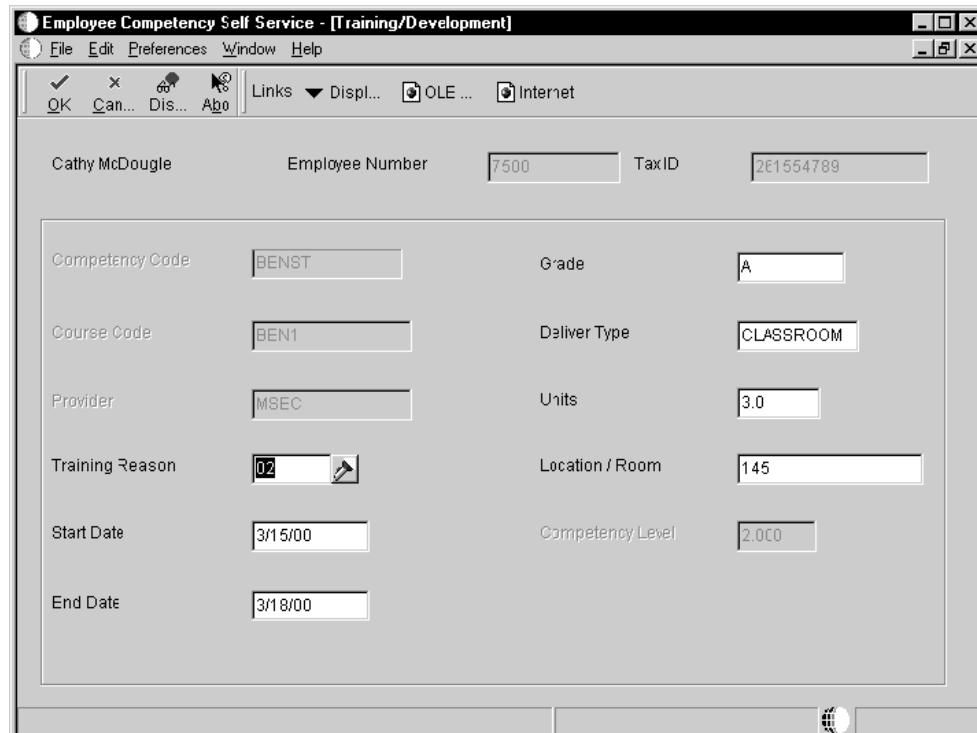
- *Entering training competencies*
- *Entering skill competencies*
- *Entering accomplishment competencies*
- *Entering certification competencies*
- *Entering education competencies*
- *Entering language competencies*

► To enter a training competency

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, choose the following option and click Add:

- Training/Development



2. On Training/Development, complete the following fields and click OK:

- Competency Code
- Course Code
- Provider
- Training Reason

3. Complete the following optional fields and click OK:

- Start Date
- End Date
- Grade
- Deliver Type

- Units
 - Location / Room
4. Repeat steps 2 and 3 for each training competency you want to enter.

► **To enter a skill competency**

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, choose the following option and click Add:
 - Skills
2. On Skills, complete the following required field:
 - Competency Code
3. Complete the following fields and click OK:
 - Skill Description
 - Date Acquired
 - Status
4. Repeat step 2 for each skill competency you want to enter.

► **To enter an accomplishment competency**

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, choose the following option and click Add:
 - Accomplishments
2. On Accomplishments, complete the following required fields:
 - Competency Code
 - Accomplishment Type
3. Complete the following fields and click OK:
 - Date Achieved
 - Awarding Organization
 - Date Awarded
 - Status
4. Repeat steps 2 and 3 for each accomplishment competency you want to enter.

► To enter a certification competency

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, choose the following option and click Add:
 - Certification
2. On Certifications, complete the following required fields:
 - Competency Code
 - Licensing Body
 - Renewal Code
 - Expiration Date
3. Complete the following fields and click OK:
 - Licensing Number
 - Score Rating
 - Status
 - Issue Date
4. Repeat step 2 and 3 for each certification competency you want to enter.

► To enter an education competency

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, choose the following option and click Add:
 - Education
2. On Education, complete the following required fields:
 - Competency Code
 - Institution Code
3. Complete the following fields and click OK:
 - Location
 - Degree Date
 - GPA Rating
 - GradeBase

- Honorary
4. Repeat steps 2 and 3 for each education competency you want to enter.

► **To enter a language competency**

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, choose the following option and click Add:
 - Language
2. On Language, complete the following required field:
 - Competency Code
3. Complete the following fields and click OK:
 - Status Date
 - Status
4. Repeat steps 2 and 3 for each language competency you want to enter.

Revising Competency Information Using Self-Service

After you enter competency information for yourself, you can review it to verify that it is correct. If you find an error or omission, you can revise the information to correct it. After you revise competency information, the appropriate person, such as your manager or a member of the human resources department, receives a Workflow message that indicates that the information is waiting for approval.

The process that you use to revise competency information is similar to the process that you use to enter this information, except that you must first search for the competency that you need to revise.

► **To revise competency information using self-service**

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, choose one or more of the following options that correspond to the type of competency that you need to revise, and then click View:
 - Training/Development
 - Skills
 - Accomplishments
 - Certification
 - Education

- Language
2. On Work With Training/Development, Work With Skills, Work With Accomplishments, Work With Certifications, Work With Education, or Work With Language, complete the following field:
 - Competency Code
 3. To narrow your search, complete any of the other fields on the form, and then click Find.
 4. Choose a record in the detail area, and then click Select.
 5. On Training/Development, Skills, Accomplishments, Certifications, Education, or Language, make the necessary changes and then click OK.

See Also

- *Entering Competency Information Using Self-Service* for more specific instructions for entering competency information

Processing Options for Employee Competency Self-Service (P05130)

Display Tab

Use this processing option to specify whether the system displays manager information on the forms.

Display Manager Information

Use this processing option to specify whether the system will display the status, verification information, and competency level on the forms. Valid values are:

Blank Do not display the information.

1 Display the information.

Manager Self-Service

Managers can accomplish many tasks with less effort and time by using self-service procedures. These procedures might be available through a company intranet site or from OneWorld menus for employees and managers. This approach reduces document handling between employees and the human resources department by allowing employees to access information, forms, and services using desktop computers.

Managers can use self-service and Manager's Workbench applications to perform a wide range of tasks for which they are responsible. These tasks include the following:

- Requesting employee status changes
- Running managerial reports
- Assigning delegates
- Generating a graphic organizational chart and reviewing the hierarchical structure of the jobs within an organization
- Reviewing jobs and job competencies in an organization
- Performing a gap analysis of employee and job competencies
- Entering employee competency information
- Reviewing employee profiles
- Reviewing employee information, such as name and address, time entry, emergency contacts, paid time off balances, and skill competencies.

Additional self-service programs are available for managers use that are not included in the Manager's Workbench. These programs, accessible from the Employee and Manager Self Service menus, are:

- Upcoming Reviews by Supervisor
- Managers Employee Setup
- Open Benefits Enrollment
- Auto Deposit Instructions
- Job Competencies

The type of information that is available on your self-service website is defined by your company. For example, your company might allow employees to make address changes but not benefits changes.

Many of the manager's self-service programs employ Enterprise Workflow Management. Workflow is an e-mail based system that automates tasks by using e-mail to reduce the processing time that it normally takes to complete a task. For example, managers can initiate an employee's promotion using Status Change from Manager's Workbench. When the process is initiated, a series of messages within Workflow are e-mailed to each manager who must be informed about the change and who must approve the change.

Only selected applications can be enabled on an intranet site. The preceding tasks are based on J.D. Edwards forms and data provided for self-service in a Windows environment. The navigations, forms, steps, and data shown in these tasks might not correspond to your customized, self-service intranet site. If you are using self-service from your self-service site,

you must always log onto the site as the first step. When you log on, the system uses your employee number to retrieve your own information.

Manager's Workbench

You can perform many common supervisory tasks from a centralized location using Manager's Workbench. From this location, your employees' information is at your fingertips, enabling you to analyze job and employee information, initiate changes, and save time when you need reports that can be processed as a list or on an individual basis. Your own personal employee information is also available from within this application.

Using the Manager's Workbench, you have quick, easy access to information that you can review and use for budgeting, planning, decision-making, and approving. This application uses the J.D. Edwards Enterprise Workflow Management system to save time communicating changes and obtaining required authorizations.

Note

The Manager's Workbench separates access to your personal information from access to your employees' information by the use of Form and Row menus. For example, when you choose options from the Form menu, you can access your own personal information and make a variety of changes. When you choose options from the Row menu, the system displays your employees' information. A manager can view an employee's information, but generally cannot make changes directly to an employee's record.

The following options are available in the Manager's Workbench:

Self-Service

You can choose Self Service Apps. from the Row or Form menus, and then perform the following tasks:

- *Review or change name and address information*
- *Review time entry*
- *Review paid time off*
- *Review or update emergency contacts*
- *Enter employee competency information*

You can review employee data, analyze employee skills, and prepare for employee coaching sessions with these self-service options. See *Assigning Competencies to Employees* for more information about working with employee competencies.

Using My Self-Service, you can review and change your own, personal information. See *Employee's Self-Service* for more information about making changes and the required procedures.

Status Change

Status Change includes the following preset options for changing an employee's status:

- Requesting a promotion
- Changing an employee's assigned location
- Changing an employee's department or supervisor
- Changing an employee's job status
- Requesting a leave of absence

This centralized approach to managing employee changes allows you to review, initiate, and approve changes for your employees. The User Defined status change category allows your Workforce Management Department to set up a new employee change category. For example, you might want to create a new category for Compensation Review. See *Change an Employee's Status* for more information

and procedures.

Reports

The following reports are available from the Manager's Workbench:

- Managers Reports
- Headcount
- Organization Chart
- Turnover Report
- Supplemental Data
- Phone List
- Time Entry

Managers Reports is a preset list of reports, defined by your Workforce Management Department, that you can use to meet frequent reporting requirements. Your Workforce Management administrator can create multiple versions that include reports that you commonly use. Adding versions is an available option only in a windows environment. This feature cannot be used in a web environment.

The Organization Chart report prints a diagram of the organization, using your managerial position as the top level. This report requires Visio software to be resident on your computer.

Your Workforce Management department should define the Supplemental Data report to include any selection of data from the Employee Master table.

Use these reports to help meet your need for organizational reporting, planning, review, and management of your employees. You can generate reports for the employee group below your job level, or you can select a subordinate management level and generate reports with that level at the top of the hierarchy.

Jobs In An Organization

Use Jobs In An Organization to review how each job fits into the hierarchical levels of the organizational structure. You can use this information to plan for new jobs and to determine the competencies that are associated with each job. When you access this program from Managers Workbench, you can review information, but you cannot change it.

See *Attaching Jobs to Organizational Levels* for more information.

Compensation Review

Use this program to review compensation data for any of your employees. The program provides you with a workbench that provides exits for the following:

- Viewing and changing salary recommendations
- Viewing the salary budget allocation, budget spent, and budget remaining by increase types
- Submitting salary recommendations up to the next level supervisor for approval
- Returning salary recommendations down to the previous level supervisor for salary rework

Providing access for a Workforce Management administrator to view or change salary recommendations of a specified supervisor with the use of a processing option

Job Competencies In An Organization

Use Job Competencies In An Organization to see how job competencies are assigned to the hierarchical levels of the organizational structure. You can use this information to determine the competencies that apply to you and the employees who report to you. See *Attaching Job Competencies to Organizational Levels* for more information.

Gap Analysis

Use Gap Analysis to help you compare the skill competencies required for a job and the current competencies of an employee. Often used in conjunction with Job Competencies In An Organization, these functions are useful for organizational planning and in preparation for employee performance reviews.

See *Reviewing Gap Analysis Online* for additional information and procedures.

Delegates	Use Delegates to set up subordinates to use Manager's Workbench in your absence or to enable others to perform managerial functions. After the initial setup, the delegates that you select can access Manager's Workbench at your organizational level and then perform functions at an authority level that you specify to help you review, change, and approve employee information.
Employee Profile	Use Employee Profile to review employee data obtained from the Employee Master table. You can also use this function to contact your Workforce Management Department about updates to an employee record. See <i>Reviewing Employee Personal Profile Information</i> for additional information and procedures.
Attachments	Attachments can be added as part of the setup function to provide information for all managers who use any of the Manager's Workbench applications. These can include instructions, reminders, or miscellaneous information. You can also add attachments while using Manager's Workbench applications. For example, you might want to remind yourself about information that will help you plan for reviews or record action steps that you want to remember regarding specific employees. You can also attach graphic files. The attached files are linked to your address number and an employee address number so that if either position changes, the notes that you attach cannot be viewed by another manager.

Compensation Management Self-Service Considerations

Your organization might have set up the Compensation Management system as a self-service application that allows you to manage the salary reviews of the employees who report to you. If you access the Compensation Management system from a self-service program, such as the Manager's Workbench, you can make salary recommendations within your own management hierarchy only. The supervisor field is disabled.

See Also

- ❑ *Setting up Manager Self-Service* to specify processing options that automatically include a manager's address book number when you access Manager's Workbench and the linked programs

Changing an Employee Status

Changing an Employee's Status, one of the applications within Manager's Workbench, provides a centralized approach to implementing common changes for employees who report to you or to one of your subordinate managers. Using this approach, you can manage some of the most common types of employee changes with a minimum of time and effort.

Using this approach, when you choose the type of change desired for a specified employee and implement a change, the system automatically notifies your HR department and any other managers who must approve the change. You will also be able to review the status of the approvals to stay current with the changes you have initiated.

You can perform any of the following, preset tasks:

- Promoting an employee
- Changing an employee's job status
- Relocating an employee

- Changing an employee department or supervisor

In addition to the five preset tasks listed above, two additional options exist that you can define in UDC 08/S4 to meet your specific requirements. For example, you might define this option to change an employee's salary. Working with your HR administrator, you can set up similar tasks or change any of the existing, pre-set tasks to use any combination of the data in the Employee Master table (F060116).

Requesting an Employee Status Change

You use a similar approach to request any of the available employee changes. The system automatically displays tabs and fields on the change request form that are required to complete the change that you request.

► To request an employee status change

From the Manager Self-Service menu (G05BMSS1), choose Managers Workbench.

1. On Work With Managers Employees, click one of the following options and click Find to display your subordinates.

- Active Employees

The Active option displays only employees with an active payroll status, including employees who are on a leave of absence.

- All Employees

The All Employees option displays all employees, including those with a terminated status.

2. Choose the desired subordinate's record from the detail area.

The first Employee's Name column displays the organizational structure that is subordinate to your position. You can click the plus sign to the left of a manager's name to display that manager's subordinates.

3. Choose Status Change Request from the Row menu, and then choose Status Change.

4. On Select Employee Status Change Request, choose one of the following options:

- Promotion
- Location
- Dept/Supervisor Change
- Job Status

The system administrator can defines values for the following fields to meet the needs of the organization:

- Flex
- User Defined

5. To display notes or instructions about the change process, click the icon next to the option.

6. Click Add.

The screenshot shows a PeopleSoft application window titled "Managers Workbench - Create Employee Status Change Request". The main area displays a promotion request for an employee named Robert Mastro. The "Compensation" tab is active, showing a grid of current and new values for various compensation fields. The fields include Pay Class (H/S/P), Pay Grade, Pay Grade Step, Annual Salary, Hourly Rate, Std Hrs/Day, Hrs/Yr, Pay on Std Hours, Std Days/Year, and Full Time Equivalents. The "New Values" column shows updated figures such as \$39,750.00 for Annual Salary and 18.149 for Hourly Rate.

7. On Create Employee Status Change Request, complete the following fields:
 - Change Reason
 - Effective On
8. Read the comments on the Instructions tab, and then click the next tab to enter appropriate changes to the active fields. Fields that are not applicable to the type of change selected are not available for changes.
9. Click each of the remaining tabs and enter changes as appropriate. Some change tasks might require more tabs than can fit on the form. If more tabs exist that you need to access on a subsequent form, the system activates the Next option in the menu bar.
10. After you review information for all tabs and complete the changes, perform one of the following:
 - Click OK to save, but not submit, the request. This option allows you to review the request at a later date and then submit it for approval.
 - Click Submit to save and submit the request for approval. After you submit a request, you cannot revise it except to enter a new Change Reason or to change the Effective On date.

If you need to change a request after you have submitted it, but before it has been approved, cancel the request and create a new one.

The system will automatically generate workflow messages in the Employee Work Center for the appropriate managers. The Employee Master table is updated when the required approvals have been completed.

Processing Options for Managers Employee Status Change (P08720)

Process Tab

These processing options specify the default settings for application processes.

1. Mail Box Designator

Blank = 01 (Personal In Basket)

Use this processing option to specify the name of the mail box in the Employee Work Center where your workflow notifications and approval messages are sent.
To create a new mail box, add a new record to the 02/MB UDC.

2. Final Status

Use this processing option to specify the final status for the Employee Status Change records (F08720) when the process has been successfully completed.

3. Allow Delegates

0 = No

1 = Yes

Use this processing option to specify whether you want to allow the use of delegates. If a manager has defined a delegate, this employee can perform certain tasks in behalf of the manager. Valid values are:

0 No

1 Yes

4. Perform Employee Master Field Edits

0 = No

1 = Yes

Use this processing option to specify whether you want the system to write information that you change in the Managers Employee Status Change application to the Employee Master table. Valid values are:

0

No

1

Yes

User Level Tab

This processing option specifies the position of the person who will be using the application.

1. User Level

1 = Manager/Employee Level.

2 = HR Administrator Level

Use this processing option to specify whether the application will be used by

a management employee or HR personnel. Valid values are:

Blank Manager

1 Manager or a manager's delegate

2 HR Personnel

Defaults Tab

Use these processing options to specify default settings that the system uses and whether the system automatically includes job and business unit/ job cross reference information in the employee record when you change a job type for an existing employee.

1. Status Change Type 1

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

2. Status Change Type 2

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

3. Status Change Type 3

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five

default status change types on the Select Employee Status Change Request form.

4. Status Change Type 4

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

5. Status Change Type 5

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

6. Job Information Change

- 0 = Do not use default data
- 1 = Use default data

Use this processing option to specify whether the system will automatically supply job information in the employee record when you change a job type for an existing employee. The system will automatically include pay frequency, union code, pay class, pay grade, overtime exempt, pay grade step, and benefit group. Valid values are:

- 0 Do not use default data
- 1 Use default data

7. Business Unit/Job ID Information Change

- 0 = Do not use default data
- 1 = Use default data

Use this processing option to determine whether the system will automatically include the business unit/job cross reference information in the employee

record when you change a job type for an existing employee. The system will automatically use the union code, workers compensation, and benefit group from the F08005 table. Valid values are:

- 0 Do not use default data
 - 1 Use default data
-

Reviewing a Status Change Request

You can use Status Change Review to examine a request that you have previously submitted, review notes that relate to a request, or follow up on a request that has not been approved within a reasonable amount of time.

If a request has not been approved, you can use the escalation monitor to determine possible reasons for the delay and restart the process. Use one of the following options, depending on the apparent cause of the delay:

- Escalation monitor. Provides a report of all halted workflow processes and moves the requests to the next stage.
- Escalate. Moves a specific request to the next stage if it has been halted due to payroll lockout, effective date, or approval inactivity.
- Restart. Restarts a specific status change process, deleting any associated workflow messages.

► To review a status change request

From the Manager Self-Service menu (G05BMSS1), choose Managers Workbench.

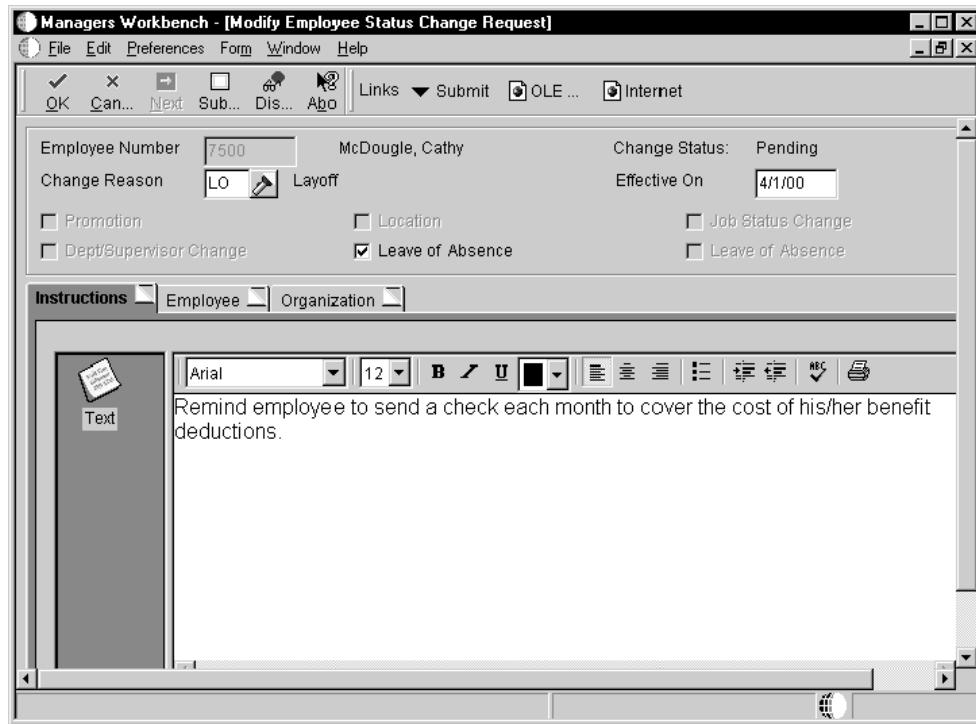
1. On Work With Managers Employees, click one of the following options depending on whether you want to see only active employees who work for you or you want to include employees whose employment has been terminated.
 - Active Employees
 - All Employees
-

Note

The Active Employees option includes employees who are on a leave of absence.

2. Choose the desired subordinate's record from the detail area.
3. Choose Status Change Request from the Row menu, and then choose Status Change Review.
4. On Work With Status Change, choose the desired employee's record and click Select.

The system automatically displays the required tabs and fields on the form. Depending on the pending change, a different number of tabs might appear.



5. On Modify Employee Status Change Request, review the information on each of the tabs and enter required changes. Fields that are not applicable to the type of change selected will not be available for changes. If more tabs exist that you need to access on a subsequent form, the Next option in the menu bar will be available.
6. After you have reviewed the information for all tabs and completed the changes, perform one of the following actions:
 - Click OK to save, but not submit, the request. This option allows you to review the request at a later date and then submit it for approval.
 - Click Submit to save and submit the request for approval and then click OK on the Workflow Pending Review Notification.

After you submit a request it cannot be revised except to enter a new Change Reason or to change the Effective On date.

If you need to make additional changes to a request after you have submitted it, but before it has been approved, cancel the request and create a new one.

The system automatically generates workflow messages in the Employee Work Center for the appropriate managers. The Employee Master table is updated when the required approvals are complete.

7. To generate a report of and move all halted processes to the next stage, on Work With Status Change, choose Escalation Monitor from the Form menu.
8. To move a specific request to the next stage, choose a record and then choose Escalate from the Row menu.

9. To restart a specific status change process and delete any pending workflow messages that are linked to the process, choose a record and then choose Restart from the Row menu.

Processing Options for Managers Status Change Review (P087201)

Processing Tab

These processing options allow you to activate potential application activities that provide managers with a broader range of control over workflow and management options.

1. Allow Delegates

1 = Yes

0 = No

Use this processing option to specify whether you want to allow the use of delegates. If a manager has defined a delegate, this employee can perform certain tasks on his or her behalf.

Valid values are:

0 No

1 Yes

2. Allow Escalating Halted Activities

1 = Yes

0 = No

Use this processing option to specify whether you want to allow the user to escalate halted workflow activities. The Status Change workflow stops the process during a Payroll Lockout or to wait for a specified effective date. If the process is waiting for an effective date, escalating will cause the changes to be committed to the database immediately instead of waiting for the effective date. Escalating a Payroll Lockout will re-verify the lockout status before allowing the process to continue. Valid values are:

0 No

1 Yes

3. Allow Restarting Active Processes

1 = Yes

0 = No

Use this processing option to specify whether you want to allow the user to restart an active Status Change process. The Status Change workflow process might stop for any of the following reasons:

- o Payroll Lockout
- o Effective date
- o Delay of management approval

When the workflow has stopped for any of these reasons, performing a restart will complete the active workflow activity and delete all approval messages, including messages that are waiting and those already approved, from the Employee Work Center and the Approval History table. The status of the Status Change record will change to pending. The workflow process will be completed but not deleted. Valid values are:

0 No

1 Yes

4. Allow Aborting Active Processes

1 = Yes

0 = No

Use this processing option to specify whether you want to allow the user to abort an active Status Change process. When the Status Change workflow process stops for a payroll lockout, an effective date, or a management approval, aborting will update the status of the Status Change record to 07-Cancelled by User and complete the active workflow. Valid values are:

0 No

1 Yes

5. Employee Status Change Version (P08720)

Blank = ZJDE0001

Use this processing option to specify which version of the Employee Status Change application (P08720) you want to use. The version will control the workflow process, retrieving the correct processing options for mail box and the final status.

If no value is entered, version ZJDE0001 will be used.

User Level Tab

These processing options specify the type of user who will be accessing the application.

1. User Level

1 = Manager/Employee Level.

2 = HR Administrator Level.

Use this processing option to specify whether the application will be used by management, employees, or HR personnel.

Valid values are:

Blank Management

1 Employees and management

2 HR personnel

Assigning Delegates

You can delegate tasks and projects to other employees to assist with your work when you are away from your office or just when you need additional assistance. When work that you assign to others requires system access with an authority level comparable to a manager's level, you can assign delegate status to them up to your own level. When you designate an employee as a delegate for you, that employee can assist with routine tasks or projects from a predefined set of applications that will allow the use of delegates. For example, you might want a delegate to run a list of weekly reports or conduct a job analysis project. You can also

delegate an employee to perform your supervisory functions for periods of time that you will be absent from work.

Assigning delegates permits you to designate another employee to access your J.D. Edwards software with system authorization at a level that you assign. You can assign an authority level up to, and including, your own. For example, you can designate an employee to perform many of the same functions that you would ordinarily perform by assigning appropriate authorization types. The system includes five preset authorization types and allows you to add customized authorization types.

Before You Begin

- Set up additional authorization types, if needed, in UDC 08/AY. See [Customizing User Defined Codes](#) for more information.

► To assign a delegate

From the Manager Self-Service menu (G05BMSS1), choose Managers Workbench.

1. On Work With Managers Employees, click Find to display your organizational hierarchy and your employees' records.
2. Choose My Delegates from the Form menu.

	Delegate Number	Delegate Name	Authorization Type	Description	Effective On	Ending Date	Authorization Level
<input checked="" type="checkbox"/>	7505	Mastro, Robert	2	Reporting	01/01/97	12/31/07	1

3. On Work With Delegates, complete the following fields:
 - Delegate Number
 - Authorization Type

- Effective On
 - Ending Date
 - Authorization Level
4. Repeat step 3 for the same employee as many times as needed, assigning an additional authorization type for each entry.
 5. When you are finished assigning delegates, click OK.

Reviewing Upcoming Employee Reviews by Supervisor

Managers can log onto the self-service intranet site to search for all upcoming employee reviews. This process can occur in one of the following ways:

- You can log onto the self-service intranet site and search for upcoming employee reviews using the Upcoming Reviews By Supervisor program (P052200). You can search for employees based on the following fields: Business Unit, Pay Class, Type of Review, and all review dates and payroll status fields. The system automatically displays employees that report directly to you by your supervisor number.
- You can log onto the self-service intranet site and access the Upcoming Reviews By Supervisor program (P052200) after receiving an electronic message about your upcoming employee reviews. Instead of having to search for specific employees, the system automatically completes the grid with the employees that you are responsible for reviewing soon.

The electronic notification process occurs after the system administrator runs the Upcoming Reviews report (R052202). If the processing options for Upcoming Reviews are set up correctly, the report initiates Enterprise Workflow Management, which notifies all supervisors about their upcoming reviews with an e-mail. The system administrator can run the report automatically on a certain date by setting a processing option appropriately and setting up the report to run in the Scheduler Workbench. See *Scheduling a Recurring job*.

Different versions of the report can be run to report overdue reviews and reviews for all employees. In these cases, you would not receive e-mails. However, the system would still supply the Upcoming Reviews By Supervisor form (W052200B) with the employees that you are responsible for reviewing.

After the system displays your employees with upcoming reviews, you can choose an employee record and choose an option from the Row menu to review profile, supplemental, employment, or organizational data for the employee. You can access this information if your OneWorld security system is set up to allow you access.

Before You Begin

- If the Upcoming Reviews by Supervisor report (R052202) has been run, you need to review only the information that appears when you log onto your self-service site. See *Running the Upcoming Employee Reviews by Supervisor Report* to further understand the procedure.

► To review upcoming employee reviews by supervisor

From the Manager Self-Service menu (G05BMSS1), choose Upcoming Reviews by Supervisor.

PeopleSoft.

Upcoming Reviews by Supervisor - Work With Upcoming Reviews By Supervisor

Search		Tools	
Select	Find	Close	Row
<input checked="" type="checkbox"/>		<input type="button" value="X"/>	
Supervisor	7500	McDougle, Cathy	
Home Business Unit		<input checked="" type="radio"/> Active Payroll Status	
Pay Class(H/S/P)		<input type="radio"/> All	
Type Review		From Review Date	
		Thru Review Date	

Records 1 - 10

Alpha Name	Next Review Date	Type Review	Type Review Description	Home Business Unit	Home Business Unit Description	Pay Class	Pay Class Description
<input type="checkbox"/> Broun, Susan			None Assigned	9	Corporate Administration S	Salaried	
<input type="checkbox"/> Brown, Susan			None Assigned	9	Corporate Administration S	Salaried	
<input type="checkbox"/> Galligan, Shawn			None Assigned	9	Corporate Administration S	Salaried	
<input type="checkbox"/> Miller, Jane			None Assigned	9	Corporate Administration S	Salaried	
<input type="checkbox"/> Smith, Josie			None Assigned	9	Corporate Administration S	Salaried	
<input type="checkbox"/> Waiters, Annette			None Assigned	9	Corporate Administration S	Salaried	
<input type="checkbox"/> Kilmer, Jessica	12/01/00 A	Annual Review		9	Corporate Administration H	Hourly	
<input type="checkbox"/> Washington, Harold	01/01/01 A	Annual Review		9	Corporate Administration S	Salaried	
<input type="checkbox"/> Abo, Connie	03/01/01 A	Annual Review		9	Corporate Administration S	Salaried	
<input type="checkbox"/> Mastro, Robert	02/01/02 A	Annual Review		5100	Potomac Hotel	S	

- On Work With Upcoming Reviews By Supervisor, complete any of the following fields:
 - Home Business Unit
 - Pay Class(H/S/P)
 - Type Review
- Complete the following fields if you want to review employees who have upcoming reviews during a specific period of time:
 - From Review Date
 - Thru Review Date

If you complete the From Review Date field but leave the Thru Review Date field blank, the system displays all employees with reviews on or after the from review date.

If you complete only the Thru Review Date field, employees with no specific next review date and employees with a next review date equal to or prior to the through review date are displayed.

- Choose one of the following options and then click Find to display your subordinates.
 - Active Payroll Status

The Active Payroll Status option displays only employees with an active payroll status, including employees who are on a leave of absence.

- All

The All option displays all employees, including those with a terminated status.

The All option includes employees on a leave of absence.

4. Review the displayed information.

Entering Data for Verification-of-Employment Letters

The Verification of Employment program (P05003) allows only human resource administrators or system administrators to enter employment data for verification-of-employment letters.

Entering the employment data is the second part of a two-step process for processing a verification-of-employment letter. The employee must first request a letter by entering personal information on the Request Information tab of the Verification of Employment Data form (W05003B). When an employee enters a request, the system copies the employee's job and compensation information from the Job Information table (F08001) to the Employment Data tab.

If Enterprise Workflow Management is enabled through your processing options, after receiving an e-mail that a verification-of-employment request is pending, you can inquire on the request, change the employee's employment data if necessary, and process the letter. You can also e-mail the completed letter to the contact person that the employee has requested.

Before You Begin

- Have your workforce management system administrator set the processing option for Verification of Employment to 3. This processing option allows you to change the job information fields on the Verification of Employment Data form, if necessary.

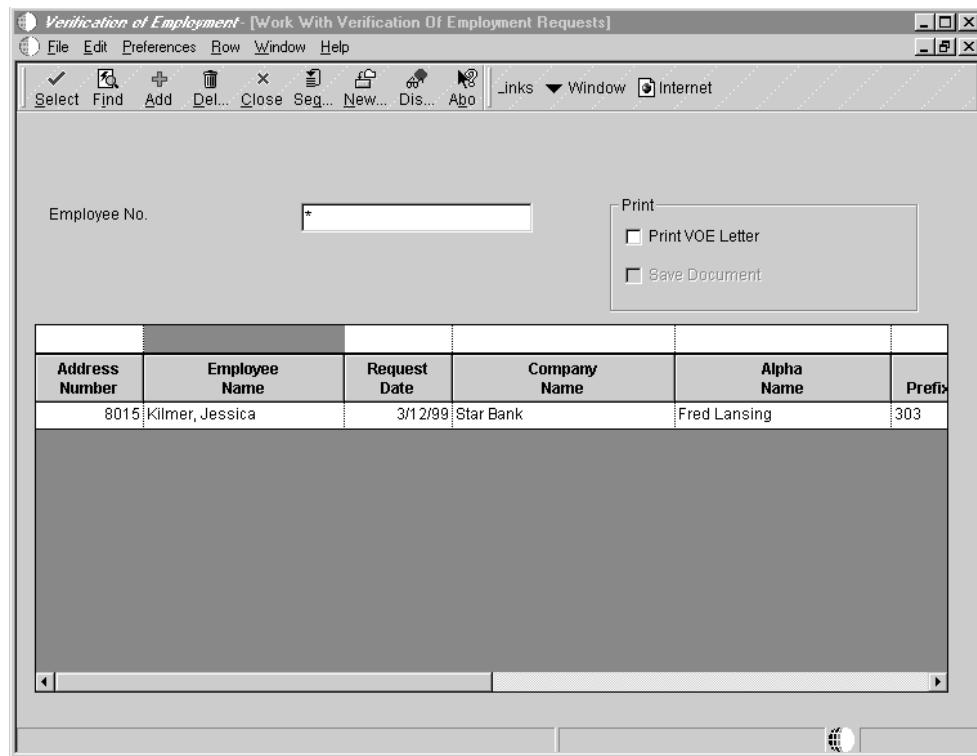
See Also

- *Requesting a Verification-of-Employment Letter* to better understand how an employee requests verification-of-employment letters
- *Working with Distribution Lists* for more information about setting up Workflow recipients and distribution lists
- *Recipient Conditions* for more information about setting up Workflow recipients and distribution lists.

► To enter employment data for verification-of-employment letters

From the Employee Self-Service menu (G05BESS1), choose Verification of Employment.

1. On Work With Verification Of Employment Requests, complete the following fields and click Find to locate an employee's request:
 - Employee ID
 - Request Date



2. If you need to delete a record, choose the record and click Delete.
3. Choose the employee's record and click Select.
The Verification Of Employment Data form appears.
4. Click the Employment Data tab.

PeopleSoft®

Verification of Employment - Verification Of Employment Data

<input type="button" value="OK"/>	<input type="button" value="Cancel"/>	<input type="button" value="Tools"/>																																																																														
Employee No. <input type="text" value="8015"/>		<input type="checkbox"/> Print VOE Letter <input type="checkbox"/> Delete Document																																																																														
<table border="1"> <thead> <tr> <th colspan="3">Request Information</th> <th colspan="3">Employment Data</th> </tr> </thead> <tbody> <tr> <td>Date Started</td> <td colspan="2"><input type="text" value="02/01/98"/></td> <td>Job Type/Step Description</td> <td colspan="2"><input type="text" value="Administrative Assistant"/></td> </tr> <tr> <td>Continued Employment</td> <td><input type="radio"/> High</td> <td><input type="radio"/> Bi-Weekly</td> <td></td> <td><input type="radio"/> Hourly</td> <td><input type="radio"/> Pay Period Salary</td> </tr> <tr> <td>Pay Frequency</td> <td><input type="radio"/> H</td> <td><input type="radio"/> A</td> <td><input type="text" value="840.00"/></td> <td><input type="text" value="8,560.00"/></td> <td><input type="text" value="8,560.00"/></td> </tr> <tr> <td>Date Of Last Raise</td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td>Amount Of Increase</td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> </tr> <tr> <td>Date of Next Raise</td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td>Pay Period Salary</td> <td><input type="text" value="840.00"/></td> <td><input type="text" value=""/></td> </tr> <tr> <td>Comment</td> <td colspan="5"><input type="text" value=""/></td> </tr> <tr> <td>Base</td> <td><input type="text" value="8,560.00"/></td> <td><input type="text" value="8,560.00"/></td> <td><input type="text" value=""/></td> <td>One Year Prior</td> <td><input type="text" value=""/></td> </tr> <tr> <td>Overtime</td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td>Two Years Prior</td> <td><input type="text" value=""/></td> </tr> <tr> <td>Commission</td> <td><input type="text" value=""/></td> </tr> <tr> <td>Bonus</td> <td><input type="text" value=""/></td> </tr> <tr> <td>Other</td> <td><input type="text" value=""/></td> </tr> <tr> <td>Total</td> <td><input type="text" value="8,560.00"/></td> <td><input type="text" value="8,560.00"/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> </tr> </tbody> </table>			Request Information			Employment Data			Date Started	<input type="text" value="02/01/98"/>		Job Type/Step Description	<input type="text" value="Administrative Assistant"/>		Continued Employment	<input type="radio"/> High	<input type="radio"/> Bi-Weekly		<input type="radio"/> Hourly	<input type="radio"/> Pay Period Salary	Pay Frequency	<input type="radio"/> H	<input type="radio"/> A	<input type="text" value="840.00"/>	<input type="text" value="8,560.00"/>	<input type="text" value="8,560.00"/>	Date Of Last Raise	<input type="text" value=""/>	<input type="text" value=""/>	Amount Of Increase	<input type="text" value=""/>	<input type="text" value=""/>	Date of Next Raise	<input type="text" value=""/>	<input type="text" value=""/>	Pay Period Salary	<input type="text" value="840.00"/>	<input type="text" value=""/>	Comment	<input type="text" value=""/>					Base	<input type="text" value="8,560.00"/>	<input type="text" value="8,560.00"/>	<input type="text" value=""/>	One Year Prior	<input type="text" value=""/>	Overtime	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	Two Years Prior	<input type="text" value=""/>	Commission	<input type="text" value=""/>	Bonus	<input type="text" value=""/>	Other	<input type="text" value=""/>	Total	<input type="text" value="8,560.00"/>	<input type="text" value="8,560.00"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>												
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5. If your processing option is set to 3, choose one or more of the following options, depending on the contact method that the employee has checked:

- Print VOE Letter
- Save Document
- E-Mail VOE Letter

If you clicked the Save Document option, the letter will be saved to the C:\TEMP\ directory.

6. Review and change the following fields if necessary:

- Date Started
- Job Type/Step Description
- Continued Employment
- Pay Frequency
- Pay Class(H/S/P)
- Date Of Last Raise
- Amount Of Increase
- Date of Next Raise

- Pay Period Salary
 - Comment
7. Review and change the following compensation fields for the Current Year, One Year Prior, and Two Years Prior if necessary:
- Base
 - Overtime
 - Commission
 - Bonus
 - Other
8. Click OK.
- The Verification-of-Employment letter appears.
9. Choose Print from the Form menu.
10. If you have clicked the option to e-mail the letter, click Send or Cancel on the E-Mail Confirmation form asking whether you want to e-mail the request.

Processing Options for Verification of Employment (P05003)

User Level Tab

Use this processing option to specify the organizational level of the user who will perform verification of employment functions.

1. User Level:

1 or blank Employee

2 HR Clerk

3 HR Administrator

(Option 3 will not send a request

through Workflow.)

Use this processing option to specify whether this program will be used by an employee, an HR clerk, or an HR administrator. Valid values are:

Blank Employee

1 Employee

2 HR clerk

-
- 3 HR Administrator (This option will not send a request through Workflow.)

Note: If this program is used by an employee or an HR clerk, the approval process will be routed through workflow, where the Workflow Setup tab must be set up.

Workflow Setup Tab

Use this processing option to specify the user or users who will process verification of employment requests.

1. Address Number of VOE request processor (HRM):

Use this processing option to specify the address number of the HR person (or a distribution list) who will process VOE requests.

What You Should Know About Processing Options

The following list describes consequences and additional setup issues that you should be aware of when you choose one of the three processing options:

1-Used by Employee	Entering 1 instructs Workflow to notify the recipient of the pending request after the employee enters the request information. The recipient completes the verification-of-employment letter and can print the letter or e-mail it to the requested contact person. This value starts the process with the employee and finishes it with the Workflow recipient. If you enter this value, you must set up your recipient in the processing option on the Workflow Setup tab.
2-Used by HRM clerk	Entering 2 instructs Workflow to notify the recipient of the completed letter after the human resource management clerk enters the request information. The recipient approves the letter and can print or e-mail the letter directly to the contact person that the employee requested. This value assumes that the process has already started with the employee. The HRM clerk does not receive a Workflow message but sends the completed letter through Workflow to a recipient for approval. If you choose this value, you must set up your recipient in the processing option on the Workflow Setup tab.
3-Used by HRM administrator	Entering 3 deactivates Workflow in the Verification of Employment program. Because the human resources administrator starts and completes all requests, no need for Workflow exists. The HRM administrator can delete a request and also print the letter or e-mail it directly to the contact person that the employee requested.

Setting Up Information for New Employees

When you hire an individual, many administrative tasks must be completed before the employee starts working. The process of setting up a new employee can involve many different people, paper forms, and approvals, and equipment must be set up for the new employee. Delays in the paperwork or approvals sometimes impede preparation for the employee and contribute to lost productivity.

Managers Employee Setup automates most communication associated with preparation for a new employee's arrival. Using this automated approach, tasks can be set up and distributed, and approvals can be routed efficiently. Each process can be tracked to spot potential problems and avoid delays. Setup processes are enhanced by the Enterprise Workflow Management process. Workflow routes approval and notification messages to required people about tasks that need to be completed by a specific date. This process tracks critical dates and notifies the originator when delays occur.

Using Workflow to help complete the setup process for new employees reduces the risk of misplacing paper forms, informs appropriate personnel of tasks that should be completed by a certain date, and decreases time spent preparing for a new employee.

You can avoid lost productivity by reviewing each setup process to resolve possible delays and ensure that all preparation will be completed on time. When you need to reduce the setup interval, you don't have to wait until all the hiring processes are complete to start preparing for the new employee. As soon as the address book number has been entered into the system, you can create setup tasks to ensure that the new employee can start work on the first day of employment.

Setting up new employees consists of the following steps:

10. Add an employee record to the database.
11. Create setup tasks to prepare for the new employee in Managers Employee Setup.
12. Initiate the employee setup process. When you initiate the process, Workflow sends a series of approvals according to the setup tasks that you entered. Each setup task can do one or more of the following activities: run a report, send an e-mail message, create a work order, or start a Workflow process.

When you add an employee record using the Employee Setup program (P08710), the system automatically adds an employee record to the Address Book table (F0101) and an employee setup record to the Employee Setup table (F08710).

Alternatively, you can add a new employee record using any of the following programs:

- Employee Information (P0801)
- Applicant Entry (P08401)
- Personic or any third-party software that updates the F060116Z table

Note

When you use one of these programs, the system does not automatically add an employee setup record to the Employee Setup table. To add a setup record after you add an employee record, you must access the Employee Setup program and initiate the process for employee setup.

Adding an Employee Record Using Employee Setup

You must add an employee record to the database before you can initiate the employee setup process. If you have already added an employee record, proceed to the task *Initiating Employee Setup*.

If you are adding an employee record using any of the following programs, see the referenced information for adding an employee record, and then proceed to the task *Initiating Employee Setup*.

- Employee Information (P0801). See *Adding Employee Records One at a Time*.
- Applicant Information (P08401). See *Entering Applicant Information*.
- Personic or any third-party software that updates the F060116Z table. See *Appendix C: About Personic Workflow*.

Before You Begin

- Set the processing options for Employee Setup.
- Complete the setup tasks for the employee setup process. See *Setting Up the Employee Setup Process*.
- Set the processing options for Employee Quick Hire to activate the new hire process, which includes Employee Setup. You must also set these processing options to specify whether the system automatically updates the Employee Master table or the Unedited Quick Hire Transaction table when you add a record. For more information about these processing options, see *Adding Employee Records Using Employee Quick Hire*.

► To add an employee record using Employee Setup

From the Manager Self-Service Setup menu (G05BMSS1), choose Managers Employee Setup.

Alternatively, from the Employee Management menu (G05BE1), choose HRM Employee Setup.

Managers Employee Setup - [Work With Employee Setup]

Supervisor	8011	Watkins, Joshua	<input type="checkbox"/> Just Pending Tasks
Employee Number	*		
Process Status	*		

Employee Number	Name	Supervisor	Process Status	Date Created	Pending Tasks	Er S
8012	Edwards, Angela	8011	Active	3/12/99	N	

Find records Row:1

1. On Work With Employee Setup, choose Quick Hire from the Form menu.
2. On Employee Quick Hire, add a new employee record.

See *Adding Employee Records for Applicants, Rehires, and New Hires*.

After you click OK on the Employee Quick Hire form, the system returns you to the Work With Employee Setup form and displays the employee with a Pending status. Proceed to the task *Initiating Employee Setup*.

Processing Options for Managers Employee Setup (P08710)

Processing Tab

These processing options specify the default values that the system will use to determine approval requirements and distribute workflow messages when managers or HR personnel perform employee setup functions.

1. Require Process Approval

1 = Yes

0 = No

Use this processing option to specify whether to require a manager's approval for the employee setup process before the system processes any of the setup

tasks.

This approval is for the entire setup process. To create additional security, you can set up a requirement for the system to send an approval message for each setup task.

2. Allow Changing Process Approver

1 = Yes

0 = No

Use this processing option to specify whether to allow a manager the authority to change the individual who can approve the employee setup process. The default setting is the manager's supervisor. For cases in which the manager has no supervisor, and the first processing option is set to require process approval, the manager has the approval authority.

3. Work Center Mail Box

Blank = 01 (Personal In Basket)

Use this processing option to specify the mailbox number in the Employee Work Center of the individual to whom you want to send your notifications and approval messages.

To create a new mailbox number, you must add a record to UDC table 02/MB.

User Level Tab

This processing option specifies the organizational level of the user who will perform employee setup functions.

1. User Level

1 = Manager/Employee Level (Default)

2 = HR Administrator Level

Use this processing option to specify whether the application will be used by

a manager (including a manager's delegate) or HR personnel. Valid values are:

- Blank Manager
 - 1 Manager or manager's delegate
 - 2 HR Personnel
-

Defaults Tab

This processing option specifies the end status of the employee setup process when you successfully complete it.

1. Ending Setup Status

Blank = 1 (Completed)

Use this processing option to specify the status to which you want the employee setup process changed when the process completes successfully. The status codes are listed in UDC table 08/S1. Valid values are:

- 1 Completed
 - 7 Archive
 - 8 Purge
-

Work Orders Tab

These processing options specify the statuses the system uses to identify pending, active, and cancelled work orders, the record type to use for writing instructions for a work order, and whether the system automatically supplies the description of the employee setup task when you create a new work order.

1. Pending W.O. Status Code (Required)

Use this processing option to specify the status that the system will use to identify pending work orders. The system places a work order in pending status when the setup task has been initiated but is waiting for the user to enter an effective date or location information.

2. Active W.O. Status Code (Required)

Use this processing option to specify the status that the system will use to identify active work orders. The system places a work order in active status when the setup task has been initiated, the effective date has been reached, and the user has entered the location information.

3. Cancelled W.O. Status (Required)

Use this processing option to specify the status that the system will use to identify cancelled work orders. The system places a work order in cancelled status when the user ends the setup task.

4. Record Type used when creating Work Order instructions

Blank = A

Use this processing option to specify the record type that you want to use when you are writing instructions for a work order. The default value is A.

5. Copy Task Description to Work Order

1 = Yes

0 = No

Use this processing option to specify whether the system will copy the description of the employee setup task contained in the F087102 table into the description field of the work order when you create a new work order. Valid values are:

- 1 Copy the description from the setup task record.**
- 0 Use the description from the work order template.**

Initiating Employee Setup

After you add an employee record, you can assign setup tasks to the employee's setup record and then initiate the setup process.

Depending on how one of the processing options has been set, the entire employee setup process might require approval. Workflow will deliver an approval form for the process and wait for confirmation before it starts individual tasks that you have assigned to the employee record.

Most setup tasks are specific to the location where the employee will be working. You can choose tasks from a default task list that displays setup tasks for every employee by job type and job step. You can also choose tasks from a setup task list that includes all defined tasks. You can change tasks to customize the employee's setup. However, this could reinstate the process approval depending on the task specifications.

Each setup task can do one or more of the following activities, depending on how the tasks have been set up: run a report, send an e-mail message, create a work order, or start a Workflow process.

Information that you enter in the tabbed area of the Employee Entry Setup form updates the Employee Setup Master table (F08710). Information that you enter in the detail area of the form updates the Employee Setup Tasks table (F08711).

Before You Begin

- Set the Employee Quick Hire processing options. See *Processing Options for Employee Quick Hire*.

► To initiate employee setup

If you added an employee record using a program other than the Employee Setup program, from the Manager Self-Service menu (G05BMSS1), choose Managers Employee Setup.

Alternatively, from the Employee Management menu (G05BE1), choose HRM Employee Setup.

If you just added an employee record using the Employee Setup program, continue with the task.

1. On Work With Employee Setup, if you used the Employee Setup program to add an employee record, go to step 3.
2. If you added an employee record with a program other than Employee Setup, complete any of the following fields and click Find:
 - Supervisor
 - Employee Number
 - Process Status
3. Choose the employee record and click Add.

4. If you added an employee record with a program other than Employee Setup, on Employee Setup Entry, complete the following fields on the Employee tab:
 - Address Number
 - Setup Action

The system supplies the header fields.
5. To add default tasks, choose Add Default Tasks from the Form menu.
If default tasks are set up for the new employee's job type and step, the system supplies the default tasks on the Employee Setup Entry form.
6. To add or change the subclass for a task, review the following fields:
 - Lock Code
 - Ranking

If a value is in the Lock Code field, you can change the subclass only to a level that is equal to or less than the value in the Ranking field.
7. Complete the following field with a value that is equal to or less than the value in the Ranking field:
 - Sub Class
8. Complete the following optional field:

- UM
9. If the task is an equipment-setup task and you need more than one unit, complete the following field:
- Units
10. Review the system-supplied information in the following grey fields:
- Order Number
 - Task Recipient
 - Approved By
 - Req. Flds
- You cannot change these fields.
11. Click the Location tab and review the following field to determine the number of Location Code fields that you need to complete for this task:
- Required Fields
12. Complete as many of the following Location Code fields as are required. For example, if four fields are required, then complete Location Code 001 through 004.
- Location Code 001
13. Complete the following optional field:
- Office Number
14. To assign an additional task, complete the following field and repeat steps 6-13:
- Task Type
- If you complete the process approval task, you do not need to repeat steps 6-13.
15. To copy tasks from another employee, complete the following field and click the Copy Employee's Tasks option on the Form menu.
- Address Number
- The system supplies the detail area with tasks from the specified employee. You can copy tasks only from employees who have the same Setup Action value as the employee that you are setting up.
16. When you finish entering all tasks for the employee's setup, click OK.
- Your new employee record displays on Work With Employee Setup and shows Pending in the Process Status column.
- The Activation Confirmation form appears asking whether you want to activate the employee setup process.

17. Choose Yes to begin the process. If you choose No, the system leaves the status of the process as Pending. You will need to come back to this form to activate the process. See [Completing Employee Setup Using Workflow](#).

Completing Employee Setup Using Workflow

After you initiate employee setup, Workflow completes one or both of the following procedures depending on how the processing options are set:

- Obtains a process approval
- Obtains a task approval for each employee setup task that includes an approval requirement

If the system requires a process approval, Workflow will not begin each employee setup task until it obtains the process approval.

Workflow can complete any or all of the following processes for each setup task:

- Create a work order
- Create a report
- Send an e-mail
- Start an additional Workflow process

When specified in the processing option, the system will require a process approval for the entire setup process. Examples of this approval are an acknowledgment from a supervisor in the new employee's department, or a salary approval before an individual is hired. When the system requires a process approval, it sets the task status to Pending (as defined in Setup Task Status list 08/S1) until the designated manager approves the task. When the designated manager approves the task, the system resets the task status to Approved and starts each task within the process, except for tasks that include a future start date. The system starts tasks with a future Start Date on the appropriate date.

Individual tasks and changes to tasks might also require approval. For example, if the task for installing an employee telephone does not require an approval, Workflow will not send an e-mail approval form. However, you can set up this task to require an approval if a manager changes the task to install a phone with multiple features.

When a task requires approval, Workflow first verifies that the manager who entered the employee setup record also entered data in the required fields that identify the location of the new employee's workspace. If values are missing, Workflow delays the process and sends an e-mails message to the manager. When the manager enters the required data, Workflow sends an e-mail approval form to the approver who has been specified for the task. The system then sets the task status to Waiting (defined in Setup Task Status list 08/S2) until it is approved. When the designated manager approves the task, the system sets the task status to Approved and starts processing the task.

As part of each task, Workflow can send an e-mail message, run a customized report, create a work order, and start an additional Workflow process. An e-mail message can contain the employee's name and location information, the description of the task, a requested completion date, and an employee's comments about the task. You can send an e-mail message to notify a recipient that the system ran a report. You can also link a work order to the setup task.

Most setup tasks require data entry to move the status to Completed. When task recipients complete their work and enter the completion in the system, the system sets the task status to Completed.

You can review and revise the task status for the entire setup process and for individual tasks. You can delete a task if it is in the Pending status. You can cancel a task if it is in the Waiting, Approved, or Active status. If you do not activate the employee setup process when you add an employee setup record, you can activate the process after your review.

Completing the employee setup process using Workflow consists of the following procedures:

- *Approving the process or task for employee setup*
- *Reviewing and revising the status*

Managers who are responsible for approving the process for new employee setup or the individual tasks within the process should complete these procedures.

Before You Begin

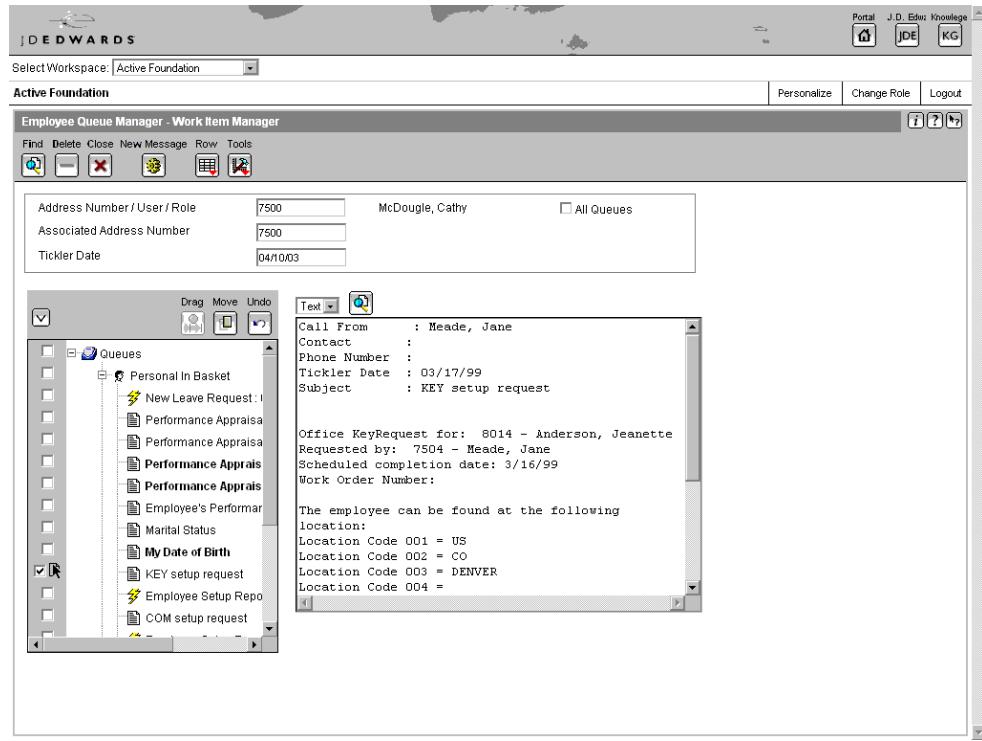
- Review the status codes from UDCs 08/S1 and 08/S2. See *User Defined Codes for Workforce Management Foundation*.

► To approve the process or task for employee setup

From the Workflow Management menu (G02), choose Employee Queue Manager.

1. On Work With Employee Queue Manager, verify that your name appears in the following field and click Find:
 - Skip To Name
2. Choose your record and click Select.
3. On Work Center, click the icon in the left queue that receives Employee Setup messages.

All setup requests appear that are pending approval.



4. Click the message that you want to see.

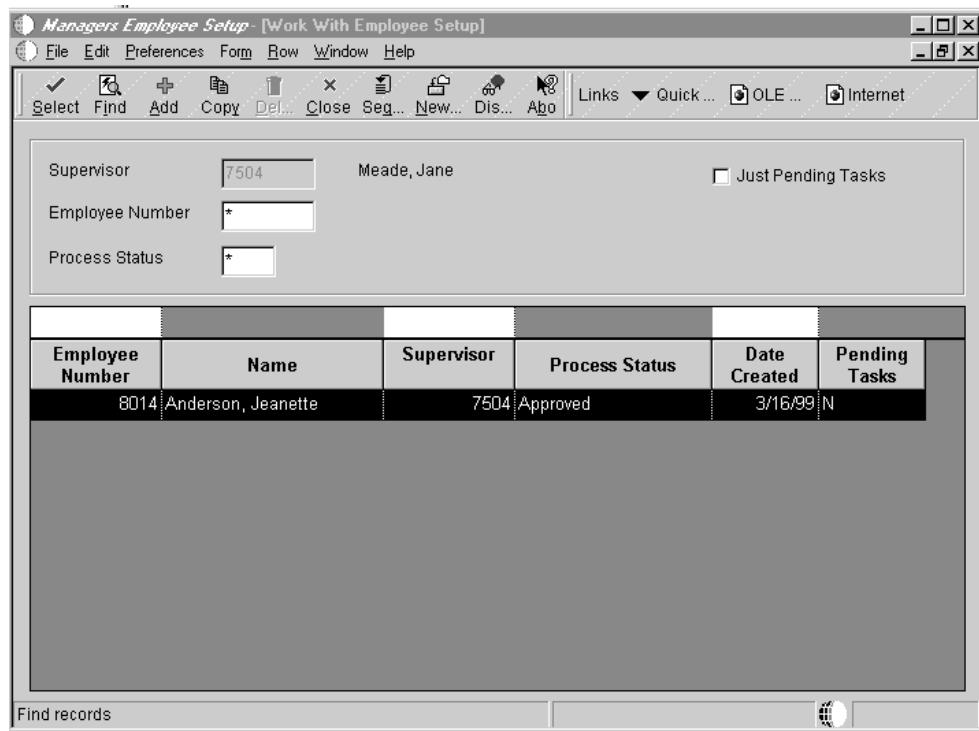
The message appears in the right queue.

5. If the message allows you to complete a task, click the icon that describes the task in the middle of the form.
6. Click the icon in the right queue.
7. On To Approve or Reject a Request, choose one of the following options in the Actions area and click OK.
 - Approve
 - Reject
8. On Employee Queue Manager, click Close.

► To review and revise the status

From the Manager Self-Service menu (G05BMSS1), choose Managers Employee Setup. Or from the Employment Management menu (G05BE1), choose HRM Employee Setup.

1. On Work With Employee Setup, complete the following fields and click Find:
 - Supervisor
 - Employee Number
 - Process Status



2. Choose a record.

3. To cancel the process, choose Cancel Process from the Row menu.

When you cancel a process, the task record remains in the system.

4. To delete the process, choose Delete.

You can delete a process or task record only while it is in the pending status, before you submit it. When you delete a process, the task record is removed from the system.

5. To activate the process, choose Process Tasks from the Row menu.

6. Click Select to review the status for individual setup tasks.

Tasks with a Y in the Pending Tasks column are pending. Although you previously submitted tasks with an N, you can also review them to track their progress.

The screenshot shows the 'Managers Employee Setup - Employee Setup Entry' screen in PeopleSoft. At the top, there's a toolbar with buttons for OK, Delete, Cancel, Form, Row, and Tools. Below the toolbar, there are tabs for Employee, Location, and Instructions, with 'Employee' selected. The main area contains several input fields: Address Number (2129), Supervisor (7500), Process Status (P), Home Business Unit (5000), Job Type/Step (OA-10), Employee Exists in (F060116), Setup Action (H), Start Date (03/15/98), Arrival Date (03/15/98), Date Created (08/29/03), and Setup ID (2330). Below these fields is a grid titled 'Records 1 - 7' with the following data:

Task Type	Sub Class	Task Description	Task Status	Units	UM	Order Number	Task Recipient	Approved By	Ren. Flds	Ranking
COM	COMDESK	Desktop Computer	Pending	1.00					3	0
BIG		Name Badge	Pending	1.00					3	0
PHN		Phone	Pending	1.00					3	0
KEY	KEYBLD	Building Key	Pending	1.00					3	0
KEY	KEYOFC	Office Key	Pending	1.00					3	0
APV		Approval	Pending	1.00			7500		0	0

- On Employee Setup Entry, review the Task Status field for each task in the detail area.

The Task Status field displays the status for an individual setup task. You can delete the task if the status is Pending. A task is pending only if you have not submitted it for processing. You can abort the task if the status is Waiting, Approved, or Active.

- To cancel a task, choose the task, choose Abort Task from the Row menu, and then click OK.

When you cancel a task, the system sets the task status to Cancelled by User.

- To complete a task in the system after the task recipient finishes the work, choose the task, click Complete Task, and then click OK.

When you complete a task, the system sets the task status to the value that you specified in the Final Task Status field on the Work With Setup Task Details form.

Approving Information Using Manager Self-Service

Employees can use self-service to enter and update some of their personal information, such as name and address, emergency contact, and so on. Some types of information that employees enter, such as automatic deposit information and competency information, must be reviewed and approved by someone else before the database is updated.

If you are a representative of your organization's payroll department, you might be responsible for approving the automatic deposit information that employees add or change. In some cases, the routing number for an employee's bank might not exist in the user defined code list for routing numbers (06/BC). You can use self-service to approve automatic deposit information and the addition of new routing numbers.

As a manager, you can use self-service to review competency information for your subordinates. You can also enter the level of proficiency that each employee demonstrates in these competencies.

Approving Automatic Deposit Information

If you are a representative of the payroll department, you might be responsible for approving the automatic deposit information that employees enter through self-service. If Enterprise Workflow Management is enabled, you receive a message in the Employee Message Center when automatic deposit information is awaiting your approval. You must verify that the employee correctly completed all of the necessary information, and then approve or disapprove the request. If necessary, you can enter a response to the employee. Workflow includes your response in the e-mail message that notifies the employee of the status of the request.

► To approve automatic deposit information

From the Workflow Management menu (G02), choose Employee Work Center.

1. On Work Center, choose the message that you need to view, and then complete the steps for reviewing messages.
See [Viewing Messages](#).
2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Review/Validate Automatic Deposit Instructions, review the information in the Current Instructions fields.
5. Review the information in the following field:

- Bank Trnst No.

If the employee entered the incorrect routing number for the bank, you can correct it.

6. Complete the following optional field:
 - Payroll Clerk's Response
7. Choose one of the following options and click OK:
 - Approve
 - Disapprove

Approving Bank Information for Automatic Deposits

Occasionally, when an employee enters automatic deposit information using self-service, the employee might discover that the routing number for the bank where the account resides is not one of the valid values in the Routing Number field. In this case, the employee can submit a request to have the bank's routing number added to the list of values. If you are a representative of the payroll department, you might be responsible for approving the employee's request before the system adds the new bank number to user defined code list 06/BC.

If Enterprise Workflow Management is enabled, you receive a message in the Employee Message Center when bank information is awaiting your approval. You must verify that the employee correctly completed all of the necessary information, and then approve or

disapprove the request. If necessary, you can enter a response to the employee. Workflow includes your response in the e-mail message that notifies the employee of the status of the request.

When you approve the employee's request, the system updates user defined code list 06/BC.

► To approve bank information for automatic deposits

From the Workflow Management menu (G02), choose Employee Work Center.

1. On Work Center, choose the message that you need to view.
See *Viewing Messages*.
2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Add Bank Transit Number, review the information in the following fields and correct it, if necessary:
 - Bank Name
 - Bank Routing Number
5. Add optional information to the Payroll Clerk's Response text area
6. Choose one of the following options and click OK:
 - Bank Added
 - Bank Not Added

Approving Competency Information

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. These qualifications, such as knowledge, skills, and training, are called *competencies*.

Your organization uses competency management to track the competencies that each employee possesses and to compare these competencies with those that are required for the employee's job. Tracking employee competencies helps you create clear career goals and performance objectives for the employees who work for you.

To simplify the process of maintaining competency information, employees can use self-service to enter and revise their own competency information. You might be responsible for approving the information that employees enter and entering the employee's level of proficiency in certain competencies. In this case, you receive a message in the Employee Message Center after an employee enters competency information. You must then review the information and enter a level of proficiency for each competency.

► To approve competency information

From the Workflow Management menu (G02), choose Employee Work Center.

1. On Work Center, choose the message that you need to view.
See *Viewing Messages*.

2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Training/Development, Skills, Accomplishments, Certifications, Education, or Language, complete all of the following fields that apply, and then click OK:
 - Competency Level
 - Verified By
 - Verification Method

Self-Service Setup

Setting up self-service is a task that should be performed by the system administrator.

Employees access self-service through a series of web pages on your company's intranet site that allow them to complete such tasks as requesting a verification-of-employment letter or changing name, address, and emergency contact information. In addition to employee functions, managers can also use the Manager's Workbench as a centralized location from which they can perform such tasks as employee status changes, the manager's personal self-service functions, creation of delegates, and various reviews. These web pages correspond to self-service programs in OneWorld.

OneWorld provides web pages for all self-service programs, as well as a logon page and a menu page. These pages are fully functional and you can use them without modification. You can also create customized self-service web pages. For example, if you want to put your own company's logo on the web pages, you need to create customized web pages.

See [OneWorld Web-Based Solutions Overview](#) for information about using the HTML generator to create web pages for self-service.

Setting Up Employee Self-Service

Use Manager Self-Service to set up and customize employee self-service programs that you are running in an intranet environment. You can specify many appearance options and offer employees self-service options that are tailored to meet organizational requirements.

Setting Up Verification of Employment

The Review Requests for Verification of Employment program (P05003) uses a review form and an entry form. The review form is the entry point to Verification of Employment. The entry form has two tabs, Request Information and Employment Data. Employees use the Request Information tab to request that a verification of employment letter be sent to a specific individual or company, such as a creditor or loan officer. On the Employment Data tab, a Human Resources administrator or system administrator can enter information pertaining to the employee, such as the date that employment began. The system calculates and supplies the employee's earnings based on the Pay Type by Category table (F05002). Only the system administrator can change the employee's earnings fields on the Employment Data tab. The administrator can also e-mail the completed letter directly to the contact whom the employee requested.

The fields on the Employment Data tab are active only when an administrator is logged on to the self-service system. When an employee is logged on, the information on the Employment Data tab is visible. However, the employee cannot change that information.

Information entered on the Review Requests for Verification of Employment program (P05003) updates the Verification of Employment Data table (F05003).

For the system to accurately report pay information on verification-of-employment letters, you must add certain pay types to the pay categories that you define in user defined code list 05/V1. For example, you might link a holiday bonus pay type and an annual bonus pay type to the bonus category.

When you set up verification of employment, you update the Pay Type By Category table (F05002).

Note

The task for requesting a verification of employment letter can include the Enterprise Workflow Management system. If your processing options are set up appropriately, Workflow notifies the individual responsible for processing the request after the request information is entered.

Before You Begin

- ❑ Verify that your verification-of-employment letter is complete. Select and review the VOEREQUEST in the MailMerge WorkBench Setup P980014. You must also hard code a company signature and phone number on the letter. See [Changing Mailmerge Documents](#).
- ❑ Set up verification of employment categories for pay information in user defined code list 05/V1. See [Understanding User Defined Codes](#) and [Changing a User Defined Code](#).
- ❑ Set up the common settings for self-service. See [Setting Up Common Settings for Human Resources](#).
- ❑ Set up the processing options for verification of employment. See [Entering Data for Verification-of-Employment Letters](#).

► To set up verification of employment

From the Self-Service Setup menu (G05BESS4), choose VOE Pay Types by Category.

1. On Work With Verification of Employment Categories, click Add.

The screenshot shows a PeopleSoft application window titled "VOE Pay Types by Category - Work With Verification of Employment Categories". The window has a toolbar with "Select", "Find", "Add", "Close", and "Tools" buttons. A search bar labeled "VOE Category" is present. Below the toolbar is a grid titled "Customize Grid". The grid has columns: VOE Category, PDBA Code, Description, Eff From, and Eff Thru. The first row is highlighted in grey and contains the value "BASE" in the VOE Category column. The second row contains "4 1st/Last Chk". The third row contains "300 Sick Pay". The fourth row contains "801 Vacation". The fifth row contains "805 Holiday Pay". The sixth row contains "811 Vacation". The seventh row contains "815 Vacation". All rows have "01/01/99" in the Eff From and Eff Thru columns.

VOE Category	PDBA Code	Description	Eff From	Eff Thru
BASE		1 Regular	01/01/99	01/01/99
BASE	4 1st/Last Chk		01/01/99	
BASE	300 Sick Pay		01/01/99	
BASE	801 Vacation		01/01/99	
BASE	805 Holiday Pay		01/01/99	
BASE	811 Vacation		01/01/99	
BASE	815 Vacation		01/01/99	

2. On VOE Pay Types by Category, complete the following fields and click OK:
 - VOE Category
 - PDBA Code
 - Eff From

Setting Up Name and Address Change

The Employee Name and Address Change form displays the employee's current name and address and allows the employee to enter a new name and address. You can attach a personal photo of the employee as a media object to the Personal tab of the Name and Address Change form.

Information entered in Employee Name and Address Change program (P05101) updates the Address Book table (F0101).

When the employee enters a city, state, or postal code change, Workflow can notify a human resource administrator about the change so that payroll files can be updated manually. For example, a human resource administrator should update any employee's change of resident tax areas. Make sure you set your processing option with the address number of the employee who is to receive these notifications.

Before You Begin

- To attach personal photos to the Personal tabs on Name and Address forms, see [Attaching Media Objects](#).

- Set up the processing options for Employee Name and Address Change. See [Changing Name and Address Information](#).

Setting Up Emergency Contacts and Phones

The Emergency Contacts and Phones program (P053010) lets employees enter the names and phone numbers of individuals that should be contacted in the event of an emergency. Information entered on the Emergency Contact and Phones form updates the Address Book-Contact Phone Numbers table (F0115).

Before You Begin

- Set up the common settings for self-service. See [Setting Up Common Settings for Human Resources](#).

Setting Up Paid Time-Off Inquiry

The Paid Time Off Inquiry program (P053020) shows an employee's paid time-off accruals, deductions, and balances. The system lists the number of hours available at the beginning of the year, the number of hours that have since been added to the available DBA code, the number of hours taken, and the number of hours that are currently available.

The program includes four versions that allow you to specify the history table from which the system retrieves paid time off information, either the Employee Transaction History Summary table (F06146) or the Fiscal and Anniversary Year History table (F06147). You specify the version that the system uses for Paid Time-Off Inquiry for employee self-service and the version that it uses for Paid Time-Off Inquiry for manager self-service.

Before You Begin

- Set up the common settings for self-service. See [Setting Up Common Settings for Human Resources](#).

Setting Up Time Entry for Self-Service

The Time Entry Floods program (P051191) for self-service allows employees to enter timecards using either the Daily Time Entry program (P051141) or the Time Entry by Line Detail program (P051131). The Daily Time Entry program might be preferable for employees who need to report their time every day. This program reduces typing time because the form includes the days of the week on the entry grid. Employees can access either program from the Time Entry-Web Self Service form (W051191F).

Employees can use the Time Entry-Web Self Service form to review past check stubs.

Information entered on the Self Service Time Entry form updates the Employee Transaction Detail File table (F06116).

Before You Begin

- Set up the common settings for self-service. See [Setting Up Common Settings for Human Resources](#).

You can access the following processing options for daily time entry with the Interactive Versions program (P983051). You must inquire on P051191. You can access the processing options for Time Entry Per Pay Period from P051191.

Processing Options for Daily Time Entry (P051191)

Display Tab

Use these processing options to specify information to display on the Employee Master Filter form, the Current Transactions Filter form, and the Historical Transactions Filter form.

1. Employee Master Tabs

Category Codes 001 - 008

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing category codes 001-008 on the Employee Master Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 001-008 for determining selection criteria for the filter. If you have not defined category codes 001-008, it is not necessary to display this tab.
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes 001-008 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001-010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011-020.

Category Codes 009 - 016

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab

containing category codes 009-016 on the Employee Master Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 009-016 for determining selection criteria for the filter. If you have not defined category codes 009-016, it is not necessary to display this tab.
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes 009-016 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001-010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011-020.

Category Codes 017 - 020

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing category codes 017-020 on the Employee Master Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 017-020 for determining selection criteria for the filter. If you have not defined category codes 017-020, it is not necessary to display this tab.
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes 017-020 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001-010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define

category codes 011-020.

Organization

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing organization information on the Employee Master Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, supervisor, and check route code for determining selection criteria for the filter.
- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, supervisor, and check route code for determining selection criteria for the filter.

Other

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing "other" information on the Employee Master Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use information contained in the "other" tab, such as last business unit worked, benefit group, shift code, job type, and job step and pay cycle code for determining selection criteria for the filter.
- 1 Display this tab on the form. By displaying this tab, you will be able

to use information contained in the "other" tab, such as last business unit worked, benefit group, shift code, job type, and job step and pay cycle code for determining selection criteria for the filter.

2. Current Transactions Tabs

Organization

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing organization information on the Current Transaction Filter form.

Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, batch number, and shift code for determining selection criteria for the filter.
- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, batch number, and shift code for determining selection criteria for the filter.

Subledger

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing subledger information on the Current Transaction Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type for determining selection criteria for the filter.

-
- 1 Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type for determining selection criteria for the filter.

Category Codes (001-004)

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing category codes 001-004 on the Current Transactions Filter form.

Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 001-004 for determining selection criteria for the filter. If you have not defined category codes 001-004, it is not necessary to display this tab.

- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes 001-004 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001-010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011-020.

3. Historical Transactions Tabs

Organization

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing organization information on the Historical Transaction Filter form.

Valid values are:

-
- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, job location, and shift code for determining selection criteria for the filter.
 - 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, job location, and shift code for determining selection criteria for the filter.

Subledger

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing subledger information on the Current Transaction Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type for determining selection criteria for the filter.
- 1 Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type for determining selection criteria for the filter.

Category Codes (001-004)

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing category codes 001-004 on the Historical Transactions Filter form.

Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 001-004 for determining selection criteria for the filter. If you have not defined category codes 001-004, it is not necessary to display this tab.

-
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes 001-004 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001-010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011-020.

Line Detail Time Entry Tab

Use these processing options to specify the version of the Time Entry Master Business Function (P050002A) to use, the information to display, and whether you want to prevent changes to timecards that are locked by another user on the Line Detail Time Entry form.

1. Time Entry Changes

1 = Prevent changes

0= Do not prevent changes

Use this processing option to specify whether you want to prevent changes to and deletion of timecards locked by another user when using the Line Detail Time Entry form. Valid values are:

- 0 Do not prevent changes to time entry on this form.
- 1 Prevent changes to time entry on this form.

2. Time Entry Version

Enter a specific version

Blank = Default version

Use this processing option to specify the version of the Time Entry Master Business Function (P050002A) that you want to use when processing timecards

using Line Detail Time Entry. If you leave this processing option blank, the system uses the default version, ZJDE0001.

3. Line Detail Display Tabs

Category Codes

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing category codes on the Line Detail Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes as default information on timecards entered using the Line Detail Time Entry form. If you have not defined category codes, it is not necessary to display this tab.
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes as default information on timecards entered using the Line Detail Time Entry form.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001-010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011-020.

Organization

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab

containing organization information on the Line Detail Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Line Detail Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Line Detail Time Entry form.

Subledger

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing subledger information on the Line Detail Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Line Detail Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Line Detail Time Entry form.

Daily Time Entry Tab

Use these processing options to specify the day of the week on which your work week begins, the version of the Time Entry Master Business Function (P050002A) to use, the information to display, and whether you want to prevent changes to timecards that are locked by another user on the Daily Time Entry form.

1. Time Entry Week Begin Day

Use this processing option to specify the day of the week on which your work week begins for time accounting purposes. When entering a work week begin date on the Daily Time Entry form, that date must be on the day of the week specified in this processing option. Valid values are:

- 1 Monday
- 2 Tuesday
- 3 Wednesday
- 4 Thursday
- 5 Friday
- 6 Saturday
- 7 Sunday

2. Time Entry Changes

1 = Prevent changes

0 = Do not prevent changes

Use this processing option to specify whether you want to prevent changes to and deletion of timecards that are locked by another user when using the Daily Time Entry form. Valid values are:

- 0 Do not prevent changes to time entry on this form.
 - 1 Prevent changes to time entry on this form.
-

3. Time Entry Version

Enter a specific version

Blank = Default version

Use this processing option to specify the version of the Time Entry Master Business Function (P050002A) that you want to use when processing timecards using Daily Time Entry. If you leave this processing option blank, the system uses the default version, ZJDE0001.

4. Daily Time Entry Display Tabs

Category Codes

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing category codes on the Daily Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes as default information on timecards entered using the Daily Time Entry form. If you have not defined category codes, it is not necessary to display this tab.
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes as default information on timecards entered using the Daily Time Entry form.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001-010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011-020.

Organization Tab

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing organization information on the Daily Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Daily Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Daily Time Entry form.

Subledger Tab

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing subledger information on the Daily Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Daily Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Daily Time Entry

form.

Time Sheet Time Entry Tab

Use these processing options to specify the version of the Time Entry Master Business Function (P050002A) to use, the information to display, and whether the system automatically supplies address numbers and pay types on the Time Sheet Time Entry form.

1. Time Entry Version

Enter a specific version

Blank = Default version

Use this processing option to specify the version of the Time Entry Master Business Function (P050002A) that you want to use when processing timecards using Time Sheet Time Entry. If you leave this processing option blank, the system uses the default version, ZJDE0001.

2. Time Sheet Display Tabs

Category Codes

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing category codes on the Time Sheet Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes as default information on timecards entered using the Time Sheet Time Entry form. If you have not defined category codes, it is not necessary to display this tab.
 - 1 Display this tab on the form. By displaying this tab, you will be able to use category codes as default information on timecards entered using the Time Sheet Time Entry form.
-

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001-010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011-020.

Organization

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing organization information on the Time Sheet Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Time Sheet Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Time Sheet Time Entry form.

Subledger

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing subledger information on the Time Sheet Time Entry form. Valid values are:

-
- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Time Sheet Time Entry form.
 - 1 Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Time Sheet Time Entry form.

Pay Info

0 = Hide Tab

1 = Display Tab

Use this processing option to specify whether you want to display the tab containing pay information such as pay type, hours, and lump sum on the Time Sheet Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use pay information such as pay type, hours, and lump sum as default information on timecards entered using the Time Sheet Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use pay information such as pay type, hours, and lump sum as default information on timecards entered using the Time Sheet Time Entry form.

3. Time Entry Defaults

Address Number

1 = Supply address number

0 = Enter address number

Use this processing option to specify whether the system automatically supplies the address number from the previous timecard if you tab through the address number field. Valid Values are:

- 0 Enter the Address Number Manually. Use this selection if you do not wish to have the address number supplied from the previous timecard.
- 1 System Supplies Address Number. Use this selection if you wish to have the address number supplied from the previous timecard.

Pay Type

1 = Supply pay type

0 = Enter pay type manually

Use this processing option to specify whether the system automatically supplies the pay type from the previous timecard if you tab through the pay type field. Valid Values are:

- 0 Enter the Pay Type Manually. Use this selection if you do not wish to have the pay type supplied from the previous timecard.
- 1 System Supplies Pay Type. Use this selection if you wish to have the pay type supplied from the previous timecard.

Profit Management Tab

Use this processing option to specify whether entry of the Activity Code is optional.

1. New Zealand Holiday Pay Act.

0 - Do not apply Act rules.

1 - Do apply Act rules.

Localization Tab

Use this processing option to specify whether the New Zealand Holiday Pay Act rules apply when entering vacation taken timecards.

Linked Information Not Found

Use this processing option to specify whether the New Zealand Holiday Pay Act should be applied when entering vacation taken timecards. Valid values are:

0

Do not apply the New Zealand Holiday Pay Act when entering vacation taken timecards.
(Default)

1

Apply the New Zealand Holiday Pay Act when entering vacation taken timecards

What You Should Know About Processing Options

Accessing the processing options You can access the processing options for Daily Time Entry and Time Entry Per Pay Period with the Interactive Versions program (P983051). You must inquire on P051191.

Employee Self-Service Benefits Setup

Setting up self-service benefits is a task that should be performed by the system administrator. The administrator can set up the desired features for employee self-service benefit selections. The administrator can also enable security functions to limit employees from viewing or changing other employees' confidential records.

Employees access self-service benefits through a series of web pages on your company's intranet site that allow them to complete such tasks as changing benefit options or changing name, address, and emergency contact information.

OneWorld provides web pages for all self-service programs, as well as a logon page and a menu page. These pages are fully functional and you can use them without modification. You can also create customized self-service web pages. For example, if you want to put your own company's logo on the web pages, you need to create customized web pages. You can organize your web-based benefits enrollment program under a menu structure based on employment events such as new hire and rehire, and life events such as children or marriage. You might create a menu from which the employee selects the event or reason for changing enrollment. If the employee selects marriage, for example, the version of the web page that allows changes associated with marriage is used.

See *OneWorld Web-Based Solutions Overview* for information about using the HTML generator to create web pages for self-service.

You can use processing options to set up different versions of the Self-Service Director application (P05410). For example, you might set up custom versions for enrollment event codes that are similar to the following versions that are included in your software:

New Hire Enrollment	NHR (New Hire)
Rehire Enrollment	RHR (Rehire)
Marriage	MAR (Marriage)
Divorce	DIV (Divorce)
Children	CHD (Children)
Open Enrollment	OPN (Open Enrollment)

Employee Self-Service Benefits Setup includes only those instructions that are required to set up employee self-service benefits. See *Setting Up Employee Self-Service* to set up other self-service features. See *Benefits Administration Setup* to set up employee benefits. These instructions assume that the setup procedures for employee benefits are complete.

Setting Up Common Display Settings for Self-Service

The setup process to provide employees with the opportunity to define and control their benefit selections begins with enabling your enhanced employee self-service software. By setting this control appropriately, you can access the necessary programs to define your self-service offerings. You can also define the primary care physician setting.

► To set up common display settings for self-service benefits

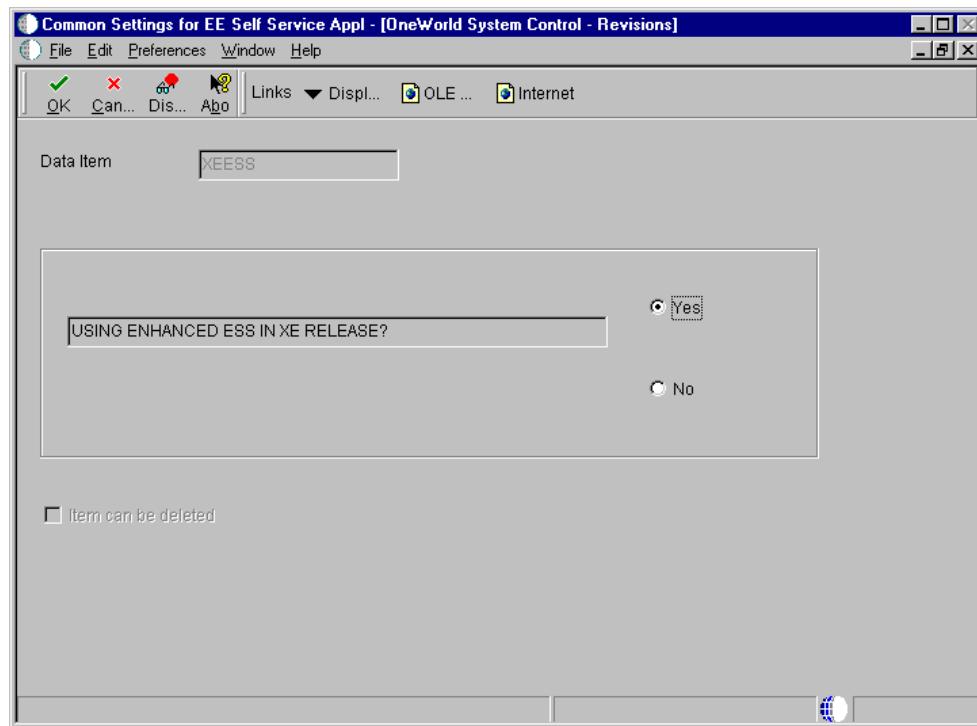
From the Self Service Setup menu (G05BESS4), choose Common Settings for EE Self Service Appl.

Data Item	Description	Current Setting	Updated By	Date Updated
PCPN	Is PCP Number Mandatory in ESS?	Yes	RW6382311	5/24/01
PCPV	Are you Tracking the PCP Visited Flag?	Yes	RW6382311	5/24/01
PID	Program ID	Yes	HB6956361	2/23/01
PLNGRP	Plan Grouping Code	Yes	HB6956361	2/23/01
PNDSS	Display Participant No. on Self Service?	Yes	MS238060	3/8/99
SCTDES	Short Category Description	Yes	HB6956361	2/20/01
SHCEOV	Display Overrides Outside Benefit Group?	Yes	KT6078909	10/14/99
SHPER	Display Personal Tab in Self Service?	Yes	KT6078909	10/14/99
SPLDES	Short Plan/Plan Option Description	Yes	HB6956361	2/23/01
TXDSS	Display Tax ID On Self Service?	Yes	KT6078909	6/26/01
UPMJ	Date - Updated	Yes	HB6956361	2/23/01
UPMT	Time - Last Updated	Yes	HB6956361	2/23/01
USER	User ID	Yes	HB6956361	2/23/01
W4NMCHFL	Flag, Name Change	Yes	KT6078909	8/10/00
XEESS	Using Enhanced ESS in XE Release?	Yes	RP1411506	4/25/01

1. On Work With HRM Common Display Settings, review the following data items:

- PCPN Determines whether the system requires a primary care physician number for self-service health and welfare benefit plans or benefit plan options that are set up to track primary care physician information.
- PCPV Determines whether the system tracks an employee visit with a primary care physician.
- XEESS Determines whether enhanced employee self-service software is being used instead of standard employee self-service software in the Xe release of OneWorld.

2. To change the current setting for an item, choose the data item and then click Select.



3. On OneWorld System Control - Revisions, choose either the Yes or No option, and then click OK.
4. To add data items, on Work With HRM Common Display Settings, click Add.
5. On OneWorld System Control - Revisions, complete the following field:
 - Data Item
6. Choose either the Yes or No option and click OK.
7. On Work With HRM Common Display Settings, click Find to display the new data item and verify the setting.

Changing Benefit Plans for Self-Service

To set up benefit plans that employees can use in self-service, you need to define the following:

- The minimum and maximum number of persons that can be included in benefit plans that cover dependents
- Whether to track the primary care physician
- Non-participating benefit plans

To review or change the appropriate information, use the Self-Service tab on the Plan Master form in *Adding a New Benefit Plan*.

Before You Begin

- Set up benefit groups and categories. See *Setting up Group Information*.

- Set up benefit plans and enable each plan for self-service. See *Setting Up Benefit Plans*.

Adding a New Benefit Plan

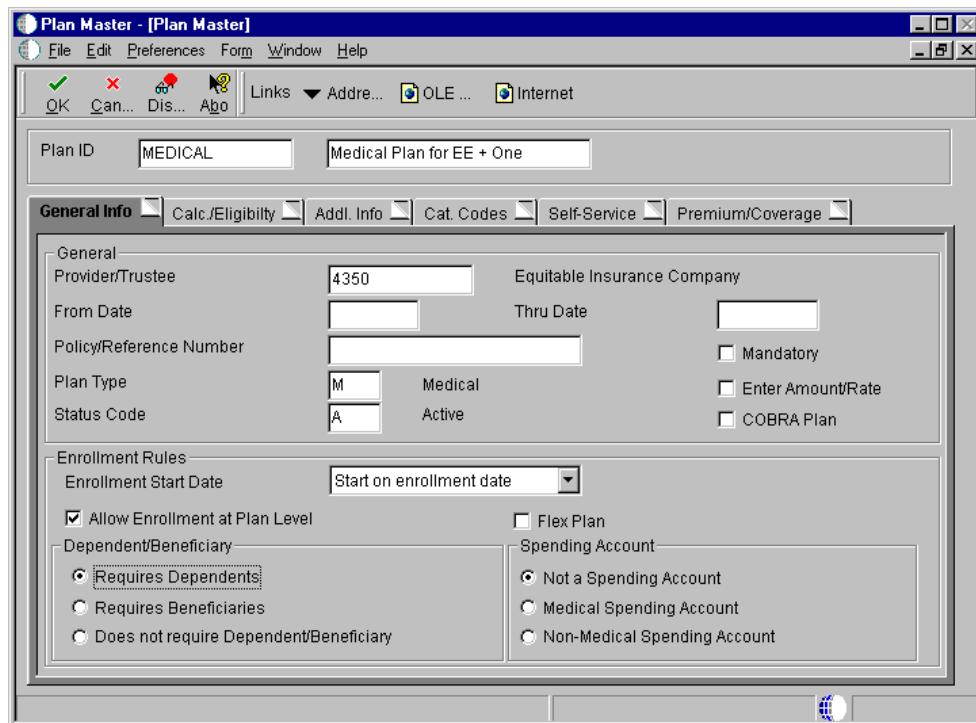
Before you can enroll employees in a benefit plan, you must set up the plan. You add a new benefit plan when you need to set up a unique plan or when you are setting up a plan for the first time. When you set up a plan, you define the following types of information

- Effective dates
- Provider or trustee
- Enrollment rules
- Eligibility tables

► To add a new benefit plan

From the Benefits Administration Setup menu (G08BB4), choose Plan Master.

1. On Work With Plan Master, click Add.



2. On Plan Master, complete the following field:

- Plan ID
3. In the unlabeled field to the right of the Plan ID field, type the name of the plan.
 4. On the General Info tab, complete the following field:

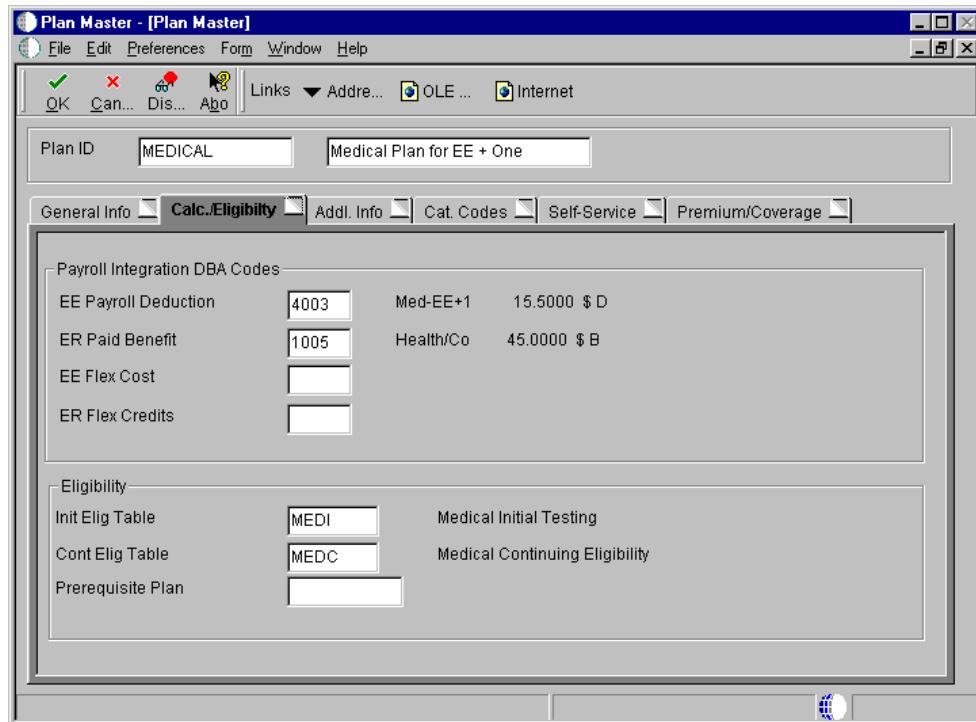
- Provider/Trustee
5. Complete the following optional fields or accept the default values:
- From Date
 - Thru Date
 - Policy/Reference Number
 - Plan Type
-

Note

You need to assign the same benefit plan type to every plan within a benefit category. For example, all health and welfare plans should be assigned to Medical, Dental, and so forth.

- Status Code
6. Click any of the following options:
- Mandatory
 - Enter Amount/Rate
 - COBRA Plan
7. In the Enrollment Rules area, click an option for the Enrollment Start Date.
8. Click one or both of the following options:
- Allow Enrollment at Plan Level
 - Flex Plan
9. Click one of the following options in the Dependent/Beneficiary area:
- Requires Dependent
 - Requires Beneficiary
 - Does Not Require Dependent/Beneficiary
- The Dependent/Beneficiary options define whether a plan is designated as a dependent plan or a beneficiary plan.
10. Click one of the following options in the Spending Account area:
- Not a Spending Account
 - Medical Spending Account
 - Non-Medical Spending Account

You use the Spending Account options to associate the account with medical or other types of expenses.



11. Click the Calc./Eligibility tab and complete any of the following DBA fields:

- EE Payroll Deduction
- ER Paid Benefit
- EE Flex Cost
- ER Flex Credits

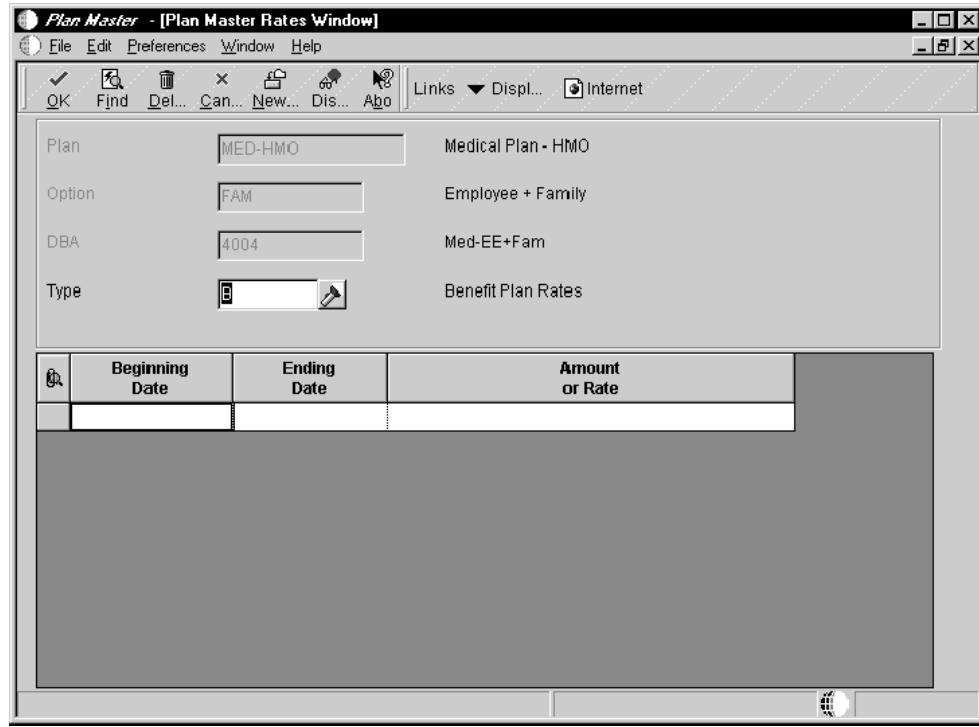
If the plan is a flex plan, you should complete either the EE Flex Cost or EE Flex Credits field.

12. To enter a date-sensitive override amount or rate for the employee contribution to one of the displayed items, click one of the DBA fields and then choose Plan Rates from the Form menu.

Note

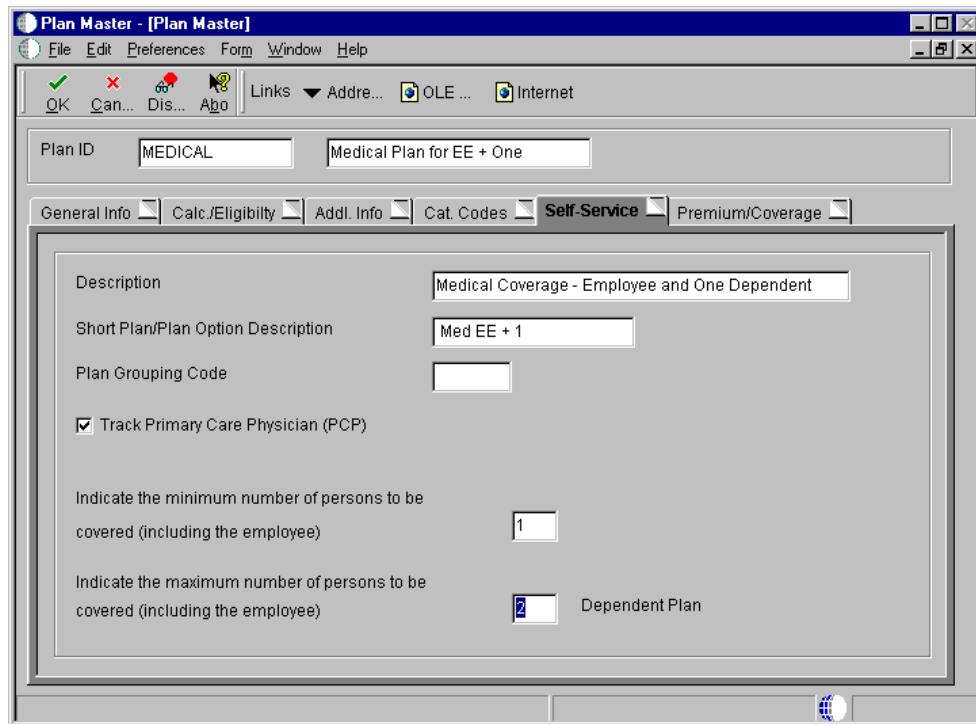
A plan rate or amount that you enter on this form is a date-sensitive override to the rate that exists in the DBA. The DBA field must be completed prior to entering override amounts or rates. You cannot enter an amount or rate for a DBA field that is blank.

Entering new rates does not change existing benefit plan information for employees. To recalculate the new premium costs, the employee must re-enroll or a Workforce Management administrator must process batch enrollment.



13. On the Plan Master Rates Window, complete the following override fields as necessary and click OK:
 - Type
 - Beginning Date
 - Ending Date
 - Amount or Rate
14. On the Plan Master, Calc./Eligibility tab, complete the following fields:
 - Init Elig Table
 - Cont Elig Table
15. Complete the following optional field:
 - Prerequisite Plan
16. To enter information about the plan, click the Addl. Info tab.

17. To track additional data, click the Cat. Codes tab and complete the relevant information.



18. If you use Self-Service Benefits, click the Self-Service tab and complete the following field:

- Description

If you do not enter a description, the plan description will be used on self-service forms. This description field allows a long representation of the benefit plan.

- Short Plan/Plan Option Description

This description field allows only a short description that is used when benefit plans appear as column titles on self-service forms.

- Plan Grouping Code

J.D. Edwards recommends that you use the Plan Master Options program (P083202) instead of Plan Grouping.

You can use plan grouping to associate benefit plans if you do not use benefit plan options. For example, if you create separate benefit plans for employee only, employee plus 1, employee plus family, and employee opt out, you can set up a plan grouping code in UDC 08/PG. You can then assign the plan grouping code to each plan master record.

J.D. Edwards recommends that you set up a non-participating plan for each benefit category so that employees can elect this plan to choose no coverage.

19. If you want to track the primary care physician number and the item appears on the form, click the following option:

- Track Primary Care Physician (PCP)

20. If the purpose of the benefit plan is to indicate that an employee is declining coverage, click the following option:

- Non-Participating Plan Flag

The system displays this option only if the plan is set up as a non-participating plan.

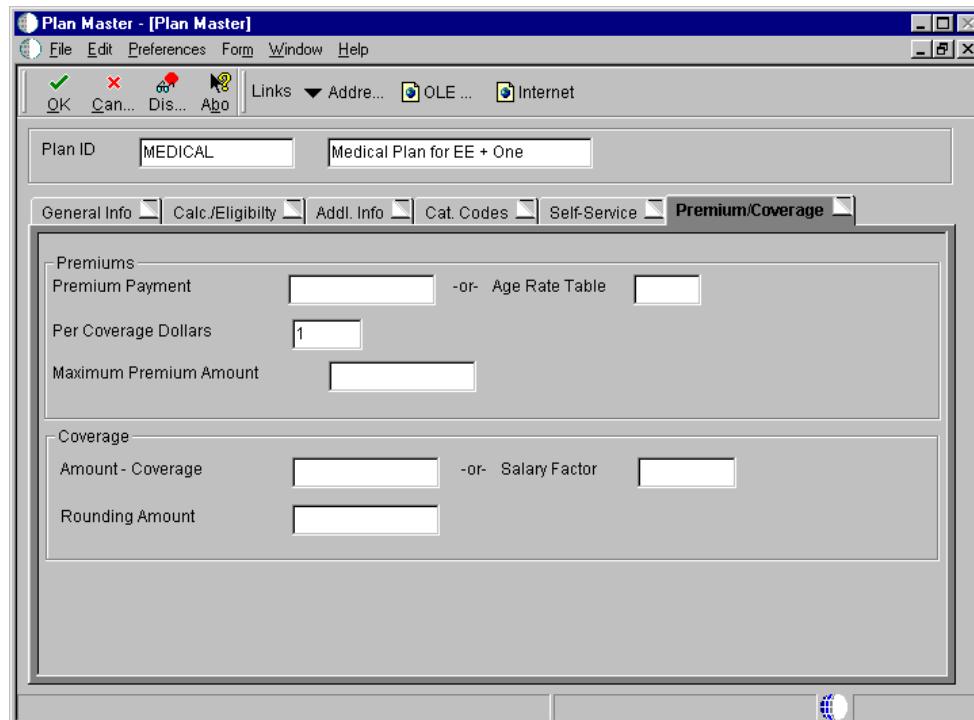
Note

J.D. Edwards recommends that you set up a non-participating benefit plan for every benefit category.

21. If the plan is a dependent plan, specify the range of persons to be covered (including the employee) by completing the following fields:

- Minimum Dependents
- Maximum Dependent

If the benefit plan is a dependent plan, the system displays two fields on the bottom of the form to allow you to enter the number of dependents who can enroll in the plan.



22. Click the Premium/Coverage tab and complete either of the following fields to specify premium information:
 - Premium Payment
 - Age Rate Table
23. Complete the following optional fields:
 - Per Coverage Dollars
 - Maximum Premium Amount
24. To enter coverage information, complete either of the following fields:
 - Amount - Coverage
 - Salary Factor
25. Complete the following optional field:
 - Rounding Amount
26. Click OK to save the record.

Processing Options for Plan Master (P08320)

Display

1. EE Flex Cost PDBA and the ER Flex Credits PDBA fields.
0 = Do not display these fields.
1 = Display these fields.
-

Changing Plan Options

After setting up the Benefit Plan Master, depending on your company setup, you might need to define the benefit plan options that employees can choose during each enrollment event. For employee self-service benefits, the benefit plan options might already be set up appropriately. You also need to specify the minimum and maximum number of dependents that are allowable for each health and welfare benefit plan option. You can use this procedure to set up new plan options or change existing options.

If the available options for a plan category include non-participation, you need to set up a non-participating plan option. For example, a dental benefit plan might include the following plan options:

- Dental Coverage - Employee Only
- Dental Coverage - Employee and Family
- Dental Coverage - Employee and One Dependent
- Dental Coverage - No Coverage

Setting Up Plan Options

When the coverage for a plan can vary from employee to employee, you can either set up a separate plan for each variation or set up a plan with several options. For example, your organization might offer a dental plan to employees. The cost for this plan might vary depending on whether employees elect coverage for themselves only or for themselves plus their dependents. You can set up this dental plan in either of the following ways:

- Set up Employee Only, Employee Plus One, and Employee Plus Family as separate dental plans and link each of these plans to the dental category.
- Set up a dental plan, such as DEN-01, for an employee and include options such as DEN-01 Plus One and DEN-01 Plus Family. When you link DEN-01 to the dental category, the system also links the options.

When you set up benefit plan options, you can enter different coverage costs for each option. For example, the Employee Only option might cost 20.00, the Employee Plus One option 40.00, and the Employee Plus Family option 80.00. You can indicate the cost of an option in either of the following ways:

- Assign a separate DBA that has an associated amount or rate to the option.
- Assign the DBA associated with the plan to the option. You can enter an override amount or rate for the option in the Plan Master Rates Window.
- Use the benefit plan DBA and the benefit plan options DBA. The DBAs must be separate in this case.

In either case, the amount or rate that you enter for the option overrides the amount or rate entered for the DBA associated with the plan. Therefore, this amount or rate must include the full cost of the option plus the cost of the plan, if any.

When the employee enrolls in a benefit plan option, the system updates the employee's DBA instructions with the amount or rate that you entered for the option.

When you set up options for a single benefit plan, use the option rule to determine how the system calculates additional coverage costs. You can include one or more of the following in the calculation:

- DBA for the benefit plan
- DBA for the option
- Additional amount

When the employee enrolls in a benefit plan option, the system uses the option rule to either add the additional cost or replace the amount in the DBA identified in the Plan Master table. For example, the plan DBA identifies the amount that the employee pays for coverage when enrolled in DEN-01 only. If the employee enrolls in DEN-01 Plus One, you can add an amount to deduct for the additional coverage. If the employee enrolls in the DEN-01 Plus Family option, you can set up an even greater amount to deduct for the coverage for an entire family.

You can use one of three option rules for a single plan with options. Depending on the value that you select for the option rule, you can include additional factors that the system uses in the calculation, such as DBAs and additional amounts or rates.

The following table illustrates the DBA and additional amounts or rates allowed with each rule:

Option Rule	DBA for Plan ID	DBA for Option	Additional Amount
1	X		X
2	X	X	X
3		X	X

You use the rules for any of the DBA codes used for the plan, including the employee payroll deduction and the employer-paid deduction.

After you set up a plan with options, you might need to periodically update the amounts or rates associated with those options periodically. For example, if you have set up a medical plan with three options (employee only, employee plus spouse, and employee plus family) and you have entered an amount for each of those options, you must update those amounts whenever the benefit carrier raises its rates.

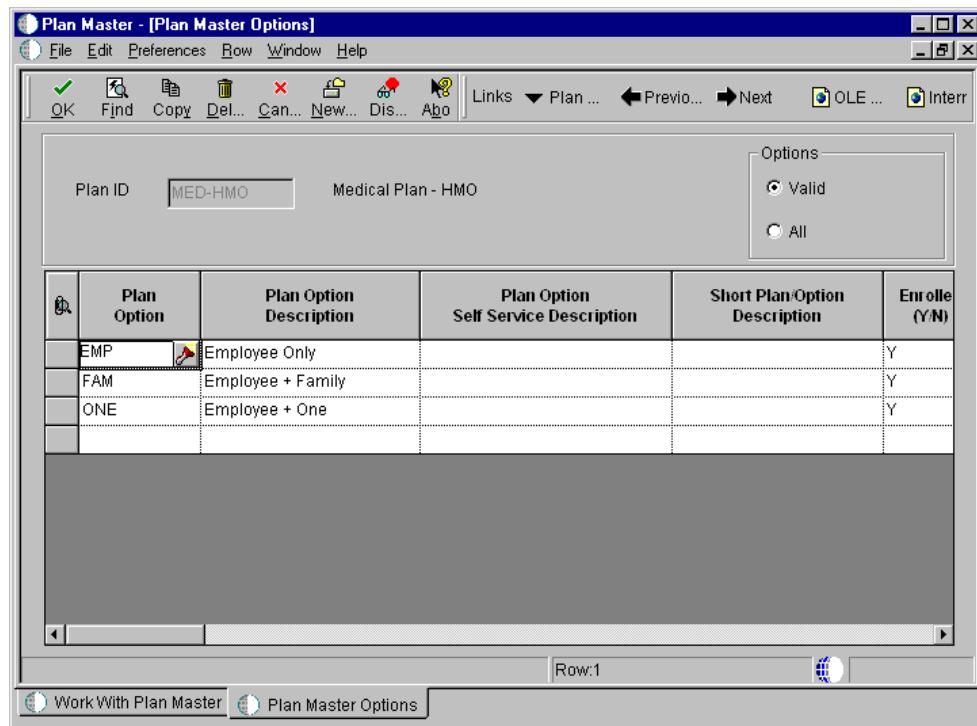
When you enter plan options, the system stores the information in the Plan Additional Options table (F083202).

You cannot delete a benefit-plan or plan option if an employee is enrolled in that option. Even when employees are not active, their records are considered to be attached to the plan option. Also, you cannot change the dependent or beneficiary status of the plan option while dependents or beneficiaries are enrolled in the plan option.

► To set up plan options

From the Benefits Administration Setup menu (G08BB4), choose Plan Master.

1. On Work With Plan Master, complete the following field and click Find:
 - Plan ID
2. Choose a plan.
3. Choose Plan Options from the Row menu.



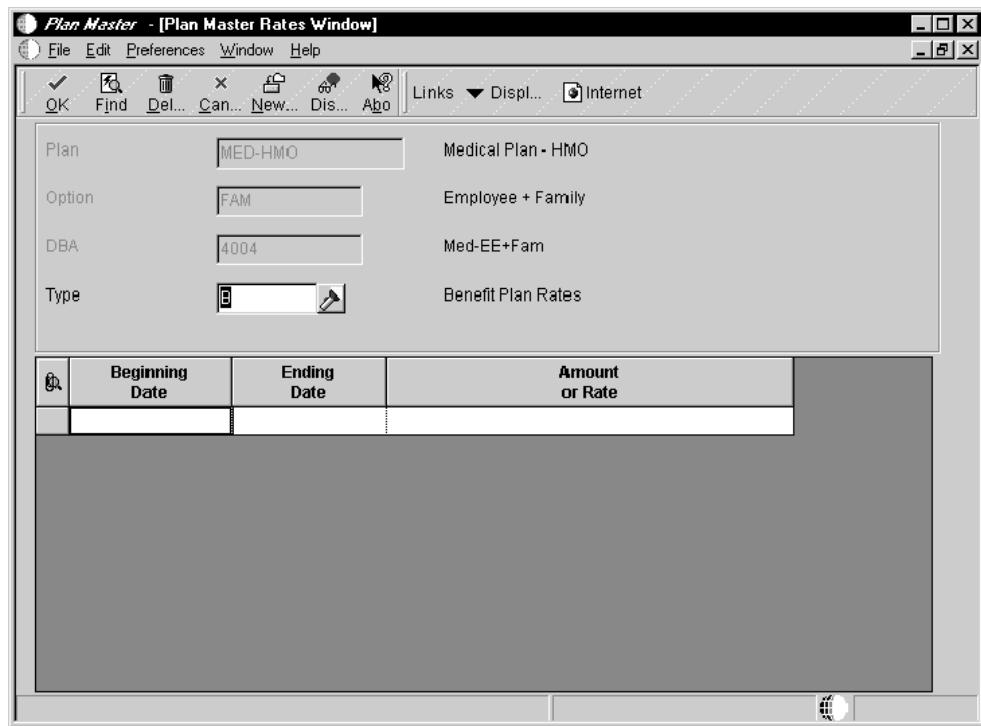
4. On Plan Master Options, complete the following fields:
 - Plan Option
 - Plan Option Description
 - Trans. Code Ben. Flag
 - Additional Premium Payment
 - VO

5. If you are using self-service benefits, you need to set up the plan option for self-service. Complete the following fields:
 - Plan Option Self Service Description
 - Short Plan/Option Description
 - Minimum Dependents
 - Maximum Dependent
 - PCP Flag
 - Non-Participating Flag

If you do not enter a self-service description, the system uses the benefit plan option description on self-service forms.

6. To set up the employee contribution information, complete the following fields:
 - Payroll Ded -Option Rule
 - Payroll Ded DBA
 - Payroll Ded - Add'l or Override Rate
7. To set up the employer-paid information, complete the following fields:
 - Paid Benefit -Option Rule
 - Paid Benefit DBA
 - Paid Benefit - Add'l or Override Rate
8. To set up the employee flex cost information, complete the following fields:
 - Flex Cost -Option Rule
 - Flex Cost DBA
 - Flex Cost - Add'l or Override Rate
9. To set up the flex credits information, complete the following fields:
 - Flex Credit -Option Rule
 - Flex Credit DBA
 - Flex Credit - Add'l or Override Rate
10. To enter a date-effective override amount or rate for the employee contribution to the DBA item, click one of the DBA fields and choose Plan Rates from the Row menu.

You must first select an employee DBA in order to enter amounts or rates.



11. On Plan Master Rates Window, complete the following fields:

- Beginning Date
- Ending Date
- Amount or Rate

12. Click OK to save the amount or rate record. Then click Cancel to return to Plan Master Options.

13. Click OK to save the plan record.

See Also

- *Setting Up Benefit Plans* for information that can help you decide whether to set up benefit plans with options

Defining Benefit Category Rules for Self-Service

Benefit category rules and specifications need to be set up before the new benefit self-service features are available to employees. To ensure that employees make benefit selections that are consistent with your organizational and provider policies, you use the Categories by Benefit Group program (P08350) to specify a classification for each benefit category and to specify that changes in employee elections must remain within a current group of benefit plans.

Benefit categories must be defined as belonging to one of the following classifications:

- Health and Welfare
- Indemnity
- Retirement Savings
- Other

For example, medical, dental, and vision categories are in the health and welfare classification. Life insurance and 401(k) categories are in the retirement savings classification. Employees might be allowed to decline inclusion in some categories, but not in others. For example, inclusion in a retirement savings plan might be optional. However, medical coverage might be required unless employees are included in spousal coverage with another employer. You can specify whether the Workforce Management administrator is notified when employees elect to decline coverage.

Note

When setting up a benefit category as a Health and Welfare category, you should include only benefit plans that do not require a beneficiary.

A benefit category should not allow more than one benefit plan election. A benefit category should also specify whether benefit plans within the category are optional. For example, valid values for the benefit category rule are as follows:

O Optional

R Required

Most insurance providers allow employees to change their coverage when they experience a qualifying life event. For example, a married employee who gives birth to, or adopts, a child can usually change their medical insurance from employee plus spouse to employee plus family within 31 days of the birth of the child. The employee cannot ordinarily change from the current provider to an alternate provider until the commencement of an open enrollment period.

The Categories by Benefit Group program is normally used in the initial setup of benefits information. You use this program to link benefit categories to benefit groups when you set up the benefits administration software. The entire task is included as part of employee self-service benefits setup to ensure that the requirements to set up self-service are reviewed and completed.

Note

J.D. Edwards does not recommend setting up a benefit category to allow the selection of multiple plans in a health and welfare benefit category. If you allow the selection of multiple plans within a category, then your benefits self-service software cannot automatically select appropriate plans for an employee based on employee dependents and beneficiaries.

Linking Categories to Benefit Groups

After you set up benefit groups and benefit categories, you can link categories to each benefit group. For example, you can link the benefit categories for medical, dental, and life to the management benefit group. When you link a category to a benefit group, all of the employees in that group are eligible for all of the benefit plans in that category.

When you link categories to groups, you can also include the following information:

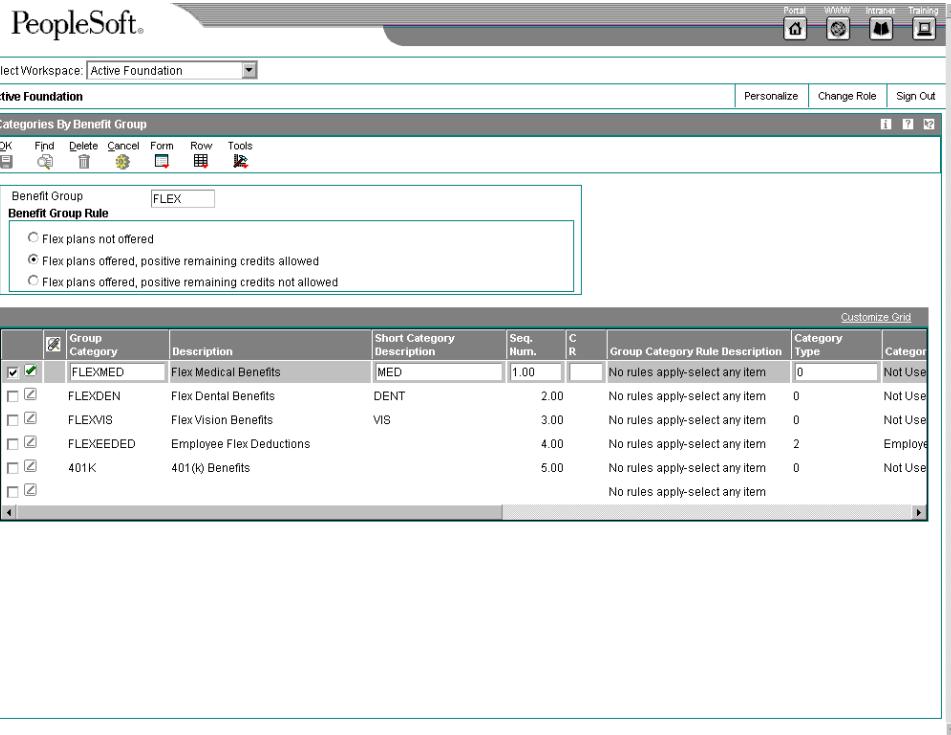
- Whether the benefit group has flex plans
- The sequence in which the benefit categories appear on the enrollment form
- The election criteria for a benefit category
- The benefit category type for special flex plans
- The benefit category classification
- An employee option to print a form for declining benefit coverage
- Whether employees must stay within the current benefit group options or within a current group of benefit plans

If a benefit group has flex plans, you must set up a benefit category for employee flex deductions (category type 2). This benefit category is the mechanism for deducting a negative flex balance from employee pay. If the employer is awarding members of the benefit group a lump sum of flex credits, you must set up a benefit category for those lump sum credits (category type 1).

► To link categories to benefit groups

From the Benefits Administration Setup menu (G08BB4), choose Categories by Benefit Group.

1. On Work With Benefit Groups, complete the following field and then click Find:
 - Benefit Group
2. Choose the benefit group record and then click Select.



3. On Categories By Benefit Group, click an option under the Benefit Group Rule heading to indicate whether the benefit group offers flex plans, and if so, how it treats positive remaining credits.
4. Complete the following fields and click OK:
 - Group Category
 - Seq. Num.
 - C R
 - Category Type
 - Benefit Category Classification
 - Decline Coverage Notification
 - Stay In Group

Setting Up URLs for Self-Service Benefits

Within the employee self-service benefit programs, employees can click on a link to get more information about benefits. You define uniform resource locator addresses (URLs) that link users to resources about plan options, plans, categories and groups. Depending on the links that might be defined, employees can learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option. These resources might also include direct access to the provider so that employees can implement changes. For example, an employee might use a link to access a provider website that lists primary care physicians.

To set up all URL specifications for benefit resources from one location, you can use the Plans Within Categories program (P08351). After choosing a benefit group, category, plan or plan option, you access the Benefits Enrollment Plan/Option URL Address program (P085540) from a Row menu option where you can record URL addresses. The URL might be a location on an organization's intranet or a provider Internet resource. The system stores the URL address information in the Benefits Enrollment Plan/Option URL Address file (F085540).

You can organize reference information as follows:

- Use a URL to access information for all benefit plan options that are linked to a benefit plan.
- Use URL to access information for all benefit plans that are linked to a benefit category.
- Use a URL to access information for all benefit categories that are linked to a benefit group.
- Use a URL to access information for all benefit groups.

When employees click on links in OneWorld benefit self-service programs, the system searches for the most specific resource using a hierachal approach. For example, if an employee clicks on a link for information about a benefit plan option, the system looks first at the benefit plan option level. If no information is found, the system looks sequentially at the benefit plan, category, and group levels.

J.D. Edwards recommends that you set up at least one URL for every benefit group. Because all benefit plans and benefit plan options appear as links, employee might click the link to get additional information. A URL is required for the function to work appropriately.

Before You Begin

- ❑ Set up benefit groups. See *Setting Up Benefit Groups*.
- ❑ Set up benefit categories. See *Setting Up Benefit Categories*.
- ❑ Link each benefit category to an appropriate benefit group. See *Linking Categories to Benefit Groups*.
- ❑ Set up benefit plans. See *Setting Up Benefit Plans*.
- ❑ Link each benefit plan to an appropriate benefit category. See *Linking Plans to Benefit Categories*.
- ❑ Set up benefit plan options. See *Setting Up Plan Options*.

Setting Up URLs for Benefit Plan Options

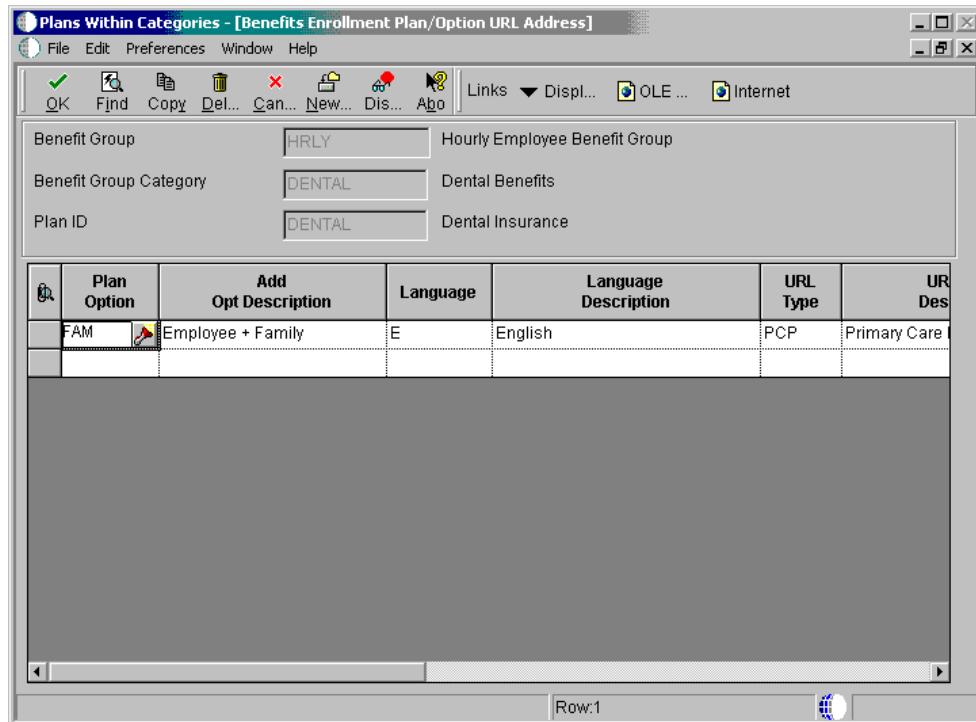
Within the employee self-service benefit programs, employees can click on a benefit plan option link to get information. Depending on the links that might be defined, employees might also have links to resources for benefit plans, benefit categories, and benefit groups. You can provide separate links for employees to learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option.

► To set up URLs for benefit plan options

From the Benefits Administration Setup menu (G08BB4), choose Plans Within Categories.

1. On Work with Categories within Groups, complete the following field and click Find to display the benefit categories that are linked to the benefit group:

- Benefit Group
2. Choose a benefit category and click Select to display the benefit plans that are linked to the benefit category.
 3. On Plans Within Categories, choose a benefit plan and choose Associate URLs from the Row menu.



4. On Benefits Enrollment Plan/Option URL Address, complete the following fields:
 - Plan Option
 - Language
 - URL Type

For example, the format of a sample URL might appear as follows:
<http://www.benefitsprovider.com>.

Note

Do not change the user defined code PCP, that is defined for the URL type. Employee self-service software recognizes only PCP and Blank as valid values.

- Portal URL Links

The system displays the Plan Option and Add Optional Description columns only when a plan option exists.

5. Click OK.

See Also

- ❑ *Setting Up URLs for Benefit Plans* for the steps to add links to resource information on employee benefit plans
- ❑ *Setting Up URLs for Benefit Categories* for the steps to add links to resource information on employee benefit categories
- ❑ *Setting Up URLs for Benefit Groups* for the steps to add links to resource information on employee benefits or benefit groups

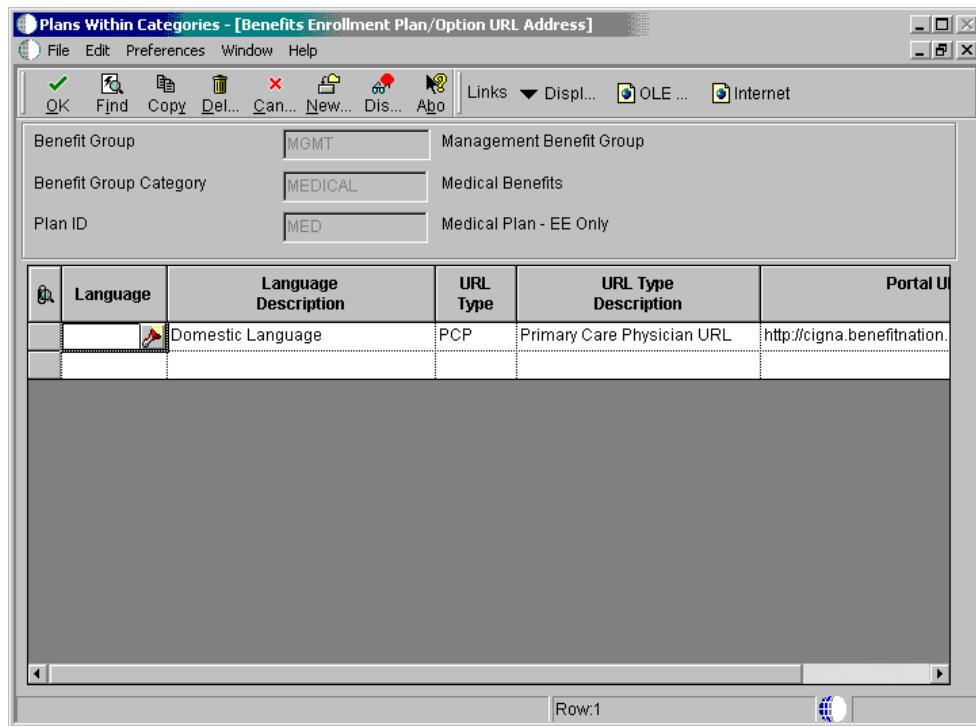
Setting Up URLs for Benefit Plans

Within the employee self-service benefit programs, employees can click on a benefit plan to get more information pertaining to the plan. Depending on the links that might be defined, employees might also have links to resources for benefit plan options, categories and groups. You can provide separate links for employees to learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option.

► To set up URLs for benefit plans

From the Benefits Administration Setup menu (G08BB4), choose Plans Within Categories.

1. On Work with Categories within Groups, complete the following field and click Find to display the benefit categories that are linked to the benefit group:
 - Benefit Group
2. Choose a benefit category and click Select to display the benefit plans that are linked to the benefit category.
3. On Plans Within Categories, choose a benefit plan and choose Associate URLs from the Row menu.



4. On Benefits Enrollment Plan/Option URL Address, complete the following fields:
 - Language
 - URL Type
 - Portal URL Links

For example, the format of a sample URL might appear as follows:
<http://www.benefitsprovider.com>.
5. Click OK.

See Also

- Setting Up URLs for Benefit Plan Options* for the steps to add links to resource information on employee benefit plan options
- Setting Up URLs for Benefit Categories* for the steps to add links to resource information on employee benefit categories
- Setting Up URLs for Benefit Groups* for the steps to add links to resource information on employee benefit groups

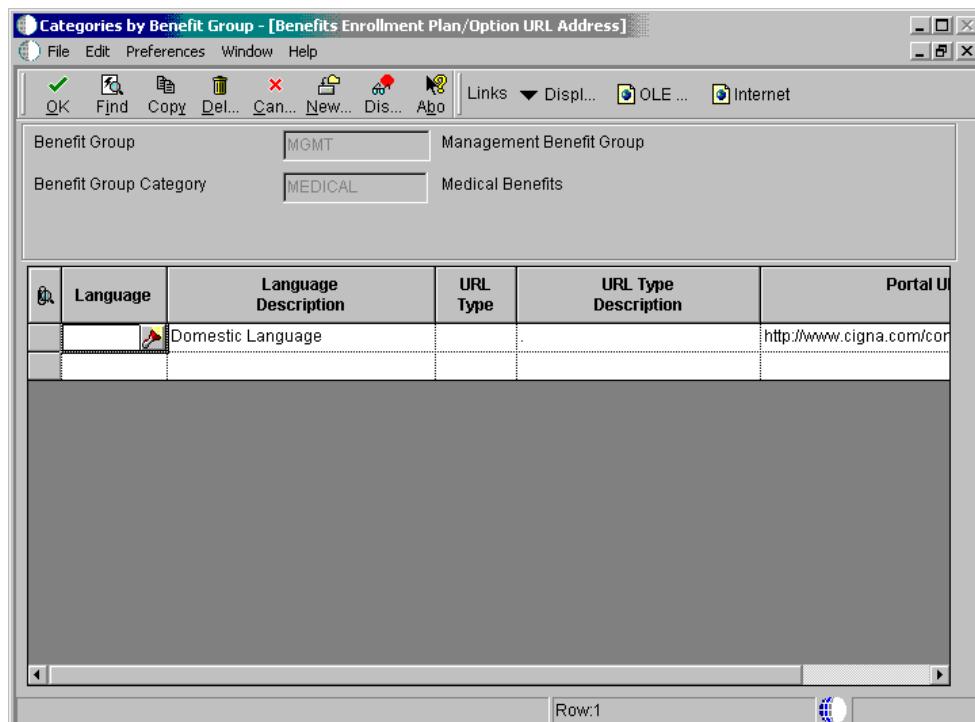
Setting Up URLs for Benefit Categories

Within the employee self-service benefit programs, employees can click on a benefit category to get additional information. Depending on the links that might be defined, employees might also have links to resources for benefit plan options, benefit plans, and benefit groups. You can provide separate links for employees to learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option.

► To set up URLs for benefit categories

From the Benefits Administration Setup menu (G08BB4), choose Categories by Benefit Group.

1. On Work With Benefit Groups, complete the following field and click Find:
 - Benefit Group
2. Choose the benefit group and click Select to display the benefit categories that are linked to the benefit group.
3. On Categories By Benefit Group, choose a benefit category and choose Associate URLs from the Row menu.



4. On Benefits Enrollment Plan/Option URL Address, complete the following fields:
 - Language
 - URL Type
 - Portal URL Links
5. Click OK.

See Also

- ❑ *Setting Up URLs for Benefit Plan Options* for the steps to add links to resource information on employee benefit plan options
- ❑ *Setting Up URLs for Benefit Plans* for the steps to add links to resource information on employee benefit plans
- ❑ *Setting Up URLs for Benefit Groups* for the steps to add links to resource information on employee benefit groups

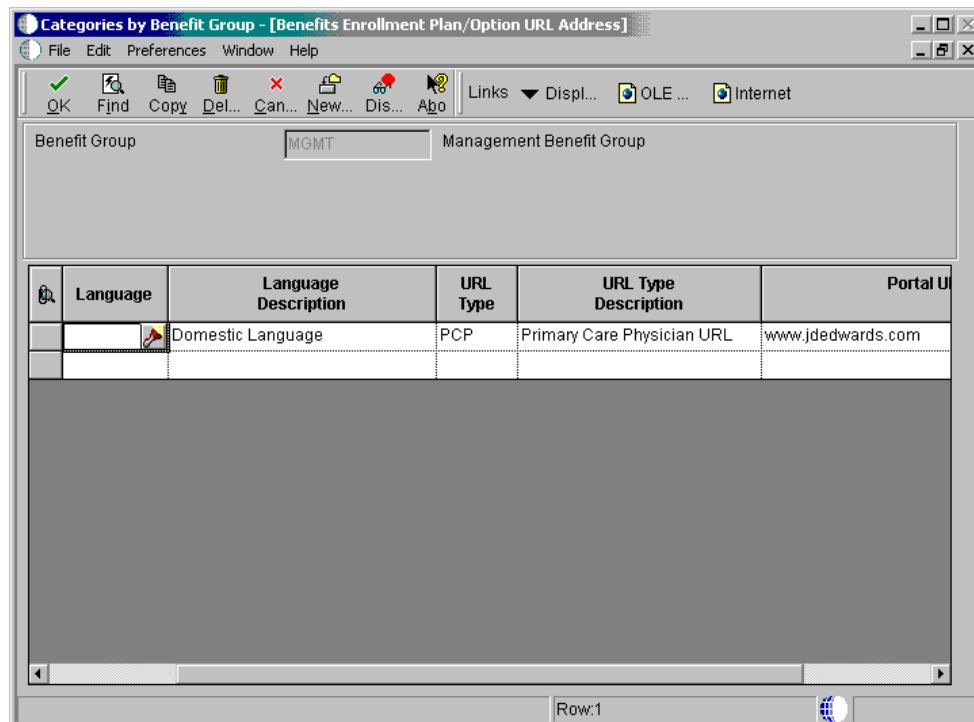
Setting Up URLs for Benefit Groups

Within the employee self-service benefit programs, employees can click on a benefit group link to get information. Depending on the links that might be defined, employees might also have links to resources for benefit plan options, benefit plans, and benefit categories. You can provide separate links for employees to learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option.

► To set up URLs for benefit groups

From the Benefits Administration Setup menu (G08BB4), choose Categories by Benefit Group.

1. On Work With Benefit Groups, complete the following field and click Find:
 - Benefit Group
2. Choose Associated URLs from the Row menu.



3. On Benefits Enrollment Plan/Option URL Address, complete the following fields:
 - Language
 - URL Type
 - Portal URL Links

For example, the format of a sample URL might appear as follows:
<http://www.benefitsprovider.com>.

4. Click OK.

See Also

- ❑ *Setting Up URLs for Benefit Plan Options* for the steps to add links to resource information on benefit plan options
- ❑ *Setting Up URLs for Benefit Plans* for the steps to add links to resource information on benefit plans
- ❑ *Setting Up URLs for Benefit Categories* for the steps to add links to resource information on employee benefit categories

Setting Up Benefit Enrollment Events for Self-Service

Although you normally set up benefit enrollment events when your benefits administration software is installed, you need to review these specifications when you add benefits self-service functionality to your system. When you set up benefit enrollment events, you can use the Benefits Enrollment Event Setup program (P08500) to define the time period during which an event is open for online changes or enrollments. If the enrollment event allows changes for a certain number of days following a specific or variable date, consider replacing Open From Date and Open Through Date values with the following value:

- Open Based From Date

When you specify the Event Date value, the system uses the date of a qualifying event as the basis for the opening date for benefits enrollment. For example, if an employee has a new child, the open enrollment period for changing health insurance enrollment can be based on the life event of Children. Typically, an employee might have up to 31 days after the Children event date to change benefits. When you use Event Date as the basis for opening enrollment, you must also specify the number of calendar days that enrollment remains open.

Setting Up Benefit Enrollment Events

When you use the Benefits Enrollment Event Setup program (P08500) to set up benefit enrollment events, you define the time period during which the event is open for online changes or enrollments. For example, open enrollment events allow changes from a specific date until another specific date. Other types of events, such as new hire enrollment events, allow changes starting on a variable date, such as the date of hire, and extending for a certain number of days following that date.

You can set up different time periods for the same enrollment event for different benefit groups. For example, open enrollment for salaried employees might be at a different time than open enrollment for executives.

► To set up benefit enrollment events

From the Self Service Setup menu (G05BESS4), choose Benefit Enrollment Events.

PeopleSoft®

Benefit Enrollment Events - Benefits Enrollment Event Setup

Customize Grid							
	Benefit Group	Enrollment Event Code	Event Description	Open From Date	Open Through Date	Open Based From Date	Number of Calendar Days Elapsed
<input checked="" type="checkbox"/>	*	401	401(k) Enrollment				0
<input type="checkbox"/>	*	BEN	Change Your Beneficiaries				
<input type="checkbox"/>	*	CHD	Children			EVDT	
<input type="checkbox"/>	*	DIV	Divorce				
<input type="checkbox"/>	*	MAR	Marriage				
<input type="checkbox"/>	*	NHR	New Hire				
<input type="checkbox"/>	*	OPN	Open Enrollment	01/01/99	12/31/05		
<input type="checkbox"/>	*	RHR	Rehire			DST	
<input type="checkbox"/>							

1. On Benefits Enrollment Event Setup, complete the following fields:

- Benefit Group
- Enrollment Event Code

The system first searches for an exact benefit group match and then for the generic * character. You can indicate that an event is open for all benefit groups by typing * in the Benefit Group field. For example, an employee in the EXEC benefit group is in open enrollment from 9/1/05 through 9/30/05. An employee in MGMT is in open enrollment from 11/1/05 through 11/30/05.

2. If the enrollment event will allow changes between specific dates, complete the following fields:

- Open From Date
- Open Through Date

3. If the enrollment event allows changes for a certain number of days following a specific or variable date, complete the following fields:

- Open Based From Date
- Number of Calendar Days Elapsed

You can enter a data item, such as the employee's start date or the event date, in the Open Based From Date field.

4. Complete the following field:

- Enrollment Effective Date

Note

If you do not define a time period for an enrollment event, the system assumes that the event is open all year.

5. Repeat steps 1 through 4 for every available enrollment event, and then click OK to save your changes.

Setting Up Categories by Enrollment Event

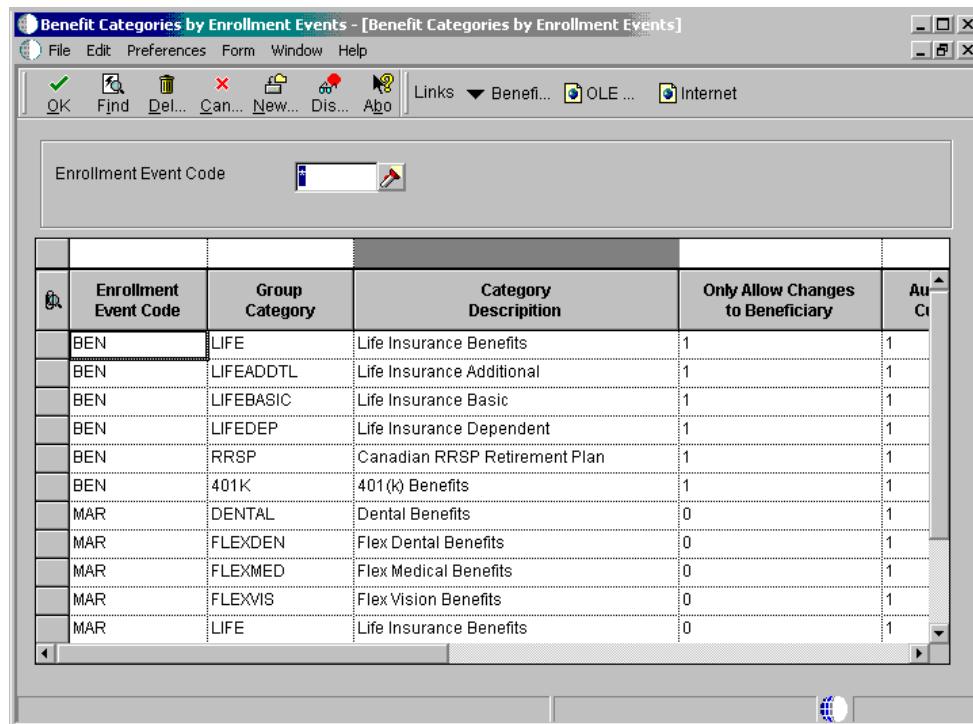
After you have set up the enrollment event codes, you need to use the Benefit Categories by Enrollment Events program (P085510) to define which benefit categories can be changed or enrolled in during each enrollment event. For example, you might allow all benefit categories (medical, dental, disability, life, and so on) to be changed during open enrollment, but only selected categories (such as medical, dental, and vision) to be changed for an event such as marriage.

In addition to defining benefit categories, you can control whether employees can change beneficiary information only, or can also change their benefit plan enrollment.

If you do not set up categories for a specific enrollment event, the system assumes that no changes or enrollments are allowed for that event.

► To set up benefit categories by enrollment event

From the Self Service Setup menu (G05BESS4), choose Benefit Categories by Enrollment Event.



1. On Benefit Categories by Enrollment Events, complete the following fields in the detail area:

- Enrollment Event Code
- Group Category
- Category Description
- Automatic Default of Current Enrollment

If the benefit plans are the same, and a processing option is set appropriately in the Current Enrollment Workfile Build report (R085530), the system supplies the current enrollment as the default enrollment. However, if a current plan is no longer available (for example, if you are changing insurance carriers), you should not accept the default.

2. Repeat step 1 for every available benefit category for each enrollment event, and then click OK to save your changes.

Setting Up Allowed Dependent Relationships by Plan

You can use the Allowed Dependent Relationships by Plan program (P085500) to define dependent relationship information for employee beneficiaries and dependents that can be covered under a dependent benefit plan or benefit plan option. If you add only a single record, by entering a * in the Relation field for a benefit plan, then any beneficiary or dependent relationship is valid. If only a certain subset of relationships is valid, then you must define each of those valid relationships.

If all employee benefit plans are set up, and any beneficiary or dependent relationship is valid, then you can run the Automatically Setup Self-Service Dependent Selection report (R085505) without defining allowed dependent relationships for each plan.

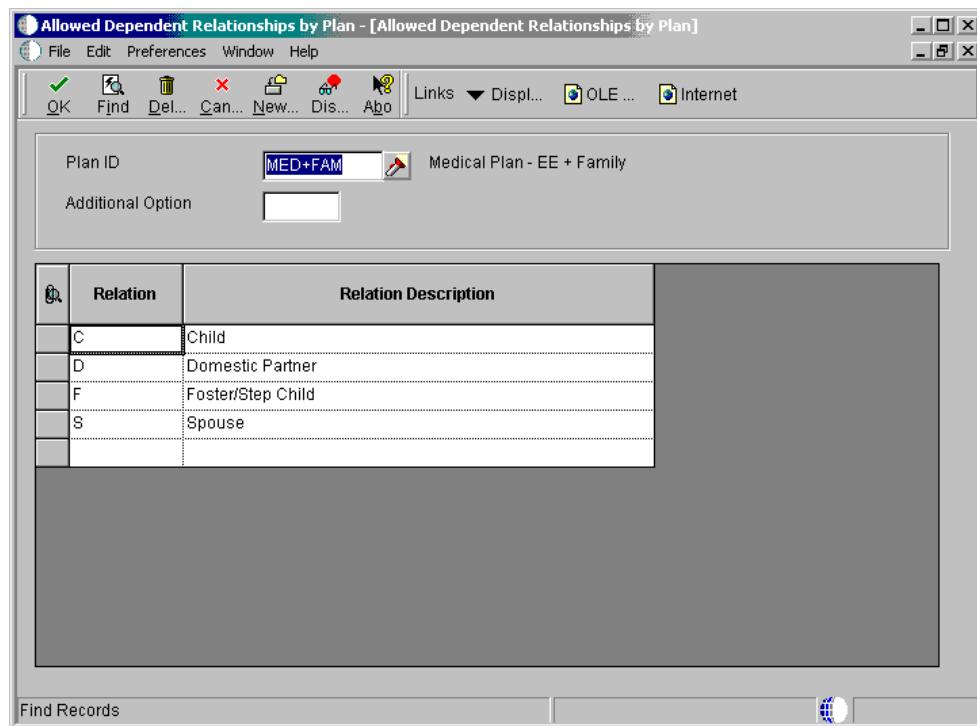
You might use this program to define allowed dependent relationships for benefit plans in an organization that covers domestic partners. Certain tax advantages that could apply to employee benefits do not apply to benefit plans that cover domestic partners. To track the DBAs for benefit plans that include a spouse and benefit plans that include a domestic partner, you might set up separate benefit plans that specify allowed dependent relationships by plan. For example, if an organization offers employee benefit plans that cover domestic partners, then the workforce management administrator might create a benefit plan with the following benefit plan options and allowed dependent relationships:

Benefit Plan Option	Valid Dependent Relationship
Employee Only (not a dependent plan)	Not applicable
Employee + Spouse	Spouse
Employee + Domestic Partner	Domestic partner
Employee + Spouse + Family	Spouse, child, step/foster child
Employee + Domestic Partner + Family	Domestic partner, child, step/foster child
No Coverage (not a dependent plan)	Not applicable

J.D. Edwards employee self-service software includes automatic selection of benefit plans that makes enrolling in benefits easier and faster for employees. The system automatically displays benefit plans and benefit plan options based on the number of dependents and their relationship to the employee.

► To set up allowed dependent relationships by plan

From the Employee Self Service General Setup menu (G08BB413), choose Allowed Dependent Relationships by Plan.



1. On Allowed Dependent Relationships by Plan, complete the following fields then click Find:
 - Plan ID
 - Additional Option
2. Specify the allowed dependent relationships for the plan by completing the following field:
 - Relation

You can add values to the list of allowed relationships in UDC 08/RL. Review the entries in this table to ensure that the correct special handling codes exist. A value of *, allowing all relationships, is an allowed value, even though this character does not display in the UDC table.

A UDC for dependent relationships must contain either a D or A in the Special Handling field. If the UDC contains a B in the Special Handling field, then the relationship is automatically excluded from being covered as a dependent.
3. When all relationships are specified for the plan, click OK.

See Also

- Automatically Setting Up Dependent Selection* to run a report that creates work files that the system uses to automatically select benefit plans and benefit plan options for employee benefit enrollment
- User Defined Codes* to set up an additional UDC code for allowed relationships and include a special handling code for self-service

Setting Up Workfiles for Benefits Self-Service

J.D. Edwards software uses workfiles to process employee self-service enrollments. The workfiles contain values for current enrollments and available employee benefit plans. Each of the workfiles must be set up before employees can use the benefits self-service programs.

Automatically Setting Up Dependent Selection

From the Employee Self-Service General Management menu (G08BESS327), choose Automatically Set Up Dependent Min/Max.

The Automatically Setup SS Dependent Selection report (R085505) builds tables that the system uses to automatically determine the minimum number of dependents that are appropriate for each benefit plan or plan option. This report also adds a value for allowed relationships in the Allowed Relationships table (F085505). A * is added to each benefit plan or benefit plan option record that does not already contain a specified value. Self-service benefits programs use these tables to select benefit plans based on covered dependents. The system uses the following factors in determining the plans that are displayed as choices from which employees can choose:

- Minimum number of dependents
- Maximum number of dependents
- Valid relationships per plan or plan option

Before running this report, ensure that benefit plans options are defined for each benefit plan or that benefit plans are set up with plan grouping. Also review your benefit plan setup to ensure that a maximum number of dependents has been defined for all benefit plans and benefit plan options.

When the report is run, you define plans or plan options that you are including in the report. You normally run this report after adding a new set of benefit plans to the software and before building the benefit workfiles that use the new plans.

Include all benefit plan options within a benefit plan when you run the Automatically Set Up Dependent Min/Max report. Do not include only one benefit plan option. If you are using benefit plan grouping, then include all benefit plans within a benefit plan group when you run the report.

The system determination of the minimum number of dependents for each benefit plan option is an estimate that is based on the maximum number of dependents listed in the prior plan option and the number of dependents that are defined for a certain plan. For example, the minimum number of dependents for the EE + 1 benefit plan in the list below is 2. The estimate of 2 is based on the maximum number of dependents defined for the previous EE Only benefit plan and the plan maximum of 2 dependents that are defined for the EE +1 benefit plan.

The system calculates the minimum number of dependents as follows:

Medical Plan Options	Number of Dependents Before Running the Report		Number of Dependents After Running the Report	
	Minimum	Maximum	Minimum	Maximum
Optional - EE Only	0	0	0	0
EE + 1	0	2	2	2
EE + 3	0	4	3	4
EE + Family	0	99	5	99

You need to review the results of this report to ensure that the dependent numbers reflect the needs of the organization.

See Also

- Setting Up Allowed Dependent Relationships by Plan* to define dependent relationships that the Automatically Set Up Dependent Min/Max report uses to automatically choose self-service benefit plans

Processing Options for the Automatically Set Up Dependent Min/Max Report (R085505)

Defaults

Default the number of dependants (1 = Yes default, 0 = No)

Default the relationship if one is not found (1 = Yes default, 0 = No)

Building the Current Coverage Workfile for Self-Service

From the Current Coverage Work File Mgmt menu (G08BESS321), choose Current Coverage Work File Build.

The Current Coverage Work File Build report should be run prior to running the following reports:

- Available Plans Work File Build (R085520)
- Build Dependent/Beneficiary Work File (R085537)
- Personal Employee Information Workfile Build (R054101)

The Current Coverage Work File Build report creates the Employee Current/Pending Work Table (F085530W) that contains current employee enrollment information. The system uses this workfile to display the benefits in which an employee is currently enrolled. When you build the Current Plans Work File table, the system uses information from the following tables:

- Employee Master (F060116)
- Employee Enrollment (F08330)
- Categories Within Benefit Groups (F08350)

- Plans Within Categories (F08351)
- Benefits Plan Master (F08320)
- Plan Additional Options (F083202)
- Employee Current/Pending Work Table (F085530W)

This report should be run at the following times:

- Before employees use the benefits self-service programs to enter changes and new information
- Before each open enrollment
- Periodically, after employees enter benefit changes

When employees re-enter self-service after entering changes, they can view their updated information only after this report is run.

If the version number has been created for the Build Current Dependent/Beneficiary Work File report (R085537), and a processing option is set appropriately, the Current Coverage Work File Build report automatically launches the Current Dependent Beneficiary Work File report.

Processing Options for the Current Coverage Workfile Build Report (R085530)

Versions

1. R085537 Version:

Enter the version of the Build Current Dependent/Beneficiaries Work File UBE (R085537) to be run. If the field is left blank, the dependent/beneficiary enrollment information will not be generated. Verify that the data selection for R085537 is set up for the selected version before running.

XJDE0001 is the standard version used.

Setting Up a Current Dependent and Beneficiary Workfile

From the Dependent/Beneficiary Work File Mgmt menu (G08BESS323), choose Dependent/Beneficiary Work File Build.

When you build the Dependent and Beneficiary Work File table, the system searches the following tables:

- Employee Master (F060116)
- Employee Enrollment (F08330)
- Dep/Ben to Employee Plan X-Reference (F08336)
- Current Dep/Ben X-Reference Work Table (F085537W)
- Primary Care Physician table (F08338)
- Dep/Ben X-Reference Tag Table (F08336B)
- Plan/Plan By Option Tag Table (F08320B)

The system obtains employee dependent and beneficiary records that are associated with plans, and records that are not associated with plans. The system then saves this information in the Current Dep/Ben X-Reference Work Table (F085537W). When employees use self-service to change their benefits or update information, the system uses information from this file to display their current dependents and beneficiaries. This report should be run before employees use benefit self-service features of OneWorld software.

You can build the workfile for open enrollment or for a current enrollment event type. The workfile stores the records for both types of events. The program maintains the dependent and beneficiary records separately for each event type.

Running this report checks for active and inactive dependents and beneficiaries and saves the information in the workfile. All dependent and beneficiary information is saved in the workfile even if the dependent or beneficiary is not currently covered by employee benefit plans or benefit plan options so that an employee can re-enroll an inactive dependent.

Before building the workfile, if the system finds unprocessed dependent or beneficiary records for an employee, the system prints the record on an exception report without processing the employee and proceeds to the next employee. The system does not include participants who are deceased.

Processing Options for Current Dependent/Beneficiary Work File Build (R085537)

Process

1. Enrollment Event Type
Specific UDC value required
-

Building the Available Plans Workfile for Self-Service

From the Available Plans Work File Mgmt menu (G08BESS322), choose Available Plans Work File Build.

When you use the Available Plans Workfile Build report (R085520) to build the Available Plans and Plan Options by Employee Work Table (F085520W), the system searches each employee benefit group for all active benefit plans and benefit plan options that are offered. It also calculates the new cost, as of the effective date, for each plan and plan option. The system obtains age and salary from the Benefit Self Service Constant table (F08505) and uses this information as of the point-in-time date to determine the cost for applicable annuity benefit plans. If the plan requires the employee to enter an amount or rate, the system calculates the costs or credits dynamically after the employee enters the amount and requests the calculation.

If the workfile contains unprocessed records, these instances are printed to an exception report.

To determine whether the current employee enrollment elections can be reused for open enrollment, the Available Plans and Plan Options Work File Build report tracks whether the current elections are different than the available benefit plans and benefit plan options. For the system to reuse current enrollment information, the following conditions must exist:

- All current benefit plans and benefit plan options must be valid for the upcoming enrollment year.
- All current benefit plans and benefit plan options must be set to allow reuse (defaulting). See *Setting Up Benefits Self-Service Categories by Enrollment Event* to review whether a benefit plan or a benefit plan option allows defaulting.

If the benefit plans are the same, and a processing option is set appropriately in the Current Enrollment Workfile Build report (R085530), the system supplies the current enrollment as the default enrollment. However, if a current plan is no longer available (for example, if you are changing insurance carriers), you should not accept the default.

You can build the Available Plans and Plan Options workfile for either open enrollment or current enrollment. In open enrollment, available plans and plan options, as well as their costs, might change. In current enrollment, which is typically associated with new hire, rehire, life event, or special enrollment, the available plans and plan options remain the same. The effective date processing option is used to obtain the active plans and plan options, with their associated costs and credits, for the event type. If you do not set up an effective date in the processing options, the system will not build the workfiles.

You can build the workfile twice; once for open enrollment and once for current enrollment. The workfile stores the records for both types of enrollment at the same time.

This program uses the following OneWorld tables:

- Employee Master (F060116)
- Categories Within Benefit Groups (F08350)
- Plans Within Categories (F08351)
- Benefits Plan Master (F08320)
- Plan Additional Options (F083202)
- Payroll Transaction Constants (F069116)
- Payroll Generic Tables (F069026)
- Payroll transaction Cross Reference (F069036)
- Generic Message/Rates (F00191)
- Plan Master Rates (F083203)
- Plan/Plan Option Tag Table (F08320B)
- Plan Master Tag File (F08320C)

You can set processing options to specify the following:

- The effective date of the active benefit plans and benefit plan options
- The event type (open enrollment or current enrollment)
- Whether the system allows prior enrollment information to be automatically defaulted as the chosen benefit plans or benefit plan options

Before You Begin

- ❑ Run the Current Coverage Work File Build report first so the report can determine whether the previous year plans can be used without changes for the upcoming open enrollment. See *Building the Current Coverage Work File*.
- ❑ If your plan rates are changing during the open enrollment period, cross-reference the current year's DBAs to new rate DBAs. See [Setting Up New DBA Plan Rates](#).

Processing Options for Available Plans Work File Build (R085520)

Date

1. Effective Date:

Enter the effective date to determine the active plans and plan options with their associated costs and credits.

Event Type

1. Event Type:

- 1 - Build available plans/plan options for Open Enrollment.
- 2 - Build available plans/plan options for Current Enrollment.

2. Process Defaulting:

Blank - Do not process for defaulting

- 1 - Process for defaulting
(Open enrollment only)

What You Should Know About Processing Options

Effective Date If the effective date is left blank, the system date is used.

Building the Personal Information Workfile

From the Personal Information Work File Mgmt menu (G08BESS324), choose Personal Information Work File Build.

You use the Personal Information Work File Build report to create tables that contain employee, dependent, and beneficiary personal information. The report obtains information from the following tables:

- Address Book Master (F060116)
- Address Book by Date (F0101)
- Address by Date (F0116)
- Address Book – Contact Phone Number (F0115)
- Address book - Who's Who (F0111)

The benefits self-service programs use this information to display employee personal information. These tables provide a temporary location that the system uses to store data before writing it back to the originating tables.

The new tables that this report creates are:

- Employee Personal Profile Information Work Table (F054101W)
- Employee Phone Number Work Table (F054115W)
- Employee Emergency Contact Work Table (F054111W)

Processing Options for the Personal Information Work File Management Build Report (R054101)

Process

1. Write Personal Information for Employee, Dependent/Beneficiary, or Both:

- 1 - Employee
- 2 - Dependent/Beneficiary
 - (R085537 MUST be run first)
- 3 - Both
 - (R085537 MUST be run first)

Setting Up Steps and Rules for Director Process Flows

From the Employee Self Service General Mgmt menu (G08BESS327), choose Populate Director Form Rules/Edits.

When you run the Populate Director Form Rules/Edits report, the system builds the following files:

- Self-Service Step Application Cross-Reference (F05402)
- Self-Service Position Rules (F05403)

The system saves information about objects and applications that can be specified in a process flow in the Self-Service Step Application table. The Self-Service Process Flow Setup program uses information from this file to define process flows.

The system saves rules and functional parameters for self-service process flows in the Self-Service Script Position Reference table.

Setting Up Self-Service Benefit Plan Guidelines

Many organizations include contribution and coverage change limits in their benefit plans and benefit plan options. For example, to participate in plans that allow for employee contributions, such as a 401 (k) benefit plan, employees might have to contribute a minimum amount. In addition, organizations normally impose a maximum amount that employees can contribute. You can use the Benefit Amount Rate Edits program (P085573) to create these rules.

For other indemnity benefit plans such as life insurance, organizations often limit the amount of coverage increase that employees can choose during enrollment events. Even if employees are permitted to enroll for higher coverage when they are hired, companies often limit annual increases. For example, if an employee is enrolled in a life insurance plan that provides \$10,000 of coverage, a rule might exist that the employee can elect to change to another plan that provides an increase of no more than \$5,000. Thus an employee with \$10,000 coverage cannot elect a life insurance benefit plan with more than \$15,000 coverage. You can use the Maximum Insurance Coverage Increase program (P085574) to set this limit.

Setting Up Benefit Contribution Limits

Organizations often offer employee benefit plans or benefit plan options to which employees can voluntarily contribute an amount or percentage of their salary. For example, an organization might offer a 401 (k) plan that allows employees to contribute up to eight percent of their salary. The organization might also stipulate that if employees choose to participate, they must contribute a minimum of one percent. You can use the Benefit Amount Rate Edits

program (P085573) to define the minimum and maximum limits for deductions, benefits, and accruals (DBAs).

To set minimum and maximum limits for a DBA, you can use the Plan Master program (P08320) to choose a benefit plan. You need to review current DBAs that might be currently attached to the benefit plan and then use a Form menu option to choose the Benefit Rates. When you specify the minimum and maximum amounts that the organization allows for a specific DBA, you also need to specify the frequency type. The frequency type determines how the system distributes the amount deducted from salary over a period of one year.

The system stores information that you enter in the Benefit Amount Rate Edits program in the Entered Benefit Amount Rate/Edits table (F085573W).

► **To set up benefit contribution limits**

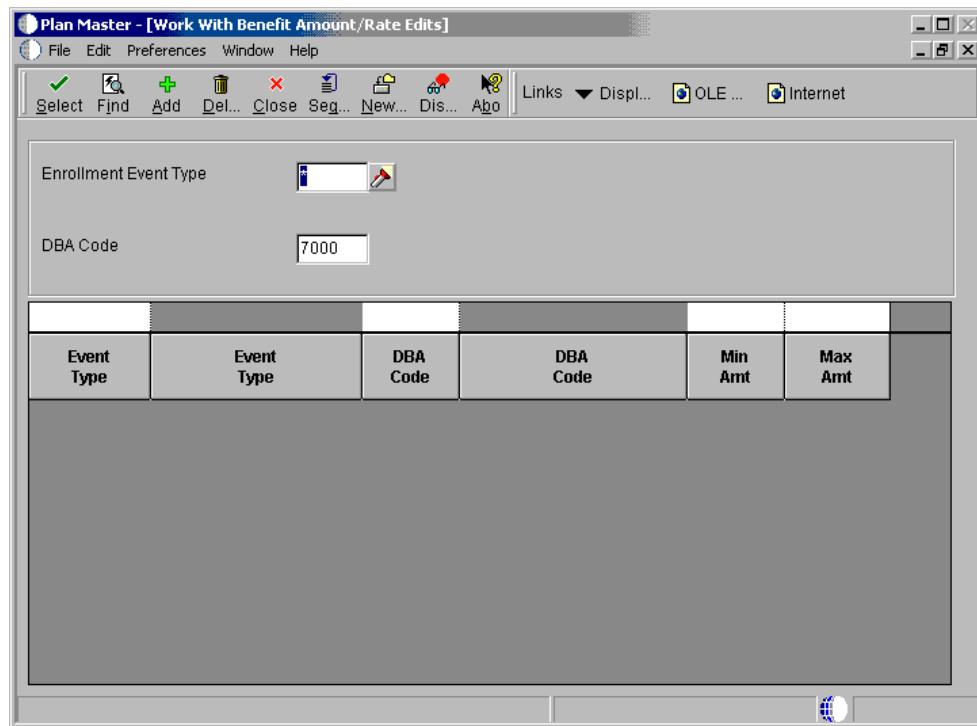
From the Benefits Administration Setup menu (G08BB4), choose Plan Master.

1. On Work With Plan Master, click Find to display existing benefit plans.
2. Choose a benefit plan, and then click Select.
3. On Plan Master, choose the Calc./Eligibility tab and review the following fields:

- EE Payroll Deduction
- EE Flex Cost

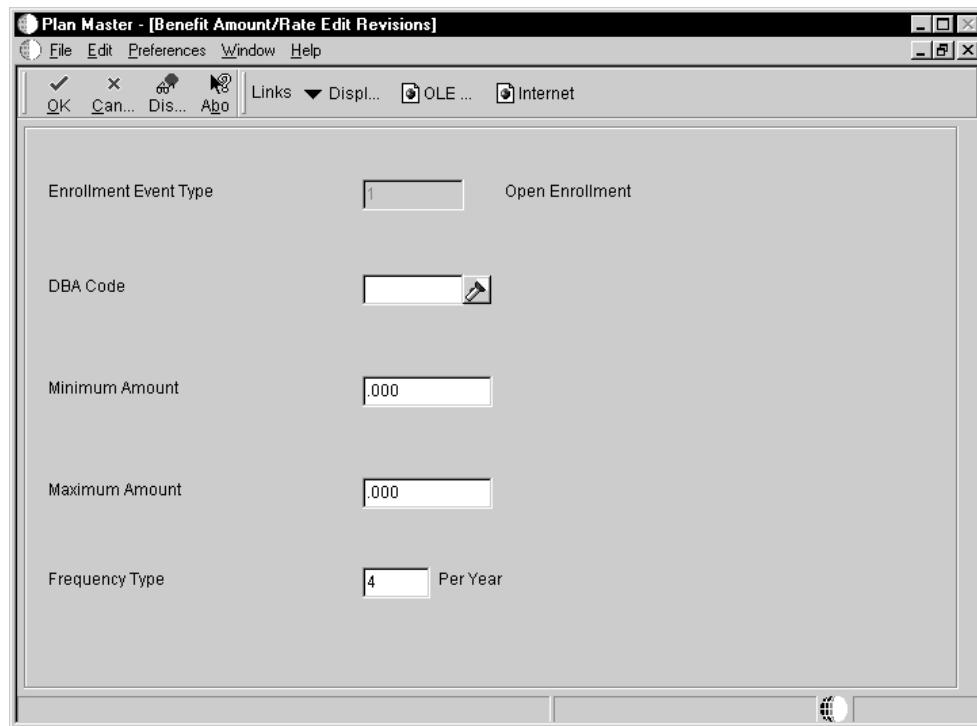
The system uses EE Payroll Deduction or EE Flex Cost, but not both. If a value exists for EE Payroll Deduction and EE Flex Cost, the system uses EE Payroll Deduction and ignores EE Flex Cost.

4. Choose one of the following fields, and then choose Benefit Rates from the Form menu:
 - EE Payroll Deduction
 - EE Flex Cost



The Benefit Rates menu option is available only when you first perform one of the following:

- Choose EE Payroll Deduction
 - Choose EE Flex Cost and EE Payroll Deduction is blank
5. On Work With Benefit Amount/Rate Edits, complete the following fields and then click Find to display existing records:
- Enrollment Event type
 - DBA Code
6. To add minimum and maximum limits to a DBA, click Add.



7. On Benefit Amount/Rate Edit Revisions, complete the following fields:

- DBA Code
- Minimum Amount
- Maximum Amount
- Frequency Type

8. Click OK.

You can enter minimum and maximum amounts for additional DBAs before canceling this form.

Setting Up Maximum Coverage Increase Limits

Many organizations offer life insurance benefit plans and benefit plan options to employees. Employees can normally choose to enroll in one or more of the plans or decline enrollment. Companies often allow employees to enroll in any available insurance benefit plan when they are hired, but limit annual increases after the initial enrollment. To qualify for an exception to the annual increase rule, an organization might require a physical examination.

You can use the Maximum Insurance Coverage Increase program (P085574) to create a coverage increase limit rule. You can create this rule for any of the following:

- Benefit plans
- Benefit categories
- Benefit plans within benefit categories

Before creating a new coverage increase limit rule, you need to review the premium and coverage information on the Premium/Coverage tab on the Plan Master. After reviewing this

information, you can choose a benefit plan and then use the Allowed Increment option on the Row menu of the Plan Master program (P08320) to access the Maximum Insurance Coverage Increase program. Alternatively, you can choose the Categories by Benefit Group program (P08350) and implement the same procedure.

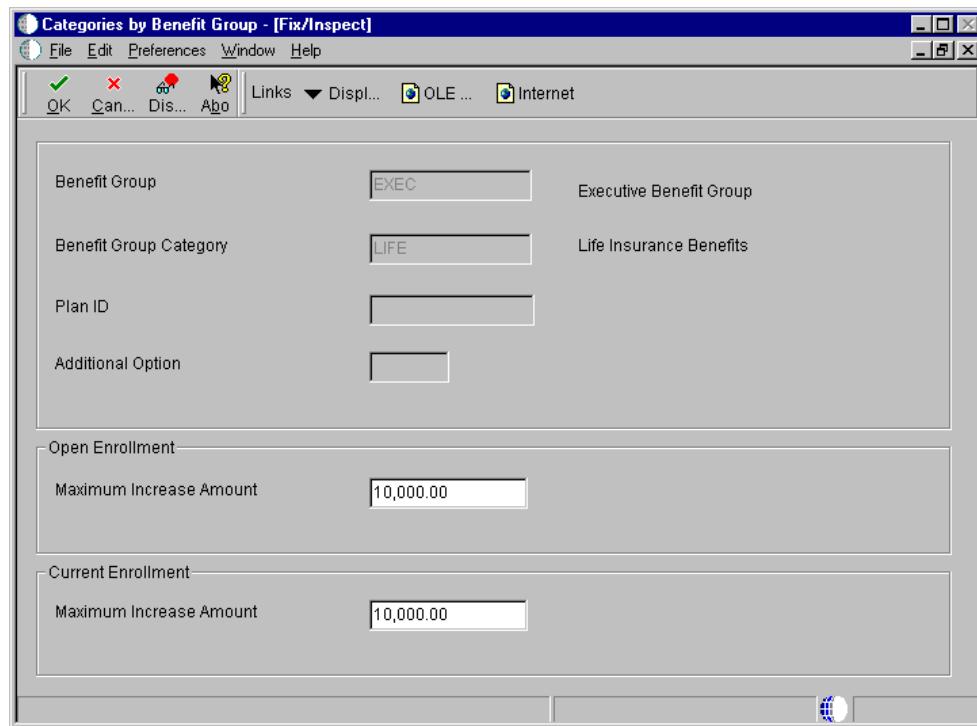
If you create a coverage increase limit rule for a benefit plan, the rule then applies to everyone in the company who is covered by the benefit plan. If you create a rule for a benefit category, then only employees within the benefit category are affected by the rule. If you create a rule for a benefit plan within a benefit category, then only employees within the category who elect the benefit plan are affected by the rule.

The system stores information that you enter in the Maximum Insurance Coverage Increase Amounts table (F085574).

► **To set up maximum coverage increase limits**

From the Benefits Administration Setup menu (G08BB4), choose Plan Master.

1. On Work With Plan Master, click Find to display current benefit plans. Then choose an indemnity benefit plan and click Select.
2. On Plan Master, click the Premium/Coverage tab and review the following fields:
 - Premium Payment
 - Age Rate Table
 - Per Coverage Dollars
 - Maximum Premium Amount
 - Amount - Coverage
 - Salary Factor
 - Rounding Amount
 - Data Item
3. Click Cancel to return to Work With Plan Master.
4. Choose a benefit plan, and then choose Allowed Increment from the Row menu.



5. On Allowed Increment, complete the following field under Open Enrollment:

- Maximum Increase Amount

6. Complete the following field under Current Enrollment:

- Maximum Increase Amount

7. Click OK.

If you want to create limit rules only at the benefit plan level, this step ends the procedure. If you want to create limit rules at a more specific level, then continue with the following steps.

From the Benefits Administration Setup menu, choose Categories by Benefit Group.

8. On Work With Benefit Groups, click Find to display existing employee benefit groups, choose a benefit group, and click Select.
9. On Categories By Benefit Group, choose an indemnity benefit plan record such as Life Insurance Benefits, and then choose Assign Plans from the Row menu.
10. On Plans Within Categories, choose an employee benefit plan and choose Allowed Increment from the Row menu.
11. On Allowed Increment, complete the following field under Open Enrollment:
 - Maximum Increase Amount
12. Complete the following field under Current Enrollment:
 - Maximum Increase Amount
13. Click OK.
14. On Plans Within Categories, click OK.

Setting Up Self-Service Process Flows

Benefits self-service software includes the opportunity for Work Force Management administrators to extensively tailor the enrollment process to meet organizational requirements. Accessing this software through an Internet web portal, you can change the appearance of the interface and the processes that employees use to manage their benefits.

You need to run the Populate Director Form Rules/Edits report prior to creating or changing self-service process flows.

You can use the Employee Self-Service Process Flow Setup program (P05400) to define the process flow for your self-service programs. The process flow includes the steps that are necessary to complete a full life event or open enrollment change. These steps might include a variety of interactive programs, reports, or director forms. You can create company or country-specific processes for each life or open enrollment event, including translated text to meet the needs of specific employee audiences.

Setting up process flows is required before employees, manager, or candidates can use self-service functions that require more than one program to complete.

Running the Populate Director Form Rules/Edits Report

From the Employee Self Service General Mgmt menu (G08BESS327), choose Populate Director Form Rules/Edits.

The Populate Director Form Rules/Edits report (R8985500) creates and stores information that is used by the Employee Self-Service Process Flow Setup program to create new process flow scripts. You need to run this report before creating or changing process flow scripts. You need to run this report only once. This report creates the following tables:

- Self-Service Step/Application Cross-Reference (F05402)
- Self-Service Script Position Rules (F05403)

The Self-Service Setup/Application Cross-Reference table saves a list of all the objects, programs, and reports that you might need when you create process flow scripts.

The Self-Service Script Position Rules table saves all of the rules that govern the setup of self-service process scripts.

Defining Process Flow Scripts

A Work Force Management administrator can use the Employee Self-Service Process Flow Setup program (P05400) to define the action steps for new self-service process flows, copy and edit existing process flows, or delete process flows that are no longer applicable to organizational requirements. These process flows define the procedure that an employee uses to enroll in or change benefits or personal information.

For a new process flow, the user initially defines general information about the script, including the company and country to which the process flow applies. Next, the administrator defines each action step of the process flow. If the action step requires a program, the user specifies the program, including the version number. You can select only self-service programs. If the action step specifies a director form, the system uses the Employee Self-Service Director Setup program to provide a form where the administrator defines the director text.

To plan a self-service process flow and implement the procedure with minimum effort, you need to be aware of the rules and program relationships that govern process flows. You generated these rules by running the Populate Director Form Rules/Edits report (R9895500). When you specify action steps in a process flow that violates any of the rules, the system produces an error and an explanation of the problem.

Self-Service Process Flow Rules and Program Relationships

Following are the rules that govern the creation of a self-service process flow:

- A director must be included between each application in the flow. Each script must follow this order: director, program, director, program, and so on.
- The first director in a script must be enabled.
- If an action step is required in a flow, then you must also enable that step in the flow. Although a setup option exists for disabling an action step, required action steps must always be enabled.
- If you specify Self-Service Action Step 70 *Dependent List* (P085551 - ZJDE001) in the process flow, then you must include Step 160 *Preview Benefit Changes* (P085568 - ZJDE0002). Step 70 must precede Step 160.
- If you specify Self-Service Action Step 80 *Beneficiary List* (P085551 - ZJDE0002) in the process flow, then you must place it after Step 70 (P085551 - ZJDE001).
- If you specify Self-Service Action Step 80 *Beneficiary List* (P085551 - ZJDE0002) in the process flow, then you must include Step 160 *Preview Benefit Changes* (P0855568 - ZJDE0002). Step 80 must precede Step 160.
- If you specify Self-Service Action Step 100 *Number of Dependents to Cover* (P085560) in the process flow, then you cannot include Step 120 'Health & Welfare' Enrollment (P085570). If you specify Step 120 'Health & Welfare' Enrollment (P085570) in the process flow, then you cannot include Step 100 *Number of Dependents to Cover* (P085560). If you specify Step 100 or Step 120 in the process flow, then you must include Step 160 *Preview Benefit Changes* (P085568). Step 100 or 120 must precede Step 160.
- If you specify Self-Service Action Step 150 *COBRA Notification* (P085580) in the process flow, then this step must follow any of the following steps if they are in the process flow:

Self-Service Action Step	Program Number	Program Version (if required)
70	P08551	ZJDE0001
80	P08551	ZJDE0002
100	P085560	
120	P085570	
160	P085568	ZJDE0002
170	P085564	
180	P085568	ZJDE0003

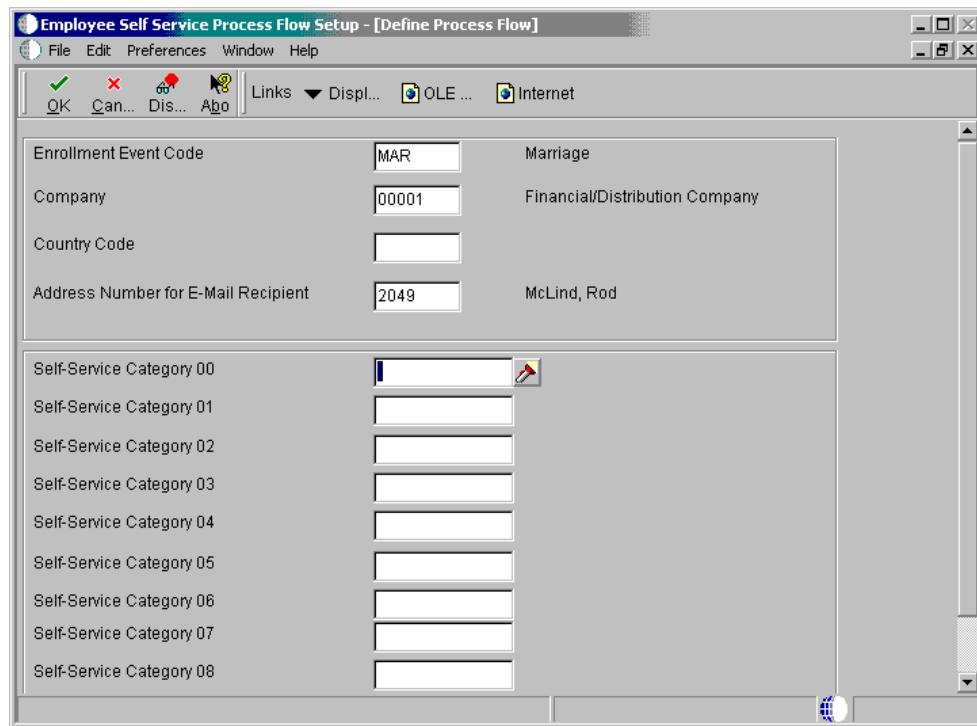
190	P085563	ZJDE0001
200	P085563	ZJDE0002
210	P085563	ZJDE0003
220	P085563	ZJDE0004

- You must specify all or none of the following Self-Service Action Steps: 160 *Preview Benefit Changes* (P085568 - ZJDE0002), 170 *Accept Benefit Changes* (P085564), and 180 *Final Benefit Confirmation Statement* (P085568 - ZJDE0003). If you specify all three steps, you must define them in sequence after Steps 60 (P085562), 70 (P085551 - ZJDE0001), 100 (P085560) and 120 (P085570).
- When you specify the following Self-Service Action Steps, you must define them in the following sequence: 160 (P085568 - ZJDE0002), 170 (P085564) and 180 (P085568 - ZJDE0003).
- If you specify any of the following Self-Service Action Steps, then you must include Step 160 (P085568 - ZJDE0002): 190 '*Indemnity*' *Plans to Change* (P085563 - ZJDE0001), 200 '*Retirement*' *Plans to Change* (P085563 - ZJDE0002), 210 '*Other*' *Plans to Change* (P085563 - ZJDE0003), or 220 *Change All Remaining Categories* (P085563 - ZJDE0004). Step 160 must follow any of these steps in the process flow.
- If you specify Self-Service Action Steps 190 '*Indemnity*' *Plans to Change* (P085563 - ZJDE0001), 200 '*Retirement*' *Plans to Change* (P085562 - ZJDE0002), and 210 '*Other*' *Plans to Change* (P085563 - ZJDE0003) in the process flow, then do not include Step 220 *Change All Remaining Categories* (P085563 - ZJDE0004). Step 220 causes redundancies in the script because the first three steps include the benefit plans that are defined in Step 220.

► To define a process flow script

From the Employee Self Service Director Setup menu (G08BB411), choose Employee Self Service Process Flow Setup.

1. On Work With Self-Service Process Flow Scripts, click Add.



2. On Define Process Flow, complete the following fields:

- Enrollment Event Code

You enter this code in a processing option for the director when running a script.

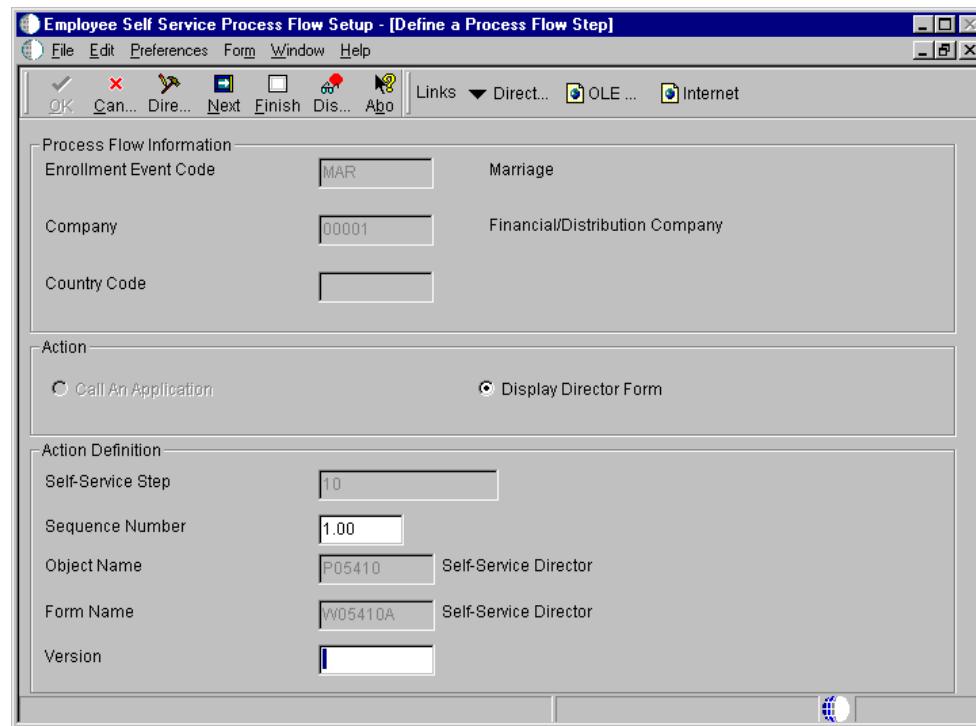
- Company

3. Complete the following optional fields and then click OK.

- Country Code
- Address Number for E-Mail Recipient

You can define any of the Self-Service Category Codes, and use them for process identification and sorting at a later time. These user defined codes are not required for the self-service process script.

The process of creating a self-service process flow includes multiple forms that the system displays in sequence. After completing a form and choosing Next, the next form in the sequence appears without an option to return to the previous form.

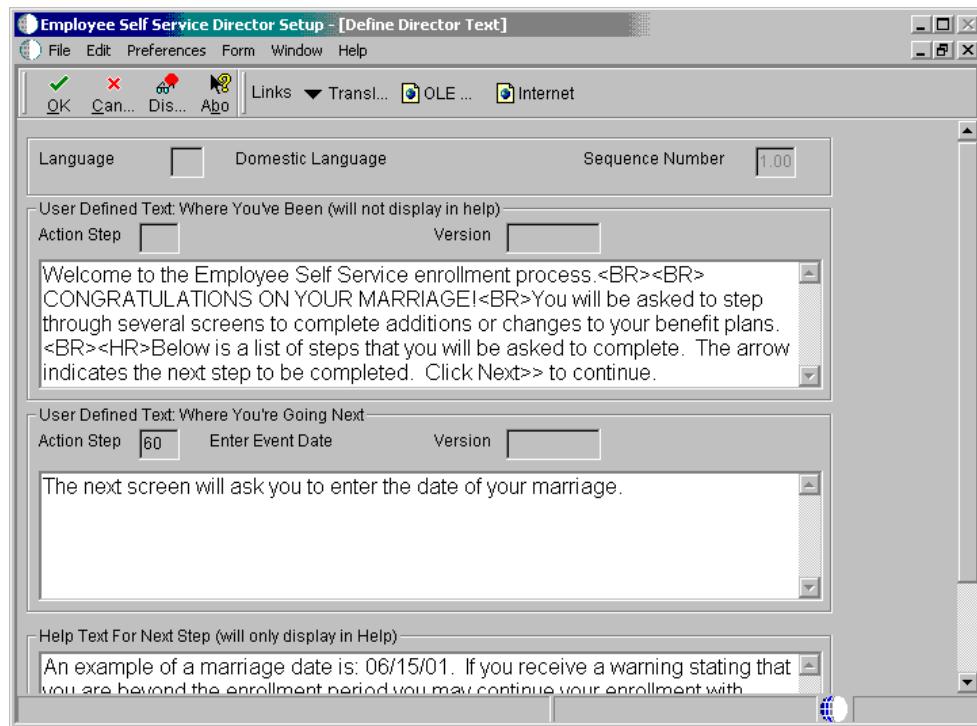


4. On Define a Process Flow Step, review the following field and click Next:

- Sequence Number

Because all self-service process flows must begin with a director form, the system automatically selects the Display Director Form option and disables the Call An Application option.

On subsequent steps of the process flow, use the Version field only when you need to specify a specific program version.



5. On Define Director Text, add employee instructions, comments, or feedback that assist an employee in the enrollment process step.

Enter text in the first text field that displays a welcome message in the first director form or describes the previous step for subsequent director forms.

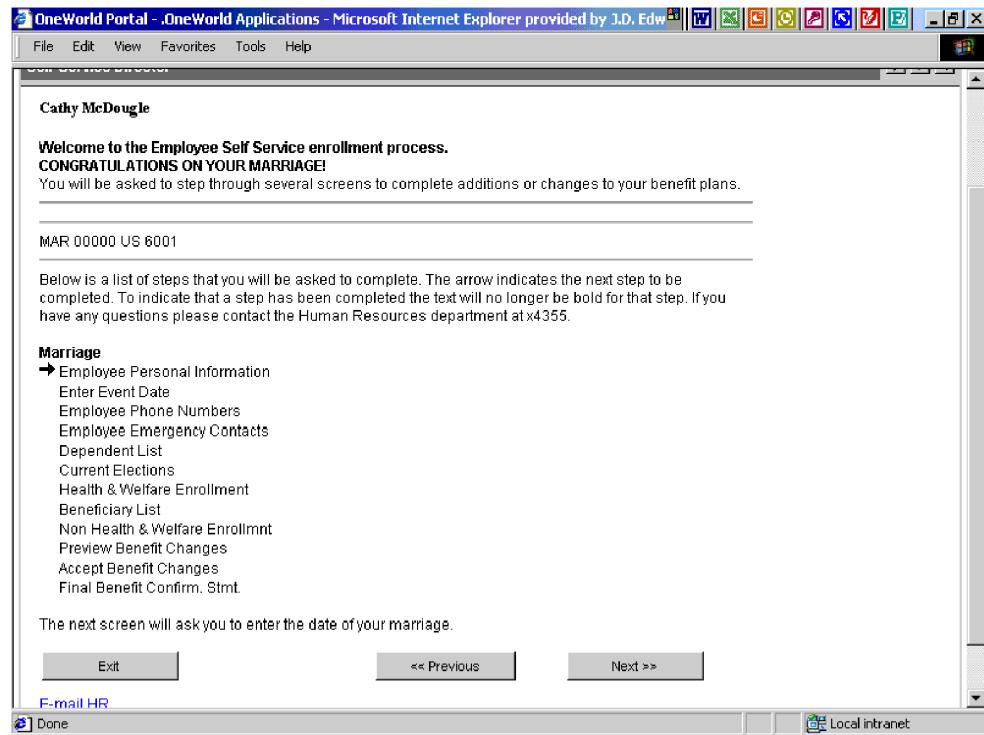
Note

Do not use the Enter keyboard command to begin a new line of text. To format text in these fields, use HTML tags.

Use the second text field to enter text that the system displays below the list of enrollment process steps on the director form. The system also displays this text when an employee chooses online help.

Enter information in the third text field that provides additional help for the following process step. For example, you might provide a sample of a correct entry, an explanation of possible warning messages, or what the employee needs to do if a data entry problem arises. The system displays information from the third text field only when an employee clicks Help on the following step in the process flow.

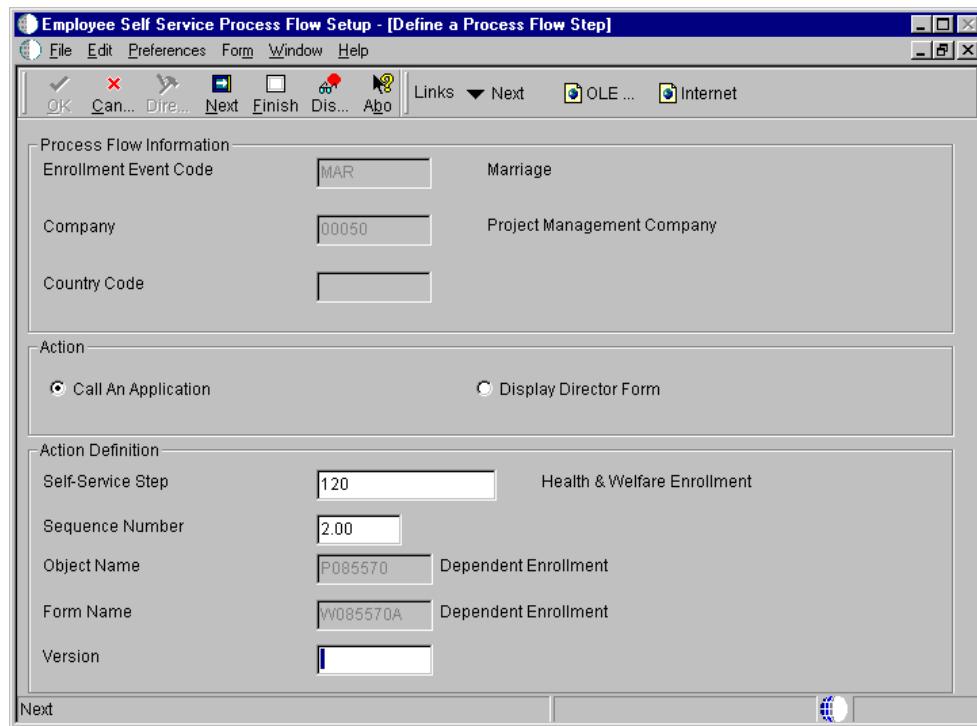
If you set up text on the Define Director Text form as illustrated above, the resulting director form that an employee uses might appear as follows:



The HTML image tag for the help icon is as follows: . Depending on your setup procedures, the path for this image might be different in your system.

In the example above, if an employee clicks Help in the Enter Event Date application, the system displays the help text that you enter into the third text field on the Define Director Text form.

6. On Define Director Text, click OK.



7. On Design a Process Flow Step, review the following options under the Action heading:
 - Call An Application
 - Display Director Form

The system automatically selects one of these options based on the process sequence. For example, after you define a director process step, the system automatically chooses the Call An Application option.
8. Complete the following fields under the Action Definition heading and click Next:
 - Self-Service Step
 - Sequence Number

The system automatically provides the next number in sequence. You can change this number to alter the order in which the forms are displayed to employees.
9. Repeat steps 2 - 7 until all steps of the process flow are complete.
10. When all process flow steps are defined, click Finish on the final appearance of the Design a Process Flow Step form.

Display Sequence	Self-Service Enabled	Action	Action Description	Self-Service Action Step	Self-D
1.00	1	0003	Call a Director Form	10	Director Form
2.00	1	0001	Call an Application	60	Enter Event
3.00	0	0003	Call a Director Form	10	Director Form
4.00	1	0001	Call an Application	90	Current Elec
5.00	0	0003	Call a Director Form	10	Director Form
6.00	1	0001	Call an Application	70	Dependent l
7.00	0	0003	Call a Director Form	10	Director Form
8.00	1	0001	Call an Application	20	Employee P

11. On Process Flow Detail, review the process flow, make changes or additions, and then click OK.

Setting Up Translated Director Text

Each organization defines self-service process flows that employees use to enroll in benefits. Each of the director forms within a process flow contains user defined text in the domestic language that assists employees with the task. When self-service process flows are defined for additional companies and countries, the director form text entries might require translation.

To set up translated director text, you use the Employee Self-Service Director Setup program to enter translated text.

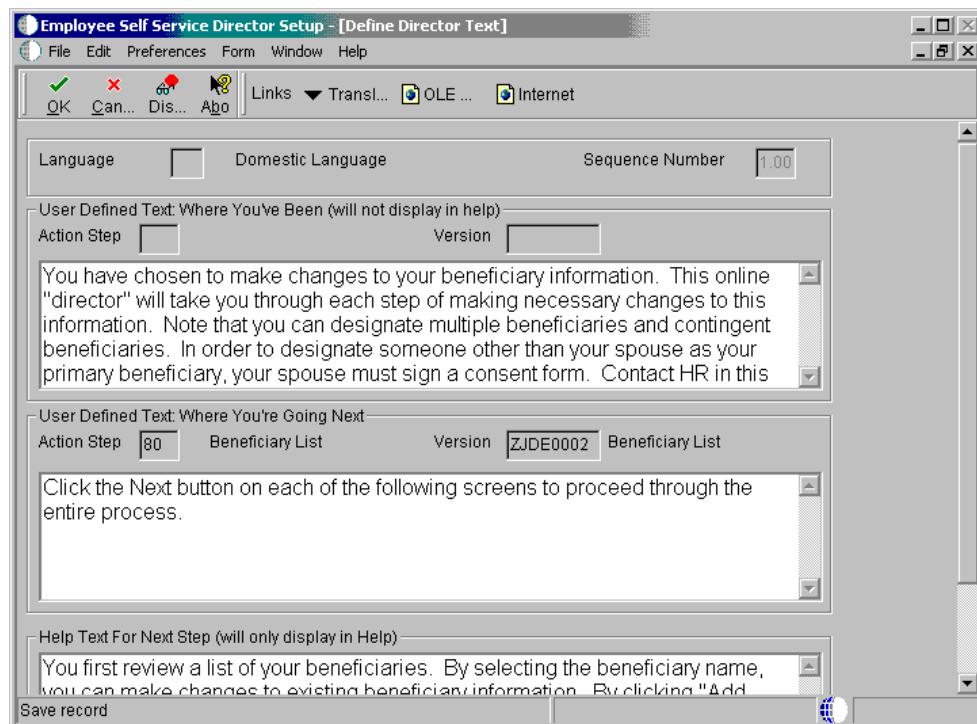
► To set up translated director text

From the Employee Self Service Director Setup menu (G08BB411), choose Employee Self Service Director Setup.

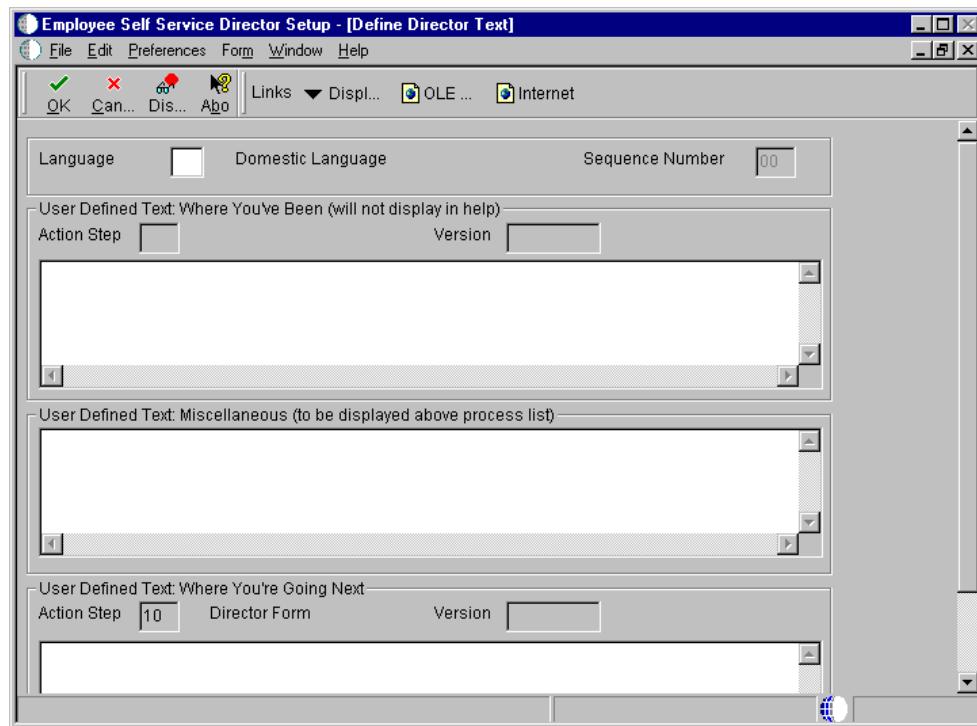
1. On Work With Director Text, complete the following fields and then click Find:
 - Enrollment Event Code
 - Company
 - Country Code
 - Sequence Number

2. Choose a self-service process flow record and click Select.

The domestic text from the record appears in each of the windows.



3. On Define Director Text, choose Translate from the Form menu.



4. Complete the following field:
 - Language
5. Enter translated text into each of the windows.
6. When finished entering translated text, click OK.

Setting Up Form Options

Although self-service forms are designed to display personal information that many organizations find appropriate and useful, in the context of self-service, some workforce management administrators might need to change these choices. You can use the Employee Self-Service Form Options program (P085550) to hide certain fields on a form or to disable certain fields so that the system displays information, but employees cannot enter changes.

The system default setting for the Employee Self-Service Form Options program is to show all fields and enable input. Only overrides to this default need to be specified. Only personal information can be set up as disabled for input. If no overrides are entered, employees have full access to each of the features. The Grouping Code field is connected to UDC 08/EG. This UDC contains a record for each program that has controls that can be hidden. The predefined Grouping Codes are as follows:

CO	Employee emergency contacts
N	
DA	Dependent and beneficiary personal information
B	

PE Employee personal information
R

You can also set up processing options for the following programs that specify display options on the following forms:

- Self-Service Director (P05410)
- Employee Information (P054215)
- Enrollment Statement (P085568)
- Dependent Enrollment (P085570)

To set up these processing options, you use the Interactive Versions program (P983051) to find the processing options template and then choose Processing Options from the Row menu.

► To set up form options

From the Employee Self Service General Setup menu (G08BB413), choose Employee Self Service Form Options.

1. On Employee Self-Service Form Options, complete the following fields and click Find:
 - Grouping Code
 - Enrollment Event Code
 - Data Item

The screenshot shows the 'Employee Self Service Form Options' window. At the top, there's a toolbar with icons for OK, Find, Del..., Can..., New..., Dis..., Abo, Links, Disp..., OLE..., and Internet. Below the toolbar is a search panel with three input fields: 'Grouping Code' (with value 'I'), 'Enrollment Event Code' (with value '*'), and 'Data Item' (with value '*'). The main area is a grid table with columns: #, Grouping Code, Enrollment Event Code, Data Item, Data Item Description, Display Option, Display Description, and Disable Input. The grid contains 12 rows of data, mostly for PER (Personnel) records, such as Employee Number, Employed, Type Code, etc., with various display options like Yes or No.

#	Grouping Code	Enrollment Event Code	Data Item	Data Item Description	Display Option	Display Description	Disable Input
1	CON		AN8	Employee Number	1	Yes	1
2	CON		EMP	Employed	0	No	1
3	CON		TYC	Type Code	0	No	1
4	DAB		AN8	Employee Number	1	Yes	1
5	DAB		EMP	Employed	0	No	1
6	DAB		TYC	Type Code	0	No	1
7	PER		AN8	Employee Number	1	Yes	1
8	PER		EMP	Employed	0	No	1
9	PER		TYC	Type Code	0	No	1
10	PER	OPN	GNNM	Given Name	1	Yes	1
11	PER	OPN	MLNM	Mailing Name	1	Yes	1
12	PER	OPN	PRNM	Preferred Name	1	Yes	1

2. To hide or disable the display of a data item, complete the following fields for each item:
 - Grouping Code
 - Enrollment Event Code
 - Data Item
 - Display Option
 - Disable Input
3. Click OK.

Processing Options for Self-Service Director (P05410)

Process

1. Process Flow Event

Display

1. Display Marital Status on the Director Form?
0 = No
1 = Yes
2. Display Salary on the Director Form?
0 = No
1 = Yes
3. Display Birthdate on the Director Form?
0 = No
1 = Yes

Processing Options for Employee Information - Telephone Numbers (P054215)

Display

- 1) Display Phone Prefix

0 = No, do not display prefix
1 = Yes, display prefix

Processing Options for Enrollment Statement (P085568)

Options

1. Confirmation Statement Options
 - C = Current Statement
 - P = Pending Statement
 - F = Final Statement
2. Employer Cost
 - 0 = Hide
 - 1 = Show
3. Final Statement
 - 0 = Show Summary Of Benefits
 - 1 = Show Transaction Number Only
4. Previous Employee Cost
 - 0 = Hide
 - 1 = Show

5. Categories To Display
0 = Show All Categories
1 = Only Categories In F085510

Default

Enter the mailing address for declined coverage statements

1. Enter The Company Name
2. Enter The Company Address
3. Enter The City
4. Enter The State
5. Enter The Postal Code
6. Enter The Persons Name For, Attention Of:

Date

1. Current Enrollment Form Date to Display

0 = No Date Displayed
1 = Latest Plan Enrollment Date
2 = System Date

2. Current Enrollment Form Date to Display

Enter a Valid Date to Override Above Options

E-mail

1. From E-mail Address
Valid E-mail Address
Blank = Same as To Address
-

Processing Options for Dependent Enrollment (P085570)

Default

Hide Benefit Calculations

0 = Do Not Hide
1 = Hide Calculation Button
2 = Hide Calculation Button and Totals

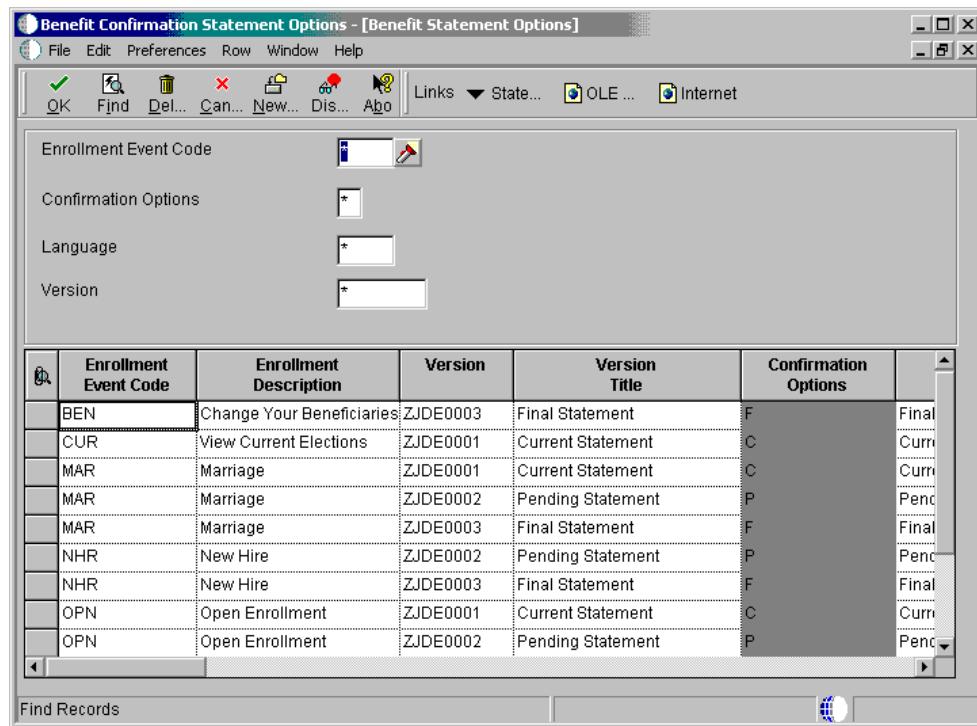
Setting Up Benefit Confirmation Statement Options

You can use the Benefit Statement Options program (P085518) to define the text on certain buttons in benefit enrollment statements. You normally define these statement forms at various intervals of the process flows for benefits enrollment. Text on the buttons can be changed to suit individual events, versions, languages, countries, and organizations. The text on each button can be changed or the text can be hidden. If the text field is left blank, the system uses the default text that is currently displayed in the software.

On some forms, certain buttons are always hidden, regardless of the settings that you might input in this program. For example, the Next button is valid only on the Current Statement. The Back button is valid only on the Current Statement and the Pending Statement. The Submit button exists on the Pending Statement and the Final Statement, but on the Final Statement, the default text is Final.

► **To set up benefit confirmation statement options**

From the Employee Self Service General Setup menu (G08BB413), choose Benefit Confirmation Statement Options.



1. On Benefit Statement Options, complete the following fields:
 - Enrollment Event Code
 - Confirmation Options
 - Language
 - Version
2. To customize the Next, Back, Print, Mail, and Submit buttons on the benefit confirmation form, complete the following fields for each event:
 - Enrollment Event Code
 - Version
 - Language
 - Print Button Text
 - Mail Button Text
 - Send Mail to HR Text
 - Hide Mail
 - Hide Print
 - Statement Text
3. When all enrollment event changes are complete, click OK.

Setting Up Self-Service Benefits Workflow Approval

You can design and use workflow processes to notify specific employees when an employee enters self-service changes. The system allows workflow processes to be created for the following workfiles:

- Benefits Information
- Personal Information
- Emergency Contact Information

You can use the Self Service Benefits Workflow Approval program (P085515) to specify workflow processes that the system starts when changes are made to certain workfiles. You need to use this program to enable or disable self-service benefits workflow processes because you cannot make these changes in the workflow Process Master. The workflow Process Master allows only one active version. You can disable a workflow process by choosing the Disable Version option. When disabled, the version is inactive and the workflow process does not start when employees enter benefit changes. This function is different than the activate and deactivate feature on the workflow Process Master program (P98800). When you define the workflow Enabled status as YES in the Self Service Benefits Workflow Approval program, the system runs the workflow process even if the Version Status in the workflow Process Master is not active.

Employee self-service benefits software includes the BENAPPRV default process. This process sends an email message and includes an acceptance form. Although the system uses only the BENAPPRV workflow process, you can create and use additional workflow process versions, modified to meet organizational requirements, with each enrollment event code and work file combination. The system requirement for each workflow process is that the data structures cannot be changed.

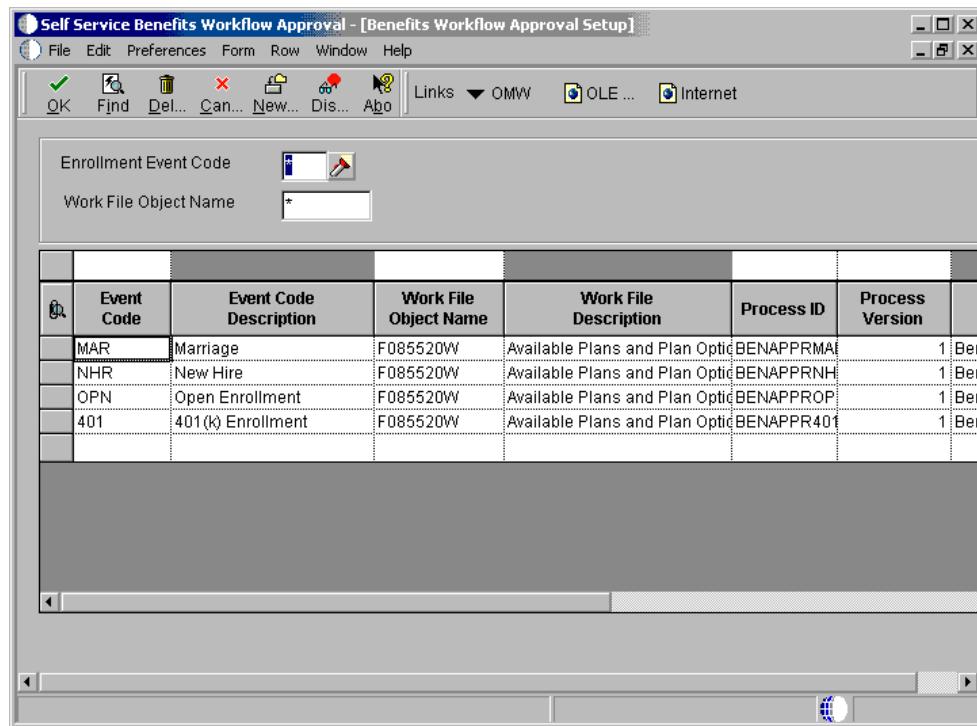
In an open enrollment event, employee benefit changes start the workflow process. If an employee enters additional changes through self-service, the system terminates any related, active workflow processes and removes pending approvals from the email system. If the workflow process cannot start, possibly because the version number is unavailable, the system sends the process recipient a notification message regarding the process failure and then accepts the benefit changes. If workflow processes are enabled in your software, you cannot update employee changes to the live tables until all workflow processes are approved.

To create a new workflow process, copy the default BENAPPRV version and assign new identity information to the copy. Then modify the values in the new version to meet the needs of your organization. After you finish revising the new version, enable the new version with the Self Service Benefits Workflow Approval program. To validate a new workflow version, choose the new version and then choose Validate Workflow from the Row menu.

You can modify a workflow process until a new workflow process version is run the first time. When you run the workflow process version, the system creates an instance record and saves the record in the Process Instance file (F98860). You must delete all instance records created by running a workflow process version before you can enter changes to the version.

► **To set up a self-service benefits workflow approval**

On the Employee Self Service Workflow Setup menu (G08BB412), choose Self Service Benefits Workflow Approval.



1. On Benefits Workflow Approval Setup, complete one or both of the following fields and click Find:
 - Enrollment Event Code
 - Work File Object Name
2. To ensure that the workflow process includes appropriate specifications, review the following fields:
 - Event Code
 - Work File Object
 - Process ID
 - Process Version
 - Version Status

The value in this field indicates whether the version of the workflow process is active.
 - MBDS

The mailbox designation is the location to which the system sends notification and approval messages.
3. To activate a workflow process version, choose a workflow process record and choose Process Master from the Form menu.
4. On Work With Processes, click Find to view the available workflow processes.

Process	Version	Description	Version Status	Product Code	Category Code
ADDBANKTRA	2	Add Bank Transit Number	Y	06	
BENAPPRMAR	1	Benefits Approval Process-Marriage	Y	08B	
BENAPPRNHR	1	Benefits Approval Process-New Hire	Y	08B	
BENAPPROPN	1	Benefits Approval Process-Open Enrollment	Y	08B	
BENAPPRV	1	Benefits Approval Process Template	N	08B	
BENAPPR401	1	Benefits Approval Process-401K	Y	08B	
BIMASTER	1	Business Intelligence Master Process	N	80	
CALLESCAL	1	Call Escalation Workflow Process	Y	17	
CALLSTATUS	1	Process Call Status Change	Y	17	
COBRA	1	COBRA Letter	Y	08	
CREDESC1	1	Credit Escalation	Y	55	
CREDLIMIT	1	Credit Limit Revisions	Y	03B	
CREDLIMIT	2	Credit Limit Revisions	N	03B	
EEMAST1	1	Employee Salary Change Approval Process	Y	05A	
EESETUP01	1	Employee Setup Approval	Y	08	

5. To activate a workflow process, choose a process record, and then choose Activate from the Row menu.
6. Click Close to return to Benefits Workflow Approval Setup.
7. Review the workflow process to verify that the status is changed.
8. When changes are complete, click OK.

Saving Self-Service Employee Information

When employees enter changes to their benefits, personal information, or dependent and beneficiary information, the system saves the changes in workfiles. This information needs to be periodically saved to system live files. After you set up benefits self-service, including the required workfiles, you need to schedule reports to run that periodically save this information.

Saving Self-Service Benefits Information

From the Update Work File Data to Live Tables menu (G08BESS325), choose Update Benefits Info to Live Tables.

You can use the Update Benefits Information to Live Tables report (R085524) to save self-service benefit changes. This report ensures that any eligibility rules are met and then saves changes from benefit workfiles to system live tables. If changes are made during open enrollment, you should run this report after the open enrollment period is closed. If changes are made because of life events, then you should run this report before each payroll is processed, so the system can save new DBA information to the appropriate files.

The Update Benefits Info to Live Tables report includes a review of self-service workflow. This report verifies that required workflow approvals are complete before the system processes employee benefit changes. The final step of this report process saves information to history tables so that employees can look up changes by transaction number.

The system references the following tables for this report:

- Employee Master Information (F060116)
- Available Plans and Plan Options by Employee Work Table (F085520W)
- Dependent/Beneficiary X-Reference Work Table (F085536W)

Processing Options for Update Benefits to Live Tables (R085524)

Process

1. Event Type:
1 = Open Enrollment
2 = Current Enrollment
2. Mode:
0 = Proof
1 = Final

Defaults

1. End Enrollment Status
A valid code
 2. End Enrollment Status based on Plan End Date(s).
A valid code.
-

Saving Self-Service Employee Personal Information

From the Update Work File Data to Live Tables menu (G08BESS325), choose Update Personal Info to Live Tables.

You can use the Update Personal Info to Live Tables report (R054104) to save self-service changes to live system tables. Processing options specify the types of changes that are saved:

- Employee personal information
- Dependent and beneficiary information
- Employee personal information and dependent and beneficiary information

You should run this report after employees use self-service to change any of their personal information. Since you might not be aware of when changes are entered, you should schedule this report to run periodically so that the system saves new information to the live tables at least once each week. You should also run this report at the conclusion of each open enrollment period. After the system updates the live tables, employees can review the new changes on self-service forms.

The Update Personal Info to Live Tables report includes a review of self-service workflow. This report verifies that required workflow approvals are complete before the system processes employee benefit changes. The final step of this report process saves information to history tables so that employees can look up changes by transaction number.

The system references the following tables for this report:

- Employee Personal Profile Information Work Table (F054101W)
- Employee Phone Number Work Table (F054115W)
- Employee Emergency Contact Work Table (F054111W)

Note

If the GeoCoder for Human Resource Management applications is active, the Update Work File Data to Live Tables program automatically updates employee tax area information if the changes that are made using self-service include a change to the employee's city, state, county, province, or postal code. If there are multiple valid GeoCodes for the employee's new address information, the system produces an exception report and does not update the employee's GeoCode. In these instances, you must select the correct GeoCode from the exception report and manually update the employee's tax area information. See Assigning Tax Information using the GeoCoder for additional information.

Processing Options for Update Personal Info to Live Tables (R054104)

Process

1. Write Personal Information for Employee, Dependent/Beneficiary or Both:

- 1 - Employee (Proof Mode Only)
- 2 - Dependent/Beneficiary (Proof Mode Only)
- 3 - Both

2. Mode:

- 0 - Proof
 - 1 - Final
-

Reviewing Employee Self-Service History

Employees can use the Employee Self-Service History Reference program (P085585) to review changes to their company benefits. When an employee enters changes to benefits, either as the result of a qualifying life event or during open enrollment, the system tracks all changes and saves them in history files. An employee might use this program to review current benefits to see if they need to be updated or to check the records for errors.

The Employee Self-Service History Reference program displays historical information in the following categories:

- Personal information
- Telephone information
- Emergency contact information
- Dependent and beneficiary information
- Benefit plan and benefit plan option information

The Employee Self-Service History Reference program uses the following OneWorld tables:

- Employee Personal Profile Information History Table (F054101)

- Employee Emergency Contact History Table (F054111)
- Employee Phone Number History Table (F054115)
- Available Plans and Plan Options by Employee History Table (F085520)
- ESS History Table Cross Reference (F085528)

If changes to benefit information are required, and the open enrollment period is open, you can enter changes until open enrollment closes. If the open enrollment period is closed, you should contact the Work Force Management administrator.

If changes to benefit information are entered as the result of a qualifying life event, and the allowed period of time for entering benefit changes has not expired, you can enter changes. If the allowed period of time for entering benefit changes has expired, you should contact the Work Force Management administrator.

► **To review employee self-service history**

From your intranet portal, choose Employee Self-Service History Reference.

1. On Employee Self-Service History Reference, choose an underlined reference number.

The underlined reference number is a link to historical information. When you click a link, the system automatically displays a form with related, historical, benefit information. Depending on the link that you choose, one of the following history forms appears:

- Employee Personal Profile History

When you view the Personal Profile History form, a Next button appears only if changes exist.

- Emergency Contacts History

When you view the Emergency Contacts History form, a Next button appears only if changes exist.

- Dependent/Beneficiary History

- Plan/Plan Option History

When you view the Plan/Plan Option History form, a Next button appears only if changes exist.

2. To view the financial summary for benefit plan or benefit plan options, choose Next.

Final Confirmation Statement
Transaction Number: N40626018002959

Benefits as of: 6/26/01

Lauren Reardon 2343 W. Dream Way Denver, CO 82778	Employee Number: 6271928
	Tax Id: 545544555

TOTAL EMPLOYEE COST PER PAY PERIOD **\$ - 516.80**

Benefits Category	Benefits Plan Selected	Employee Cost Per Pay Period
Medical Benefits <i>Covered Dependents:</i> Alex Kems	Medical Coverage Employee + 1	\$ 0
Dental Benefits <i>Covered Dependents:</i> Alex Kems	Dental Employee + 1 Dependent	\$ - 25.00
Vision Benefits	Vision - Employee Only	\$ - 1.56
Life Insurance Benefits	Not Participating	\$ 0
Life Insurance Additional	Not Participating	\$ - .50
Life Insurance Dependent	Not Participating	\$ 0
Short Term Disability	Short Term Disability	\$ - 3.64
Long Term Disability	Not Participating	\$ 0
401K Retirement Plan	401(k) Retirement Savings Plan	\$ - 486.10
<i>Covered Beneficiaries:</i> Alex Kems	Percent: Primary: 0.00	

COST PER PAY PERIOD **\$ - 516.80**

PREVIOUS COST PER PAY PERIOD **\$ - 11,743.60**

TOTAL EMPLOYEE COST PER PAY PERIOD **\$ - 516.80**

The plan/plan option history form displays the same data that appears on the final benefits enrollment confirmation form during the open enrollment process.

You can use the Back button to return to the previous form.

Depending on how the self-service benefits programs are set up, the following items might not appear:

- Flex cost column
- Employer cost column
- Cost per pay period row
- Send email to HR button

The system displays two financial summary rows; one at the top of the form and one at the bottom. Because information displayed between these two rows might exceed the information that you can see on a video display, summary information is provided in both locations for user convenience.

Processing Options for Employee Self Service History Reference (P085585)

Default

1. Address Number of HR E-Mail Recipient

Display

1. Display Employer Cost column on Plan and Plan Option History Form.

0 = No

1 = Yes

2. Display text and buttons to resemble the Enrollment Statement.

C = Current Enrollment Statement (Default)

P = Pending Enrollment Statement

F = Final Enrollment Statement

Revising Workfiles for Benefits Self-Service

A system administrator can use workfile maintenance programs to enter changes to the benefits self-service workfiles. Although entering changes directly to a workfile should be an unusual event, you can directly change the data in the workfiles to correct errors or enter changes that occur outside of normal parameters. You might use this approach for any of the following:

- Review files for data errors
 - Correct errors
 - Enter changes to data outside of open enrollment
-

Caution

This program should have the highest possible level of system security because when you revise self-service benefits information manually:

- The system does not validate data entry.
- Changes entered in this program can create unintentional detrimental effects in other programs.
- Data can be removed or changed that negatively affects payroll processing and employee benefits.

Only an expert OneWorld user should enter changes to benefits self-service workfiles. The user should be aware of all of the benefits self-service tables and understand the interactions of the enhanced self-service software. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, errors result unless associated dependent records for the family enrollment are also changed.

A system administrator can remove data from the workfiles without replacing the data with valid values. For example, if an administrator mistakenly removed a benefit plan option, all employees enrolled in the benefit plan option are affected. The self-service workfiles might require rebuilding as the result of potential errors.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact J.D. Edwards for technical support.

Revising the Current Coverage Workfile

An expert system administrator can use the Employee Enrollment Work File Revision program (P085530W) to enter changes to the data in the Employee Current/pending Elections Work Table (F085530W) before the system saves the temporary information from this table in the live tables. For example, if data errors are discovered in current employee coverage information, the system administrator can change, remove, and add data to the workfile.

After you build the Current Coverage Work File, this table provides a picture of all the current employee enrollment information. Because enrollment changes that employees enter do not affect this file, you can use this file as a reference point when working in the Available Plan and Plan Options program (P085520W).

The system administrator should be aware that many changes that are possible in this program might include interdependent considerations in other tables. All changes to data using the benefits maintenance programs must be entered and tracked manually. The system does not review, track, or implement related changes to this or other tables.

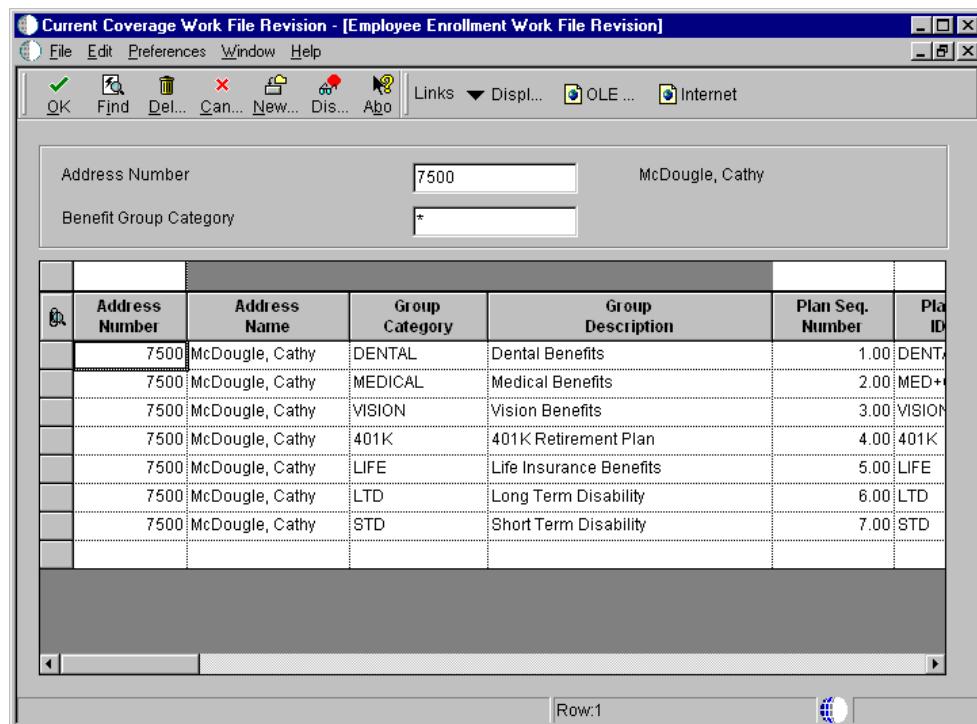
Caution

Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, errors result unless associated dependent records for the family enrollment are also changed.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact J.D. Edwards for technical support.

► To revise the current coverage workfile

From the Current Coverage Work File Mgmt menu (G08BESS321), choose Current Coverage Work File Revision.



1. On Employee Enrollment Work File Revision, complete one or both of the following fields, and then click Find:
 - Address Number
 - Benefit Group Category
2. Review the values in following fields and enter appropriate changes:
 - Address Number
 - Group Category
 - Plan Seq. Number
 - Plan ID
 - Add Opt
 - Effective Date
 - Benefit Category Classification
 - Plan Grouping
 - Plan Cost
 - Plan Credit
 - Flex Cost
 - D B
 - Additional Amount
 - Amount or Rate
 - Amount or Rate
 - PCP Flg
 - PCP Visited
 - PCP Number
 - Category Seq. Number
 - Category Type
 - Ending Date
 - Stay In Group
 - Non-Participating Plan
3. Review the values in following fields:

- User ID
- Program ID
- Work Stn ID
- Date Updated
- Time Updated

These values cannot be changed. They are for history tracking purposes and display information about the last change to the employee benefit record.

4. Click OK to save the changes in the workfile.

See [Saving Employee Self-Service Information](#) for the procedure to save the temporary information in the workfile to the live tables.

Revising the Available Plans Work File

An expert system administrator can use the Available Plans and Plan Options program (P085520W) to enter changes to the data in the Available Plans and Plan Options by Employee Work Table (F085520W) before the system stores the temporary information from this table in the live tables.

After you build the Available Plans Work File, this table provides a current picture of all the available benefit plans and benefit plan options from which an employee can choose. As employees enter changes, this file records the changes that are active for the upcoming benefit plan year.

A system administrator might enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, an employee is unable to update benefits choices during open enrollment and open enrollment is now closed. During open enrollment, the system automatically assigned the current benefit choices as the choices for the upcoming benefit year. The records in the Available Plans Work File show that the employee is enrolled in a Preferred Provider Option benefit plan (PPO) for the upcoming benefit year. The employee wants to change medical coverage from a PPO plan to an HMO plan. The system administrator can use the Available Plans Work File Revision program to remove the employee enrollment in the PPO plan and record an enrollment in an HMO plan. The system administrator must be aware that if dependents are affected by the benefit plan change, all issues that might be related to the change must be manually addressed. The system does not review, track, or implement related changes to this or other tables.

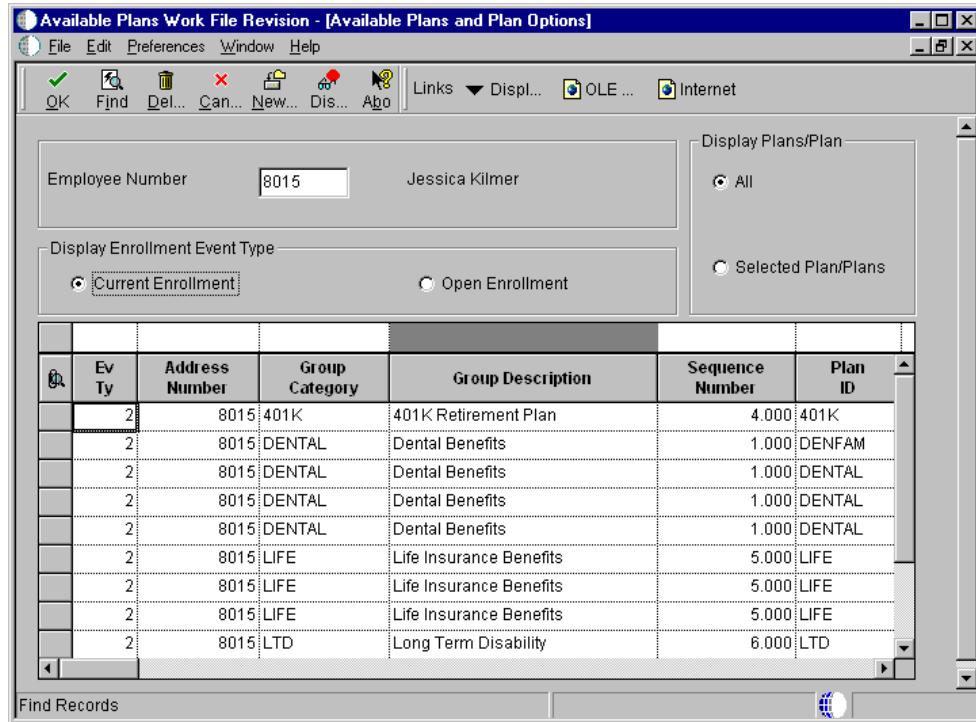
Caution

Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the benefits maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, data integrity errors result unless associated dependent records for the family enrollment are also changed.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact J.D. Edwards for technical support.

► To revise the available plans workfile

From the Available Plans Work File Mgmt menu (G08BESS322), choose Available Plans Work File Revision.



1. On Available Plans and Plan Options, complete the following field:
 - Employee Number
2. In the Display Enrollment Event Type area, choose Current Enrollment or Open Enrollment.
3. In the Display Plans/Plan area, choose All or Selected Plan/Plans, and then click Find.
4. Review the values in following fields and enter appropriate changes:
 - Ev Ty
 - Address Number
 - Group Category
 - Sequence Number
 - Plan ID
 - Add Opt
 - D B

- PCP Flg
- PCP Visited
- PCP Number
- Amt Rte
- Employee DBA ID
- Employer DBA ID
- Additional Amount
- Non-Participating Plan
- Stay In Group
- Ded Pnts
- Cred Pnts
- Plan Cost
- Plan Credit
- Amount or Rate
- Amount or Rate
- Effective Date
- M P
- Dft Pln
- Ending Date
- Enrollment Event Code
- Selc 01
- Flex Cost
- Category Type
- Benefit Category Classification
- Decline Coverage Notification
- Defaulting Allowed
- Max DP
- Minimum Dependents

- Number Partic
 - Plan Grouping
 - Sequence Number
 - Short Category Description
 - Short Plan/Option Description
5. Review the values in following fields:
- Electronic Signature ID

Electronic Signature ID and the next four data items, Date Updated, Time Updated, Updated By, and Program ID, track the last time that the employee made a change to the benefit record.
 - Date Updated
 - Time Updated
 - Updated By
 - Program ID
 - Date Updated

Date Updated and the three following data items, Update Time, and User ID, and Work Stn ID, track the last time anyone made a change to the benefit record, whether that person was the employee or another person.
 - Update Time
 - User ID
 - Work Stn ID

These values cannot be changed. They are for history tracking purposes and display information about the last change to the employee benefit record.
6. Click OK to save the changes in the workfile.
See Saving Employee Self-Service Information for the procedure to save the temporary information in the workfile to the live tables.

Reviewing Dependent and Beneficiary Current Coverage Revisions

A Work Force Management administrator can use the Dep/Ben Current Coverage Revisions program (P085537W) to review current dependent and beneficiary information that is contained in the Current Dep/Ben X-Reference Work File (F085537W). This table provides a picture of current dependent and beneficiary enrollment information that is updated each time that you build a new Current Coverage Work File (F085530W). See [Building the Current Coverage Work File for Self-Service](#) for the steps to build a new workfile.

If information in this table is incorrect, you should not enter corrections to this table. Because the system does not save information from this table in the live tables, any changes that you

enter in this table are lost. An expert system administrator can use the Dependent/Beneficiary Coverage Revisions program (P085536W) to enter changes to the Dependent/Beneficiary X-Reference Work File (F085536W). After you save changes to the workfile and then build new workfiles, your changes are included in the new Current Dep/Ben X-Reference Work File.

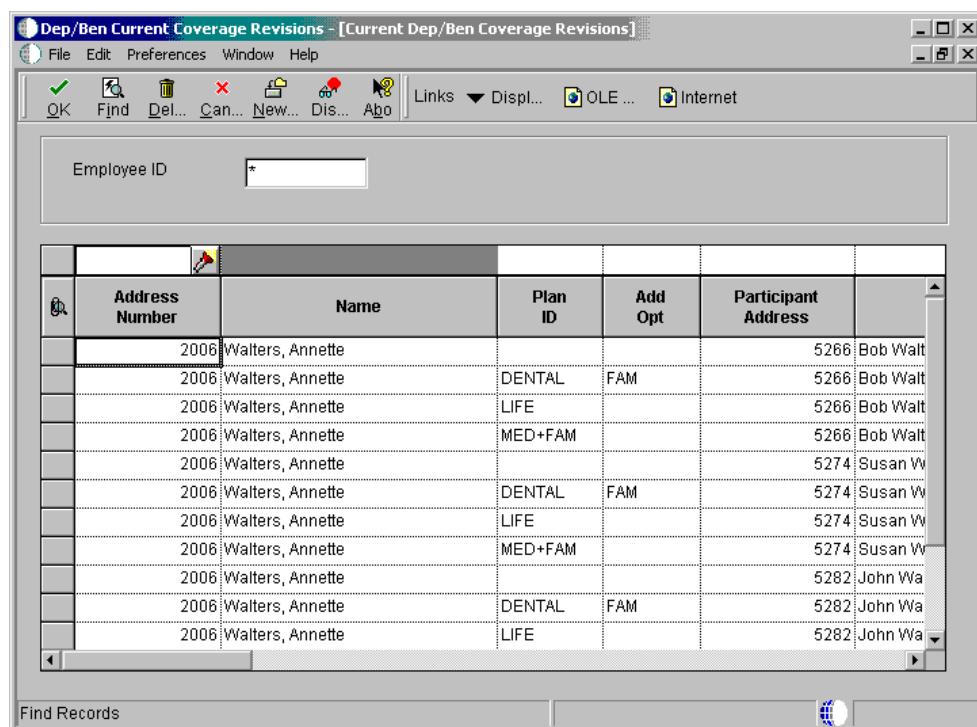
Caution

The Dependent/Beneficiary Coverage Revisions program should not be used to enter changes to the Current Dep/Ben X-Reference Work File. No changes should be made to this file. Changes to this table replace information that you might need for reference or troubleshooting procedures. Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the maintenance programs.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact J.D. Edwards for technical support.

► To review dependent and beneficiary current coverage revisions

From the Dependent/Beneficiary Work File Mgmt menu (G08BESS323), choose Dep/Ben Current Coverage Revisions.



1. On Current Dep/Ben Coverage Revisions, complete the following field and then click Find:
 - Employee ID

2. Review the values in following fields, but do not enter changes:

- Address Number
- Plan ID
- Add Opt
- Participant Address
- Mailing Name
- DB
- RL
- A/I
- Ben %
- Secondary Ben %
- New Ben %
- New Second Ben %
- Effective Date
- Ending Date
- PCP Number
- PCP Visited
- User ID
- Program ID
- Work Stn ID
- Date Updated
- Time Updated

Revising the Dependent and Beneficiary Updated Revisions Workfile

An expert Work Force Management administrator can use the Dependent/Beneficiary Coverage Revisions program (P085536W) to review updated dependent and beneficiary information that is contained in the Dependent/Beneficiary X-Reference Work File (F085536W). This table displays updated dependent and beneficiary enrollment information that employees enter using self-service. The system periodically saves this information to live tables.

A system administrator might enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, an employee is unable to update benefits choices during open enrollment and open enrollment is now closed. During open enrollment, an employee enters dependent or beneficiary information that contains errors. The open enrollment period is now over, but the errors remain in the Dependent/Beneficiary X-Reference Work File, but the workfile records have not been saved in the live tables. The system administrator can use the Dep/Ben Updated Coverage Revisions program to correct the errors. The system administrator must be aware that if the new information contains errors, all issues that might be related to the change must be manually addressed. The system does not review, track, or implement related changes to this or other tables.

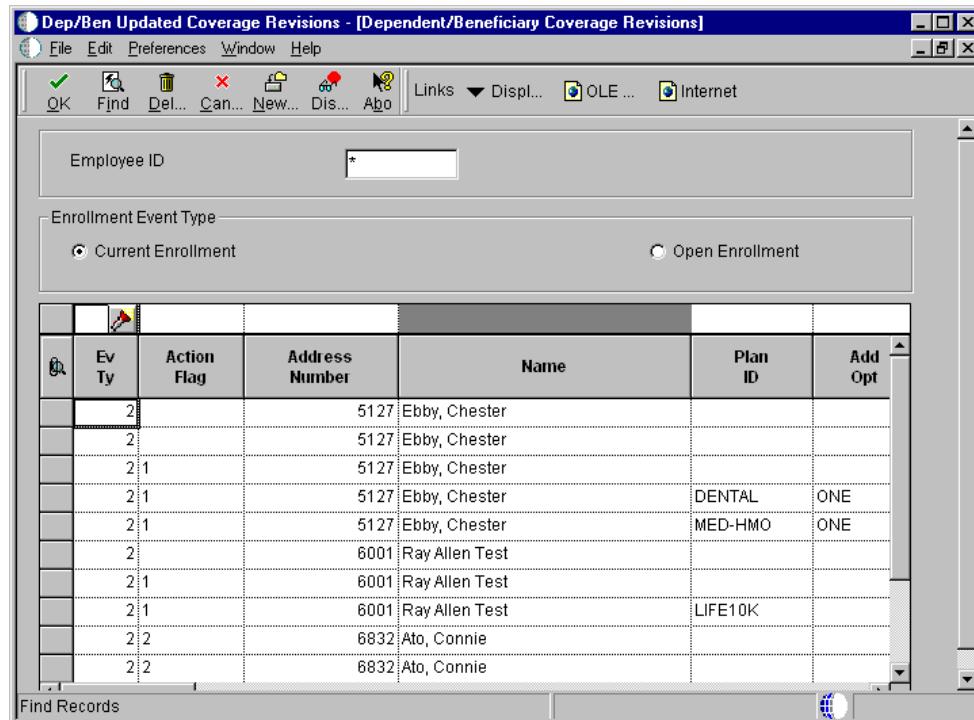
Caution

Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, errors result unless associated dependent records for the family enrollment are also changed.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact J.D. Edwards for technical support.

► To revise the dependent and beneficiary updated coverage revisions workfile

From the Dependent/Beneficiary Work File Mgmt menu (G08BESS323), choose Dep/Ben Updated Coverage Revisions.



1. On Dependent/Beneficiary Coverage Revisions, complete the following field:
 - Employee ID
2. In the Enrollment Event Type area, choose one of the following options: Current Enrollment or Open Enrollment.
 - Current Enrollment
 - Open Enrollment

3. Click Find.
4. Review the values in following fields and enter appropriate changes:
 - Ev Ty
 - Action Flag
 - Address Number
 - Plan ID
 - Add Opt
 - Participant Address
 - Mailing Name
 - D B
 - R L
 - Ben %
 - Secondary Ben %
 - New Ben %
 - New Second Ben %
 - Effective Date
 - Ending Date
 - Enrollment Event Code
 - Event Date
 - PCP Number
 - PCP Visited
 - A/I
5. Review the values in following fields:
 - Electronic Signature ID

Electronic Signature ID and the next five data items, Date Updated, Update Time, Updated By, User ID, and Program ID, track the last time that the employee made a change to the benefit record.

 - Date Updated
 - Update Time
 - Updated By
 - User ID
 - Program ID
 - Work Stn ID

Work Stn ID and the two following data items track the last time anyone made a change to the benefit record, whether that person was the employee or another person.

 - Date Updated

- Time Updated

These values cannot be changed. They are for history tracking purposes and display information about the last change to the employee benefit record.

6. Click OK to save the changes in the workfile.

See Also

- *Saving Employee Self-Service Information* for the procedure to save the temporary information in the workfile to the live tables

Revising the Personal Profile Workfile

An expert Work Force Management administrator can use the Work With Employee Personal Profile Information Table program (P054101W) to review updated dependent and beneficiary information that is contained in the Employee Personal Profile Information Work table (F054101W). This table displays current employee, dependent, and beneficiary personal profile information that employees enter using self-service. The system periodically saves this information to live tables.

A system administrator can enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, during open enrollment, an employee might enter personal profile information that contains errors. When open enrollment closes, a system administrator might need to enter corrections to the temporary workfile records before saving the new data in the live tables. The system administrator can use the Personal Profile Work File Revision program to correct the errors.

The system administrator must be aware that if the new information contains errors, all issues that might be related to the change must be manually addressed. This program allows changes to all data in the table except the fields that track the individuals entering changes and when changes are entered. The program even allows changes to data that is not entered by an employee. The system does not review, track, or implement related changes that might be required in other tables.

Caution

Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes employee personal information, errors might result unless associated dependent records for the family enrollment are also changed.

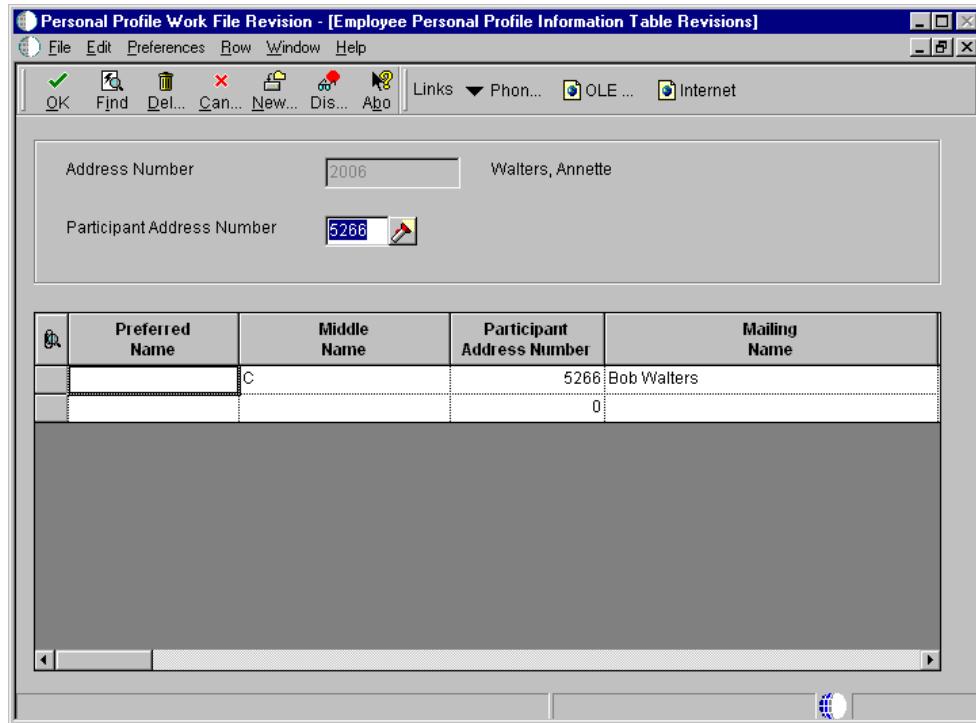
If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact J.D. Edwards for technical support.

► To revise the personal profile workfile

From the Personal Information Work File Mgmt menu (G08BESS324), choose Personal Profile Work File Revision.

1. On Work With Employee Personal Profile Information Table, complete one of the following fields and click Select:
 - Address Number

- Participant Address
2. Review the values in each field to determine whether inaccurate information exists.
 3. To enter personal profile changes, choose a record and then choose Profile Revisions from the Row menu.

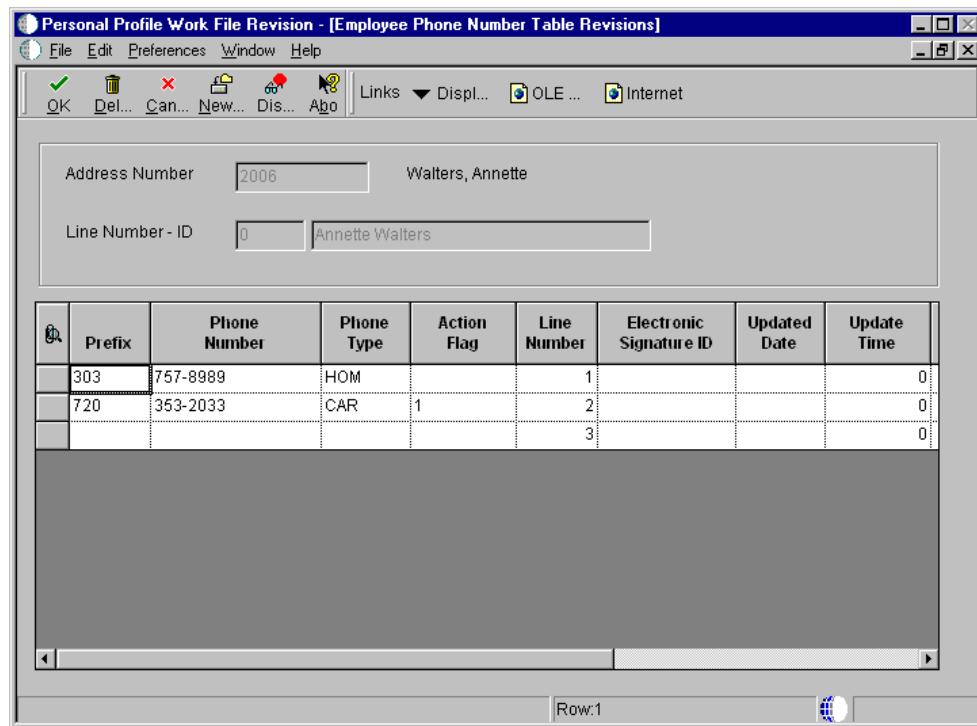


4. On Employee Personal Profile Information Table Revisions, review the following fields and enter appropriate changes:
 - Preferred Name
 - Middle Name
 - Participant Address Number
 - Mailing Name
 - Given Name
 - MI
 - Surname
 - Home Business Unit
 - Job Desc
 - Supervisor Name
 - Business Card Name
 - Tax ID
 - Address Line 1
 - Address Line 2

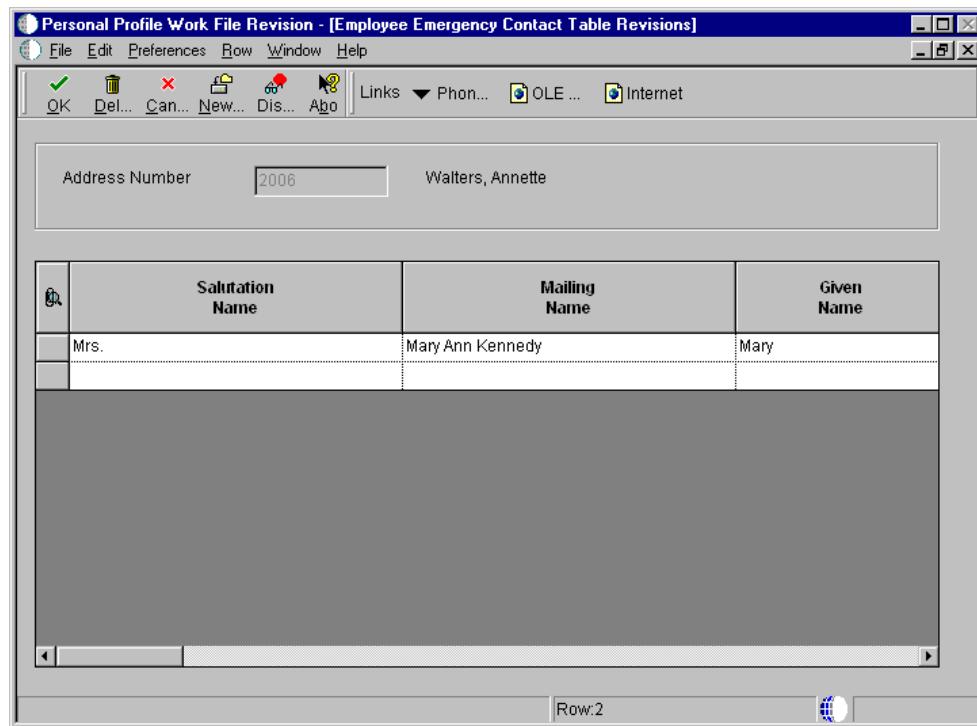
- Address Line 3
- Address Line 4
- City
- ST
- Postal Code
- Ctry
- County
- Co
- R L
- Birth Date
- Gender
- Dep/Ben Tax ID
- H.S. Grad
- Emp
- F.T. Student
- School Attending
- D F
- Disb. Date
- Death Date
- Medicare Date
- Electronic Address
- Action Flag

Review the following fields that the system provides only to track changes to this table:

- Electronic Signature ID
 - Updated Date
 - Update Time
 - Updated By
 - Program ID
 - User ID
 - Work Stn ID
 - Date Updated
 - Time Updated
5. When you are finished entering changes, click OK to save the new data.
 6. To change telephone number information, choose a record and then choose Phone Number from the Row menu.



7. On Employee Phone Number Table Revisions, review the following fields and enter appropriate changes:
 - Prefix
 - Phone Number
 - Phone Type
 - Action Flag
 - Line Number
8. Review the following fields that the system provides to track changes to this table:
 - Electronic Signature ID
 - Updated Date
 - Update Time
 - Updated By
 - User ID
 - Program ID
 - Work Stn ID
 - Date Updated
 - Time Updated
9. When changes are complete, click OK.
10. To change emergency contact information, choose a record and then choose Emergency Contact from the Row menu.



11. On Employee Emergency Contact Table Revisions, review the following fields and enter appropriate changes:

- Salutation Name
- Mailing Name
- Given Name
- MI
- Surname
- Address
- City
- ST
- Postal Code
- Ctry
- Type Code
- Professional Title
- Line ID
- Display Sequence
- Remark
- Action Flag

12. Review the following fields that the system provides to track changes to this table:

- Electronic Signature ID
- Updated Date
- Update Time
- Updated By
- User ID
- Program ID
- Work Stn ID
- Date Updated
- Time Updated

13. When changes are complete, click OK.

The system saves your changes in the workfile immediately. The system saves your changes in the live tables only when the next workfile build is run.

See Also

- Building the Personal Information Workfile* for the procedures to build a new Personal Information workfile and save information to the live tables

Employee Self-Service Demonstration

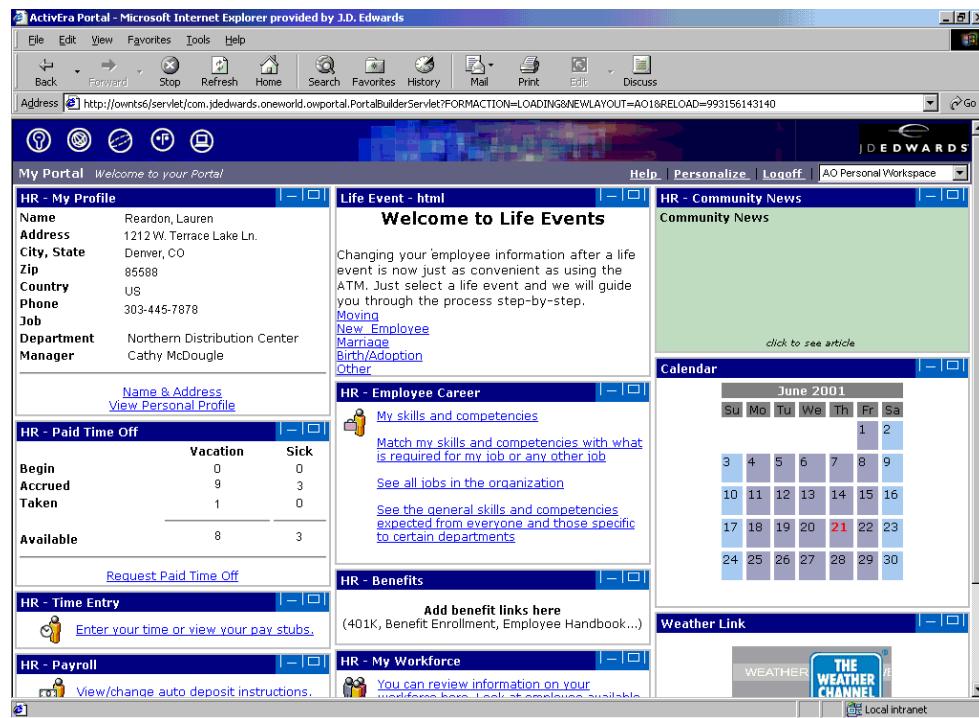
Employees use benefits self-service to change benefit options during open enrollment and after a life event such as marriage or the birth of a child. To begin the self-service process, employees start a web browser and choose a self-service option from their intranet web portal. The first form that an employee sees is a self-service director. This form, the text on the form, and all other director forms that follow it, are defined when the software is set up. A system administrator uses the following programs to create process scripts and define information that the system displays on forms:

- Employee Self Service Process Flow Setup - Work With Self-Service Process Flow Scripts (P05400)
You can use this program to create process flow scripts.
- Employee Self Service Director Setup - Work With Director Text (P05401)
You can use this program to create up to three blocks of text on each director form.
- Employee Self Service Form Options (P085550)
You can use this program to hide fields that you do not want employees to see. You can also set up fields so that employees can view information but not change it.
- Benefit Confirmation Statement Options (P085515)
You can use this program to define the text that displays on certain buttons in benefit enrollment statements.

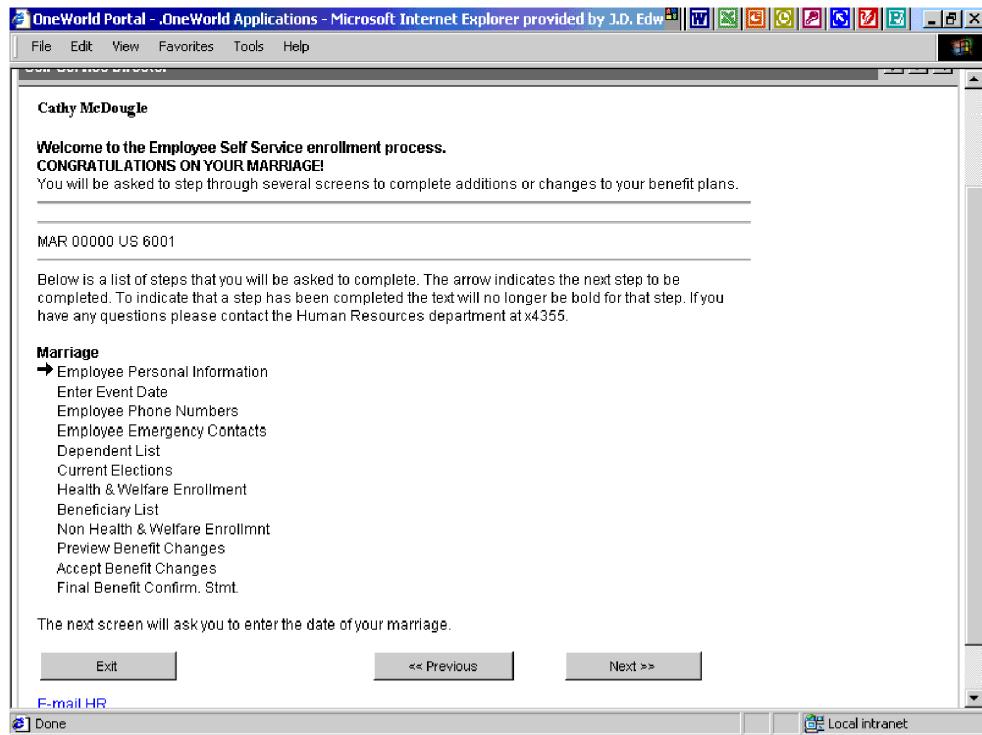
The self-service program that you link to the web portal is the Self-Service Director (P05410). Because the web portal and all of the self-service forms are defined by each organization to meet diverse requirements, the forms that are presented in this demonstration are a sample of only one possible design. This demonstration provides a view of a sample process flow and potential form that might be included in your script. The process demonstrates the

process that an employee might use to change benefits and personal information following a marriage event.

When an employee starts a web browser, the portal might appear as follows:



The first object that you define in all scripts is the self-service director form (P05410).



You can use the Employee Self Service Director Setup program (P05401) to set up three blocks of text. The welcome and congratulations text are included in the first text field. You can define the information that displays immediately above the list of enrollment events in the first text field of the setup form. You can define the information that follows the list of enrollment events in the second field of the setup form. The system uses the second and third blocks of text on each director form as online help. On enrollment forms after the first director form, when an employee clicks on the book icon to display help, the system displays the help text that is located on the previous director form.

The process flow rules for creating scripts require that you specify a director form to start each script and then subsequent director forms after each interactive program. You can hide subsequent director forms for an employee audience that does not require frequent process directions. Even when hidden, when an employee clicks the help icon, the system displays the help text that you create in the second and third text blocks on each of the previous director forms.

On the first director form of each process flow script, an arrow indicates the enrollment event that the system starts first. Text in the third text block needs to instruct employees about which button to click to advance the process and the action that they perform on the following form.

For all benefit and personal information changes that are based on a qualifying life event, employees must enter an event date (P085562).

OneWorld Portal - OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards

File Edit View Favorites Tools Help

J D E W A R D S

Select Workspace OneWorld Applications

Welcome to your Portal Personalize | Logout

Enter Event Date

Cathy McDougle

Please enter your legal marriage date

Exit << Previous Next >>

[Send E-mail to HR](#)

After entering the event date, the system can display a summary of an employee's current benefits and current costs per pay period (P085568, Version ZJDE0001).

OneWorld Portal - OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards

File Edit View Favorites Tools Help

J D E W A R D S

Select Workspace OneWorld Applications

Welcome to your Portal Personalize | Logout

Current Elections

<< Previous Next >> ?

Current Elections

These are your current enrollments.

Cathy McDougle 43 S. Iliff #301 Denver, CO 80210	Employee Number: 5966664 Tax Id: 456985456
---	---

Totals Per Pay Period

Flex Credits Available	0.00	Non-Flex Payroll Deductions	50.00
Flex Credits Spent	13.00	Flex Payroll Deductions	13.00
Flex Credits Remaining	- 13.00	Total Payroll Deductions	63.00

Total Employee Cost: \$ 63.00 (per pay period)
Total Employer Cost: \$ 50.00 (per pay period)

Benefits Category	Benefits Plan Selected	Flex Cost	Employee Cost	Employer Cost
		(per pay period)	(per pay period)	(per pay period)

On Current Elections, you can scroll down to view remaining information and use one or more of the features, such as printing a copy of the elections.

The screenshot shows a Microsoft Internet Explorer window with the title "OneWorld Portal - OneWorld Applications - Microsoft Internet Explorer provided by TD". The main content is a table summarizing employee benefit elections:

Benefits Category	Benefits Plan Selected	(per pay period)	(per pay period)	(per pay period)
Flex Dental Benefits	Flex Employee Only	\$ - 30.00	\$ 0	\$ 0
Flex Medical Benefits	Medical Flex Ee + 2 or More	\$ - 25.00	\$ 0	\$ 0
<i>Covered Dependents:</i>				
Robert McDougle				
Jon McDougle				
Flex Vision Benefits	Vision Flex Ee + 1	\$ - 8.00	\$ 0	\$ 0
<i>Covered Dependents:</i>				
Robert McDougle				
401K Retirement Plan	401(k) Retirement Savings Plan	\$ 0	\$ 50.00	\$ 0
<i>Covered Beneficiaries:</i>				
Robert McDougle Primary: 100.00				
Cost Per Pay Period:		\$ 63.00	\$ 50.00	\$ 0
Total Employee Cost:	\$ 63.00 (per pay period)			
Total Employer Cost:	\$ 50.00 (per pay period)			

At the bottom, there are links for "Print A Copy", "E-mail a Copy", and "MAIL a Copy of This Statement". Navigation buttons include "Exit", "<< Previous", "Next >>", and a yellow question mark icon. A link "Send E-mail to HR" is also present.

To update an employee name and address, the system displays a personal information form (P054201). The personal information form displays current employee information. Employees can make changes to this information.

OneWorld Portal - .OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards

File Edit View Favorites Tools Help

Select Workspace | OneWorld Applications | Personalize | Logout

Welcome to your Portal

Employee Personal Information

Employee Information Employee Address

Cathy McDougle

Name - First, Middle, Last [] [] []

Mailing Name [Cathy McDougle]

Employee Number [5966664]

Tax ID [456985456]

Job Title [Programmer]

Supervisor [Ray Allen]

Business Unit [20]

Exit << Previous Next >>

This screenshot shows the 'Employee Personal Information' screen for an employee named Cathy McDougle. The 'Employee Information' tab is selected. It displays basic details such as Name (First, Middle, Last), Mailing Name, Employee Number, Tax ID, Job Title (Programmer), Supervisor (Ray Allen), and Business Unit (20). Navigation buttons at the bottom include 'Exit', '<< Previous', and 'Next >>'.

To enter new address information, the employee clicks the Employee Address Information tab. The system displays current address information:

OneWorld Portal - .OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards

File Edit View Favorites Tools Help

Select Workspace | OneWorld Applications | Personalize | Logout

Welcome to your Portal

Employee Personal Information

Employee Information Employee Address

Cathy McDougle

Address Line 1 [43 S. 11iff #301]

Address Line 2 []

Address Line 3 []

Address Line 4 []

City [Denver]

County [No county]

State [Colorado]

Postal Code [80210]

Country [United States]

Same Address for Dependents

Exit << Previous Next >>

This screenshot shows the 'Employee Personal Information' screen for the same employee, but the 'Employee Address' tab is selected. It displays address fields including Address Line 1 (43 S. 11iff #301), City (Denver), County (No county), State (Colorado), Postal Code (80210), and Country (United States). A checkbox for 'Same Address for Dependents' is present. Navigation buttons at the bottom include 'Exit', '<< Previous', and 'Next >>'.

Employees can enter changes to the existing personal address information.

For new telephone information, the system displays the Telephone Numbers form with the current telephone information. Employees can view and change this information.

The screenshot shows a Microsoft Internet Explorer window titled "OneWorld Portal - .OneWorld Applications - Microsoft Internet Explorer provided by JDE". The window displays the "Employee Phone Numbers" form for an employee named "Cathy McDougle". The form has two columns: "Prefix" and "Number" on the left, and "Type of Phone Number" on the right. There are two rows of data visible:

Prefix	Number	Type of Phone Number
303	555-7411	Home
303	555-1937	Car or Mobile

Below the table are three buttons: "Exit", "<< Previous", and "Next >>". The top of the window includes a menu bar (File, Edit, View, Favorites, Tools, Help), a toolbar with various icons, and a status bar with "Personalize | Logout".

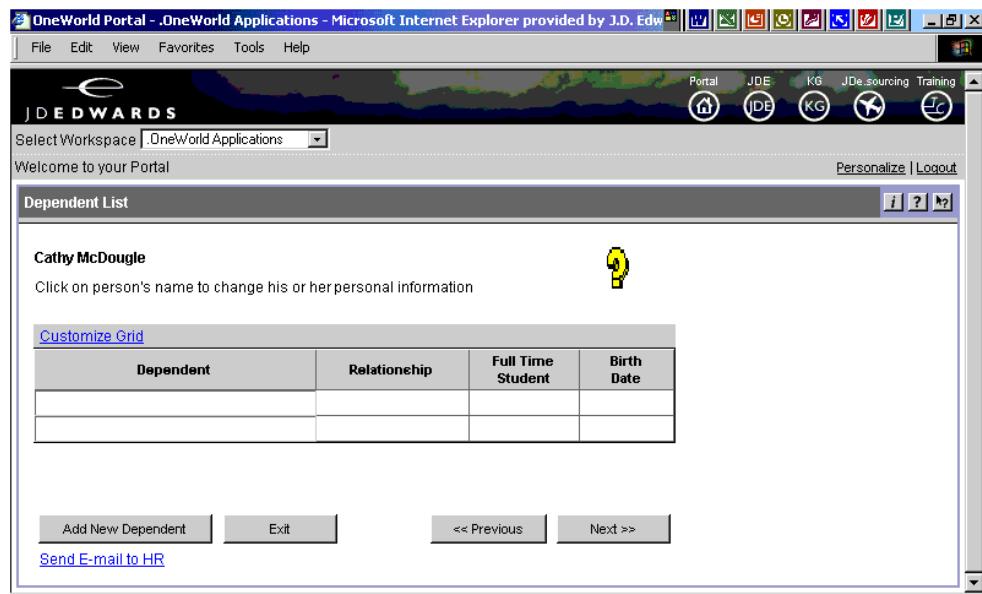
To add or revise emergency contact information, the system displays current information on the Contacts form (P054111).

The screenshot shows a Microsoft Internet Explorer window titled "OneWorld Portal - OneWorld Applications". The page header includes the J.D. Edwards logo, a workspace selection dropdown set to "OneWorld Applications", and links for "Portal", "JDE", "KG", "JD eSourcing", "Training", and "Personalize | Logout". The main content area is titled "Employee Emergency Contacts" and displays a grid of contacts for "Cathy McDougle". The grid has columns for Name, Contact Relationship, and Phone Number. It lists two entries: "Karen McDougle" (Mother, 303 555-7483 Home - Emergency contact) and "Walter Erikson" (Neighbor, 303 555-8448 Home - Emergency contact). Below the grid are buttons for "Add A Contact", "Delete A Contact", "Exit", "<< Previous", "Next >>", and a link "E-mail HR". At the bottom left is a "Done" button, and at the bottom right is a "Local intranet" icon.

If an employee clicks Add A Contact, the system displays the Emergency Contact Information form:

The screenshot shows a Microsoft Internet Explorer window titled "OneWorld Portal - OneWorld Applications". The page header includes the J.D. Edwards logo, a workspace selection dropdown set to "OneWorld Applications", and links for "Portal", "JDE", "KG", "JD eSourcing", "Training", and "Personalize | Logout". The main content area is titled "Emergency Contact Information" and displays a form for adding a new contact for "Cathy McDougle". The form fields include: Name - First, MI, Last (Walter Erikson), Mailing Name (Walter Erikson), Contact Relationship (Neighbor), Remark 1 (empty), Prefix, Phone Number, Type (303 555-8448, Home - Emergency contact), Address Line (empty), City (empty), State (empty), Postal Code (empty), and Country (empty). Below the form are buttons for "Exit", "<< Previous", "Next >>", and a link "E-mail HR". At the bottom left is a "Done" button, and at the bottom right is a "Local intranet" icon.

After completing emergency contact information, the system provides a Cover Dependents form (P085551). Adding or changing dependent information includes a group of forms. The Cover Dependents form lists current information about employee dependents. You can use the Personal Information form (P054201), with three tabs, to add or change dependent information. The third form is an updated version of the Cover Dependents form, showing new beneficiary additions and changes. When the system displays the third form, the beneficiary name is underlined and is linked to the data entry forms. When an employee clicks a name, the system redisplays the Personal Information form.



On the Cover Dependents form, employees can change current dependent information or add new dependents. To add a new dependent or beneficiary, an employee clicks Add New Dependent, and the system displays the Update Dependent Information form:

The screenshot shows a Microsoft Internet Explorer window titled "OneWorld Portal - .OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards". The window has a menu bar with File, Edit, View, Favorites, Tools, and Help. A toolbar with various icons is visible above the main content area. The main content is a form titled "Update Dependent Information". At the top of the form are three tabs: "Dependent Information" (selected), "Dependent Address", and "Dependent Additional Information". Below the tabs, the name "Bob Walters" is displayed. The form contains several input fields: "Name - First, Middle, Last" (Robert McDougle), "Mailing Name" (Robert McDougle), "Dependent Number" (5266), "Tax ID" (empty), "Prefix, Phone Number, Type" (303 555-7954 Business), "Prefix, Phone Number, Type" (303 555-7411 Home), and "E-Mail Address" (empty). At the bottom of the form are buttons for "Exit", "<< Previous", and "Next >>".

The personal information form for dependents and beneficiaries includes three tabs:

- Dependent Information
- Dependent Address
- Dependent Additional Information

On the Dependent Information tab, employees enter basic information for a new dependent or beneficiary. The following form shows the Dependent Address tab on the Update Dependent Information form:

OneWorld Portal - .OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards

File Edit View Favorites Tools Help

Select Workspace | OneWorld Applications | Personalize | Logout

Welcome to your Portal

Update Dependent Information

Dependent Information | **Dependent Address** | Dependent Additional Information

Robert McDougle 

Address Line 1	43 S. Illiff #301
Address Line 2	
Address Line 3	
Address Line 4	
City	Denver
County	No county
State	Colorado
Postal Code	80210
Country	United States

Exit << Previous Next >>

To enter additional information about a new dependent or beneficiary, an employee chooses the Dependent Additional Information tab:

OneWorld Portal - .OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards

File Edit View Favorites Tools Help

Select Workspace | OneWorld Applications | Personalize | Logout

Welcome to your Portal

Update Dependent Information

Dependent Information | Dependent Address | **Dependent Additional Information** 

Robert McDougle

Gender	<input checked="" type="radio"/> Male	<input type="radio"/> Female
Relationship	Husband	
Date of Birth	02/15/67	
<input checked="" type="checkbox"/> High School Graduate		<input checked="" type="checkbox"/> Employed
<input type="checkbox"/> Full Time Student		School Attending
<input type="checkbox"/> Legally Disabled?		Date of Disability
Date of Medicare		Date of Death

Exit << Previous Next >>

When data entry is complete, the employee clicks Next and the system displays summary information on the Dependent List form:

Dependent	Relationship	Full Time Student	Birth Date
Robert McDougle	Husband	No	02/15/87
Jon McDougle	Scn	Yes	06/18/87

Buttons at the bottom include Add New Dependent, Exit, << Previous, Next >>, and Send E-mail to HR.

After an employee adds new dependent information, the system displays a Health and Welfare form (P085570) that includes benefit plan options that are based on the new dependent information and current enrollments. The form lists dependents and the health and welfare benefit categories that the employee can elect.

Name	Relationship	Flex Medical	Flex Dental	Flex Vision
Cathy McDougle	Self	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Robert McDougle	Spouse	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Jon McDougle	Child	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons at the bottom include Recalculate, Exit, << Previous, and Next >>.

Based on your setup and the dependents that an employee chooses to cover, the system attempts to elect the best plan option. If more than one plan is available for the dependents that an employee wants to cover, the system then displays the Elect Coverage form (P085571). The employee can choose from the list of available benefit plans.

The screenshot shows a Microsoft Internet Explorer window titled "OneWorld Portal - .OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards". The page is titled "Elect Coverage" and shows information for "Cathy McDougle". It includes a "Totals Per Pay Period" table and a "Customize Grid" section with a table for selecting benefit plans. The "Plan" column contains underlined links: "Life Insurance - Basic Coverage" and "Life Insurance - \$100,000".

Elect	Plan	Amt Rte	Saved Amt/Rate	Plan Cost	Saved Plan Cost	Flex Cost
<input type="checkbox"/>	Life Insurance - Basic Coverage			3.00		
<input type="checkbox"/>	Life Insurance - \$100,000			15.00		

Buttons at the bottom include "Recalculate", "Exit", "Previous >>", "Next >>", and "Send E-mail to HR".

On the Elect Coverage form, clicking an Elect option enrolls an employee in a benefit plan. The benefit plan options are underlined, indicating that a link exists to additional information. When set up appropriately, clicking a benefit plan might link an employee to a web site that provides additional details about the plan.

When an employee chooses a benefit plan that requires a primary care physician number, the system displays the Primary Care Physician form:

OneWorld Portal - OneWorld Applications - Microsoft Internet Explorer provided by JDE Edwards

File Edit View Favorites Tools Help

Portal JDE KG JDE.sourcing Training

J D E W A R D S

Select Workspace OneWorld Applications

Welcome to your Portal Personalize | Logout

Primary Care Physician

Cathy McDougle

Medical Flex Ee + 2 or More

Below is a list of dependents that require a Primary Care Physician Number.
A list of physicians can be found at <http://www.palmettoprimarycare.com/>

Customize Grid

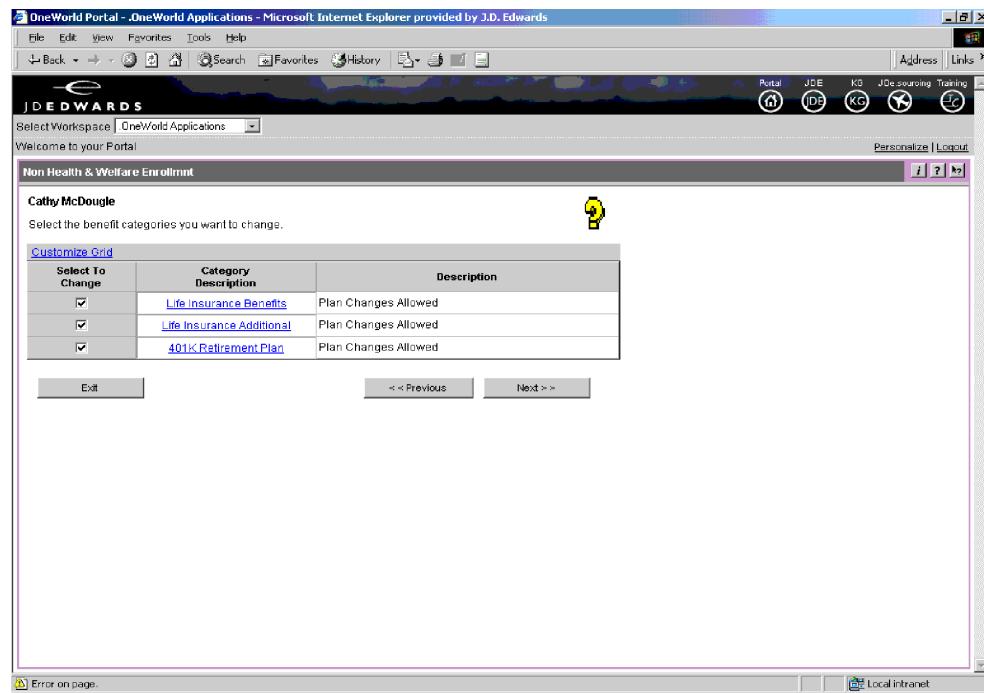
Name	Benefit Plan	PCP Number	PCP Visited
Cathy McDougle	Medical Flex Ee + 2 or More	A12-4265	<input type="checkbox"/>
Robert McDougle	Medical Flex Ee + 2 or More	A12-4265	<input type="checkbox"/>
Jon McDougle	Medical Flex Ee + 2 or More	A12-4265	<input type="checkbox"/>

Exit <<Previous Next>>

[Send E-mail to HR](#)

On the Primary Care Physician form, the system lists all individuals who are covered under the plan. The employee enters the PCP number for each person.

After enrolling in health and welfare benefit plans, the system displays the remaining benefit categories that an employee needs to consider on the Non Health & Welfare Enrollment form (P085563):



On the Non Health & Welfare Enrollment form, an employee can choose a benefit category and then choose Next to view a form that lists available benefit plans. The employee elects benefit coverage and then clicks Next.

When an employee elects a benefit plan that requires a beneficiary designation, the system displays the Beneficiary Enrollments form (P085572):

OneWorld Portal - OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards

File Edit View Favorites Tools Help Personalize | Logout

Welcome to your Portal

Beneficiary Enrollments

- A beneficiary cannot be both primary and secondary.
- You may have more than one primary, or secondary, beneficiary.

Cathy McDougle

[Life Insurance - Basic Coverage](#)

Enter the percentage of your benefit you would like distributed to your primary and secondary beneficiaries.

Upon your death, your primary beneficiary will receive your benefits. If your primary beneficiary does not outlive you, your secondary beneficiary will receive your benefits.

[Customize Grid](#)

Beneficiary	Relationship	Primary %	Secondary %
Robert McDougle	Spouse	100.00	
Jon McDougle	Child		100.00

[Exit](#) [<< Previous](#) [Next >>](#)

[Send E-mail to HR](#)

On the Beneficiary Enrollments form, the system lists current beneficiary information. The employee specifies a primary and secondary percentage for each beneficiary on this form.

Based on the demonstration script, the employee benefit choices are complete. The system displays the Benefits Confirmation form (P085568, Version ZJDE0002):

Elections Pending Submission

Benefits as of: 10/10/01 Pending Submission and Approval

These are your pending elections.

Cathy McDougle	Employee Number:	5966664
43 S. Iliff #301	Tax Id:	456985456
Denver, CO 80210		

Totals Per Pay Period

Flex Credits Available	0.00	Non-Flex Payroll Deductions	53.00
Flex Credits Spent	13.00	Flex Payroll Deductions	13.00
Flex Credits Remaining	- 13.00	Total Payroll Deductions	66.00

Total Employee Cost: \$ 63.00 (per pay period)
Total Employer Cost: \$ 50.00 (per pay period)

Benefits Category	Benefits Plan Selected	Flex Cost (per pay period)	Employee Cost (per pay period)	Employer Cost (per pay period)
Flex Medical Benefits	Medical Flex Ee + 2 or More PCP Numbers	\$ - 13.00	\$ 0	\$ 0

You can scroll to the bottom of Benefits Confirmation to view the remaining information:

Benefits Confirmation

Robert McDougle Spouse PCP#A12-4826
 Child PCP#A12-4825

Flex Dental Benefits Flex Employee Only \$ - 50.00 \$ 0 \$ 0
 Vision Flex Ee + 1 \$ 0 \$ 0 \$ 0

Covered Dependents:
 Robert McDougle

Life Insurance Benefits Life Insurance - Basic Coverage \$ 0 \$ 3.00 \$ 0
Covered Beneficiaries:
 Robert McDougle Percent:
 Primary: 100.00
 Secondary: 100.00

401K Retirement Plan Not Participating \$ 0 \$ 50.00 \$ 0
Covered Beneficiaries:
 Robert McDougle Percent:
 Primary: 100.00

Cost Per Pay Period: \$ 63.00 \$ 53.00 \$ 0
Previous Cost: \$ 63.00 \$ 50.00 \$ 0

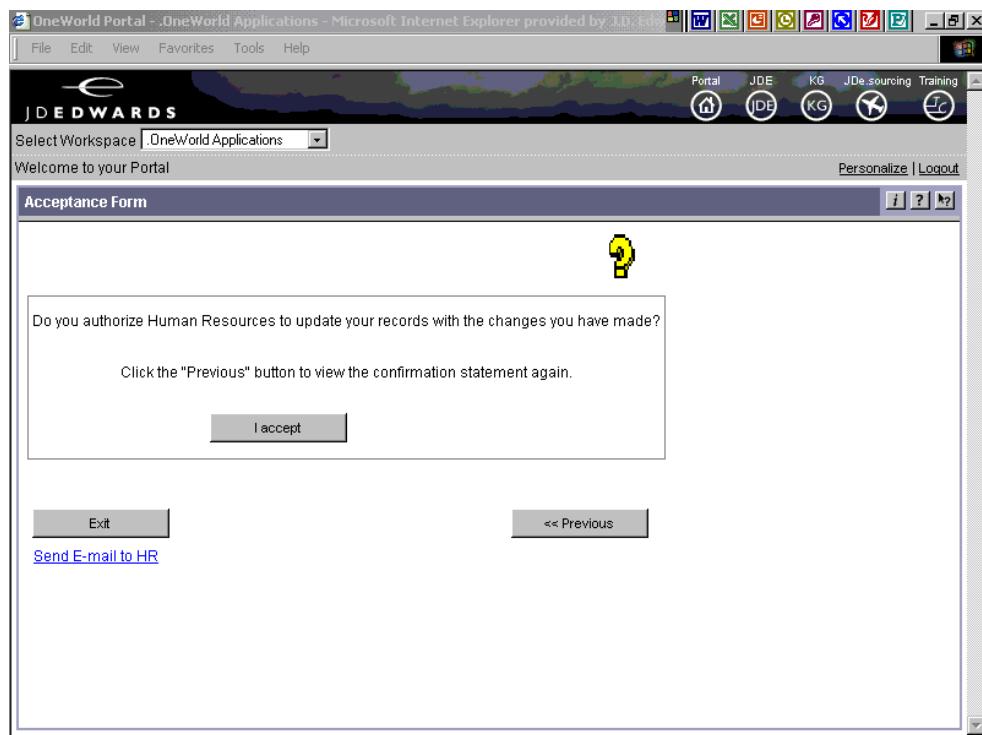
Total Employee Cost: \$ 53.00 (per pay period)
Total Employer Cost: \$ 0 (per pay period)

[PRINT a Copy of This Statement](#) [E-MAIL a Copy of This Statement](#) [MAIL a Copy of This Statement](#)

[Exit](#) [Send E-mail to HR](#) [<< Return](#) [Submit Your Changes](#)

On the Benefits Confirmation form, the system displays all of the benefit choices and the cost to the employee. After reviewing the pending benefit changes and cost information, the employee can click Back to enter additional changes or Next to display an acceptance form.

To fulfill organizational and legal requirements for confirmation and legal signature, the system displays the Acceptance Form (P085564), as follows:



The Acceptance Form is a required step for the process flow script. The Back option allows an employee to review the preview confirmation statement again. If additional changes are required, the employee can click on underlined links that are related to the information they need to correct. For example, to correct address information, an employee can click on their name and the system displays the Personal Information form. The employee enters changes and clicks Next.

After an employee accepts all benefit changes, the system displays the Final Confirmation Statement form (P085568, Version ZJDE0003):

OneWorld Portal - OneWorld Applications - Microsoft Internet Explorer provided by J.D. Edwards

File Edit View Favorites Tools Help

Final Benefit Confirm. Stmt.

Next >> ?

Final Confirmation Statement
Transaction Number: J-10110117313696

Benefits as of: 10/10/01

These are your elections submitted for approval.

Cathy McDougle 43 S. Iliff #301 Denver, CO 80210	Employee Number: 5966664
	Tax Id: 456985456

Totals Per Pay Period

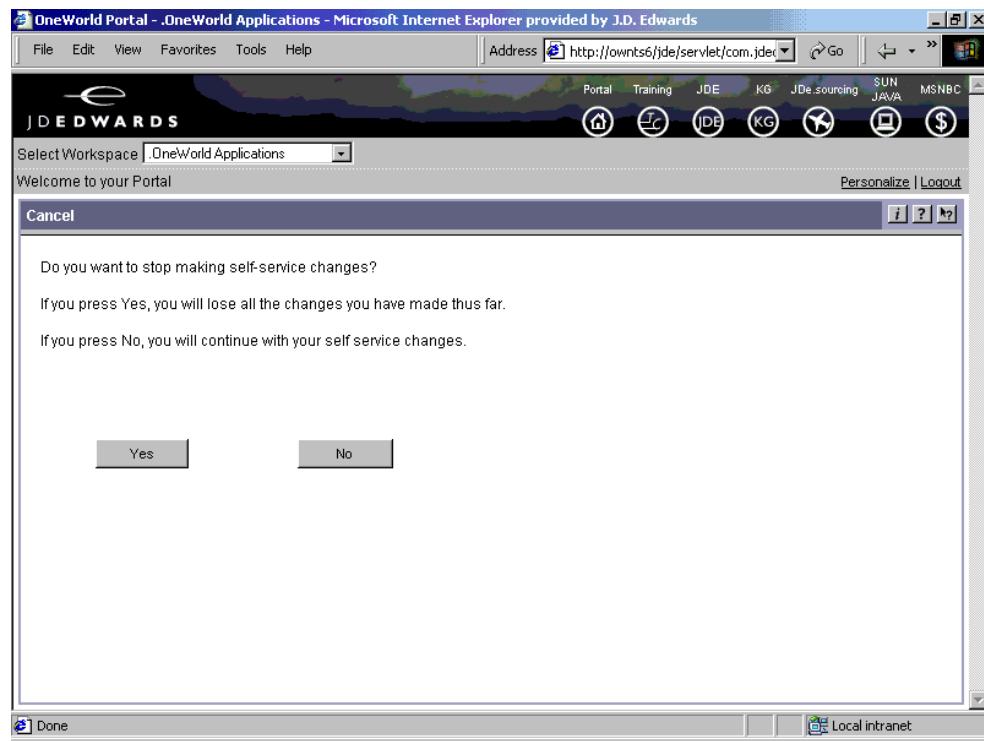
Flex Credits Available	0.00	Non-Flex Payroll Deductions	53.00
Flex Credits Spent	13.00	Flex Payroll Deductions	13.00
Flex Credits Remaining	- 13.00	Total Payroll Deductions	66.00

Total Employee Cost: \$ 63.00 (per pay period)
Total Employer Cost: \$ 50.00 (per pay period)

Benefits Category	Benefits Plan Selected	Flex Cost or Credit (per pay period)	Employee Cost (per pay period)	Employer Cost (per pay period)
Flex Medical Benefits	Medical Flex Ee + 2 or More PCP Numbers:	\$ - 13.00	\$ 0	\$ 0

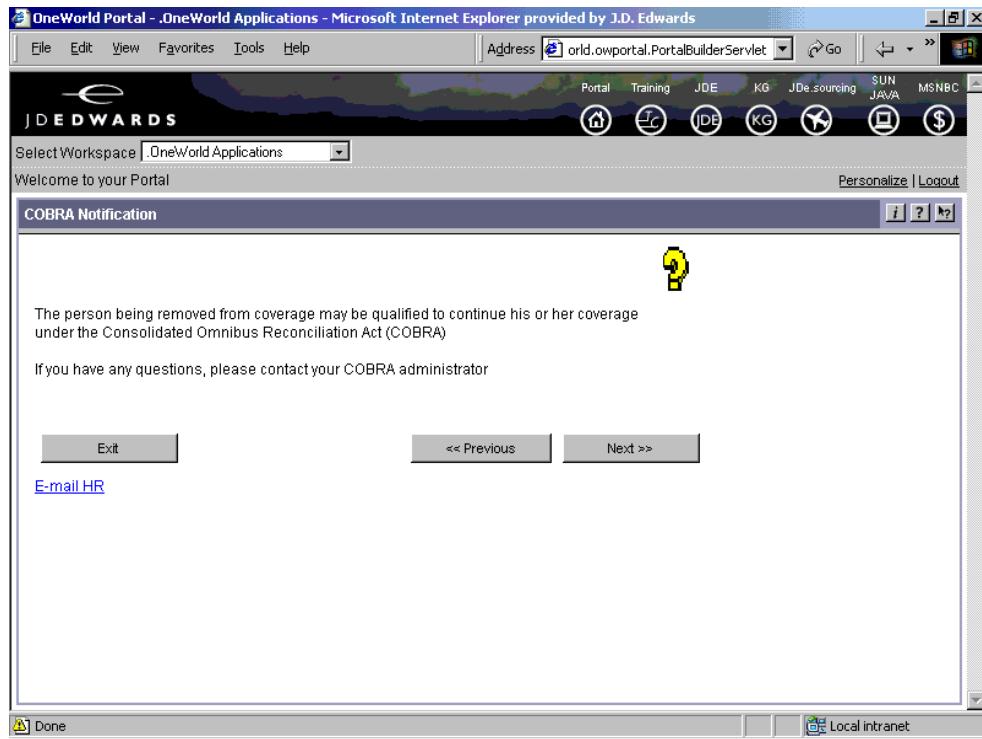
The Final Confirmation Statement is the last step in the demonstration script. This form is a required step for each process flow script. After confirming all changes, the employee can preview the confirmation statement again, but cannot enter additional changes to benefits.

If an employee terminates the enrollment process prior to completion, the system displays the Cancel form:



The system does not save any of the changes or new information that the employee enters up to this point. An employee must start a new enrollment process to elect benefits or change benefit information if he or she stops the enrollment process before completing the last step.

The following form might appear if an employee is removed from benefit coverage:



Setting Up New DBA Plan Rates

If any of your benefit plans are changing rates during the open enrollment period, you can cross-reference the current year's DBAs (deductions, benefits, and accruals) with the current rates to the DBAs that reference the new rates. This cross-reference lets you effectively change the rates that appear for the enrollment period without changing the rates for the current DBAs.

You need to cross-reference DBAs only for benefit calculations that are table based or if the DBA is changing radically (for example, from a flat dollar amount to a percentage). If you do not set up a cross-reference, the system retrieves new rates from the Plan Master Rate table. If you set up both the Plan Master Rate table and the DBA cross-reference, the system uses the DBA cross-reference.

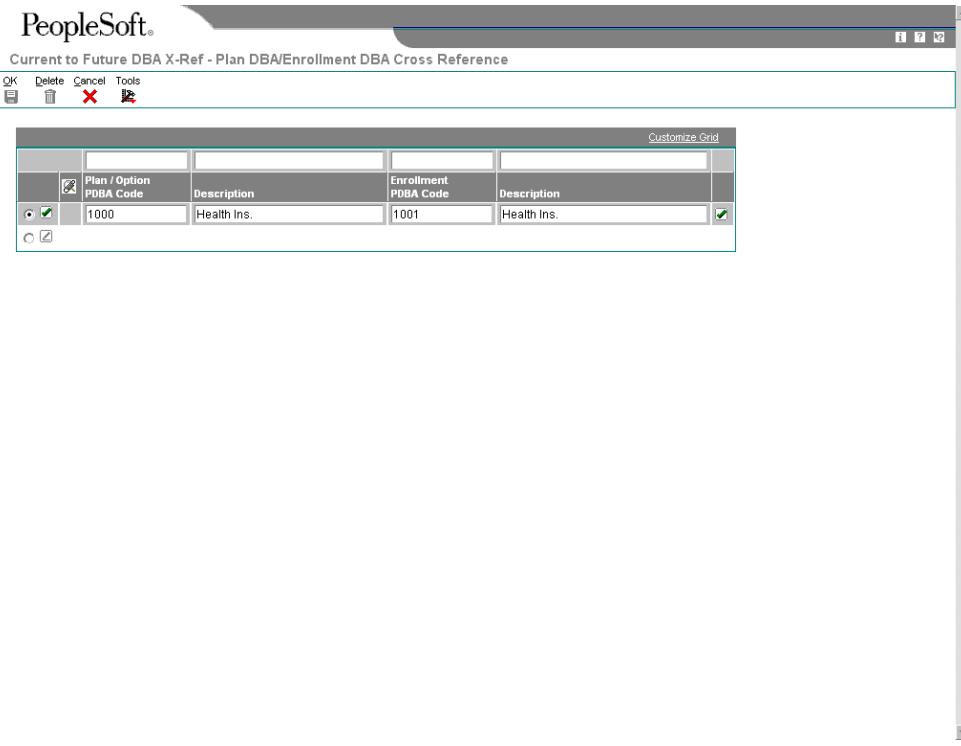
You need to set up the DBA cross-reference before you build the workfiles for open enrollment.

Before You Begin

- Set up the DBAs for the new rates. See *Setting Up Deductions, Benefits, and Accruals*.

► To set up new DBA plan rates

From the Employee Self Service Setup menu (G05BESS4), choose Current to Future DBA X-Ref.



1. On Plan DBA/Enrollment DBA Cross Reference, enter the current year's DBA in the following field:
 - Plan / Option PDBA Code
2. Enter the corresponding DBA for the new rate in the following field:
 - Enrollment PDBA Code
3. Repeat steps 1 and 2 for all the rates that are changing, and then click OK to save your changes.

You still need to change your enrollment plan's DBA amounts to the new rates prior to the period in which they will be effective.

Setting Up Manager Self-Service

You can set up self-service programs that will assist supervisors in managing the hiring and reviews of employees.

Setting Up Upcoming Reviews by Supervisor

The Upcoming Reviews by Supervisor program (P052200) can be used by employees in a managerial or supervisory position. Supervisors can log onto the self-service site to see all employees whom they are responsible to review soon.

The Upcoming Reviews By Supervisor report (R052200) can be run to report employees with upcoming reviews by supervisor and to add Enterprise Workflow Management functionality to

the process. If the processing options for this report are set up correctly, the system automatically reports employees with upcoming reviews, reminds each supervisor of upcoming reviews by sending an e-mail, and automatically updates the Upcoming Reviews By Supervisor program (P052200).

When a supervisor logs onto the program, the system recognizes the supervisor's employee number and displays the supervisor's employees who have upcoming reviews. You can set up processing options so that supervisors can choose options from the row menu to view an employee's information on the following forms: Employee Organizational Assignments (W0801ORG), Personal (W0801EMP), Employee Basic Compensation (W0801CMP), and Supplemental Data Inquiry (W050200). You can choose whether you want to set up security to permit access to these forms by certain individuals only. See *Working With Security Workbench*.

This program updates supervisors and eliminates the time that they would spend researching upcoming reviews for their employees.

You can also set a processing option to have the report run automatically on a certain date. See *Scheduling a Recurring Job*.

Processing options are also available to run versions that report past due reviews and reviews for all employees without specified dates. Neither of these versions include Workflow.

Upcoming Reviews By Supervisor (P052200) is an inquiry-only program. The information presented by the program is from the Employee Master table (F060116).

Before You Begin

- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.

See Also

- Running the Upcoming Employee Reviews by Supervisor Report*, after you set the specifications, for information about running the report

Processing Options for Upcoming Reviews by Supervisor (P052200)

Process Tab

Use these processing options to define the defaults that will determine the options available when using this program.

1. Enable Select Button To Basic Compensation

1 = Yes

0 = No

Use this processing option to enable the row exit to Basic Compensation. Valid values are:

Blank Disable row exit.

1 Enable row exit.

2. Enable Organizational Assignment Row Exit

1 = Yes

0 = No

Use this processing option to enable the row exit to Organizational Assignment. Valid values are:

Blank Disable row exit.

1 Enable row exit.

3. Enable Employment Information Row Exit

1 = Yes

0 = No

Use this processing option to enable the row exit to Employee Information.

Valid values are:

Blank Disable row exit.

1 Enable row exit.

4. Enable Employee Profile Row Exit

1 = Yes

0 = No

Use this processing option to enable the row exit to Employee Profile. Valid values are:

Blank Disable row exit.

1 Enable row exit.

5. Enable Supplemental Data Row Exit

1 = Yes

0 = No

Use this processing option to enable the row exit to Supplemental Data. Valid values are:

Blank Disable row exit.

1 Enable row exit.

Use this processing option to enable the row exit to Create Performance Appraisal. Valid values are:

0 or Blank

Disable Row Exit

1

Enable Row Exi

Defaults Tab

Use this processing option to define whether the program will provide the opportunity to enter a supervisor data item.

1. Enable Supervisor Number Entry

1 = Yes

0 = No

Use this processing option to enable a supervisor data item to be entered.

Valid values are:

1 Enable supervisor data item to be entered.

0 Disable data item. The supervisor data item will be either passed to the application or supplied from the user address book number.

Version Tab

Use these processing options to define the defaults that will determine the options available when using this program.

1. Employee Compensation

Enter a specific version

Blank = Default version

Use this processing option to specify the version for Employee Compensation.

The default version is ZJDE0001.

2. Employee Organizational Assignment

Enter a specific version

Blank = Default version

Use this processing option to specify the version for Organizational Assignment. The default version is ZJDE0001.

Setting Up the Employee Setup Process

After hiring an employee, a manager can use self-service to add an employee record and initiate an employee setup process. Workflow then sends task approval messages and reminders about equipment setup to certain people.

You can set up tasks for the new employee that are default tasks. Default tasks can be tasks that every new employee needs. For example, if your company provides a phone for most employees, you might want to set up a default task for installing a phone. Managers can change these tasks unless you enter a lock code for the task when you set it up. When you set up a default task, always associate it with a job type and step. Information entered as a default task updates the Default Setup Tasks table (F087101).

You also set up a task list by location. You enter every possible setup task for every location. For every task in the task list, you can specify an approver, a task recipient, and other task details. Managers can choose tasks from the task list and assign them to a new employee's setup record.

Setting up the employee setup process includes the following procedures:

- *Setting up default tasks*
- *Setting up tasks by location*

You can set up each task to do one or more of the following activities: run a report, send an e-mail message, create a work order, or start a Workflow process. You must first customize a report, set up a work order, or set up an additional Workflow process if you are planning to attach these activities to a task.

You can also require an approval for each task that you set up. If you require an approval, Workflow sends an e-mail approval form to the address book number of the person that you designated in the Approver field. You must also set your processing options to determine whether Workflow should obtain a process approval for the entire employee setup process for every new employee record.

The system determines the date to begin the approval process from the values that you enter in the following three fields on the Work With Setup Task Details form:

- Based On Date
- Duration
- Offset Days

To determine the date to begin each task, the system performs the following:

13. Retrieves the date from the Based On Date field (for instance, the arrival date of the employee)
14. Adds the number of days from the Duration field (the number of days needed to complete the task)
15. Adds the number of days from the Offset Days field (the number of days, when added to the Duration values, that determine the day by which the task must be completed)

The information that you enter in the header area of the setup forms updates the Setup Task List table (F087102). The information that you enter in the detail area of the setup forms updates the Setup Task Details table (F087103).

Before You Begin

- You must set up numerous user defined codes for the employee setup process, including location codes 08/L1 through 08/L0. See *Understanding User Defined Codes*.
- Adding a User Defined Code* for the procedures to add a new user defined code.
- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.
- Set up your processing options to require a process approval and to specify an ending status for the process approval.
- Verify that the following Workflow processes are activated in the Process Master (P98800):

EESETUP01- Employee Setup Approval	The Workflow process that e-mails an approval form for the entire employee setup process to the address book number of the approver. After Workflow obtains an approval, it e-mails approval forms for each setup task that requires an approval. If you want your system to obtain an approval for this process, you must set a processing option. You must also set up this task on any task setup form. See <i>Processing Options for Managers Employee Setup</i> .
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EESUTSK03-Get Task Approval	The Workflow process that e-mails an approval form to the address book number of the approver for an individual employee setup task that requires an approval. After Workflow obtains an approval, it begins the task.
--	--

EESUTSK01- Employee Task Setup	The Workflow process that begins the employee setup task after obtaining approval. Depending on how this task is set up, this task might include running a report, sending an additional e-mail, creating a work order, or starting an additional Workflow process.
---	---

► To set up default tasks

From the Manager's Employee Setup Options menu (G05BMSS4), choose Default Setup Tasks.

1. On Work With Default Setup Tasks, click Add.
2. On Edit Default Setup Tasks, complete the following fields:
 - Job Type
 - Job Step
 - Task Type

3. Complete the following optional fields and click OK:

- Sub Class
- Lock Code

► To set up tasks by location

From the Manager's Employee Setup Options menu (G05BMSS4), choose Setup Task List.

1. On Work With Setup Tasks, click Add.

Records 1 - 1										
	Location Code 1	Location Code 2	Location Code 3	Location Code 4	Location Code 5	Location Code 6	Location Code 7	Location Code 8	Location Code 9	Location Code 10
<input checked="" type="checkbox"/>	US	CO	DENVER							

2. On Work With Setup Tasks Details, complete the following fields in the header area:

- Task Type
- Sub Class
- Description
- Approval Required
- Required Location Fields
- Ranking
- Final Task Status

3. Enter your address book number or the address book number of the person responsible for monitoring this task in the following field:
 - Task Owner
4. Complete the following optional field if you have an additional form set up to enter additional task information:
 - App. Form Name
5. Complete the following field in the detail area:
 - Task Recipient

The task recipient receives any e-mail, work order, or report that you attach to this task.
6. To identify the employee's workspace, complete as many of the Location Code fields that are required.

To determine the required number of fields, refer to the value in the Required Location Fields field.
7. If you entered the Approval Required option, complete the following field:
 - Approver
8. If you set up a customized report for this task, complete the following fields:
 - Report Name
 - Version
9. If you set up an additional workflow process for this task, complete the following field:
 - Process ID

If you set up the process approval task, enter EESETUP01 in the Process ID field.
10. To send an e-mail message to the task recipient, complete the following field:
 - Send E-Mail
11. To create a work order for this task, choose Work Order Entry from the Form menu and proceed to the task *Creating Work Orders* in the *Work Orders Guide*.
12. If you create a work order, complete the following field:
 - Order Number
13. Complete the following fields so that the system can determine the start date of the task:
 - Offset Days
 - Duration
 - Based on Date

If you are setting up the process approval task, you must enter the creation date as the value in the Based on Date field. The Completion Offset Days and Duration fields must be set to 0.

14. Repeat steps 2-13 to enter different locations for the task.
15. When you are finished, click OK.

Setting Up Employee Status Change

Employee Status Change (P08740) is one of the suite of applications that a manager can use from Manager's Workbench (P08712). Managers can use Employee Status Change to perform any of the following changes:

- Promotion
- Job status
- Location
- Leave of absence
- Department or supervisor

Managers can save time and effort by using the five default tasks above to perform the most frequent types of employee changes. For example, when an employee changes jobs, the employee's supervisor can initiate the change using the Manager's Workbench. Workflow can route the status change to human resources for the appropriate approvals. Once the change request has been approved, the change will automatically be updated in the system.

Your software has been supplied with a default version that contains options, approval requirements, and data items that are common to a large cross-section of organizations. As a result, little or no change might be required for this application to meet your needs. If you want to add data items to any of the existing change forms, you will find that the majority of the fields from the Employee Master table are currently available.

If you want to change the default settings, the best approach is to make a copy of the existing version, rename the new version appropriately, and make changes only to the new version. Because any new version must maintain the same data structure (input parameters), this approach will result in less effort and fewer errors.

An additional setup option exists, within the Manager's Employee Status Change application, to define a sixth type of change that can be either a combination of existing change types or a selection of any of the fields in the Employee Master table (F060116). You can accomplish this addition in Employee Status Change Setup.

Normally, you will use the existing processing option settings for Employee Status Change Setup. These settings are:

- Report Name
- Report Version

The default report name and version include the options, approval requirements, and data items mentioned above. You should alter these settings only when you have created a new version and want managers to use your customized change options.

Before You Begin

- Verify that Workflow process EESTSCHG-Employee Status Change is activated in the Process Master (P98800). See [Activating a Workflow Process](#).

► To set up employee status change

From the Self-Service Setup menu (G05BESS4), choose Status Change Setup.

1. On Employee Status Change Setup, complete the following field and click Find:
 - Change Type

The system automatically displays the data items that are currently selected. A check mark in the row header indicates that the data item is selected and appears as an available field on Create Employee Status Change Request. If a lightening bolt symbol appears in the row header, the field is a required field and will be marked with an asterisk on Create Employee Status Change Request.

 2. To change the status of a selected field to a required field, double-click the row-header (the field with the check mark) so that the lightening bolt symbol appears.
 3. To completely deselect a field, double-click the row-header again so that no symbol appears.
 4. To add a new field, click All from the Display Options. This will display all the enabled data items from the Employee Master table from which you can select.
 5. Double-click the row-header of the data item that you want to add and click OK.

Processing Options for Status Change Setup (P08730)

Defaults Tab

These processing options specify the defaults that the system will apply when you initiate the status change process.

1. Business Function Name

Default Business Function used to initiate the status change process.

Use this processing option to specify the business function you want to use to initiate the status change workflow process. This business function must also handle the other workflow processes such as aborting, escalating, restarting, and approving.

The default function is Initiate Status Change. The source module is N0800206.

2. Hide Status Change Initialization Business Function

1 = Yes

0 = No

Use this processing option to specify whether you want to allow the user to see the Status Change business function driver used to initiate the Status Change process. It is recommended that you set this value to 1. Valid values are:

- 0 No
 - 1 Yes
-

Setting Up Manager Reports

Reports, from the Manager's Workbench, is one of the applications that a manager can use to automate required reporting procedures and save time. Managers can select reports from a preset list to meet frequent reporting requirements. Two report options are available:

- Individual reports
- Managers reports

Managers can select and print any of the individual reports, such as Headcount or Phone List, by clicking the report name, reviewing the print destination on the Printer Selection form, and then clicking OK.

The Managers Reports option includes a customized list of reports that can save you time. For example, if a manager needs to review his employees' time reports at the end of each time reporting cycle, the Time Entry report can be selected and printed out for each employee. After these report lists have been set up in Managers Reports Setup, individual managers can select reports within a list and specify the order in which they will print to meet specific requirements.

The Organization Chart report will print a picture of the organization, starting at the requesting manager's level. This report requires Visio software installed on the manager's computer.

The Supplemental Data report produces information from the Supplemental Data table, linked to the Employee Master table. For example, you might want to print a report on skills or competencies for an employee. You can review the supplemental information that is available for this report in Employee Supplemental Data Inquiry (P0801).

When you create custom reports and want to add them to a report list in Managers Reports, you might need to alter one or more of the data items that you have included in the report's data structure to successfully run the report. To accomplish this mapping, use Work With Data Structure Mapping (P08770), which is available by selecting the Set Parameters row menu option in Managers Report Setup.

Before You Begin

- ❑ To set up new category codes to which you can assign a new selection of reports, before starting the following process, see *Understanding User Defined Codes* in this guide and *Adding a User Defined Code* to create a user defined code. To create a new category for human resources reports, use 08 in the Product Code field and RP in the User Defined Codes field.

► To set up manager reports

From the Self-Service Setup menu (G05BESS4), choose Managers Report Setup.

1. On Manager's Report Setup, complete the following field and click Find to display the report names that are currently assigned:
 - Category
 2. To assign a report to a category, complete the following fields:
 - Report ID
 - Version
- You can use search parameters to limit your search for a type of report. For example, you can enter R08* in the Application column header and click Find to locate the human resources reports.
3. After you have added the necessary reports, click OK.

Self-Service Time Entry

Using J.D. Edwards self-service applications, you can streamline and simplify the process of entering and reviewing employee timecard information. Using the self-service approach for time entry allows you to eliminate, or greatly reduce, the need for paper time sheets. You can also increase the accuracy of your data by eliminating the need for a time entry clerk to manually enter data into the system using paper timesheets, which also increases employee efficiency.

Self-service time entry applications allow you to customize the user interfaces that employees use to enter timecards. You can create multiple interfaces to accommodate the different business requirements of different employee groups within your organization.

When employees access the self-service time entry system, the system displays a welcome form called a director. You can customize this form to include user instructions for the time entry process, or to include information that employees need to complete their timecards for the specified pay period. In addition to user instructions, the director form also includes links to the Daily Time Entry and Summary Time Entry applications. The form also includes a link that managers can use to review and approve employee timecards.

When an employee selects the appropriate link from the director form, the system automatically displays a time entry form where they can enter their timecard information. You can customize this form to include only the fields that you want employees to complete. Using the ESS Time Entry Setup program (P051123), you can choose from over 50 predefined fields to appear on the employee time entry form. This program allows you to quickly and easily create custom time entry forms to meet your business requirements. You can also define the pay types that each employee can use to enter timecards, which helps to ensure the accuracy of the timecard data.

Note

Employees can enter timecards only for themselves using self-service time entry applications. Similarly, employees who are not managers are able to review only their own timecards. Managers can review their own timecards and those of their employees. If it is necessary for an employee to enter timecards for another employee, these timecards must

be entered using standard time entry programs. See *Entering Timecards for Employees* for instructions for entering timecards using the standard time entry programs.

After employees enter timecards into the system, those timecards can be reviewed and approved, changed, deleted, or rejected by the employees' managers. You can also set up manager delegates to perform the review and approval process in the event that an employee's manager is unavailable. Manager delegates are employees that are assigned permission to review and approve timecards on behalf of a manager. In addition, you can generate e-mail messages directly from the review and approval application, which allows managers to automatically notify employees of the status of their timecards during the approval process.

When employees enter timecards using self-service applications, those timecards are stored in the Employee Transaction - Batch table (F06116Z1), which is a temporary workfile. After the timecards have been reviewed and approved, you can run the Time Entry Batch Processor program (R05116Z1I) to transfer the timecards from the workfile into the Employee Transaction Detail table (F06116). When the timecards are in the F06116 table, they can be included in payroll cycle processing.

Note

Because the timecards that are entered using self-service time entry applications are stored in the Employee Transaction - Batch table (F06116Z1), employees can enter timecards while the payroll cycle is being processed without affecting that payroll cycle. Only timecards that have been converted to the Employee Detail Transaction table (F06116) are included in the payroll cycle.

Entering Timecards Using Self-Service

The Self Service Director form serves as the entry point for employees and managers to access self-service time entry applications. You can customize the text that appears on this form and automatically complete the Pay Period Ending Date field so that employees can easily enter timecard information using self-service applications.

Employees access the time entry applications by clicking links that appear on the Self Service Director form. Employees can click the Summary Time Entry link or the Daily Time Entry link. In addition to the time entry application links, a link to the timecard review and approval application is provided for managers who must review and approve timecards.

Note

The Summary Time Entry, Daily Time Entry, and Manager Review and Approval links always appear on the Self Service Director form. The Summary Time Entry and Daily Time Entry links are always active for all employees; however, the Manager Review and Approval link is active only for managers and their active delegates who must review employee timecards.

Before You Begin

- Set up the Self Service Time Entry functionality. See *Setting Up Self Service Time Entry* for instructions.

Entering Self-Service Timecards Using Daily Time Entry

When you click the Daily Time Entry link from the Self Service Director form, the system displays the Self Service Daily Time Entry form. The fields that employees must complete are determined during the setup process, and the format of the form is determined by the pay frequency of the employee who accesses the form. For example, when an employee whose pay frequency is weekly accesses the Daily Time Entry form, the system displays a review area that summarizes timecard information for the seven days for which the employee can enter timecards. Similarly, when an employee whose pay frequency is biweekly accesses the form, the system displays a review area that summarizes timecard information for the 14 days for which the employee can enter timecards.

To enter timecards using this program, employees are provided with a time entry grid that contains a column for each day in the pay period. Employees can enter all timecards that are associated with the same pay type on one line in the grid for the entire pay period.

Employees must enter a separate line in the grid for each pay type used during the pay period. For example, if an employee works eight hours of regular time each day and also works two hours of overtime each day, two lines of time entry are required to accurately track the employee's time for the pay period. The employee must enter one line using the regular pay type; the hours associated with each day within the pay period can be entered on this line. The employee must also enter an additional line using the overtime pay type; the overtime hours for each day within the pay period can be entered on this line.

Note

Only employees whose pay frequency is weekly, biweekly, or semimonthly can enter self-service timecards using the Daily Time Entry form. Employees whose pay frequency is monthly must use the Summary Time Entry form to enter self-service timecards.

When an employee enters or updates timecards using this application, the timecards are stored in the Employee Transaction - Batch table (F06116Z1), which is a temporary workfile, when the Save button is clicked. These timecard records are assigned a status of 0 - Waiting for Approval, which allows managers to easily identify timecards that must be reviewed and approved. Users can enter or update their own timecard records using this form. However, if a manager has already approved a timecard, the user cannot update the timecard.

After the timecards have been approved, the Time Entry Batch Processor program (R05116Z1I) is used to create timecards in the Employee Transaction Detail table (F06116). After timecards from the workfile are converted and stored in the F06116 table, they can be processed in a payroll cycle.

► To enter self-service timecards using daily time entry

From the portal that is created by your organization, access the Self Service Director form.

1. On the Self Service Director form, verify that the date in the Pay Period Ending Date field is correct, and then click the Daily Time Entry link.
2. On the Daily Time Entry form, click a blank line in the time entry grid at the bottom of the form.
3. Enter the pay type in the Pay Type field.
4. Enter the number of hours that are associated with the pay type that you entered in step 3 for each day of the pay period.
5. Complete any additional fields in the grid line.

Note

The fields that the system displays in the grid are determined during self-service time entry setup. For instructions for completing any of the fields that appear in the grid, see *Entering Daily Timecards for Employees*.

6. Click the Save button to save the record and to display a new line in the time entry grid.

Note

When you click the Save button, the system updates the totals in the review sections of the form.

7. Complete steps 2 through 6 until you have entered all timecard information. You must enter a separate line for each pay type.
8. Click the Back button to return to the Self Service Director form.

► To delete or modify self-service timecards using daily time entry

From the portal that is created by your organization, access the Self Service Director form.

1. On the Self Service Director form, click the Daily Time Entry link.
2. On the Daily Time Entry form, to delete timecards, click the Select option next to the records that you want to delete, and then click the Delete button.
3. To modify timecards, change any of the fields in the detail area of the form and then click the Save button.

Note

You cannot delete or modify a timecard if a manager has already approved it.

4. Click the Back button to return to the Self Service Director form.

Entering Self-Service Timecards Using Summary Time Entry

When you click the Summary Time Entry link from the Self Service Director form, the system displays the Self Service Summary Time Entry form. Two sections are available on the Self Service Summary Time Entry form where employees can enter timecard information. In the Pay Type (Totals Only) section of the form, employees can enter lump sum amounts for regular, sick, vacation, and holiday hours that they worked during the pay period.

For example, if an employee took 40 hours of vacation time during the pay period, they could enter 40 in the Vac field in the Pay Type (Totals Only) section of the form. The vacation pay type that you define in the processing options for the Self Service Director program (P051125) is used to create the employee's timecard.

Additionally, employees can enter timecard records in the time entry grid at the bottom of the form. The fields that appear in the time entry grid are determined during the self-service time entry setup process.

Note

Employees whose pay frequency is monthly must use the Summary Time Entry form to enter self-service timecards. Only employees whose pay frequency is weekly, biweekly, or semimonthly can enter self-service timecards using either the Daily Time Entry form or the Summary Time Entry form.

When an employee enters or updates timecards using this application, the timecards are stored in the Employee Transaction - Batch table (F06116Z1), which is a temporary workfile, when the Save button is clicked. These timecard records are assigned a status of 0 - Waiting for Approval, which allows managers to easily identify timecards that must be reviewed and approved. Users can enter or update their own timecard records using this form. However, if a manager has already approved a timecard, the user cannot update the timecard.

After the timecards have been approved, the Time Entry Batch Processor program (R05116Z1I) is used to create timecards in the Employee Transaction Detail table (F06116). After timecards from the workfile are converted and stored in the F06116 table, they can be processed in a payroll cycle.

► To enter self-service timecards using summary time entry

From the portal that is created by your organization, access the Self Service Director form.

1. On the Self Service Director form, verify that the date in the Pay Period Ending Date field is correct, and then click the Summary Time Entry link.
 2. On the Summary Time Entry form, complete the following fields in the Pay Type (Totals Only) section of the form to enter lump sum amounts:
 - Reg.
 - Vac
 - Sick
 - Holiday
 3. To enter timecards in the detail section of the form, click a grid line and enter a pay type in the Pay Type field.
 4. Complete any additional fields in the grid line.
-

Note

The fields that appear in the grid are determined during self-service time entry setup. For instructions for completing any of the fields that appear in the grid, see *Entering Timecards for Employees*.

5. Click the Save button to save the record and display a new line in the time entry grid.
6. Complete steps 2 through 5 until you have entered all timecard information.
7. Click the Back button to return to the Self Service Director form.

► To delete or modify self-service timecards using summary time entry

From the portal that is created by your organization, access the Self Service Director form.

1. On the Self Service Director form, click the Summary Time Entry link.
2. On the Summary Time Entry form, to delete timecards, click the Select option next to the records that you want to delete, and then click the Delete button.
3. To modify timecards, change any of the fields in the detail area of the form and then click the Save button.

Note

You cannot delete or modify a timecard if a manager has already approved it.

4. Click the Back button to return to the Self Service Director form.

Reviewing and Approving Self-Service Timecards

After employees enter self-service timecards into the system, managers must review those timecards. Using the Manager Review And Approval program (P051129), managers can review, change, reject, and approve employee timecards. Along with reviewing and approving timecards, managers can use this program to view a list of employees who are missing timecards for the pay period. You can also set up the review and approval process to be completed by manager delegates.

Managers or their delegates can review the timecards for a group of employees and approve or reject all of the timecards at once, or timecards can be approved, changed, or rejected individually. Managers can also select multiple timecards or employees to approve or reject at one time.

In addition to approving and rejecting timecards, managers also can assign the Paid- Not Approved status to timecards. This status is used for informational purposes, and the timecards that are assigned this status are processed in the same way approved timecards are processed. Managers might use this status if a timecard is incorrect but the approval deadline does not allow for the timecard to be changed and re-entered by the employee. Assigning the Paid - Not Approved status allows the system to pay the employee for the timecard. The manager would then need to follow up with the employee to ensure that the timecard information is corrected during a future pay period.

Managers also can send e-mail messages to employees using the Send E-Mail to Employee link on the Self-Service Manager Review and Approval form. Managers might use this function to notify employees of the reason a timecard was changed or rejected, or to remind employees who have not entered timecards for the period to enter their timecards before the deadline.

The timecards that employees enter into the system are stored in the Employee Transactions - Batch table (F06116Z1), which is a temporary workfile. After the timecards are reviewed and approved or rejected, the Time Entry Batch Processor program (R05116Z1I) converts all of the timecards with an Approved or Paid Not Approved status and stores them in the Employee Transaction Detail table (F06116). When timecards are in the F06116 table, they can be processed in a payroll cycle.

Note

To use the missing timecards option during the review and approval process, you must set the processing options for the Self Service Director program (P051125) to turn on that functionality. Also note that in order to display a list of employees who have not entered timecards for the pay period, the system must search through the entire employee database to find all of the employees that report to the specified manager; therefore, this process might take a significant amount of processing time.

See Also

- Working with Time Entry Batch Processing* for more information about processing self-service timecards

► To review and approve self-service timecards

From the portal that is created by your organization, access the Self Service Director form.

1. On the Self Service Director form, verify that the date in the Pay Period Ending Date field is correct, and then click the Manager Review/Approval link.
2. On Self-Service Manager Review and Approval, complete the following fields:

Note

If you are a delegate who is reviewing and approving timecards for a manager, enter the approving manager's address book number, and click the Refresh button to display employees managed by the manager.

- Pay Period Ending Date
3. To specify which timecards to review, click one of the following options and then click the Refresh button:
 - 4. To approve all of the timecards for multiple employees, click the Select option next to each employee for whom you want to approve timecards, and then click the Approved button.
 - 5. To reject all of the timecards for multiple employees, click the Select option next to each employee for whom you want to reject timecards, and then click the Reject button.
 - 6. To reject all of the timecards for multiple employees, but allow them to be processed in a payroll cycle, click the Select option next to each employee for whom you want to assign the Paid - Not Approved status, and then click the Paid - Not Approved button.
 - 7. To review the timecard detail for an individual employee, click the Select option next to the employee's record in the detail area of the form, and then click the Review Timecard Detail button.

Note

If the employee entered timecards using daily time entry, the Employee Daily Time Entry form appears when you review timecard detail. Similarly, if the employee used summary time entry, the Employee Summary Time Entry form appears. If the

employee entered timecards using both applications during the same pay period, the Employee Summary Time Entry form appears and all of the employee's timecards, whether entered through summary or daily time entry, are displayed.

If necessary, you can change any of the information for each timecard that is displayed on the time entry form.

8. To approve selected timecards for the employee, click the Select option next to each timecard that you want to approve, and then click the Approve button.
 9. To reject selected timecards for the employee, click the Select option next to each timecard that you want to reject, and then click the Reject button.
 10. To assign the Paid - Not Approved status to selected timecards for the employee, click the Select option next to each timecard for which you want to assign this status, and then click the Paid - Not Approved button.
 11. When you have finished reviewing all of the employee's timecards, click the OK button to return to the Self-Service Manager Review and Approval form.
 12. To send an e-mail message to an employee, click the Select option next to the employee, and then click the Send E-Mail to Employee link.
-

Note

You can send e-mail messages to only one employee at a time. Do not choose multiple employees when sending e-mail messages from the Manager Self-Service Review and Approval form.

13. On Self-Service E-Mail Message, complete the following field:
 - Subject
14. Type your message in the text box and then click the Send button.
15. On Manager Self-Service Review and Approval, click the Previous button to return to the Self Service Director form.

Setting Up Self-Service Time Entry

Before employees can enter timecard information using the self-service time entry applications, you must create the text that appears on the time entry forms, set up user interfaces, assign manager delegates for managers who review and approve timecards, and specify the available pay types that can be used for each employee group.

First, you must set up the director form. The director form is the first form that employees see when they access the self-service time entry system. You can enter text that will appear on this form. This text is called director text. You use director text to provide user instructions for employees or to provide pay-period specific information that might be needed for employees to enter timecards correctly.

In addition to director text, the director form also contains links to the actual time entry interfaces. You can activate the links to the Summary Time Entry application, the Daily Time Entry application, or both applications. Though all of the links are displayed on the form, whether the links are active is determined by the processing option settings for the Self-Service Director program (P051125).

After you set up the director, you must set up user interfaces for the time entry applications. You can create multiple interfaces to accommodate the business requirements of different companies or business units within your organization. To set up a user interface for self-service time entry, you choose which fields you want to display on the time entry forms. J.D. Edwards has set the following fields as default fields that the system automatically displays on both the daily and summary time entry forms:

- Pay Type
- Hours
- Work Date
- Subledger
- Subledger Type
- Charge To
- Shift Code
- Equipment Worked
- Equipment Hours

J.D. Edwards also provides you with over 50 additional predefined fields to choose from. This allows you to quickly and easily customize your user interfaces to meet the business needs of your organization.

You can also specify which pay types are available to employees within different employee groups. For example, employees in business unit 100 might need to use different pay types than employees in business unit 200, or employees with Job Type A-200 might use different pay types than employees with Job Type B-55. You can use the Classification/Pay Cross Reference program (P05932) to specify the available pay types for each specified employee group. When you set up this information, employees can enter timecards for only the pay types that have been assigned to their employee group. If you do not set up this information, employees can access all of the pay types within your system. You can define employee groups according to the following criteria:

- Job Type only
- Job Type and Job Step only
- Business Unit only
- Union Code only
- Shift Code only
- Job Type, Job Step, Business Unit, Union Code, and Shift Code

You can select which fields you use to define employee groups for pay type assignment in the processing options of the Self Service Director program (P051125).

Lastly, you can set up manager delegates for managers who review and approve timecards. Manager delegates are employees who are given permission to perform duties on behalf of a manager. For example, if a manager is not available to review and approve timecards before the timecard approval deadline, a manager delegate could review and approve the timecards for that manager.

Setting Up the Time Entry Director Form

The Self Service Time Entry Director form is the first form that employees see when they access the self-service time entry system. You define the text that appears on this form. This

text is called director text. You use director text to provide user instructions for employees or to provide pay-period specific information that employees might need to enter timecards correctly. If you choose to include pay-period specific information in director text, you must revise the text for each pay period.

The following examples illustrate the types of information that you might want to include in director text:

Example 1

July 1–15 time entry reports are due by noon July 16 — 80 total hours.

United States employees, code July 4 holiday pay to pay code 882. Canadian employees, code July 2 holiday pay to pay code 882.

Overtime reminder: All employees who are eligible for overtime are responsible for coding all overtime hours worked to pay code 300. If you have any questions about overtime eligibility, please speak with your manager or a human resources representative.

Example 2

To enter timecards using this self-service form, verify that the date in the Pay Period Ending Date field is correct and then click the Summary Time Entry link to access the time entry screen. On the time entry screen, complete all of the fields and then click the Save button. Your manager will review your timecards and you will receive an e-mail response regarding the approval status of your timecards. If you have questions regarding the time entry process or the review and approval process, please speak with your manager or a human resources representative.

In addition to director text, the director form also contains links to the daily and summary time entry interfaces, as well as the Manager Review and Approval form. Using the processing options for the Self-Service Director program (P051125), you specify which of these links are active.

Lastly, the director form displays the last day of the pay period in the Pay Period Ending Date field, which is automatically completed using information that you enter in the processing options.

► To set up director text for self-service time entry

From the Time Entry Self-Service Setup menu (G05BESS41), choose Director Text Setup.

1. On Work With Director Text, click Add.
2. On Define Director Text, complete the following fields:
 - Company
 - Business Unit
3. In the text pane, enter the text that you want to appear on the employee self-service time entry form.

Note

You can only enter text in the text pane. Do not enter rich text, OLE objects, or images in the text pane. Also, when you enter text into the text pane, you must enter

 when you want a line break. Using the Enter key will not simulate a line break when the text appears on the director form.

4. Click OK.
5. If you want to enter different director text for different groups within your organization, complete steps 1 through 4 for each company and business unit combination for which you want to create director text. If you want to use the same director text for all employees in your organization, complete these steps once and enter 0 in the Company field and leave the Business Unit field blank.

► To revise director text for self-service time entry

From the Time Entry Self-Service Setup menu (G05BESS41), choose Director Text Setup.

1. On Work With Director Text, click Find.
2. Choose the record in the detail area that you want to revise and click Select.
3. On Define Director Text, revise the text that appears in the text pane.

Note

You can only enter text in the text pane. Do not enter rich text, OLE objects, or images in the text pane. Also, when you enter text into the text pane, you must enter
 when you want a line break. Using the Enter key will not simulate a line break when the text appears on the director form.

4. Click OK.

Processing Options for the Self-Service Director Program (P051125)

Date/Pay Cycle Code Tab

These processing options specify the pay period ending dates that are displayed on the Self Service Director form. The system displays the date that is associated with the employee's Pay Cycle Code. These processing options must be updated each pay period to ensure that the correct date is displayed on the form.

1. Pay Period Ending Date - Weekly

Use this processing option to specify the last day of the work week for weekly processing periods

Weekly Pay Cycle Code

Use this processing option to specify which Master Pay Cycle you want the system to use to determine pay period dates

2. Pay Period Ending Date - Bi-Weekly

Use this processing option to specify the last day of the bi-weekly processing period

Bi-Weekly Pay Cycle Code

Use this processing option to specify which Master Pay Cycle you want the system to use to determine pay period dates

3. Pay Period Ending Date - Semi-Monthly

Use this processing option to specify the last day of the semi-monthly processing period.

Semi-Monthly Pay Cycle Code

Use this processing option to specify which Master Pay Cycle you want the system to use to determine pay period dates

4. Pay Period Ending Date - Monthly

Use this processing option to specify the last day of the monthly processing period.

Monthly Pay Cycle Code

Use this processing option to specify which Master Pay Cycle you want the system to use to determine pay period dates

Pay Type Tab

These processing options specify the pay types that the system uses to create timecards for lump sum entries in the Pay Type (Totals Only) section of the summary time entry forms.

1. Pay Type - Regular

Use this processing option to specify the pay type that the system assigns to timecard information that is entered in the Regular Pay field in the self-service time entry applications

2. Pay Type - Sick Leave

Use this processing option to specify the pay type that the system assigns to timecard information that is entered in the Sick Pay field in the self-service time entry applications

3. Pay Type - Vacation

Use this processing option to specify the pay type that the system assigns to timecard information that is entered in the Vacation Pay field in the self-service time entry applications

4. Pay Type - Holiday

Use this processing option to specify the pay type that the system assigns to timecard information that is entered in the Holiday Pay field in the self-service time entry applications

5. Pay Type - Overtime

Use this processing option to specify the pay type that the system assigns to timecard information that is entered in the Overtime Pay field in the self-service time entry applications

6. Cross Reference Search

1 = Job Type

2 = Job type and Job Step

3 = Business Unit

4 = Union Code

5 = Shift Code

0 = By all fields blank(default)

Use this processing option to define the criteria by which you want to set up the pay type cross reference function for Employee Self-Service Time Entry. You use pay type cross reference to define which pay types specified employee groups can use for time entry purposes.

For example, if you want to assign pay types to employees by their Job Type and Job Step, enter 2 in this processing option. If you enter 2, you must define pay types for all employee groups using Job Type and Job Step information. Similarly, if you want to assign pay types to employee groups by Business Unit, enter 3 in this processing option.

However, if you want to assign pay type cross references using different criteria for each employee group, enter 0 in this processing option. Entering 0 allows you to assign pay types to specific employee groups, and also to set up a default set of pay types by leaving all of the criteria fields blank. Code 0 allows you to use any, all, or none of the fields to define pay type cross references. Valid values are:

1

Job Type

2

Job Type and Job Step

3

Business Unit

4

Union Code

5

Shift Code

0

By all fields Blank (Default)

Leave Entry Tab

These processing options specify how the system edits employee available leave balances and which table the system uses to retrieve employee leave balances.

1. Leave Time Available

0= Do not Perform Editing

1= Perform Editing, Hard Error if

Insufficient Balances Exist

2= Perform Editing, Warning Message if

Insufficient Balances Exist

**3= Perform Editing, Use Available Plus
Insufficient Balances Exist**

Accured Balances, Hard error if

**4= Perform Editing, Use Available Plus
Message if Insufficient Balances Exist**

Accured Balances, Warning

Use this processing option to specify the method the system uses to respond to employee requests for leave or leave taken. If you enter any value other than 0, employees can take only available leave. This value is in effect for all pay types that are set up to use leave tracking. This information is stored in the Payroll Transaction Constants table (F069116). Valid values are:

0

Do not verify available leave balances.

1

Verify available leave balances. A hard error results if insufficient balances exist.

2

Verify available leave balances. A warning message results if insufficient balances exist.

3

Verify available leave balances. Employees can use available plus accrued balances. A hard error results if insufficient balances exist

2. Leave History Source

0= Employee Transaction History Summary(F06146)

1= Fiscal And Anniversary Year History (F06147)

Use this processing option to specify the table that the system uses to verify available leave balances. Valid values are:

0

Employee Transaction History Summary table (F06146)

1

Fiscal and Anniversary Year History table (F06147)

Account Number Tab

These processing options specify how the system validates account numbers associated with employee timecards.

1. Validate # sign

0= Allow # Sign(Default)

1= Do Not allow

Use this processing option to determine whether the system must verify that the account numbers associated with each timecard are valid, or whether employees can enter a pound sign (#) in the place of a valid account number. Valid values are:

0

Allow #

1

Do not allow

2. Posting Account Only

0= Allow All Accounts(Default)

1= Allow Only Postable Accounts

Use this processing option to specify whether the system validates the account entered for the timecards. Valid values are:

0

Allow all accounts. (Default)

1

Allow only postable accounts

Manager Tab

This processing option specifies whether the missing timecard function is used.

1. Multicurrency

1= Enable Multicurrency

0= Do not enable multicurrency Functionality

Use this processing option to specify whether managers can view the employees who have not entered timecards for the specified time period. Valid values are:

0

Enable the missing timecard option.

1

Disable the missing timecard option

Creating the Employee Self-Service Time Entry Interface

Before employees can enter timecard information into the system, you must define the information that appears on the interface that employees use. J.D. Edwards has set up the following default fields to appear on all self-service time entry forms; however, you can choose to display additional fields as well:

- Pay Type
- Hours
- Work Date
- Subledger
- Subledger Type
- Charge To
- Shift Code
- Equipment Worked
- Equipment Hours

You can choose from over 50 additional predefined fields to appear on the employee time entry interface. This allows you to quickly and easily create time entry forms that meet the requirements of your organization. Depending on your business needs, you can create different time entry interfaces for each home company and home business unit combination within your organization.

For example, if you want employees in Company A to enter simple time entry records that do not require a large amount of data entry, you can choose to display only the default fields for Company A employees.

Conversely, you might want employees in Company B to enter detailed time entry information. In this case, you might select a large number of additional fields to appear on the employee time entry interface for Company B. Examples of additional fields that you might want to display are:

- Company - Home
- Object Account
- Subsidiary
- Item Number
- Unites - Pieces
- Amount - Sales
- Union Code
- Work State
- Billing Rate

► **To create the employee self-service time entry interface**

From the Time Entry Self-Service Setup menu (G05BESS41), choose Self-Service Screen Setup.

1. On Work With ESS Time Entry Setup, click Add.
2. On ESS Time Entry Setup Revisions, complete the following fields:
 - Company
 - Business Unit

3. To specify which time entry programs you want employees to use, click one of the following options:
 - Summary Time Entry
 - Daily Time Entry
 - Both
 4. Choose the Fields 1-22 tab and click the option for any of the following fields that you want to appear on the time entry interface:
 - Account Number
 - Job Type
 - Job Step
 - LS Amnt
 - Opt Sequence
 - Equip Worked On
 - Union
 - Batch
 - Uprate Amount
 - Shift Differential
 - Amount or Percent
 - Billing Rate
 - Home Company
 - Cost Code
 5. Choose the Fields 23-42 tab and click the option for any of the following fields that you want to appear on the time entry interface:
 - Home Business Unit
 - Tax Area
 - Item
 - Piece Rate
 - Pieces
 - Phase
 - Record Type

- WCI Code
 - SC/WC
 - Check Route
 - Cat 001
 - Cat 002
 - Cat 003
 - Cat 004
 - Bill RtCd
 - Equipment Object
 - Equipment Blrt
6. Choose the Fields 43-52 tab and click the option for any of the following fields that you want to appear on the time entry interface:
- Cost Type 1
 - Cost Object 1
 - Cost Type 2
 - Cost Object 2
 - Cost Type 3
 - Cost Object 3
 - Object Type 4
 - Cost Object 4
 - Activity Code
 - Leave Type
 - Leave ID Number
7. Click OK.
8. Complete steps 2 through 7 for each company and business unit combination for which you want to create a separate user interface. If you want to use the same user interface for all of the employees in your organization, you can create one interface by entering 0 in the Company field and leaving the Business Unit field blank.

Assigning Pay Types to Employee Groups

To simplify the time entry process and to ensure that employees enter timecards using the correct pay types, you can use the Classification/Pay Cross Reference program (P05932) to

specify the available pay types for specified employee groups within your organization. You can define groups based on job types, job steps, business units, shift codes, union codes, or any combination of these fields. You can use the processing options for the Self Service Director program (P051125) to specify which of these fields you want to use to create employee groups for pay type classification purposes.

When you assign pay types to specific employee groups, employees can use only the pay types that have search criteria that matches the information in the employee's Employee Master Information record. For example, if you assign a pay type to business unit 100 and job type A-50, only employees whose Employee Master Information includes business unit 100 and job type A-50 can enter timecards using that pay type. Additionally, only the pay types associated with an employee's group are displayed with the Search function for the Pay Type field during the time entry process.

You can also set up a set of default pay types for employees whose Employee Master Information does not meet specified search criteria. You might want to do this in order to identify employee groups for which you have not set up pay type information. For example, if you set up pay type information for each employee group within your organization, you can set up default information and include only one pay type in the default set. If an employee does not meet the search criteria for any of the other employee groups, that employee can enter time using only the pay type that you have set up in the default set. You can then review time entry records to determine whether any employees have entered timecards using that pay type. By identifying those employees, you can identify employee groups for which you must set up pay type information.

You might also want to use a default set of pay types if you have a large number of employees in different employee groups who can use the same pay types. For example, if only three of the business units within your organization require unique pay types, you might set up pay types for each of the three business units. However, if the rest of the employees within your organization use the same pay types, you can set up a default set of pay types for those employees rather than setting up the same pay type information for each business unit.

Note

Assigning pay types to employee groups is not required in order for self-service time entry programs to function properly. However, if you do not set up this information, each employee in your organization can use any of the pay types in the system when they enter timecards.

► To assign pay types to business units

From the Rate Derivation Setup menu (G05BRD4), choose Classification Pay/X-Ref.

1. On Work With Classification Pay/Cross Reference, click Add.
2. On Classification/Pay Cross Reference Revisions, complete any of the following fields to define the employee group to which you want to assign pay types:
 - Job Type
 - Job Step
 - Union Code
 - Business Unit

- Shift Code

Note

To create a default set of pay types, leave all of these fields blank.

3. In the detail area of the form, enter the beginning pay type code in a range of pay types in the following field:
 - From Trans
4. Enter the ending pay type code in a range of pay types in the following field:
 - Thru Trans

Note

When you are entering a range of pay types to assign to an employee group, both the pay type in the From Trans field and the pay type in the Thru Trans field are included in the range and assigned to the specified group. If you do not want to enter a pay type range, you can enter the same pay type code in the From Trans and Thru Trans fields.

5. Choose a blank row in the detail area and complete steps 3 and 4 until you have assigned all of the pay types for the specified business unit.
6. Click OK.

Setting Up Manager Delegates

After employees enter timecards in the system, managers can review and approve, change, or reject those timecards. Occasionally, managers are not available to review and approve timecards. In these circumstances, you can set up delegates to perform certain review and approval functions on behalf of the manager.

When you set up manager delegates, you can assign each delegate an authorization level. The authorization level specifies how much authority the delegate has during the timecard review and approval process. Delegates with a low authorization level are only able to approve or reject timecards, and delegates with a high authorization level are able to approve, change, delete, and reject timecards on behalf of the manager.

You can also assign effective dates to delegate records. For example, if a manager is on vacation for two weeks, you might set up a delegate that has review and approval authority during the time that the manager is unavailable. After the ending date that is assigned to the delegate record is reached, the delegate no longer has authorization to review and approve employee timecards. A manager can have no more than two active delegates at any given time.

► To set up manager delegates

From the Time Entry Self-Service Setup menu (G05BESS41), choose Manager Delegate Setup.

1. On Work With Manager Delegates Setup, review and verify the information in the following field:
 - Manager
2. Complete the following fields for each delegate, and then click OK:
 - Delegate Number
 - Effective Date
 - Ending Date
 - Authorization Type

Processing Options for the Manager Delegate Setup Program (P051126)

Defaults Tab

This processing option specifies which manager delegates are allowed to be viewed by users.

1. User Level

0 = Manager/Employee Level (Default)

1 = System Administrator Level

Use this processing option to specify whether to display delegates for different managers or to display the delegates for only one manager. Valid values are:

0

Only see one manager's delegates. (default)

1

Can change managers to see everyone's delegates

Processing Options for Managers Delegates (P08750)

Defaults Tab

Use this processing option to specify the organizational level of the user who can see managers delegates.

1. User Level

1 = Manager/Employee Level

2 = HR Administrator Level

Use this processing option to specify whether to see delegates for different managers or to see the delegates for only one manager. Valid values are:

- 0 Only see one manager's delegates.
 - 1 Can change managers to see everyone's delegates.
-

Generating the Flat File for LifeMap

From the LifeMap Integration menu (G08LM40), choose LifeMap Flat File Generation.

You can use the Generate LifeMap Data Export Flat File program (R083351) to create a text file named F08335A that contains employee benefit information. This file can be imported into LifeMap so that the LifeMap program displays resource information that applies to current employee benefit enrollment.

LifeMap provides employees at their desktops with personalized human resources benefits communications, education, and training filtered through Life Events. LifeMap integrates advanced database, multimedia, interactive online training, and decision support technologies designed to transform employee self-service into employee self-sufficiency — that means a dramatic reduction in your administrative tasks.

To use LifeMap, employees simply log on using their personal ID and password. LifeMap identifies the user and filters your company benefits and resource information based upon their specific benefit profile, thus enabling your employees to receive consistent, immediate answers to their benefit-related questions with just 2-3 clicks of their mouse!

Administration of LifeMap is as easy as "cut and paste" with little or no IT involvement required. You control the content provided within LifeMap through the use of simple "on/off" features and three basic functions: add, edit and delete. In addition, customized company information can be easily integrated. It's that easy.

The data selection for the default version of the Generate LifeMap Data Export Flat File report includes current enrollment for all benefit groups and all current benefit plans as of the date that you specify in the processing options. You can narrow the data selection by creating a new version and specifying more restrictive parameters.

When you run this program, the system always creates a report in PDF format that you can view online or print. To generate a flat file, you must define a valid file location by using a processing option. If a valid file location is not defined, then this program does not create a flat file.

Note

To verify that the system generates a flat file, check the designated directory for the file and verify the date and time of the file creation.

The Generate LifeMap Data Export Flat File program writes one record for each active plan in which an employee is enrolled. The program saves the following information in the flat file:

- Address Book Number (AN8)
- Mailing Name (MLNM)
- Benefit Group (DIVC)
- Employee Tax ID (SSN)
- Birth Date (DOB)
- Plan ID (PLAN)
- Additional Option (AOPT)

Before writing each record to the flat file, the program verifies that the benefit plan is active on the "as of" date that is specified in a processing option, normally the date that the report is generated. To verify the active status of a plan, the program checks the date range in the Employee Enrollment table (F08330) and then checks the status indicator. This indicator can be any code in UDC 08/ST that begins with an A. If the benefit plan or benefit plan option is not active, then the program does not include information about the plan in the flat file.

The Generate LifeMap Data Export Flat File program uses the following tables:

- Employee Master Information (F060116)
- Address Book - Who's Who (F0111)
- Employee Enrollment (F08330)

During installation of LifeMap software, you might receive a message that indicates a requirement for an existing LifeMap Flat File (F08335A). If you receive this message, create an empty F08335A file in the target directory for the LifeMap software and then proceed with the installation.

Processing Options for Generate LifeMap Data Export Flat File (R083351)

Process Tab

These processing options are used to specify the path and location where the system writes the LifeMap data export flat file. They also define whether the system writes a new file each time you run this program, or if the system appends new information to an existing file.

1. Enter the path in which the file will be created. This field cannot be left blank

Use this processing option to specify the directory location where the program creates the F08335A.txt file. An example of a valid path code is as follows:

"C: this path code, the program writes the file to your local machine, on the C: drive, in the B7 directory

2. Append new records to existing file

0 - Clear file before adding records

1 - Append records to existing file

Use this processing option to specify whether the system deletes an existing F08335A.txt file before writing a new one or appends new records to the end of an existing file.

Normally, an existing file is deleted before writing a new file to avoid writing duplicate records to an existing file. Valid values are:

0

Delete an existing file before adding records

1

Append records to an existing file

Edits Tab

These processing options specify the effective date of the new flat file and provides the option to remove extra characters from tax ID numbers that the system might include in the file.

1. Enter "As Of" date

Use this processing option to specify the date the system uses for this report. The system generates information about benefit plans and enrollment that is current as of the date that you enter. If you leave this field blank, the system uses the current date

If no date is entered, the UBE will examine records based on today's date

2. Remove extra characters from Tax ID

0 - Do not remove extra characters

1 - Remove extra characters

Use this processing option to specify whether the system removes all nonnumeric characters from a tax identification number. Because LifeMap does not recognize nonnumeric characters, if employee tax ID numbers in your system include hyphens, you need to use this processing option to remove them. For example, setting this processing option to 1 converts a tax ID of 123-45-6789 to 123456789. Valid values are:

0

No not remove extra characters

1

Remove extra character

Employee History and Turnover

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

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

- Review an employee's job progression
- Review salary increases given at the same time a job change was made
- Analyze historical changes to employee information
- Consider an employee for a promotion
- Consider an employee for another position
- Monitor employee movement within your company

For more information about employee history, review the following topics:

- *How the system stores Employee Master history and turnover*
- *Importance of the change reason code*
- *Where the system stores history and turnover records*

How the System Stores Employee Master History and Turnover

Employee master history includes the history records that the system creates when you change information on the employee entry forms.

You must choose the data items (such as home company, tax ID number, and so on) for which you want to track history and turnover.

These data items must exist in the Employee Master table. Whenever you change employee information, the system creates a separate history record for each data item for which you are tracking history.

The history records include the following information:

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

Importance of the Change Reason Code

When you revise employee information, the system prompts you for a change reason code. If you enter a change reason code, the system creates a turnover record with a history record. If you do not enter a change reason code, the system creates only a history record.

You define change reason codes in user defined code list 06/T. When you define change reason codes, remember that alphabetic codes indicate a negative effect on turnover. For example, you use an alphabetic code to indicate that a person has resigned. Numeric codes indicate either a positive or a neutral effect on turnover. For example, when you hire an applicant from outside of your organization, the change has a positive effect on turnover. When a person changes departments within your organization, the change has a neutral effect on turnover because it negatively affects turnover for the department that the employee leaves and positively affects turnover for the department that the employee enters.

Where the System Stores History and Turnover Records

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

- Employee master history is in the HR History table (F08042)
- Employee turnover information is in the Employee Turnover Analysis table (F08045)

Working with Employee History Records

When current employee information changes, such as when an employee receives a promotion or changes marital status, you must update the employee's record to reflect the change. You can set up your system options so that the system creates history records for employees whenever you change employee information.

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

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

You can review an employee's history record for information as it was on a specific date. For example, a supervisor might need to know the annual salary that an employee was earning on January 1, 1995.

When you enter, revise, or review employee information, you can easily access history for a particular field. For example, you can review past changes to an employee's salary or position ID.

If you make a mistake and do not want to maintain the record in history, you can delete the history record from the history table.

Before You Begin

- ❑ Choose the employee data items for which you want to track history. See [Choosing Data for History Tracking Purposes](#).

- Verify that the Human Resources options are set up to track employee history. See [Setting Up System Options](#).

Reviewing Complete History for an Employee

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

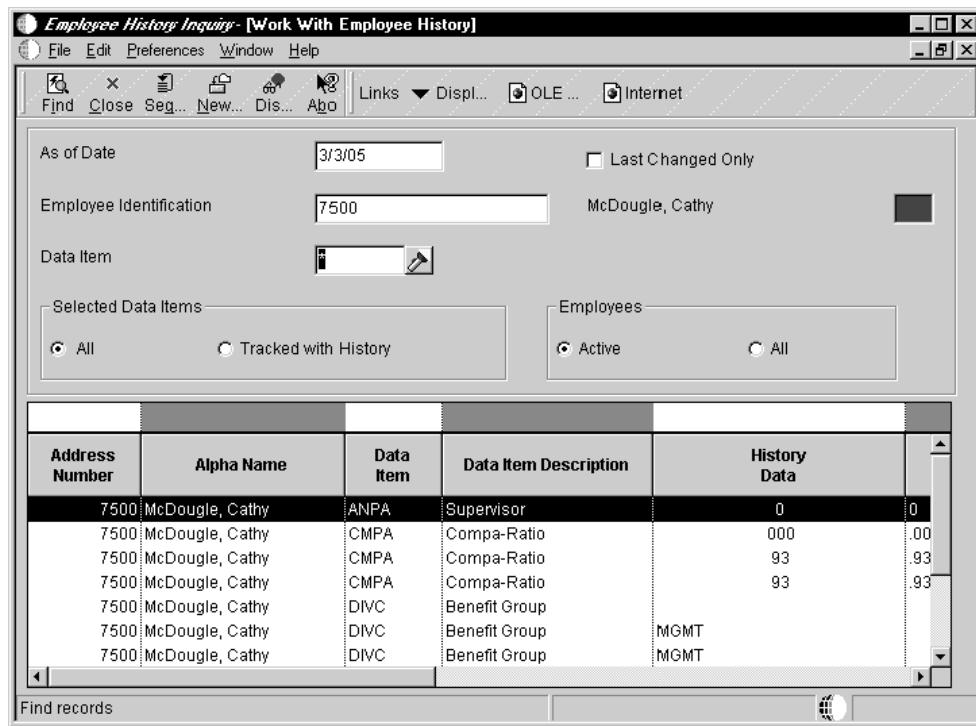
- Analyze historical changes to employee information
- Consider an employee's work record for promotions or raises
- Consider an employee's work record for another position

To review the complete history records for an individual, from the oldest entry through the most recent entry, you can use Employee History Inquiry.

► **To review complete history for an employee**

From the Employee History menu (G05BH1), choose Employee History Inquiry.

1. On Work With Employee History, complete the following field:
 - Employee Identification
2. To narrow your search, complete one of the following optional fields:
 - Effective On
 - Last Changed Only
3. Complete the following field in the QBE line if you are tracking history for a specific item:
 - Data Item
4. Choose an option under the Selected Data Items and Employees headings and click Find.
5. To display all employees who are not terminated or in a leave of absence, click the Active option.



6. Click the Tracked with History option to display all data items that you selected for tracking during setup and which have history records attached. Click the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.
7. Review the information.

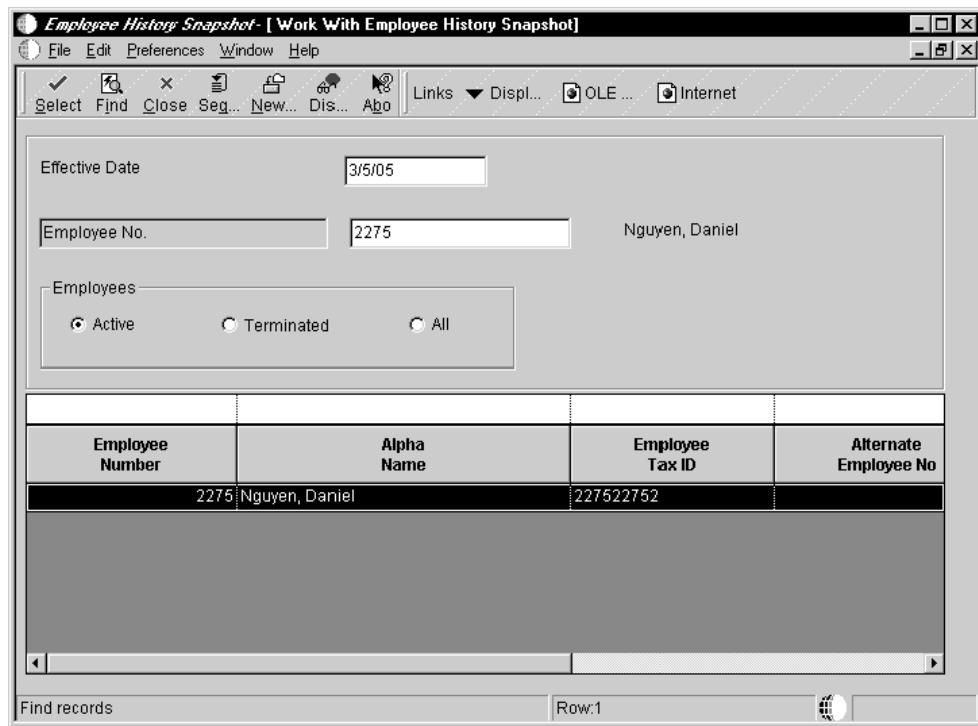
Reviewing Employee History for a Specific Date

To review employee history for a specific date, you can use Employee History Snapshot. For the date that you enter, the system displays history information for the fields for which you are tracking history. You define the fields for which you want to track history when you set up your system.

► To review employee history for a specific date

From the Employee History menu (G05BH1), choose Employee History Snapshot.

1. On Work With Employee History Snapshot, complete the following fields:
 - Employee Number
 - Effective Date
2. Click one of the options in the Employees area and click Find.



3. To view the information for a different date, change the value in the following field and click Find:
 - Effective Date
4. Choose the record that you want to review and click Select.

The screenshot shows the PeopleSoft Employee History Snapshot window. At the top, it displays the employee number (6002), name (Abbott, Dominique), and effective date (03/05/05). Below this, there are several sections of form fields:

- Basic Information:** Date Started (06/03/99), Change Reason (empty), Original Hire Date (06/03/99), Home Company (empty), Date Pay Starts (02/15/05), Home Business Unit (empty), Sal Forecast Chg Dt (empty), Pay Status (empty), Salary (\$75,000.00), Employment Status (Full-time Regular), Hourly Rate (\$16.106).
- Job Details:** Job Type/Step (A1), President, FLSA Exempt Y/N (Y), Pay Grade/Step (empty), Pay Freql/Class (empty), Benefit Group (empty), Worker's Comp (No Workers' Comp Code), EEO Job Cat (empty), Union Code (empty).
- Compensation:** Check Route Code (empty), Locality (empty), Tax Area (Res.) (empty), Pay Cycle Code (empty), Tax Area (Work) (empty), Marital Status (empty).

5. On Employee History Snapshot, review the information.

Reviewing History for a Specific Field

When you enter, revise, or review employee information, you might need to review history for a specific type of information only. For example, when you enter a job change for an employee, you might need to review all of the previous jobs in which the employee has worked.

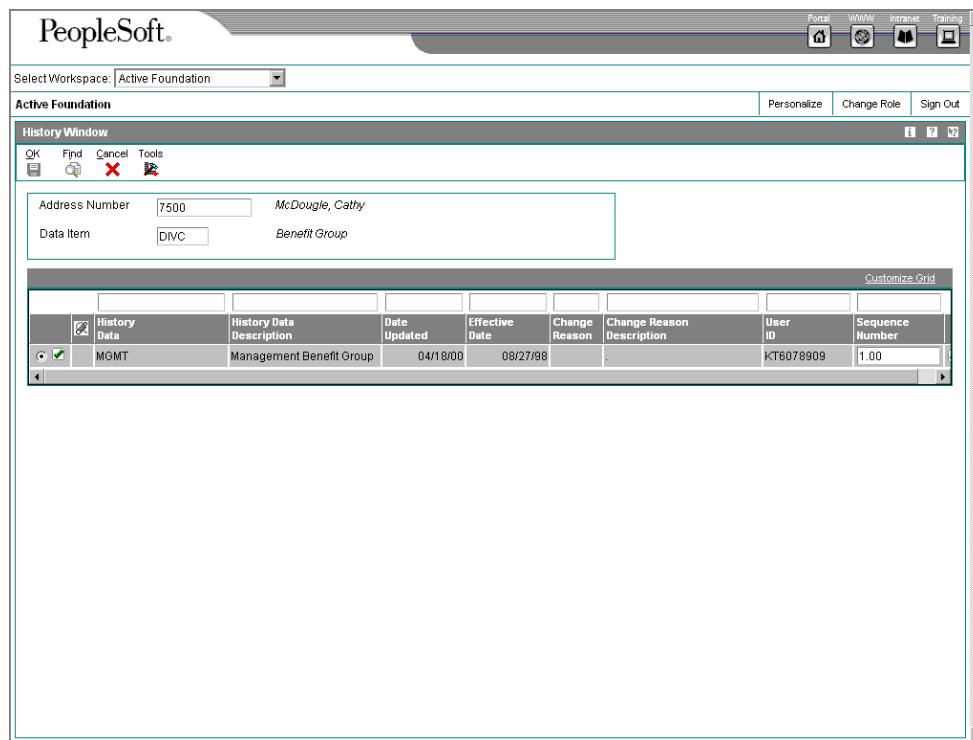
The History Window provides quick and efficient access to field-specific history for an employee. You can access the History Window for any forms that have data items from the Employee Master table (F060116). For example, you can access history for a specific field from any of the following employee entry forms:

- Employee
- Personal
- Organizational Assignment
- Basic Compensation
- National and Fiscal Data
- User Def. Dates
- User Def. Category Codes
- Eligibility/NDT/Participation
- Employee Payroll Revisions

► To review history for a specific field

From the Employee Management menu (G05BE1), choose Employee Information.

1. On Work With Employee Information, to locate the employee record for which you need to review history, complete any of the following fields:
 - Home Business Unit
 - Home Company
2. Click Active, Terminated, or All and click Find.
3. Choose the employee record and, from the Row menu, choose the form that contains the information for which you need to review history.
4. On the appropriate form, move the cursor to the field for which you need to review history and choose History Tracking from the Form menu.



5. On History Window, review the information.

Correcting Employee History

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

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

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

Correcting employee history includes the following procedures:

- *Deleting an incorrect history record*
- *Correcting the change reason or effective date for a history record*

► To delete an incorrect history record

From the EE History/Turnover Adv& Tech Ops menu (G05BH3), choose Update Employee History.

Address Number	Alpha Name	Data Item	Data Item Description	History	Formatted History	History Data Description	Eff On	Change Reason
7500	McDougle, Cathy	CMPA	Compa-Ratio	93	.93		08/27/98	
7500 McDougle, Cathy	DIVC	Benefit Group	MGMT	MGMT		Management Benefit Gr	08/27/98	
7500 McDougle, Cathy	DSI	Date - Original Empl	089154	06/03/1999			08/27/98	
7500 McDougle, Cathy	ECNT	Employee Classification	N	N		Regular Employee	08/27/98	
7500 McDougle, Cathy	EEOJ	Job Category (EEO)	002	002		Professionals	08/27/98	
7500 McDougle, Cathy	EIC	Earned Income Cred					09/24/98	
7500 McDougle, Cathy	EST	Employment Status				Full-time Regular	08/27/98	
7500 McDougle, Cathy	FLSA	FLSA Exempt Y/N	Y	Y	YES		08/27/98	
7500 McDougle, Cathy	HM01	EEO - I9 Status	N	N		Waiting for verification	08/27/98	
7500 McDougle, Cathy	HM04	EEO - Disability	N	N	No		08/27/98	

1. On Update Employee History, to locate the record, complete one or both of the following fields:
 - Employee Identification
 - Data Item
2. To narrow your search, click an option under the Selected Data Items and Employees headings and click Find.
3. To display all employees who are not terminated or in a leave of absence, click the Active option.

4. Click the Tracked with History option to display all data items that you selected for tracking during setup and which have history records attached. Click the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.
5. Choose the incorrect record and click Delete.
6. If the record that you deleted was a duplicate for the same data item on the same date, enter the correct sequence number for the remaining record in the following field:
 - Sequence Number
7. Click OK.

► **To correct the change reason or effective date for a history record**

From the EE History/Turnover Adv& Tech Ops menu (G05BH3), choose Update Employee History.

1. On Update Employee History, to locate the record, complete the following fields:
 - Employee Identification
 - Data Item
2. To narrow your search, click an option under the Selected Data Items and Employees headings and click Find.
3. To display all employees who are not terminated or in a leave of absence, click the Active option.
4. Click the Tracked with History option to display all data items that you selected for tracking during setup and which have history records attached. Click the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.
5. Change the value in either of the following fields and click OK:
 - Eff On
 - OW Chg Rsn

See Also

- *Correcting Turnover Records*

Correcting Turnover Records

When employee assignment information changes (such as when an employee changes jobs or moves to a new business unit within your organization), you must update the employee's record to reflect the change. You can set up your system to create turnover records of the information that you change when you update employee records. Turnover records also show employee movement that results from new hires and terminations.

If you enter incorrect employee assignment information, you must reenter the correct information. You should also correct the turnover record so that you can accurately analyze turnover information.

To track turnover for a change, you must enter a change reason and an effective date. The system does not create a turnover record unless you enter a change reason code. You can review turnover records to verify that no duplicate records, incorrect change reason codes, or incorrect effective dates exist.

You can correct only the effective date in the turnover data. If any other information in the turnover record is incorrect, you should delete the entire record. When you correct the information in employee information, the system creates the correct turnover record.

When you enter information for which you are tracking turnover, the system creates a turnover record for each of the following data items:

- Home company (HMCO)
- Home business unit (HMCU)
- Job number (JBCD)
- Check route (MAIL)

When you correct turnover, you must correct the turnover records for each of these data items.

To maintain the accuracy of your historical information, you should correct the corresponding employee history record when you correct turnover records.

See Also

- See *Initializing History* for information about setting up turnover records.
- See *Turnover Tracking* for information about setting up turnover records.

► **To correct turnover records**

From the EE History/Turnover Adv& Tech Ops menu (G05BH3), choose Update Employee Turnover.

Address Number	Alpha Name	Turnover Date	Description	Change Reason	Description	Effective Date	T E ID	User ID
13001	Miller, Jane	00001	Financial/Distribution Comp	001	New Hire	08/26/03	+	CR5993
8011	Watkins, Joshua	00001	Financial/Distribution Comp	TE	Termination-Eligible to	08/26/03 -		RW6382
12501	Smith, Josie	00001	Financial/Distribution Comp	001	New Hire	08/25/03	+	CR5993
5522	Thompson, Craig	00001	Financial/Distribution Comp	LO	Layoff	08/23/03	-	DV5830
7504	Meade, Jane	00001	Financial/Distribution Comp	010	Database correction	05/08/03	+	CR5993
5651	Rothchild, Abigail E.	00001	Financial/Distribution Comp	010	Database correction	05/08/03	+	CR5993
7500	McDougle, Cathy	00001	Financial/Distribution Comp	010	Database correction	05/07/03	+	CR5993
6001	Allen, Ray	00001	Financial/Distribution Comp	010	Database correction	05/07/03	+	CR5993
7708	Johnson, Karen	00077	Canadian Company	001	New Hire	04/29/03	+	DV5830
7708	Brown, Daniel	00077	Canadian Company	001	New Hire	04/29/03	+	DV5830

1. On Turnover Record Maintenance, to locate the incorrect record, enter HMCO (Home Company) in the following field:
 - Data Item
2. To narrow your search, complete any of the following optional fields:
 - Turnover Data
 - Change Reason
3. To further narrow your search, click any of the Effect on Turnover options and click Find:
 - +
 - -
 - 0
4. For a record that is correct except for the change reason or effective date, change the information in one or both of the following fields in the detail area:
 - Change Reason
 - Effective Date
5. For any record that contains incorrect information (other than the effective date), choose the record and click Delete.

6. Repeat steps 1 through 5 for each of the remaining data items: Home Business Unit (HMCU), Check Route Code (MAIL), and Job Code (JBCD).

See Also

- Correcting Employee History*

Running History and Turnover Reports

You can run history reports to review the most recent changes made to your employee history records. Turnover reporting identifies changes in jobs and terminations. You define the columns that you want to use to analyze turnover. For example, you might want to report on terminations with and without cause. To do this, you would set up a column to compile the specific data types associated with termination.

Running the Employee History Log

From the Employee History menu (G05BH1), choose Employee History Log.

Run the Employee History Log report to review history for either a single data item or for all data items that you are tracking for each employee. The information that prints on this report is the same information that you can review on the Employee History Inquiry form (P050242).

This report locates information from the Employee Master table (F060116) and the HR History table (F08042).

See Also

- R080423, *Employee History Log* for a report sample

Processing Options for Employee History Log (R080423)

Narrative

1. Enter a '0' or blank to see just Active employees. Enter a '1' to see just inactive employees. Enter a '2' to see both Active and Inactive employees.
 2. Enter Beginning Effective On Date.
 3. Enter Ending Effective On Date.
 4. Enter the Data Item you wish to view. Blanks will display all data items being tracked.
-

Running the Employee Salary History Analysis Report

From the Employee History menu (G05BH1), choose Employee Salary History Analysis.

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

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

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

See Also

- R080424A, *Employee Salary History Analysis* for a report sample

Working with the Employee Turnover Report

You can define turnover columns to organize the turnover information that prints on the report.

Defining Turnover Columns

Before running an employee report, you define turnover columns to organize the turnover information that prints on the report.

► To define turnover columns

From the Employee History Setup menu (G05BH4), choose Define Turnover Columns.

1. On Work With Turnover Columns, click Add.
2. On Define Turnover Report Columns, complete the following required fields:
 - Turnover Column Group
 - Turnover Column
 - Column Heading 01
3. Complete the following field as needed:
 - Column Heading 02
4. Complete the following field and click OK:
 - Chg Rsn

After defining the turnover columns, you can run your employee turnover report.

Running the Employee Turnover Report

From the Employee History menu (G05BH1), choose Employee Turnover Report.

After you define the turnover columns, you can run the employee turnover report. You can create turnover reports based on Company, Business Unit, Check Route code, and Job Type.

See Also

- R080430, *Employee Turnover* for a report sample

Processing Options for Employee Turnover (R080430)

Process

1. Enter the From Date to begin tracking turnover.
 2. Enter the Thru Date when calculations are to cease. Default of blank will calculate through today.
 3. Enter the Turnover Column Group which contains the column headings you wish to have display on the report.
-

Running the Employee Activity Analysis Report

From the Employee History menu (G05BH1), choose Employee Activity Analysis.

Run the Employee Activity Analysis report to review employee turnover by the dates and the data item that you define in your processing options. You can also set up your processing options to segment the date that you entered in the From Date and Thru Date fields into six segments, such as months or years.

Processing Options for Employee Activity Analysis (R080431)

Setup

- 1) From Date
- 2) Thru Date
- 3) Turnover Column Group
- 4) Data Item

Segments

- 1) Date 1
 - 2) Date 2
 - 3) Date 3
 - 4) Date 4
 - 5) Date 5
 - 6) Date 6
-

Job Information

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

- Track pay and other types of information about jobs
- Simplify the process of entering employee information

You define jobs so that you can track pay and detailed information about the jobs within your organization. After you define a job, you can assign it to one or more employees.

You can review job information and the employees who are assigned to a particular job.

Periodically, you might need to update job information. For example, when management negotiates a new contract with a union, you typically need to update the pay rates for the pay grade steps associated with the union members' jobs. When you change information for a job, you can globally apply the changes for all of the employees who are assigned to that job.

Defining Jobs

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

To help you determine equitable pay ranges for a job, you can evaluate each job by degrees or points, depending on the evaluation method that you link to each job.

When you define a job, you can track additional information that is unique to your organization or your industry. For example, if a senior consultant job requires fluency in Spanish, you can track the language skills required for the job.

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

Entering Job Information

You enter job information to identify and define the jobs within your organization. You must define and identify a job before you can enter supplemental data for it. When you enter a new job, you can review an existing job first, and copy information from it, if applicable.

Initial job information includes information such as the following:

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

You must set up your processing options for Job Entry and Evaluation to allow a legislative form to appear after you enter job information. The legislative form allows you to enter job information specific to your country.

Entering this information at the job level simplifies the process of entering employee information because it eliminates the need to enter that information for each employee in that

job. When you assign a job to an employee, you can have the system automatically assign all the associated job information to the employee. You can override this default job information for individual employees, if necessary.

After entering initial job information, you can evaluate a job to determine a salary for the position. Job evaluation is a method of comparing jobs and establishing equitable salaries for all positions relative to their importance and value to your company. You might evaluate jobs when you add new positions to your company or when you determine a salary increase for all positions in a certain job group to stay competitive with comparative salaries in the industry.

Depending on how your processing options are set up, you can access the Job Evaluation form following your entry of job information, or you can access the form from the menu.

You choose a job evaluation method to evaluate your jobs, and then rate the job using the evaluation factors that you defined for that method. Typical evaluation factors include:

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

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

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

Before You Begin

- Set up the pay grades and pay grade steps for jobs. See [Setting Up Job Information](#).
- Set up your processing options for Job Entry and Evaluation to specify whether the Job Evaluation form and a country-specific legislative form appear after you enter a job.

See Also

- [Adding Employee Records One at a Time](#) for information about assigning a job to an employee
- [Updating Jobs Globally](#) for information about changing the job specifications for one or more jobs in your organization

► **To enter job information**

From the Job Specifications menu (G05BJ1), choose Job Entry and Evaluation.

1. On Work With Job Entry and Evaluation, click Add.

The screenshot shows the PeopleSoft interface for 'Job Entry and Evaluation'. At the top, there's a navigation bar with links for 'Portal', 'VWW', 'Intranet', and 'Training'. Below that is a toolbar with icons for 'OK', 'Cancel', 'Form', and 'Tools'. The main area is divided into several sections:

- Job Type/Step:** Shows '2H-2' and an empty field.
- Description:** Contains the text 'Employment Representative'.
- Pay Frequency:** Set to 'S' (Semi-Monthly).
- Pay Class(H/S/P):** Set to 'S' (Salaried).
- Pay Grade/Step:** Set to 'S4'.
- Overtime Exempt Y/N:** Set to 'Y'.
- Union Code:** An empty field.
- Benefit Group:** Shows 'SALARY' and 'Salary Employee Benefit Group'.
- Job Group:** Shows 'PROF' and 'Professional'.
- Job Status:** Shows 'Active'.
- Status Change Reason:** An empty field.
- Effective From/Thru:** Two empty fields.

2. On Job Entry and Evaluation, complete the following fields:
 - Job Type/Step
 - Description
 - Overtime Exempt Y/N
3. To enter pay information, complete the following fields:
 - Pay Frequency
 - Pay Class(H/S/P)
 - Pay Grade/Step
4. Complete the following optional fields:
 - Union Code
 - Benefit Group
 - Job Group
 - Job Status
 - Status Change Reason

- Effective From/Thru
5. Click OK.
- If your processing options are set up appropriately, a legislative form appears.
6. Enter the job information specific to your country.
 7. If your processing options are set to enable the Job Evaluation form, choose Job Evaluation from the Form menu, and continue to the next task. If your processing options are not set to enable the Job Evaluation form, click OK.

Caution

You must click OK for your changes to be accepted. If you enter job information and perform the next step without clicking OK, your changes will be lost.

See Also

Entering Job Evaluation Information

Related Tasks

Entering additional job information	You might need to track specific job information that is unique to your organization or your industry. J.D. Edwards software includes category codes and user defined fields that you can customize to track specific information. See <u>Entering User Defined Information for Employees</u> .
Deleting jobs	The system displays a warning message when you attempt to delete a job that has employee records associated with it. When you delete a job ID, you must enter a new job ID for each employee record associated with the deleted job ID. See <u>Working with Obsolete Jobs</u> .

Processing Options for Job Entry and Evaluation (P08001)

Auto Call

1. Enter a '1' to automatically call the Category Code window when adding a job. Default of blank will not call the Window.
 2. Enter the country whose legislative/regulatory window is to be called when adding a job. A blank will call the form which applies to the country of the default company 00000.
 3. Enter a '1' to automatically call the Job Evaluation window when adding a job. Default of blank will not call the Window.
-

Entering Job Evaluation Information

Job evaluation is a method of comparing jobs and establishing equitable salaries for all positions relative to their importance and value to your company. You might evaluate jobs when you add new positions to your company.

Evaluating jobs is also helpful for comparing how salaries in your company compare with other salaries for the same positions within the industry.

To evaluate jobs, you need to choose a method of evaluation and then define evaluation factors for rating the job. You can choose an industry method like the Hay method, or you can define your own method of evaluation.

Before You Begin

- ❑ Use the Evaluation Factors Tables to define a table for each evaluation method that you want to use. See [Defining Job Evaluation Factors](#).

► To enter job evaluation information

From the Job Specifications menu (G05BJ1), choose Job Evaluation Degree.

Alternatively, if continue with the task if the system displays the Job Evaluation form after you enter job information.

The screenshot shows the PeopleSoft Job Evaluation Degree - Job Evaluation screen. At the top, there are fields for Job Type/Step (0A-1), Job Evaluation Method (Factor Comparison Method), and Job Evaluation Date. Below these are several evaluation factors listed in a grid:

Description	Job Points	Maximum Points	Evaluation Memo Code	Weight %
Profit and Loss Responsibility	225	300		33.00
Number of Subordinates	225	250		33.00
Technical Skills	125	200		19.00
Education	100	100		15.00
Σ	675	850		100.00

1. On Job Evaluation, complete the following fields and click Find:
 - Job Type/Step
 - Job Evaluation Method
 - Job Evaluation Date
2. Complete the following fields that apply to the evaluation method that you entered:
 - Degree
 - Job Points

3. Complete any of the following optional fields and click OK:

- Evaluation Memo Code
- Weight %

Processing Options for Job Evaluation Degree (P050011)

Edits

1. Enter a '1' to clear the Evaluation Points and Degrees when the Evaluation Method is changed. Enter a '2' to clear the Evaluation Points, Degrees, Memo and Weight when the Evaluation Method is changed. Blank will not clear any of the Evaluation Data.

Entering Supplemental Data for Jobs

From the Job Supplemental Data menu (G05BSDJ1), choose Job Supplemental Data Entry.

Supplemental data is any type of information that you want to track that is not already provided for by the system. You can track supplemental data for the following databases:

- Employees
- Jobs
- Applicants
- Requisitions

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

For jobs, typical types of supplemental data might include the following:

- Job descriptions
- Major responsibilities
- Authority level
- Job reporting relationships
- Education required
- Experience required
- Skills required
- Job progression patterns
- Hazardous materials handling
- Succession candidates

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

See Also

- ❑ *Working with the Supplemental Database* for information about entering, reviewing, and copying supplemental data

Reviewing Jobs

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

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

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

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

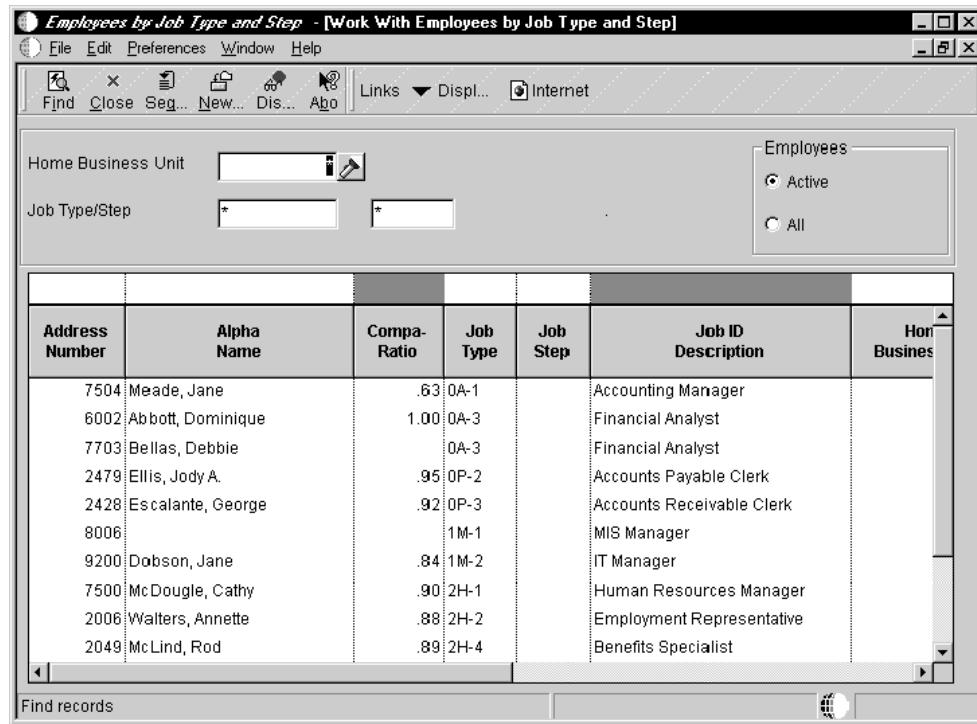
You can also review the pay ranges for the jobs and pay grades within your organization. You can use this information to verify that these ranges are equitable and appropriate for the job duties and the geographic location where each job is performed.

Reviewing Employees by Job Type and Step

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

► To review employees by job type and step

From the Job Specifications menu (G05BJ1), choose Employees by Job Type and Step.



1. On Work With Employees by Job Type and Step, complete any of the following fields:
 - Home Business Unit
 - Job Type/Step
2. To narrow your search, choose one of the options in the Employees area and click Find.
3. When you finish reviewing information, click Close.

Reviewing Job Comparisons by Factor

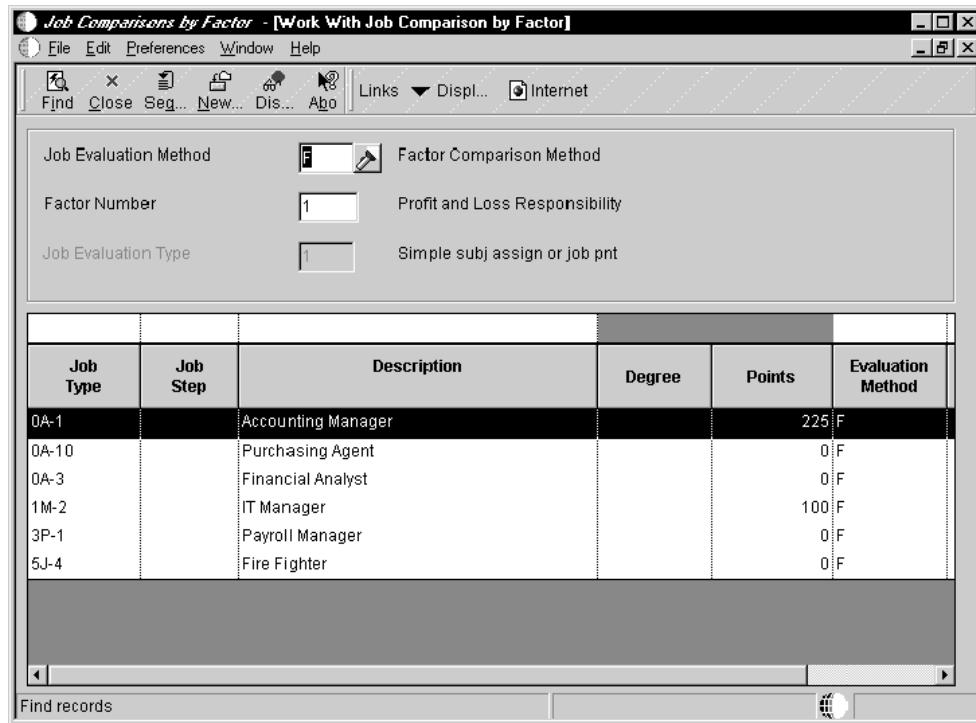
You evaluate jobs to determine an equitable salary range for each job within your organization. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Typical evaluation methods include the following:

- Degree method
- Hay method
- Factor comparison method

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

► To review job comparisons by factor

From the Job Specifications menu (G05BJ1), choose Job Comparisons by Factor.



1. On Work With Job Comparison by Factor complete the following field and click Find:
 - Job Evaluation Method
2. Review the information in the following fields:
 - Job Type
 - Job Step
 - Degree
 - Points

Reviewing and Ranking Jobs by Factor

In addition to reviewing jobs by method, you can also review and rank jobs using additional criteria to ensure the accuracy of data entry and equitable salary ranges in your organization. Although you can select a report option to produce similar results, reviewing and ranking jobs by factor provides a greater range of options for sorting and reviewing. A sample group of criteria might include:

- Job Group
- Job Type/Step

- Job Evaluation Method

Use the search button to display the five options that you can use to rank the jobs that you select. The ranking method that you choose provides criteria that weight different aspects of a job to apply in your selection process.

- Pay Grade/Step
- Job Effective Date

You accomplish the task of ranking jobs when you apply one of the job evaluation methods. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Evaluation options include the following:

- Degree Method
- Evalucomp Method
- Factor Comparison Method
- Hay Method
- Point Factor Method

You can also use any of the fields in the Query By Example row to sort, rank, and compare job data. If you wish, you can use the job effective date on each of the forms to limit your search to a desired span of time.

See Also

- *Running the Job Evaluation Factor Data Report* for information about evaluating jobs and printing reports

► To review and rank jobs by factor

From the Job Specifications menu (G05BJ1), choose Review and Rank Jobs by Factor.

1. On Work With Jobs By Factor, complete any of the following fields and click Find:

- Job Group
- Job Type/Step
- Job Evaluation Method

The various methods offer different types of weighting and value considerations that can be used for ranking in your job evaluation.

- Pay Grade/Step
- Job Effective Date

2. Review the information in all fields, based on the selection criteria that you have specified.

Reviewing Pay Ranges for Jobs

After you define and evaluate the jobs for your organization, the system automatically creates a pay range (minimum, midpoint, and maximum rate) for each job, based on the job evaluation points and the pay range formulas. To verify that the pay ranges for your jobs are

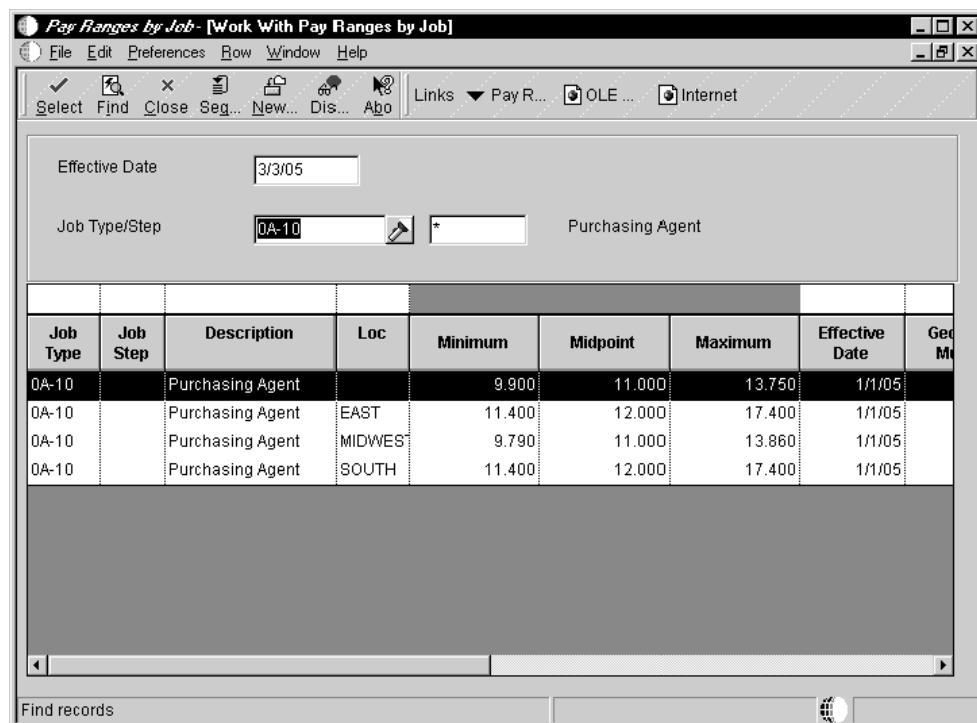
equitable and appropriate for the job duties and the geographic location where each job is performed, you can review pay ranges for jobs.

Before You Begin

- ❑ Evaluate the job and verify that it is not associated with a pay grade step. See [Entering Job Evaluation Information](#).
- ❑ Verify that the job has a pay class. (The pay class defines the way in which an employee who works in the job is paid. Valid pay classes include salary, hourly, and piecework.) See [Entering Job Information](#).
- ❑ Set up the formulas that the system uses to calculate pay ranges. See [Setting Up Pay-Range Formulas](#).

► To review pay ranges for jobs

From the Job Specifications menu (G05BJ1), choose Pay Ranges by Job.



1. On Work With Pay Ranges by Job, complete the following field:
 - Job Type/Step
2. To limit the pay ranges that appear, complete the following optional field and click Find:
 - Effective Date
3. To review additional information about a pay range, choose a record and click Select.
4. On Pay Range Formulas, review the information.

5. Click Cancel and then click Close.

See Also

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

Reviewing Pay Ranges for Pay Grades

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

► **To review pay ranges for pay grades**

From the Job Specifications Setup menu (G05BJ4), choose Pay Grades by Class.

Pay Grade	Locality	Source	Effective Date	Union Code	Minimum Salary	2nd Quartile Salary	Midpoint Salary
S2			1/1/97		19,500.000		24,750
S3			1/1/97		25,000.000		31,000
S4			1/1/97		31,500.000		38,000
S6			1/1/97		46,500.000		55,750
S7			1/1/97		55,000.000		66,480
S2			1/1/05		19,500.000		24,750
S3			1/1/05		25,000.000		31,000
S4			1/1/05		31,500.000		38,000

1. On Pay Grades by Pay Class, complete the following field:
 - Pay Class(H/S/P)
2. Complete any of the following optional fields and click Find:
 - Union Code
 - Locality

- Source
 - Effective Date
3. Review the information and then click Close.

Updating Pay Rates for Pay-Grade Steps

Periodically you might need to adjust the pay rates for your pay grade steps. For example, you might need to enter a cost-of-living increase for certain pay grade steps. Updating the Pay Grade Step Table automatically applies a cost-of-living increase to one or multiple pay grade steps. Therefore, employees in these pay grade steps receive the specified increase.

You can enter a new amount or a percentage change once, and the system automatically applies the change to the specified pay grade steps.

► To update pay rates for pay-grade steps

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade	Next Pay Grade Step	Remark
S1	A			01/01/05		20,874.000	S1	B	
S1	B			01/01/05		23,339.000	S1	C	
S1	C			01/01/05		25,803.000	S2	A	
S2	A			01/01/05		22,614.000	S2	B	
S2	B			01/01/05		28,123.000	S2	C	
S2	C			01/01/05		33,051.000	S3	A	
S3	A			01/01/05		28,992.000	S3	B	
S3	B			01/01/05		35,950.000	S3	C	
S3	C			01/01/05		41,749.000	S4	A	
S4	A			01/01/05		48,500.000	S4	B	

1. On Pay Grade Step Table, to locate the pay grade steps that you need to update, complete any of the following fields and click Find:
 - Pay Class(H/S/P)
 - Union Code

- Locality
 - Pay Grade
 - Effective Date
2. Complete either of the following fields:
 - Percent to Apply
 - OR Amount
 3. To cause the system to calculate the new pay rate for each pay grade step, choose Calculation from the Form menu.
 4. Click OK.

Updating Jobs Globally

From the Job Specifications Adv Operations menu (G05BJ3), choose Update Job Information to EE Master.

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

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

Before You Begin

- Make any changes to job information that you want reflected in employee records.
See [Entering Job Information](#).

Processing Options for Update Job Information to Employee Master (R08801)

Process Tab

Use these processing options to select the mode in which you want to run the Update Job Information to Employee Master report, to choose whether category codes from the Job Master table will override category codes in the Employee Master table, and to select the change reason and the effective date that will be assigned to any changes made to the Employee Master table.

1. Processing Mode

0 = Proof Mode

1 = Update Mode

Use this processing option to specify whether you want to process the report in proof mode or update mode. Valid values are:

- 0 Proof mode. Use this processing mode to print a report of all changes that will be updated to the Employee Master table when the report is run in update mode. Running this report in proof mode does not update the Employee Master table.
- 1 Update mode. Use this processing mode to update the Employee Master table with updated information from the Job Master table and to print a report of all changes made.

Caution: Once you run this report in update mode, any corrections to updated data in the Employee Master table will need to be done manually. You should run this report in proof mode and verify all information before running in update mode.

2. Category Codes

0 = Do Not Copy

1 = Copy

Help: Use this processing option to specify whether the category codes from the Job Master table will override existing category codes in the Employee Master table. Valid values are:

- 0 Do not copy category codes from the Job Master table. Use this option if you do not want to change category code information in the Employee Master table to match category code information in the Job Master table.
- 1 Copy all category codes from the Job Master table. Use this option to change all category codes in the Employee Master table to match the category codes in the Job Master table.

3. Change Reason

Required if processing in update

mode.

Use this processing option to identify the reason for any changes made to the Employee Master table. You are required to enter a change reason when processing this report in update mode. All updates to the Employee Master table will be made with the change reason entered here. To enter different change reasons for different jobs, you must run this report separately for each job by specifying the job in the data selection of this report. For a list of valid change reasons, see UDC list 06/T.

4. Effective date

Blank = System Date

Enter the effective date for all updates made to the Employee Master table. To enter different effective dates for different jobs, you must run this report separately for each job by specifying the job in the data selection of this report. If you do not enter an effective date, the system date is used.

Updating the Compa-Ratio for an Employee

From the Employee Adv & Technical Operations menu (G05BE3), choose Compa-Ratio Batch Calculation.

A company can use a compa-ratio to assess how they are paying employees in relation to the midpoint of the employee's pay range. Compa-ratios can be used to compare employee salaries against a company's intended pay policy. Generally, a compa-ratio of 1.0 means that the employee's current salary falls within close parameters of the company's pay policy.

The compa-ratio is an employee's salary divided by the mid-point amount of the employee's pay grade. For example, if an employee in pay grade X has a salary of 35,000, and the midpoint of pay grade X is 38,000, the employee's compa-ratio is .921. This means that the employee is making 92.1 percent of the midpoint of his or her pay grade. Compa-ratios above or below 1.0 might be for a number of reasons. For example, a new hire typically has a compa-ratio under 1.0. A compa-ratio over 1.0 could mean that the employee has high seniority or performs well.

When calculating the new compa-ratio, the system uses the midpoint of the pay grades that you defined in the Pay Grades by Class table (F082001). The system also uses the midpoint amount that is effective for the effective date.

If any of the information that the system uses to calculate compa-ratio changes, you must run a batch program to update employees compa-ratios. For example, when you change the midpoint amount for a pay grade, you must update the compa-ratio for all of the employees assigned to those salary ranges. You can update compa-ratio for one employee or all employees.

You must update employee compa-ratios if you have run the global mass update program for pay grades, rates, or jobs and their salary ranges. You can run this program in either proof or update mode. You can also have the system print a report that lists the updated information.

If the new compa-ratio differs from the existing compa-ratio, and your system is set up to track employee history, the program creates a history record.

Processing Options for Compa-Ratio Batch Calculation (R082501)

Report

1. Should the file be updated? (1-Yes, 0-No). Default is '0'
2. Would you like a report? (1-Yes, 0-No). Default is '1'

Employee

1. Enter a valid change reason code for all new records.
2. Enter the effective date. Blank will default to the system date.

Pay Range

1. Enter the effective date for the Pay Range. Blank will default to the system date.
-

Working with Obsolete Jobs

Occasionally, a job that you have defined becomes obsolete. When a job becomes obsolete, you can do one of the following:

- Delete the job from the Job Master table
- Change the status of the job to indicate that it is inactive

Deleting the job from the Job Master table conserves computer disk space and eliminates obsolete information. However, after you delete a job, you cannot use it for review or for historical reporting purposes.

To track historical records of all the jobs within your organization, you can change the status of obsolete jobs rather than delete them. After you change a job status to indicate that it is inactive, you should no longer assign that job to active employees. The inactive job remains in the Job Master table.

After you delete a job from the Job Master table or change a job status to inactive, you must change the employee records of each active employee who is assigned to the deleted or inactive job. When you change these employee records, you manually replace the obsolete job ID with a valid job ID.

To identify the employees assigned to obsolete jobs, you can print the Invalid Job IDs in Employee Master report.

Changing the Status of a Job

If your organization needs to keep historical records of obsolete jobs, you can change the status of obsolete jobs rather than delete them. When you change a job status to inactive, you indicate that it is historical. You should not assign inactive jobs to active employees.

► To change the status of a job

From the Job Specifications menu (G05BJ1), choose Job Entry and Evaluation.

1. On Work With Job Entry and Evaluation, to locate the obsolete job, complete the following field and click Find:
 - Job Type/Step
2. Choose the obsolete job in the detail area, and then click Select.
3. On Job Entry and Evaluation, change the value in the following field and click OK:
 - Job Status

Identifying Employees Assigned to Obsolete Job IDs

From the Job Specifications Adv Operations menu (G05BJ3), choose Invalid Job IDs in EE Master.

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

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

When a job becomes obsolete, you can delete it from the Job Master table. Then, for each employee who is assigned to the obsolete job, you must manually replace the obsolete job ID with a valid job ID. To identify the employees who are currently assigned to obsolete jobs, review the Invalid Job IDs in Employee Master report.

When you replace an obsolete job ID in an employee's record, verify that additional job-related information for the employee, such as the pay frequency, pay class, and pay grade step, are appropriate for the new job.

Reviewing Jobs with Job Reports

To review or compare all the information that you entered for jobs, the system includes a series of reports that you can use to evaluate the jobs in your organization, review the compensation linked to jobs, and review the supplemental data defined for jobs. You can use these reports, for example, to help you determine whether certain jobs are rated at an appropriate level or to identify all jobs that share a particular training requirement.

Running Job Evaluation Reports

You can use the job evaluation reports to review the information that is assigned to each job in your organization. You can analyze data such as the reporting structure, evaluation components, and evaluation methods that are linked to each job.

Running the Job Evaluation Factor Data Report

From the Job Specifications menu (G05BJ1), choose Job Evaluation Factor Data.

After you evaluate jobs, you can run the Job Evaluation Factor Data report to review the evaluation method, factors, points, and degrees assigned to each job. Use this information to compare the job evaluations for similar jobs and to determine whether the reporting structure of the jobs accurately reflects their evaluations.

See Also

- R051450, *Job Evaluation Factor Data* for a report sample

Running the Job Data and Evaluation Points Report

From the Job Specifications menu (G05BJ1), choose Job Data & Evaluation Points.

You should run the Job Data and Evaluation Points report to review job information with evaluation information such as evaluation method, evaluation date, and evaluation points.

See Also

- R08001, *Job Data and Evaluation Points* for a report sample

Running the Job Evaluation Factors Report

From the Job Specifications Setup menu (G05BJ4), choose Evaluation Factors Table Report.

After you set up your evaluation methods for evaluating jobs, you can run the Evaluation Factors Table Report to review the evaluation methods that you defined. The information printed on the report is identical to the information in the Evaluation Factors table (F08011).

See Also

- R080012, *Job Evaluation Factors* for a report sample

Running Compensation Reports

You can run compensation reports to review and analyze compensation information that is linked to jobs, pay ranges, and employee groups. You can also review upcoming performance reviews to help evaluate compensation expenditures and plan for future economic requirements.

Running the Pay Ranges By Job Report

From the Job Specifications menu (G05BJ1), choose Pay Ranges by Job Report.

You can run the Pay Ranges by Job report to review the pay ranges defined for each job. The information that prints is the same information that you review on the Work With Pay Ranges By Job form (P052002).

See Also

- R052450, *Pay Ranges by Job* for a report sample

Processing Options for Pay Ranges by Job Report (R052450)

Defaults

1. Enter a Pay Range - As of Date. Blank will use the system date.
-

Running the Employees Above/Below Pay Grade Report

From the Job Specifications menu (G05BJ1), choose Employees Above/Below Pay Grade.

Run the Employees Above/Below Pay Grade report to review employees paid above the maximum amount for their pay grade or below the minimum amount for their pay grade.

See Also

- R052001, *Employees Above Pay Grade* for a report sample

Processing Options for Employees Above/Below Pay Grade (R052001)

Title Display

1) Report Title Display:	Blank = Employees Above Pay Grade Maximum	1 =
	Employees Below Pay Grade Minimum	

Running the Upcoming Employee Reviews by Supervisor Report

From the Periodic Processing menu (G05B2O), choose Upcoming Reviews.

This is a batch process to report employees who have upcoming reviews by supervisor. Each employee is displayed with the Dates of Next Review and Type of Review. You can set up processing options to determine whether this report runs automatically on a specified date, to activate Enterprise Workflow Management, and to allow the system to update the Upcoming Reviews By Supervisor program (P052200) on the self-service website. If Workflow is activated, the system sends reminder messages to each supervisor about pending reviews.

You also set a processing option to determine which of the three versions you want to run. A version exists that reports on overdue reviews and a version that reports on all employees with upcoming reviews without specified review dates. Neither of these versions starts Workflow.

See Also

- Reviewing Upcoming Employee Reviews By Supervisor*
- Setting Up Upcoming Reviews By Supervisor* for more information

Processing Options for Upcoming Employee Reviews by Supervisor Report (R052202)

Defaults Tab

Use these processing options to select an employee for this report and to include the Uniform Resource Locator for supervisory review instructions.

1. Employee Number Display

A = Address Book

S = Social Security Number

O = Other Number

Use this processing option to specify the employee number to print on the report. Valid values are:

A

Address book number

S

Employee tax identification number

O

Other number

2. URL For Supervisor Review Instructions

Use this processing option to specify the uniform resource locator for the supervisor review instructions.

Process Tab

Use these processing options to specify whether to run the Workflow Reminder Process and to define defaults that limit the report to specific parameters.

1. Workflow Reminder Process

1 = Run workflow

0 = Don't run workflow

Use this processing option to specify whether to run the workflow reminder process. Valid values are:

0

Do not run the workflow process.

1

Run the workflow process.

2. From Date

Use this processing option to limit reviews. You must enter a date that is less than or equal to the date that you enter in the Thru Date processing option for this program.

3. Thru Date

Use this processing option to limit reviews processed. The date that you enter must be greater than or equal to the date that you enter for the From Date processing option in this program.

4. Days From Today

Use this processing option to limit reviews processed. Enter Days From Today to process all new review dates that are less than or equal to the system date and the number of days entered into the processing option. Enter Date of Thru Date to ignore this option.

Running Job Supplemental Data Reports

You can run reports on job supplemental data to review all of the information that you collect for jobs in your organization. You can evaluate information that is a shared requirement for a group of jobs and focus on job categories for which you need to gather additional data.

Running the Job Supplemental Data Report

From the Job Supplemental Data menu (G05BSDJ1), choose Job Supplemental Data Report.

This report helps you to review all jobs that have information for all data items.

See Also

- R080412, *Job Supplemental Data* in for a report sample

Processing Options for Job Supplemental Data Report (R080412)

Narrative

1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Running the Job Data by Data Type Report

From the Job Supplemental Data menu (G05BSDJ1), choose Job Data by Data Type Report.

Run the Job Data by Data Type Report (R080402) to review all jobs by a specified data item. For example, you can inquire on the Hazardous Materials Handling data item to identify all jobs that have this training as a requirement.

See Also

- R0804702, *Job Data by Data Type* for a report sample

Competency Management

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. These qualifications, such as C programming skills, CPA license, and fluency in French, are called *competencies*. You can use competency management to identify both employee competencies (the competencies that employees possess) and job competencies (the competencies that are required to perform a specific job within the organization). You might want to track competencies for employees but not for jobs. However, if you want to track competencies for jobs, you must also track competencies for employees.

To understand competency management, review the following topics:

- *Advantages of competency management*
- *Core competencies*
- *Inherited competencies*

Caution

When you enter and review information for competency management, use the OneWorld menus, not the fast path, to access the forms. Accessing forms from the fast path might produce unexpected results.

Advantages of Competency Management

Employees use their competencies to help the organization achieve its goals and objectives. By linking the competencies of an organization with employee jobs, you can determine how employees can best help the organization meet its goals and objectives, thereby giving employees competency-based job descriptions that provide clear, detailed expectations and illustrate the way in which each employee fits into the whole organization.

Some types of competencies, such as education and training, are relatively simple to track and quantify, while more intangible skills, such as negotiation skills or knowledge of pricing strategies, are more difficult to quantify. Categorizing and quantifying competencies allows you to create a searchable database that you can use to locate employees who possess specific competencies, thereby giving you the ability to efficiently reallocate employees in response to market or organizational changes. Such reallocation can help your organization reduce operating costs and make employees more productive.

Effectively managing competencies can also help your organization train and retain competent employees. The organization benefits by having more productive employees and less employee turnover, which results in a lower operating cost. Employees benefit by having a set of goals and expectations to do their job and improve in their careers. The challenge for human resource specialists is to align and link the goals and objectives of the corporation with the valuable human assets within the organization.

Core Competencies

Core competencies are competencies that help employees meet the high-level goals and objectives of the organization. All of the employees in the organization should be proficient in these core competencies. You can track core competencies only if you are tracking competencies for both jobs and employees.

Inherited Competencies

To simplify the tracking of job competencies, you can attach individual competencies to each level in the organizational structure, and then attach jobs to those levels. *Inheritance* is the process of attaching job competencies to high levels in the organizational structure so that they filter down to the lower levels. Inheritance means that, when you attach a competency to a business unit that is at a high level in the organizational structure, that competency applies to the jobs in that business unit, as well as all of the jobs that are in lower-level business units. You can further take advantage of inheritance by assigning competencies at the company or job-group level. For example, you might define Commitment to Quality as a core competency and attach it to the company level of the organizational structure so that all of the jobs in the company will inherit that competency. For jobs that are at lower levels of the organizational structure, you can attach additional, more specific competencies and override the inherited competencies, if necessary.

Employees are expected to be proficient in the competencies required for their jobs, as well as in any inherited competencies. The following are advantages of inherited competencies:

- You can reduce data entry tasks by defining and attaching a competency in one place only.
- When you change a competency, you make changes in one place and all jobs that inherit that competency automatically inherit the changes.
- You can attach one competency to many jobs.

Gap Analysis

Competency management gives employees and managers a clear, quantifiable measurement of the current and future needs of the organization and the abilities of the employees. When you track both employee competencies and job competencies, you can easily identify discrepancies between the competencies that an employee possesses and the competencies that are required for the employee's current job, or for a job to which the employee aspires. The process of identifying and analyzing such discrepancies is called *gap analysis*. Employees and managers can use self-service applications to review gap analysis information. You can use gap analysis to review career paths for employees who want to examine the possible career opportunities within the organization.

Defining Organizational Structures for Job Competencies

Before you can assign jobs and job competencies to the hierarchical levels in your organizational structure, you must define the organizational structure that you will use to track competency information. Although you can use the financials organizational structure to track competency information, J.D. Edwards recommends that you create a separate structure. You can also create new business units for job competencies so that you are not using the business units that your organization uses for financial reporting purposes. By maintaining the competency organizational structure and business units separately from the financials structure, the human resources department can revise the competency structure without affecting the structure that the accounting department uses to make financial decisions. Likewise, when the accounting department needs to revise the financials organization structure, the competency structure will not be affected.

When you define a separate organizational structure for job competencies, you can either create a new structure or copy and modify an existing structure, such as the financials structure. In most cases, it is probably more efficient to copy an existing structure; however, if the existing structures are very different from the one that you intend to create, you might choose to create a new organizational structure.

To help you explore a variety of scenarios, you might create several draft versions of the organizational structure. When you have decided which draft you want to use, you can activate that draft and define it as the default organizational structure. When an organizational structure becomes obsolete, you can update date-effective information to indicate that it is no longer the current structure.

Creating New Organizational Structures for Job Competencies

From the Advanced Organization Setup menu (G094111), choose Organization Structure Definition.

To associate jobs and job competencies with the hierarchical levels in your organization, you can create an organizational structure that is specific to job competencies. In many cases, you can base the competency organizational structure on the structure that the accounting department uses for financial reporting (the financial organizational structure). If the financial organizational structure is much different from the organizational structure that you need to create for competencies, creating a new structure is probably more efficient than copying and modifying an existing structure.

To give the human resources department more flexibility in attaching competencies, you might also create new business units for the competency organizational structure. When you create a new business unit for job competencies, enter 1 in the Subledger Inactive field so that no activity regarding the business unit will be reflected in the business units and organizational structure that your organization uses to track financial information.

To create a new organizational structure, use the Business Unit Structure Definition program (P0050B). To create new business units, use the Business Units program (P0006). You complete the same steps to create the new organizational structure and business units for job competencies as you would to create them for financials. When you create the structure for job competencies, you do not need to run the Business Unit Structure Build program (R10450).

The new structure that you create is an inactive, or draft, structure that contains no effective dates. You can modify the draft as many times as necessary. When you are ready to begin using this organizational structure, run the Activate Job Competencies report (R080014) to activate the draft structure and set it up as the default structure for job competencies. This program also enters an ending date for the organizational structure that was previously the default structure, if one exists.

See Also

- *Defining Organization Report Structures* for step-by-step instructions for creating a new organizational structure
- *Setting Up Business Units* for step-by-step instructions for creating a new business unit
- *Updating Date-Effective Information for Organizational Structures* for more information about the Activate Job Competencies report
- *Copying Existing Organizational Structures* for information about an alternative to creating a new organizational structure

Copying Existing Organizational Structures

To associate jobs and job competencies with the hierarchical levels in your organization, you can create an organizational structure that is specific to job competencies. In many cases, you can save time by copying the existing organizational structure for financials and then modifying it so that it is appropriate for tracking job competencies. The business units for the new organizational structure will be the same as those that are in the organizational structure that you copied; however, in the new structure, you can change the arrangement of the business units, if necessary.

When you copy an existing structure, the system creates a draft structure that contains no effective dates. You can modify the draft as many times as necessary. When you are ready to begin using this organizational structure, run the Activate Job Competencies report (R080014) to activate the draft structure and set it up as the default structure for job competencies. This program also enters an ending date for the organizational structure that was previously the default structure, if one exists.

You can also copy job competency information from an existing organizational structure to a new organizational structure that does not yet have job competency information associated with it.

The copy program includes both a form where you specify the information that you want to copy and a batch process. When you click OK on the form, the system automatically runs the batch process and prints a report that lists the information that you want to copy. You can run the batch process in proof mode, which allows you to verify the information before the system updates the database. You must run the copy program from a client workstation (NT), not from an internet or intranet site. Internet and intranet servers do not have the specific application program interfaces (APIs) that the system needs to perform the copy.

Before You Begin

- Set up the program to run on your local workstation. See [Mapping Objects](#).
- Enter a code for the new organizational structure in UDC 00/TS.

► To copy an existing organizational structure

From the Competency Mgmt Advanced & Tech Oper menu (G05BC3), choose Copy Job Competency. Alternatively, from the Competency Management Periodic Processing menu (G05BC2), choose either Jobs in an Organization or Job Competencies in an Organization, and then choose Create Draft from the Report menu.

1. On Copy Job Competencies, complete the following fields:
 - From Type Structure
 - To Type Structure
2. Choose one of the following options:
 - Proof Mode
 - Show Report Details
3. If the From Type Structure has job competency information associated with it, choose any of the following options:
 - Copy Job Competencies
 - Copy Job Competency Descriptions
 - All Translations
4. If you choose to copy competency descriptions, choose one or more of the options in the Copy Specific Descriptions group.
5. Click Submit.

The system prints a report that lists the information that will be copied. If you did not turn the Proof Mode option on, the system also runs a batch process that updates the database with the copied information.

Processing Options for Copy Job Competency (P080020)

Versions Tab

Use these processing options to specify versions of the job competencies to copy.

1) Copy Job Competencies Report Version

Blank = XJDE0001

A valid version

Use this processing option to specify the version of the Copy Job Competency

Report (R080015) to use when exiting to the program. Blank will use version XJDE0001.

2) Jobs Competencies in an Organization Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

Changing the Default Organizational Structure

As you work with job competency information, you might create several organizational structures for job competencies. Some of these structures might be draft structures that you have either decided not to use or are planning to use at some time in the future. For example, if your organization is planning to acquire an additional company, you might create a draft structure that you use to incorporate jobs from the new company into your existing organizational structure. You might also have some historical organizational structures. Historical structures are those which your organization used at one time but is no longer using. A historical structure remains active, but it cannot be used as the default structure.

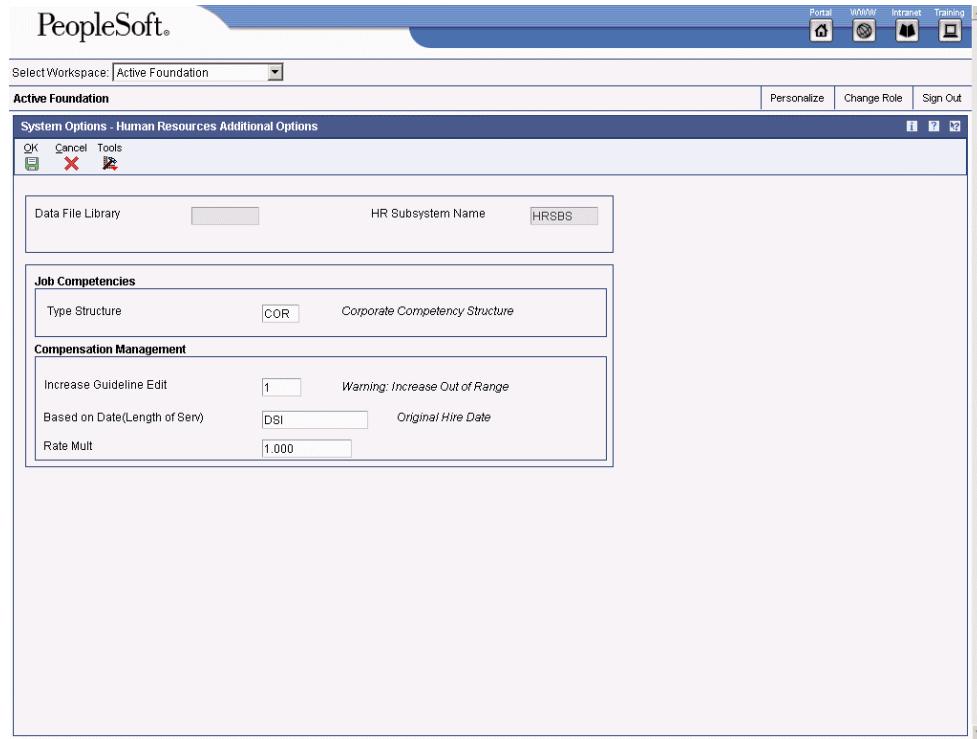
The default organizational structure is the structure that your organization is currently using to track job competency information. When managers and employees use self-service to review job competency information, they can access only the information for the default structure. For security purposes, only human resources administrators can access draft and inactive structures.

Occasionally, you might need to change the default organizational structure for job competencies. For example, you might have mistakenly activated a draft structure that should not have been activated for another month.

► To change the default organizational structure

From the HRM Setup menu (G05B4), choose System Options.

1. On Work with HRM Foundation System Options, choose HR Addl. Options from the Row menu.
2. On Human Resources Additional Options, complete the following fields, and then click OK:
 - Type Structure
 - Based on Date(Length of Serv)



Updating Date-Effective Information for Organizational Structures

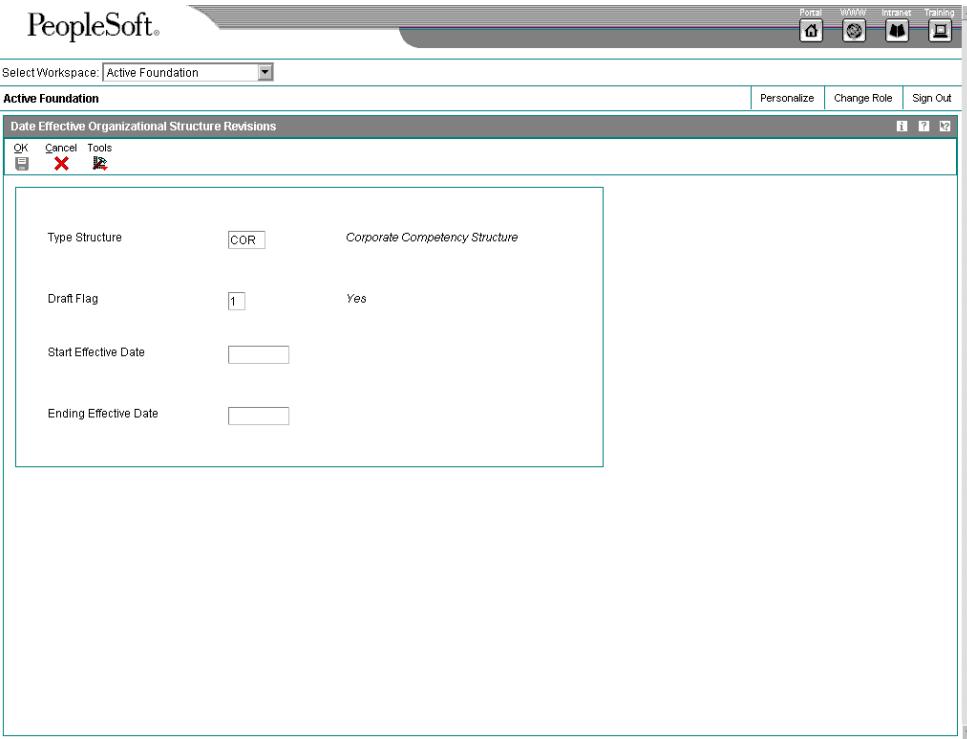
When you create a new organizational structure for job competencies using the Organizational Structures Revision program (P0050), the system does not recognize the structure as a valid structure for job competencies. To make the structure valid for job competencies, you must update its date-effective information. You do not need to enter this information if you used the Copy Job Competency program (P080020) to create the organizational structure for job competencies.

This program updates the Date-Effective Organizational Structure table (F0800608).

► **To update date-effective information for an organizational structure**

From the Competency Setup menu (G05BC4), choose Date Effective Organizational Structure.

1. On Work with Date Effective Organizational Structures, complete the following field and click Find:
 - Organizational Structure
2. Choose a record in the detail area and click Select.



3. On Date Effective Organizational Structure Revisions, complete the following fields:
 - Draft Flag
 - Start Effective Date
4. Complete the following optional field:
 - Ending Effective Date
5. Click OK.

After you complete this task, you must run the Activate Job Competencies report (R080014) to complete the process of activating the draft structure. See [Activating Draft Organizational Structures](#).

Working with Job Competency Information

You use competency management to track the competencies that employees possess and to compare these competencies with those that are required for the employees' jobs. You define job competencies to establish the criteria required for each job in your organization. You can make job competencies as specific or general as you choose. The competencies that you define for jobs do not need to correspond directly to the competencies that you define for employees. To ensure that job competencies apply to a variety of employees in many different jobs, you might choose to define job competencies more broadly than employee competencies.

When you define job competencies, you can enter detailed descriptions for them. These descriptions are electronic attachments to the form. Then, use competency options to

indicate the employee competencies that fulfill a particular job competency. To review a written summary of all of the competency descriptions associated with a particular job, print the Job Profile report.

Defining Job Competencies and Descriptions

Before you assign job competencies to jobs and business units, you must define job competencies and enter descriptions of them. You can enter detailed descriptions for job competencies that explain the criteria on which each competency is based. These descriptions simplify the process of differentiating between similar job competencies. You can create multiple competency descriptions for each job competency and customize each description to a specific audience.

For example, you might define the following descriptions and audiences for the Negotiation Skills competency:

Human resources administrator	Those who possess negotiation skills are able to work with other parties to obtain mutually beneficial objectives. Negotiation requires assertiveness to achieve one's own goals while considering the concerns of the other party.
Managers	Employees who have good negotiation skills show a willingness to work with others to obtain a desired objective.
Employees	When demonstrating negotiation skills, you remain focused on the desired result and recognize when the process is moving in an appropriate direction. You are able to appreciate the needs of others and assume that the negotiation will end in a decision that is agreeable to all of the parties involved.

To simplify the process of locating and comparing job competencies, you can use category codes to group descriptions for similar job competencies. For example, you might set up a category code called Technical that you would use to group all job competencies that apply to the technical jobs within your organization.

Before You Begin

- Set up the category codes for job competencies (UDC 08/C0 through 08/C9). See [Defining Category Codes](#).
- Set up processing options for the codes for Job Competencies in an Organization (P08006). These options determine the types of views for which you will be creating job competency descriptions. For example, you might have an HR view and a Manager view. If you need to add or change the existing views, you can add codes to user defined code list 08/UD. See [Customizing User Defined Codes](#).

► **To define job competencies and descriptions**

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competency.

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Select Workspace: Active Foundation

Active Foundation

Work With Job Competencies

Job Competency Code	Description	Include in Gap and Performance Appraisals	Include in Gap and Performance Appraisals	Job Competency Category Code 001	Job Competency Category Code 002	Job Competency Category Code 003	Job Competency Category Code 004	Job Competency Category Code 005	Job Competency Category Code 006	Job Competency Category Code 007	Job Competency Category Code 008
<input checked="" type="checkbox"/> ACCT	Accounting Skills	1	Yes	MGT	Manager
<input type="checkbox"/> ACH	Achievement Orientation		1 Yes	MGT	Manager
<input type="checkbox"/> ASSERT	Assertiveness		1 Yes	MGT	Manager
<input type="checkbox"/> COMP	Compliance Issues		1 Yes	PRF	Professional
<input type="checkbox"/> CS	Customer Service Skills		1 Yes	PRF	Professional
<input type="checkbox"/> DET	Attention to Detail		1 Yes	PRF	Professional
<input type="checkbox"/> EDUC	Education Level		1 Yes	PRF	Professional
<input type="checkbox"/> JOB	Job Knowledge		1 Yes	PRF	Professional
<input type="checkbox"/> LANG	Foreign Language Ability		1 Yes	PRF	Professional
<input type="checkbox"/> LEAD	Leadership Qualities		1 Yes	MGT	Manager

Competency Description

Employee View

Text

Understanding of Generally Accepted Accounting Practices; understanding of how accounting processes affect other departments.

1. On Work With Job Competencies, click Find to review any existing job competencies.
2. Move the cursor to the first blank row in the detail area and then complete the following fields:
 - Job Competency Code
 - Description
 - Include in Gap and Performance Appraisal
3. Complete any of the following fields that apply to your organization:
 - Job Competency Category Code 001
 - Job Competency Category Code 002
 - Job Competency Category Code 003
 - Job Competency Category Code 004
 - Job Competency Category Code 005
 - Job Competency Category Code 006
 - Job Competency Category Code 007
 - Job Competency Category Code 008

- Job Competency Category Code 009
 - Job Competency Category Code 010
4. To indicate the audience for this job competency description, click an option that corresponds to a type of view, such as one of the following:
- Human Resource View
 - Manager Coaching View
 - Employee View
 - Manager View
- You define these views in the processing options for Job Competencies in an Organization (P08006).
5. Choose Edit Description from the Row menu.
 6. On Job Competency Description Maintenance, enter a text description in the media attachment area at the bottom of the form.
 7. To attach other types of electronic attachments, such as pictures and links to Internet pages, right-click in the exit bar to the left of the media object, choose New from the menu, and then choose the type of object that you want to attach.
 8. When you have finished entering attachments, click OK.
 9. To enter another job competency and description, repeat steps 1 through 8.
- Repeat these steps until you have entered a description for each of the audiences.

Processing Options for Job Competency (P08009)

Version Tab

Use these processing options to specify the versions that the system uses for Job Competency.

1. Job Competencies in an Organization Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Job Competencies in an Organization program (P08006) to use. The default is ZJDE0001.

2. Jobs in an Organization Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Jobs in an Organization program (P08007) to use. The default is ZJDE0001.

3. Copy Job Competencies Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Copy Job Competencies program (P080020) to use. The default is ZJDE0001.

Defining Job Competency Options

Typically, job competencies represent broad categories of knowledge or experience, while employee competencies represent measurable and observable traits and behaviors that demonstrate proficiency in one or more job competencies. While employee competencies are usually closely related to job competencies, they might not correspond exactly. In many cases, two or more employee competencies combine to satisfy a job competency, and a single employee competency can fulfill multiple job competencies. For example, the job competency Negotiation Skills might require that employees be proficient in the employee competencies Communication Skills and Conflict Management Skills. The employee competency Communication Skills might also apply to other job competencies, such as Management Skills and Teamwork.

To associate employee competencies with the job competencies that they fulfill, you enter options for job competencies. A job competency option represents a group of employee competencies that can be combined to fulfill a job competency. If more than one combination of employee competencies can be used to fulfill a job competency, you can create multiple options for that job competency. For a job competency that has multiple options, you can indicate which option is the preferred option.

Before You Begin

- Define job competencies and descriptions. See [Defining Job Competencies and Descriptions](#).
- Define employee competencies. See [Defining Employee Competencies](#).

► To define job competency options

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competency.

1. On Work With Job Competencies, click Find to review the existing job competencies.
2. Choose a record in the detail area, and then choose Competency Options from the Row menu.
3. On Work With Job Competency Options, click Add.

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Competency Type	Competency Type Description	Competency Code	Competency Code Description	Auto Calc. Competency	Required Competency Level
<input type="checkbox"/> 002	Skill	GAAP	Gen1 Accepted Acctg Practices	1	Yes
<input type="checkbox"/> 002	Skill	IMP	Impact of Department	1	Yes
<input type="checkbox"/> 002	Skill	INTER	Interdependence of tasks	1	Yes
<input checked="" type="checkbox"/>					

4. On Job Competency Option Changes, complete the following fields:
 - Option Number
 - Preferred Method
5. Complete the following fields in the detail area:
 - Competency Type
 - Competency Code
 - Auto Calc. Competency
 - Required Competency Level
 - Competency Level Acceptable Low
 - Competency Level Acceptable High
 - Competency Level Rule Weight (%)
6. To add additional employee competencies to this job competency option, repeat step 5.
7. When you have finished adding competencies for this option, click OK.
8. To add another option for this job competency, repeat steps 3 through 6.
9. When you have finished adding job competency options, click OK.

Reviewing the Job Profile Report

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Profile Report.

When you need a formal description of a job, such as when you are advertising a job opening, you can print the Job Profile report. This report displays detailed information about the job, such as job competencies, job competency options, and job competency descriptions. It also displays the employee competencies and competency levels that are required for the job.

See Also

- R080021, *Job Profile* for a report sample

Processing Options for Job Profile Report (R080021)

Select Tab

Use these processing options to specify information that will be included in the report.

1. Organization type structure

Blank = Default organizational structure

Use this processing option to specify the organizational structure used in the Job Description report (R080021). This option will produce a report of the job descriptions for selected jobs and organizational business units.

If this field is left blank, the default organizational structure will be used.

2. Job type

Blank = All jobs

Use this processing option to produce a Job Description report (R080021) on a specific job type. If a value is entered, it is necessary to also specify an organizational business unit.

Blank will produce a Job Description report (R080021) of all jobs in an organizational business unit and organizational structure.

3. Job step

*** = All job steps**

Use this processing option to produce a Job Description report (R080021) on a specific job step. If a value is entered, you must also specify an organizational business unit and the job type.

A * specifies to create a Job Description report on all job steps within a job type.

4. Organizational business unit

Blank = All organizational business units

Use this processing option to create a Job Description report (R080021) based on a specific organizational business unit. If you leave this processing option blank, a Job Description report will be created for all specified jobs in all organizational business units.

5. Date - effective

Blank = Today's date

Use this processing option to produce a Job Description report (R080021) at a specific time.

Blank will produce a Job Description report (R080021) of jobs on the current date.

Versions Tab

Use this processing option to specify version information for the report.

1. Job Competencies in an Organization Version

Blank = ZJDE0001

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

Display Tab

Use these processing options to select competency descriptions that will be displayed on the report.

1. First job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the first user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the first user defined description found in the processing options for the Job Competency Workbench.

2. Second job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the second user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the second user defined description found in the processing options for the

Job Competency Workbench.

3. Third job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the third user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the third user defined description found in the processing options for the Job Competency Workbench.

4. Fourth job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the fourth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the fourth user defined description found in the processing options for the Job Competency Workbench.

5. Fifth job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the fifth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the fifth user defined description found in the processing options for the Job Competency Workbench.

6. Sixth job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the sixth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the sixth user defined description found in the processing options for the Job Competency Workbench.

Working with Competencies in Organizational Structures

To simplify the process of tracking job competencies within your organization, you can attach jobs and job competencies to the hierarchical levels within the organizational structure that you created for job competencies.

When you attach a job competency to the entity that is at the top of an organizational structure, the system applies that competency to all of the jobs that are attached to the organizational structure. Likewise, when you attach a competency to a business unit within an organizational structure, the competency applies to all of the jobs within that business unit. This feature, called *inheritance*, reduces much of the administrative work associated with attaching job competencies and helps you ensure that competencies are attached consistently throughout your organization.

Attaching job competencies to organizational structures saves you time by reducing the number of competencies that you need to assign to each job. Attaching jobs to organizational

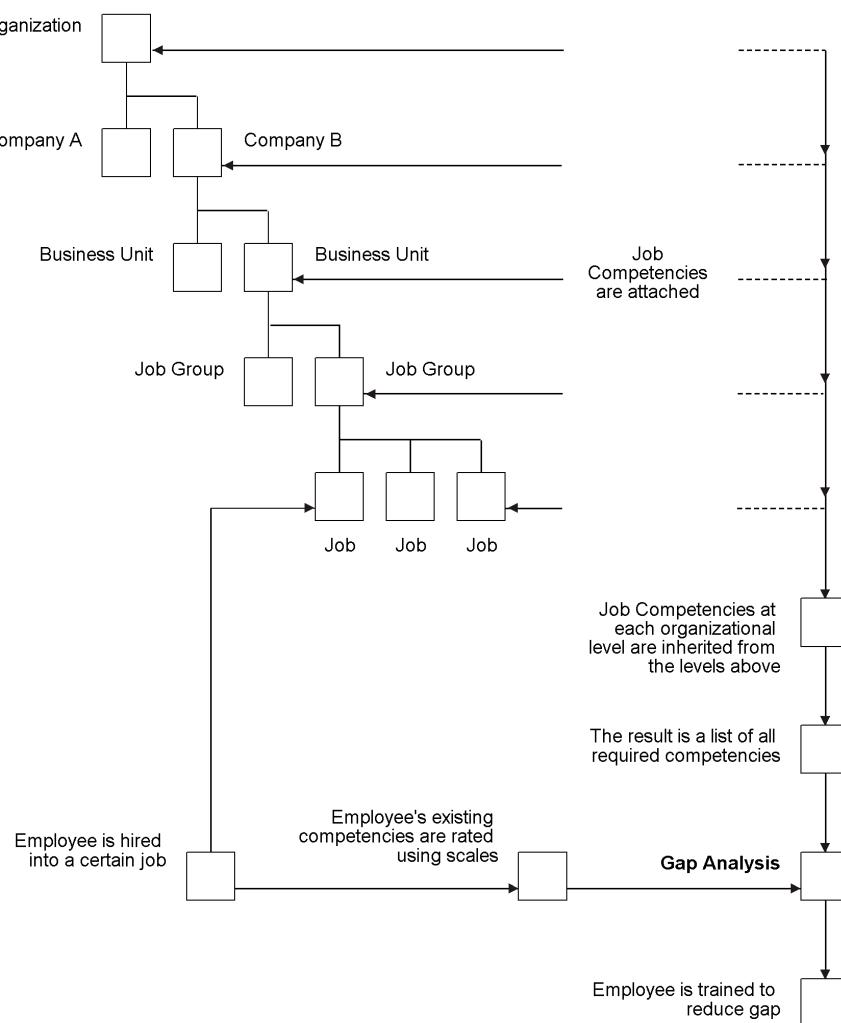
levels allows you to take advantage of the inheritance feature, as well as to indicate the business unit in which the job resides. A job can reside in more than one business unit within the structure.

For each business unit, job group, and job, you can override certain information for inherited competencies, when necessary. To verify that inherited and overridden competencies occur where you are expecting them, you can review override information by job, job group, and business unit. If necessary, you can revise this information.

If your organization has employees in more than one country, you might want to translate the competency descriptions so that all employees can understand them. After you have reviewed job competencies and their overrides, you can enter these translated versions of the competency descriptions and attach them to the job competencies.

Typically, when you are working with competencies in organizational structures, you use a draft structure. When you have finished attaching jobs and job competencies to organizational levels and are satisfied with the results, you are ready to activate the draft organizational structure.

The following graphic illustrates how competencies can be attached at the various levels in an organization:



Attaching Job Competencies to Organizational Levels

To reduce data entry and simplify the process of updating competencies as the goals and objectives of your organization change, you can attach job competencies to the hierarchical levels in your organizational structure. You perform this task after you have created an organizational structure for job competencies and defined the job competencies that your organization uses. Each level in the organizational structure represents a business unit within the organization.

You can use the Job Competencies in an Organization program (P08006) to assign core competencies (the competencies that apply to all of the employees in your organization) to the organizational structure itself. When you assign a competency to an organizational structure, all of the jobs that are attached to the structure inherit those competencies.

For competencies that apply only to specific business units within the structure, you can also use this program to attach job competencies to those individual business units. After you attach competencies to the organizational structure and the levels (business units) within it, you can use the Jobs in an Organization program (P08007) to attach additional, more specific competencies to job groups and individual jobs. You can also override certain job competency information at these lower levels.

You can attach job competencies to the current, active organizational structure or to a draft structure. When you attach a job competency to an organizational level, all of the subordinate organizational levels inherit that job competency. Therefore, J.D. Edwards recommends that you begin attaching competencies at the organizational structure level and then work down through the business units in each subordinate level. After you attach a competency to a business unit, you cannot attach that competency to a business unit that is at a subordinate or superior level within the organizational structure.

Self-Service Considerations

Your organization might have set up the Job Competencies in an Organization program as a self-service application that managers and employees can use to determine where competencies are assigned within the organizational structure. If you are accessing Job Competencies in an Organization from a self-service program, such as the Form menu on Manager's Workbench (P08712), you can review the organizational structure to see where each competency is attached, but you cannot attach or delete any competencies within the structure.

Before You Begin

- Define the organizational structure for job competencies. See [Defining Organizational Structures for Job Competencies](#).
- Define the job competencies for your organization. See [Defining Job Competencies and Descriptions](#).

► To attach a job competency to an organizational level

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competencies In An Organization.

1. On Work With Job Competencies In An Organization, complete the following fields and click Find:

- Effective Date
- Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To attach a job competency to a level in the structure, click once on the level to select it, click once on the competency to select it, and then click Add.

The competency appears in the tree view under the level that you chose.

Job Competency Code	Job Competency	Job Competency Category Code 001	Job Competency Category Code 0
ACCT	Accounting Skills		
ACH	Achievement Orientation	MGT	Management Pat
ASSERT	Assertiveness	MGT	Management Pat
COMP	Compliance Issues		
CS	Customer Service Skills	PRF	Professional Pat
DET	Attention to Detail	PRF	Professional Pat
EDUC	Education Level		
JOB	Job Knowledge		
LANG	Foreign Language Ability		
LEAD	Leadership Qualities	MOT	Management Pat

4. To remove a job competency from a level in the structure, click once on the competency in the tree view and then click Delete.
5. Complete steps 3 and 4 for as many competencies as you need to add or delete.
6. To save your work, choose Submit from the Form menu.

See Also

- ❑ *Overriding Inherited Job Competencies*

Processing Options for Job Competencies in an Organization (P08006)

Defaults Tab

1) Audience Flag

1 = Employee

2 = Manager

3 = Human Resources

Use this processing option to specify who is going to use the application to what capacity.

Competency Descriptions Tab

1) User Defined Competency Description

Code 1

Blank = Do not display description 1

A valid Competency Description Code

Use this processing option to list the code for the first Job Competency Code description to show. This code is associated with the first radio button on the form. When a Job Competency Code and the first radio button are selected, the associated description is displayed.

2) User Defined Competency Description

Code 2

Blank = Do not display description 2

A valid Competency Description Code

Use this processing option to list the code for the second Job Competency Code description to show. This code is associated with the second radio button on the form. When a Job Competency Code and the second radio button are selected, the associated description is displayed.

3) User Defined Competency Description

Code 3

Blank = Do not display description 3
A valid Competency Description Code

Use this processing option to list the code for the third Job Competency Code description to show. This code is associated with the third radio button on the form. When a Job Competency Code and the third radio button are selected, the associated description is displayed.

4) User Defined Competency Description
Code 4

Blank = Do not display description 4
A valid Competency Description Code

Use this processing option to list the code for the fourth Job Competency Code description to show. This code is associated with the fourth radio button on the form. When a Job Competency Code and the fourth radio button are selected, the associated description is displayed.

5) User Defined Competency Description
Code 5

Blank = Do not display description 5
A valid Competency Description Code

Use this processing option to list the code for the fifth Job Competency Code description to show. This code is associated with the fifth radio button on the form. When a Job Competency Code and the fifth radio button are selected, the associated description is displayed.

6) User Defined Competency Description
Code 6

Blank = Do not display description 6
A valid Competency Description Code

Use this processing option to list the code for the sixth Job Competency Code

description to show. This code is associated with the sixth radio button on the form. When a Job Competency Code and the sixth radio button are selected, the associated description is displayed.

7) View Language Specific User Defined Competency Description.

1 = Yes

0 = No

Use this processing option to indicate whether language specific descriptions should be used. If this flag is set to 1, the program will look for a description in the user's language. If this language is not found, the default language will be used. If this flag is set to 0, the default language will always be used.

Versions Tab

1) Jobs in an Organization Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Jobs Workbench program (P08007) to use. The default is ZJDE0001.

2) Job Competencies Version

Blank = ZJDE0003

A valid version

Use this processing option to specify the version of the Job Competencies program (P08009) to use. The default is ZJDE0001.

3) Gap Analysis Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Gap Analysis program (P08009) to use. The default is ZJDE0001.

4) Organizational Structure Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Organizational Structure program (P0050) to use. The default is ZJDE0001.

5) Copy Job Competencies Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Copy Job Competencies program (P080020) to use. The default is ZJDE0001.

6) Job Competency Defaults and or Overrides Version

Blank = ZJDE0003

A valid version

Use this processing option to specify what version of Job Competency Defaults and or Overrides (P080018) to use when exiting to that program.

Attaching Jobs to Organizational Levels

To reduce data entry and simplify the process of attaching job competencies to the jobs within your organization, you can attach jobs to the business units that compose the hierarchical levels of an organizational structure. You perform this task after you have created an organizational structure for job competencies.

When you attach a job to a business unit, the job inherits all of the competencies that are attached to that business unit and to the highest level of the organizational structure. Regardless of the business unit to which the job is attached, the job also inherits the competencies that are attached to its job group. If necessary, you can attach additional competencies to the job or override certain information for the inherited competencies.

When your organization restructures, you can easily move a job from one business unit in the organizational structure to another.

Self-Service Considerations

Your organization might have set up the Jobs in an Organization program (P08007) as a self-service application that managers and employees can use to review jobs within the organizational structure. If you are accessing Jobs in an Organization from a self-service program, such as the Form menu on Managers Workbench, you can review the organizational structure to see where each job is attached, but you cannot attach or delete any jobs within the structure.

Before You Begin

- Define the jobs for your organization. See [Entering Job Information](#).
- Define the organizational structure for job competencies. See [Defining Organizational Structures for Job Competencies](#).

► To attach a job to an organizational level

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Jobs In An Organization.

1. On Work With Jobs In An Organization, complete the following fields and click Find:

- Effective Date
- Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The hammer icon indicates a job. On the right side of the detail area, the system displays the jobs that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To attach a job to a level in the structure, click once on the level to select it, click once on the job to select it, and then click Add.

The job appears in the tree view under the level that you chose.

4. To remove a job from a level in the structure, click once on the job in the tree view and then click Delete.
5. Complete steps 3 and 4 for as many jobs as you need to add or delete.
6. To save your work, choose Submit from the Form menu.

See Also

- Overriding Inherited Job Competencies*
- Attaching Additional Job Competencies* for information about entering specific competencies for job groups and individual jobs

Attaching Additional Job Competencies

After you attach competencies to the organizational structure, you can attach additional, more specific competencies to each of the following:

- Business units
- Job groups
- Jobs
- Individual jobs within a business unit

Attaching additional competencies gives you the flexibility to customize competencies to a particular job and still take advantage of the time-saving qualities of inheritance. When you attach a job competency to a business unit or job group, all of the jobs within that business unit or job group inherit the competency.

For each job, you can also attach competencies that are specific to a particular business unit. For example, the job Administrative Assistant might require different competencies when it is in the Information Technology business unit than it does when it is in the Finance business unit. You can also override certain information for inherited competencies.

In some cases, you might want to override the decision to include a competency in gap analysis. For example, a competency such as word processing skills might be essential to the job Administrative Assistant. The job Programmer might also require word processing skills, but these skills are considered minor requirements compared to the other more essential competencies, such as programming languages and analytical thinking ability. Therefore, you might choose to include that competency in the gap analysis and performance review for administrative assistants, but not in the gap analysis and performance review for programmers.

Before You Begin

- Attach jobs and job competencies to the levels in the organizational structure. See [Attaching Job Competencies to Organizational Levels](#) and [Attaching Jobs to Organizational Levels](#).

► To attach additional job competencies

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Jobs In An Organization.

1. On Work With Jobs In An Organization, complete the following fields and click Find:
 - Effective Date
 - Type Structure
2. From the Form menu, choose Competencies For:, and then choose one of the following options:
 - Organization
 - Job Group
 - Business Unit
 - Job
 - Job Within A BU

PeopleSoft®

Select Workspace: Active Foundation

Attached Job Competency Codes

Job Competency Code	Job Competency	Include in Gap and Performance	Description	Job Compet Source
EDUC	Education Level	1 Yes		
LEAD	Leadership Qualities	1 Yes	Managers	
MGT	Management Skills	1 Yes	Managers	
MNGREL	Managing Relationships	1 Yes	Corporate C	
RESP	Responsibility/Accountability	1 Yes	Corporate C	
STRAT	Strategic Agility	1 Yes	Corporate C	
VCOM	Verbal Communication Skills	1 Yes	Managers	

3. On Attached Job Competency Codes, complete all of the following fields in the header area that correspond to the menu option that you chose, and then click Find:

- Type Structure
- Job Group
- Organizational Business Unit
- Job Type/Step

For example, if you chose Competencies For: Job Group from the menu, you would complete the Job Group field on Attached Job Competency Codes.

4. To override the decision to include an existing competency in gap analyses and performance appraisals, change the value for that competency in the following field in the detail area:
- Include In Gap Analysis And Performance Appraisal
5. To add a job competency, complete the following fields in the first blank line of the detail area.
- Job Competency Code
 - Job Competency Source
 - Include In Gap Analysis And Performance Appraisal

- Overrides Exist Flag
- When you have finished entering information, click OK.

See Also

Overriding Inherited Job Competencies

Overriding Inherited Job Competencies

When you attach a competency to an organizational structure, business unit, or job group, the jobs within that level inherit that competency. After you review the inherited competencies for a job, you might need to customize these competencies to the particular needs of an organizational structure, business unit, job group, or job. For example, a competency such as computer skills might require a different level of proficiency for computer programmers than it does for administrative assistants. When you set up the options for this job competency, you might enter a basic level of proficiency. Then, for the job computer programmer (which inherits the competency), you can override the competency options by entering a different level of proficiency.

Whenever you add, change, or delete any descriptions or options for an inherited or attached competency, you are overriding that competency. You can override any inherited or attached competency at any level in the organizational structure.

Before You Begin

- Attach jobs and job competencies to the levels in the organizational structure. See [Attaching Job Competencies to Organizational Levels](#) and [Attaching Jobs to Organizational Levels](#).

► To override competency descriptions

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competencies In An Organization.

1. On Work With Job Competencies In An Organization, complete the following fields and click Find:

- Effective Date
- Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To review existing overrides, choose a competency in the tree structure and then choose Edit Descriptions from the Row menu.

The screenshot shows the PeopleSoft Job Competency Description Review interface. At the top, there's a navigation bar with links for Portal, MyNet, Intranet, and Training. Below that is a toolbar with icons for Find, Close, Form, Tools, and a magnifying glass. The main area has a title 'Job Competency Description Review' and a sub-section 'Inherited Competency Description'. On the left, there's a tree view of the organizational structure. On the right, there's a table with columns for Type Structure, Job Competency Code, Corporate Competency Structure, and other details like Organizational Business Unit and Language. Below this is a section for 'Competency Description Overrides' with 'Employee View' selected and a text area containing a competency definition.

4. On Job Competency Description Review, choose one of the following options and then review the corresponding definition:
 - Human Resource View
 - Manager Coaching View
 - Employee View
 - Manager View
5. To override a description, choose the option for that description and then choose Add Description from the Form menu.
6. On Job Competency Description Maintenance, enter a text description and then click OK.

► To override competency options

From the Competency Mgmt/Periodic Processing menu (G05BC2), choose Job Competencies In An Organization.

1. On Work With Job Competencies In An Organization, complete the following fields and click Find:
 - Effective Date
 - Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To review the current options and enter overrides, choose a competency in the tree structure and then choose Override Options from the Row menu.

	Option Number	Preferred Method	Preferred Method Description	Competency Type	Competency Type Description	Competency Code	Competency Code Description
<input checked="" type="radio"/>	1	0	No	002	Skill	DECI	Decisive
<input type="radio"/>				002	Skill	QUAL	Quality

4. On Work With Job Competency Options, review the information in the detail area to see which competencies have been inherited or overridden.
5. To add an override for an option, click Add and then complete the steps for defining job competency options.

See [Defining Job Competency Options](#).

Note

You can also delete or modify any of the existing options.

Related Tasks

Reviewing default descriptions	From Work with Job Competencies in an Organization, you can review the default descriptions for a competency by choosing a competency from the list on the right side of the detail area and then choosing Default Description from the Row menu. The system displays the default descriptions for the competency that you choose. For instructions for adding options, see <u>Defining Job Competencies and Descriptions</u> .
Reviewing default options	From Work with Job Competencies in an Organization, you can review the default options for a competency by choosing a competency from the list on the right side of the grid and then choosing Default Options from the Row menu.

menu. The system displays the default options for the competency that you choose. For instructions for adding options, see [Defining Job Competency Options](#).

Excluding a competency from gap analysis

If you want to include a competency in the gap analysis for some jobs but not all, you can enter that information when you attach an additional competency to a business unit, job group, or job. See [Attaching Additional Job Competencies](#).

Reviewing Job Competency Information

After you attach jobs and job competencies to levels in the organizational structure and enter any overrides, you might need to review attached competencies and competency overrides to ensure that they have been applied consistently. You can review override information, such as effective dates and gap analysis inclusion, for any of the following:

- Jobs
- Job groups
- Business units
- Organizational structures

If you need to add or revise any job competency information, you can use the options on the Form and Row menus to access the forms for entering job competencies, competency options, and competency descriptions. You can revise override information, as well as default information.

► To review job competency information

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competency Defaults and or Overrides.

1. On Work with Job Competency Attached and Overridden, complete any of the following fields:
 - Type Structure
 - Job Competency Code
 - Job Group
 - Organizational Business Unit
 - Job Type
 - Job Step
2. Choose one of the following options:
 - Attached Competencies
 - Overridden Competencies
 - Both
3. Click Find.

Work with Job Competency Attached and Overridden

Option	Included in Gap and Performance Appraisal	Description
Attached Competencies	COR	Corporate Competency Structu ACH
Attached Competencies	COR	Corporate Competency Structu VCOM
Attached Competencies	COR	Corporate Competency Structu WCOM

- Review the information in the detail area.

Translating Job Competency Descriptions

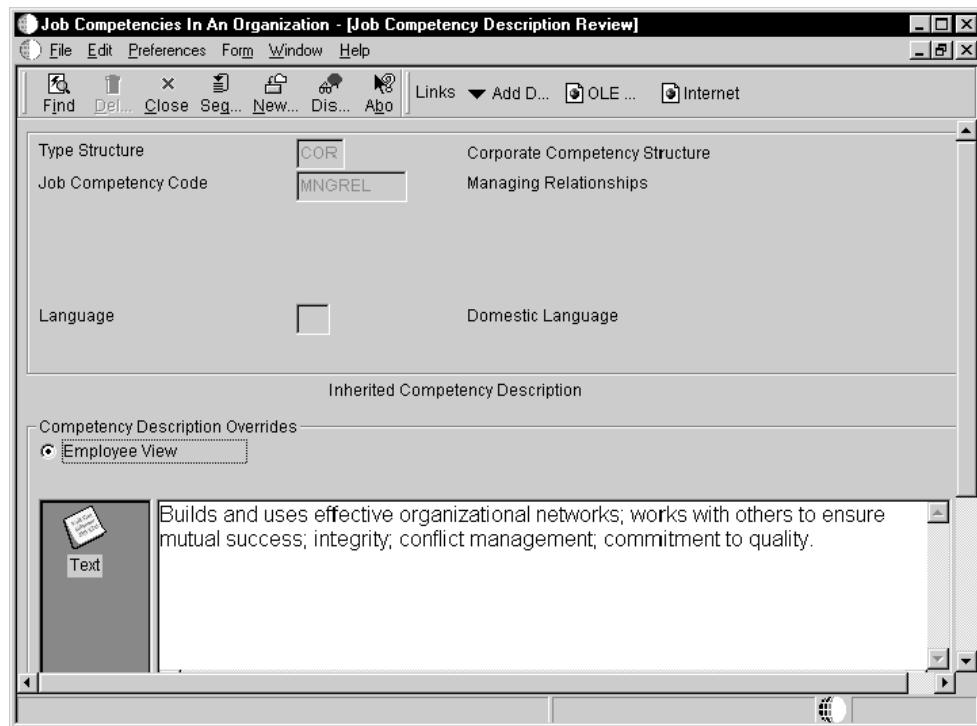
When you enter descriptions for job competencies, the system stores those descriptions in the domestic language that is specified in your user profile. If your organization has employees in more than one country, you might need to translate these descriptions into one or more additional languages. Because the system stores job competency descriptions as media objects, they are not translated along with the rest of the software. You enter translated descriptions manually, using the Job Competencies Description Translation program.

► To translate job competency descriptions

From the Competency Mgmt Advanced & Tech Oper menu (G05BC3), choose Job Competency Description Translation.

- On Work With Job Competencies Description Translation, complete the following fields and then click Find to locate the job competency description that you need to translate:
 - Type Structure
 - Job Competency Code
- To narrow your search, complete any of the following fields or options, and then click Find:

- Organizational Structure
 - Organizational Business Unit
 - Effective Date
 - Job Group
 - Job Type
 - Job Step
 - Language
 - Descriptions Not Translated
3. Choose one of the following options to specify the audience for the description:
- View 1
 - View 2
 - View 3



4. Choose a record in the detail area and then click Select.
5. On Job Competency Description Review, to add a new, translated description for this view, choose Add Description from the Form Menu.
6. On Job Competency Description Maintenance, complete the following field:

- Language
7. Enter the translated description in the media attachment area at the bottom of the form.
 8. To attach other types of electronic attachments, such as pictures and links to Internet pages, right-click in the exit bar to the left of the media object, choose New from the menu, and then choose the type of object that you want to attach.
 9. When you have finished entering attachments, click OK.
 10. To enter a translated description for another audience, repeat steps 1 through 8.
Repeat these steps until you have entered a translated description for each of the audiences.

Related Topics

Revising descriptions	To revise an existing description for a job competency, choose the Update Description option from the Form menu of Job Competency Description Maintenance.
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Processing Options for Job Competency Description Translations (P080019)

Versions Tab

1) Job Competencies in an Organization

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

Activating Draft Organizational Structures

From the Competency Mgmt Advanced & Tech Oper menu (G05BC3), choose Activate Job Competencies.

When you create a new organizational structure or copy and modify an existing one, the system maintains that organization structure in draft mode. You can modify the draft organizational structure and add jobs and job competencies to it without affecting the active structure. When you are ready to begin using the draft structure, you can run a program that updates the status of the structure to Active. Activating the draft structure also makes that structure the default structure for your organization (the structure that your organization is currently using to track job competency information).

After you activate a draft structure, you cannot change it back to a draft again. To help you verify that the information in the draft structure is correct before you activate it, you can set processing options to run the program in proof mode and print a verification report. When you run the program in proof mode, the system does not update the tables to indicate that the

structure is the default, active structure. When you run the program in update mode, the system performs the following functions:

- Changes the status and date of the draft organizational structure to indicate that it is Active. Because you might have more than one draft structure, you must enter in the processing options the name of the structure that you want to activate.
- Enters an ending effective date for the structure that is currently the default structure for job competencies, if one exists. The system maintains a historical record of this structure's status so that you will know the dates when it was used as the default structure.
- Updates the system options to indicate that the new structure is the default structure.
- Updates the following tables:
 - HR Constants (F08043)
 - Date Effective Organizational Structure (F0800608)
 - Organizational Business Unit/Job Cross-Reference (F0800601)
 - Job Group Competencies (F0800603)
 - Organizational Business Unit Competencies (F0800604)
 - Job Type/Step Competencies (F0800605)
 - Competency Rules/Overrides (F0800606)
 - Date Effective Organizational Structure (F0800607)
 - Competencies in Structure and Job (F0800610)
 - Job Competency Default - Overrides (F0800611)
 - Job Competency Descriptions (F0800612)

Processing Options for Activate Job Competencies (R080014)

Display Tab

1) Show Detail

0 = No

1 = Yes

Blank = 1

A code that specifies whether the system prints a detailed report. Valid values are:

- 0 No, the system does not print a detailed report.
- 1 Yes, the system prints a detailed report.

If you leave this processing option blank, the system prints a detailed report.

Defaults Tab

1) Active Organizational Structure End Date

Use this processing option to specify an ending date for the organizational structure that is currently active.

Blank The end date for the active organizational structure will be the current date.

2) New Organization Structure

Use this processing option to specify a new organizational structure. The new structure name is needed for updating the Beginning/End Dates for the new structure.

3) New Organizational Structure Begin Date

Use this processing option to specify a beginning date for the new organizational structure.

4) New Organizational Structure Ending Date

Use this processing option to specify an ending date for the new organizational structure.

Process Tab

1) Final Mode

0 = No

1 = Yes

Blank = 1

A code that specifies in which mode the process will run.

- 0 No, do not run the process in final mode.
- 1 Yes, run the process in final mode and update the appropriate files.

If you leave this processing option blank, the system runs the report in final mode.

Working with Employee Competencies

You use competency management to track the competencies that employees possess and to compare them with those that are required for the employees' jobs. You can track the following types of employee competencies

- Training
- Skills
- Accomplishments
- Certificates
- Degrees
- Languages

You can track a variety of competencies for each competency type. For example, for the Skills competency type, you can track programming skills, communication skills, and so on.

Before you enter competency information for employees, you must define the scales that you use to rate the levels of proficiency that employees demonstrate in each competency. You must also define the specific employee competencies that you are tracking for each competency type. You also can define training courses and specify the competencies that they fulfill.

You set up security for competency levels so that you can specify the type of user within your organization who is responsible for entering competency levels for employee competencies. This feature is particularly useful if your organization allows employees and managers to enter and update competency information using self-service. In some cases when your organization is using employee self-service, you might also want to set up routing instructions for competency approvals. Routing instructions allow you to identify a person, other than an employee's supervisor, who is responsible for approving specific employee competencies or competency types.

When you assign competencies to an employee, you list each competency that the employee possesses, along with the level of proficiency that the employee demonstrates.

Defining Scales for Employee Competencies

A *competency scale* is a method of measuring an employee's level of proficiency in a particular competency. You must associate a scale with each competency before you can begin entering competency information for employees. You can use the same scale for every competency, or you can define a separate scale for each competency. For example, for C programming ability, in the skill competency type, you might define the following numeric scale:

- 1** Beginner
- 2** Competent
- 3** Accomplished
- 4** Expert

For each level on a scale, you define a low value and a high value. Scale values always increase from low to high; therefore, low values always mean less proficient and high values mean more proficient. You can either enter the scale values manually or have the system generate them automatically.

If you are also tracking job competencies, the scales that you define for employee competencies are the same scales that you use for job competencies.

► To define basic information for scales

From the Competency Setup menu (G05BC4), choose Scale Information.

1. On Work With Scales, click Add.

The screenshot shows the 'Review Scales' dialog box from the PeopleSoft application. The dialog has a title bar 'Review Scales' with buttons for OK, Cancel, Tools, and a red X. Below the title bar are three input fields: 'Scale' (5PT), 'Low Value' (1.000), and 'High Value' (5.000). At the bottom of the dialog is a 'Description' field containing the text 'Five Point Performance Scale'. The background of the dialog is light gray, and the overall interface follows the standard PeopleSoft color scheme.

2. On Review Scales, complete the following fields and then click OK:

- Scale
- Low Value

- High Value
- Description

After you create a scale, you must define the values for each level. You can enter the values manually or run a program that assigns them automatically.

► To generate values for scales automatically

From the Competency Setup menu (G05BC4), choose Scale Information.

After you complete the steps to define basic information for scales, you can have the system automatically generate the values for the scales.

1. On Work With Scales, complete the following field and then click Find to locate the scale that you just created:
 - Scale
2. Choose the record in the detail area and then choose Generate Levels from the Row menu.

The screenshot shows the 'Scale Information - Generate Competency Levels/Ranges' dialog box. At the top, there are buttons for OK, Cancel, and Tools. The 'Scale' field contains '5PM' and '5 Point Performance Scale'. The 'Low Value' field is set to '1.000'. The 'Increment By' field is empty. The 'High Value' field is set to '5.000'. The 'Description' field also contains '5 Point Performance Scale'. To the right of the 'High Value' field is a radio button group with two options: 'Distinct Values' (which is selected) and 'Range'.

3. On Generate Competency Levels/Ranges, complete the following field:
 - Increment By
4. Choose one of the following options and then click OK:
 - Distinct Values

- Range

► To enter values for scales manually

From the Competency Setup menu (G05BC4), choose Scale Information.

After you complete the steps to enter basic information for scales, you can enter values for scales manually.

1. On Work With Scales, complete the following field and then click Find to locate the scale that you just created:
 - Scale
2. Choose the record in the detail area and then choose Define Levels from the Row menu.

The screenshot shows the 'Define Competency Levels' window in a PeopleSoft application. The window title is 'Define Competency Levels'. At the top, there are buttons for OK, Delete, Cancel, Tools, and a red X. Below the buttons, the scale name '5PT' is displayed next to a dropdown menu labeled 'Five Point Performance Scale'. The main area is a grid titled 'Customize Grid' with columns: Low Value, High Value, and Description. The first row shows '1.000' in the Low Value column and '1.999' in the High Value column, with the description 'Needs Improvement'. Below this row, there are four more rows with values: 2.000 (2.999 Learner), 3.000 (3.999 Capable), 4.000 (4.999 Accomplished), and 5.000 (5.000 Expert). Each row has a checkbox in the first column.

Low Value	High Value	Description
1.000	1.999	Needs Improvement
2.000	2.999 Learner	
3.000	3.999 Capable	
4.000	4.999 Accomplished	
5.000	5.000 Expert	

3. On Define Competency Levels, complete the following fields:
 - Low Value
 - High Value
 - Description
4. Repeat step 3 for as many competency levels as you need to define and then click OK.

Defining Employee Competencies

You define employee competencies to quantify the skills, training, and expertise that employees possess. You categorize competencies by competency type and then track multiple competencies for that competency type. For example, for the competency type Training you might track the following competencies:

- Employee orientation
- OneWorld Foundations class
- Financials Expedition

After you define employee competencies, you can assign these competencies to employees and indicate the levels of proficiency that employees demonstrate in each competency.

Before You Begin

- Review UDC 05/CY for a list of available competency types. Each of the values in this UDC list represents a competency table. The values in this list are hard coded and cannot be changed. Adding additional values to this list requires that you customize the system.

► To define employee competencies

From the Competency Management menu (G05BC1), choose Competency Information.

1. On Work With Competency Information, click Add.

The screenshot shows the 'Review Competencies' dialog box from the PeopleSoft application. The dialog has a title bar 'Review Competencies' with buttons for OK, Cancel, Form, Tools, and a red X. Below the title bar are several input fields:

- Competency Type: 002
- Competency Code: INIT
- Competency Class: SOFT
- Description: Initiative
- Scale: 5PM
- Auto Calculate Competency:

The background of the dialog shows a standard PeopleSoft interface with a toolbar at the top and various links like Portal, WWW, Internet, Training, etc., at the top right. A 'Select Workspace' dropdown is also visible at the top left.

2. On Review Competencies, complete the following fields and then click OK:

- Competency Type
 - Competency Code
 - Competency Class
 - Description
 - Scale
 - Auto Calculate Competency
3. Repeat steps 1 and 2 for as many competencies as you need to define, and then click OK.

Defining Training Courses

In some cases, a training course might help employees attain a variety of competencies in addition to a specific training competency. For example, a training course in OneWorld Foundation might help employees acquire the following competencies:

Training	OneWorld training
Skills	Basic OneWorld skills
Certification	OneWorld certification

When you define a training course, you can specify the competencies that it affects. Assigning competencies to training courses helps ensure that you consistently update the competency information for the employees who complete those training courses.

► To define training courses

From the Competency Management menu (G05BC1), choose Course Information.

1. On Work With Course Information, click Add.

The screenshot shows the 'Course Information Revisions' page in the PeopleSoft Active Foundation workspace. The top navigation bar includes links for Portal, MyNet, Intranet, Training, and other system icons. The main form has tabs for 'Course Information Revisions' and 'Competency Codes'. The 'Course Information Revisions' tab is active, showing fields for Course Code (PRES1), Provider (INT), Effective From Date (01/01/05), Effective Thru Date (12/31/05), Course Name (Presentation Skills 101), Units (3.0), Cost (450.00), and Training Type. Below these fields is a tree view of competency types: Course Competency X-Reference, Training, Skill, and Accomplishment. To the right of the tree view is a list of competency codes. A large scroll bar is visible on the right side of the form.

2. On Course Information Revisions, complete the following fields:
 - Course Code
 - Provider
 - Effective From Date
 - Effective Thru Date
 - Course Name
 - Units
 - Cost
 - Training Type
3. On the lower-left portion of the form, choose the competency type that the training course affects.
On the lower-right portion of the form, the system displays the competency codes for the competency type that you selected.
4. Choose the competency code that the training course affects and then click the left-arrow button in the lower-middle portion of the form.
A + sign appears next to the competency type. When you click it, the system displays the competency code under the competency type.

5. Repeat steps 3 and 4 for as many competencies as the training course affects.

You can choose multiple competency codes for each competency type.

6. Click OK.

Related Topics

Alternate method of attaching competencies to training courses

After you define a training course, you can use the Define Class/Competency X-Reference form to do any of the following:

- Review the competencies that are attached to the training course
- Attach additional competencies to the training course
- Delete (detach) competencies from the training course

To access the Define Class/Competency X-Reference form, choose Define X-Reference from the Row menu on Work with Course Information.

Setting Up Security for Competency Levels

After an employee or an employee's supervisor enters competency information, another person in the organization, such as a member of the human resources department, might be responsible for assigning a competency level (the employee's level of proficiency) to each competency. You can choose a different person to enter competency levels for each competency type or individual competency.

You set up security for competency levels so that you can specify the type of user who has permission to update the competency levels for each competency that the employee enters. For example, you might set up the training competency type so that the training development manager is responsible for approving each employee's training competencies and entering the competency levels for each employee. In this case, the employees' supervisors could use the Manager's Workbench to enter and review employee training competencies, but the supervisors would not be allowed to enter the competency levels for training competencies.

You use the Competency Update Events program (P05106) to set up security for competency approvals. This program works in conjunction with a processing option on the Resource Competency Information program (P05100) to control access to the Competency Level field. You enter codes in the Competency Update Events program that represent a type of user, such as supervisors. These codes correspond to the values that you enter in a processing option on Resource Competency Information. You set up different versions of Resource Competency Information for each type of user.

Before You Begin

- Set up the user defined code list for competency update codes (05/CU). The codes that you enter in this list correspond to the values that you enter in the Competency Update Event Code processing option for the Resource Competency Information program.

► To set up security for competency levels

From the Competency Setup menu (G05BC4), choose Competency Update Events.

1. On Competency Update Event Revisions, complete the following field to specify a category of user who is responsible for approving competencies:

- Competency Update Event Code

To give the users who are assigned to this competency update event code access to the competency levels for all employee competencies, leave the remaining fields on the form blank.

2. To limit the users who are assigned to this competency update event code to a specific competency type, complete the following field:
 - Competency Type
3. To limit the users who are assigned to this competency update event code to a specific competency within the competency type, complete the following field:
 - Competency Code

If you enter a competency code, you must enter a competency type.
4. To limit the users who are assigned to this competency update event code to a specific competency class, complete the following field:
 - Competency Class
5. Repeat steps 1 through 4 for as many competencies, competency classes, and competency types as you need to assign to a competency update event code, and then click OK.

Setting Up Routing Instructions for Competency Approvals

Your organization might allow employees to use self-service to enter their own competency information. After the employee enters competency information, the system sends an e-mail message to the person who is responsible for approving the employee's competencies. Typically, employees' supervisors are responsible for approving the information that employees enter and for assigning a competency level (the employee's level of proficiency) to each competency. In some cases, however, you might want someone other than the employees' supervisors to assign competency levels. For example, the training development manager might be responsible for approving training competencies. Routing also occurs when another person adds competency information for an employee but is unable to update the competency levels.

You set up routing instructions for competency approvals so that you can identify a person, other than the employee's supervisor, who is responsible for approving specific employee competencies or competency types. You can choose a different person to approve each competency type or individual competency. For example, you can set up the routing instructions so that the training development manager is responsible for approving employee training competencies and the employees' supervisors are responsible for approving all other types of competencies.

When you set up routing instructions for a competency, the system sends an approval message to the person specified in the routing instructions when any other user enters information in that employee competency. For example, supervisors might be allowed to enter competency information for their employees, but they might not be responsible for approving training competency information. In this case, when a supervisor enters a training competency for an employee, the training development manager receives the approval message, just as he would if the employee entered the training competency.

If one or more competencies have no routing instructions specified, the system automatically routes approval messages for those competencies to the employee's supervisor.

► To set up routing instructions for competency approvals

From the Competency Setup menu (G05BC4), choose Competency Update Approval Routing.

1. On Competency Approval Routing Revision, to limit the approver's authority to only those employees who are in a particular organization business unit, complete the following field:
 - Organizational Business Unit
2. To enter routing instructions for a particular competency type, complete the following field:
 - Competency Type
3. To enter routing instructions for a particular competency code within a competency type, complete the following field:
 - Competency Code

If you enter a competency code, you must enter a competency type.
4. Complete the following field:
 - Address Number
5. Repeat steps 1 through 4 for as many routing instructions as you need to add, and then click OK.

Assigning Competencies to Employees

After you define employee competencies, you can assign those competencies to employees and indicate the level of proficiency that employees demonstrate in each competency. By tracking competencies for employees, you can determine the competencies that they need in order to satisfy the requirements of their current jobs and any jobs that they hope to obtain in the future. You can also create clear career goals and performance objectives for employees.

Self-Service Considerations

Because maintaining competency information for all of the employees in an organization can be a time-consuming task for human resources representatives, your organization might have set up the employee competency programs as self-service programs that managers can access from the Managers Workbench. Managers can enter and review competency information only for those employees who report to them.

Your organization can also activate the employee self-service programs for competency management. Employees can use these programs to enter their own competency information and then request that their managers approve the information. The employee self-service programs for competency management are slightly different from the competency programs that you access from the Competency Management menu and the Managers Workbench; however, the two sets of programs contain essentially the same information.

Before You Begin

- ❑ Enter an organizational business unit for each employee for whom you plan to assign competencies. You enter organizational business units on the Organizational Assignment form (P0801ORG). See [Entering Organizational Assignment Information](#).

See Also

- ❑ *Entering Competency Information Using Self-Service* for information about how employees can use self-service to enter their own competency information

► To assign training competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 001 in the following field and then click Add:
 - Competency Type

The screenshot shows the PeopleSoft interface for 'Review Training & Development'. At the top, there's a toolbar with icons for Portal, WWW, Intranet, and Training. Below the toolbar, a navigation bar shows 'Active Foundation' and links for Personalize, Change Role, and Sign Out. The main window has a title 'Review Training & Development' and a sub-section 'Training/Development'. A detail area contains fields for Resource Type (01, Individual), Address Number (7500, McDougle, Cathy), Competency Type (001, Training), Competency Code (MGMT, Management Training), and Competency Level (3.000, Obtained). Below this is a grid titled 'Records 1 - 2' with columns for Provider, Course Code, Course Description, Start Date, End Date, Grade, Location Room, Delivery Type, Units, and Cost. One record is visible: MSEC, TEAM3, Team Building for Managers, 03/15/00, 03/18/00 A, 145, CLASSROOM, 3.0.

2. On Review Training & Development, complete the following fields:
 - Address Number
 - Competency Code
 - Competency Level
3. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
4. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
5. On Review Training & Development, complete the following fields in the detail area:

- Provider
 - Course Code
 - Start Date
 - End Date
 - Grade
 - Location Room
 - Delivery Type
 - Units
 - Cost
 - Training Reason
6. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
 7. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
 8. Repeat steps 5 through 7 for as many training courses as you need to enter for this employee and competency code, and then click OK.

► **To assign skill competencies**

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 002 in the following field, and then click Add:
 - Competency Type

PeopleSoft®

Description	Date Acquired	Verified By	Status	Status Description
Accomplished	01/01/05		Approved	<input checked="" type="checkbox"/>

2. On Skills/Resource Revisions, complete the following fields:
 - Address Number
 - Competency Code
3. Review the following fields:
 - Competency Level
 - Resource Type
4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. On Skills/Resource Revisions, complete the following fields in the detail area:
 - Description
 - Date Acquired
 - Verified By
 - Status

7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
9. Repeat steps 5 through 7 for as many skills as you need to enter for this employee and competency code, and then click OK.

► To assign accomplishment competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 003 in the following field and click Add:
 - Competency Type

Accomplishment Type	Accomplishment Type Description	Date Achieved	Awarding Organization	Date Awarded	Status	Status Description
3	Other	06/20/05	A Model Financial Reptg Co.	06/20/05	1	Complete

2. On Review Accomplishments, complete the following fields:
 - Address Number
 - Competency Code
3. Review the following field:
 - Competency Level
4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.

5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. On Review Accomplishments, complete the following fields in the detail area:
 - Accomplishment Type
 - Date Achieved
 - Awarding Organization
 - Date Awarded
 - Status
7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
9. Repeat steps 5 through 7 for as many accomplishments as you need to enter for this employee and competency code, and then click OK.

► **To assign certification competencies**

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 004 in the following field and click Add:
 - Competency Type

PeopleSoft®

The screenshot shows the PeopleSoft Active Foundation application. The title bar says "PeopleSoft®". The menu bar includes "Portal", "MyNet", "Intranet", "Training", and other options like "Personalize", "Change Role", and "Sign Out". The main window is titled "Certification Revisions". It has a toolbar with icons for OK, Find, Delete, Cancel, Form, Row, Tools, and a red X. Below the toolbar is a grid titled "Customize Grid" with columns: Licensing Body, Licensing Body Description, Licensing Number, Issue Date, Expiration Date, Verified By, Score Rating, and Verification Method. One row is selected, showing HRCI as the licensing body and Human Res Cert Institute as the description. At the bottom of the grid is a scroll bar. Above the grid is a detail view area with tabs for "Certifications" and "Attachments". The "Certifications" tab is selected, showing fields for Resource Type (01 Individual), Address Number (7500 McDougle, Cathy), Competency Type (004 Certificate), Competency Code (SPHR Sr. Prof. in Human Resources), Competency Level (3.000 Obtained), and Expiration Date (08/01/01).

2. On Certification Revisions, complete the following fields:
 - Address Number
 - Competency Code
3. Review the following fields:
 - Resource Type
 - Competency Level
4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. On Certification Revisions, complete the following fields in the detail area:
 - Licensing Body
 - Licensing Number
 - Issue Date
 - Expiration Date
 - Verified By

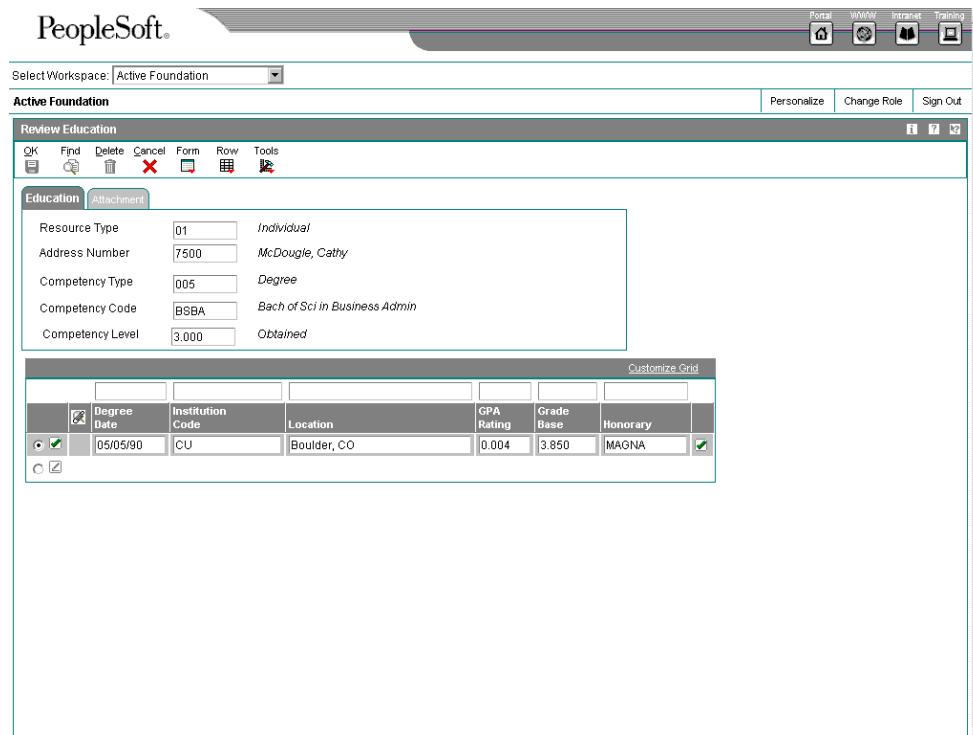
- Score Rating
 - Verification Method
 - Renewal Code
 - Cost
 - Status
7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
 8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
 9. Repeat steps 5 through 7 for as many certifications as you need to enter for this employee and competency code, and then click OK.

► To assign education competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 005 in the following field and click Add:

- Competency Type



The screenshot shows the PeopleSoft Review Education interface. At the top, there's a toolbar with icons for Portal, Web, Intranet, Training, and others. Below the toolbar, a navigation bar includes 'Select Workspace: Active Foundation' and links for Personalize, Change Role, and Sign Out. The main window has a title bar 'Review Education' with tabs for 'Education' (selected) and 'Attachment'. Under the 'Education' tab, there's a form with fields: Resource Type (01, Individual), Address Number (7500, McDougle, Cathy), Competency Type (005, Degree), Competency Code (BSBA, Bach of Sci in Business Admin), and Competency Level (3.000, Obtained). Below the form is a grid titled 'Customize Grid' with columns: Degree Date, Institution Code, Location, GPA Rating, Grade Base, and Honorary. A single row is visible in the grid, showing data: 05/05/90, CU, Boulder, CO, 0.004, 3.850, MAGNA.

2. On Review Education, complete the following fields:

- Address Number
 - Competency Code
3. Review the following field:
 - Competency Level
 4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
 5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
 6. On Review Education, complete the following fields in the detail area:
 - Degree Date
 - Institution Code
 - Location
 - GPA Rating
 - Grade Base
 - Honorary
 7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
 8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
 9. Repeat steps 5 through 7 for as many educational entries as you need to make for this employee and competency code, and then click OK.

► **To assign language competencies**

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 006 in the following field and click Add:
 - Competency Type

The screenshot shows the PeopleSoft Active Foundation workspace. The top navigation bar includes links for Portal, MyNet, Intranet, Training, and a user icon. The main area is titled "Active Foundation" and contains the "Review Languages" application. The application has two tabs: "Language" (selected) and "Attachments". The "Language" tab displays a form with the following data:

Resource Type	01	Individual
Address Number	7500	McDougle, Cathy
Competency Type	006	Language
Competency Code	SIGN	Sign Language
Competency Level	5.000	

Below the form is a grid titled "Records 1 - 1" with the following data:

Status Date	Status	Status Description
06/02/97	F	Fluent

2. On Review Languages, complete the following fields:
 - Address Number
 - Competency Code
3. Review the following fields:
 - Resource Type
 - Competency Level
4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. Complete the following fields in the detail area:
 - Status Date
 - Status
7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.

9. Repeat steps 5 through 7 for as many languages as you need to enter for this employee and competency code and then click OK.

Processing Options for Resource Competency Information (P05100)

Edits Tab

1. Competency Update Event Code

Use this processing option to enter a code that specifies a type of user that has access to employee competency information. The code that you enter must exist in the user defined code list for competency update codes (05/CU). This code also corresponds to a code that you entered in the Competency Update Event Code field in the Competency Update Events program (P05106).

You use this processing option in conjunction with the Competency Update Events program to control access to the Competency Level field for specific types of users. You set up different versions of Resource Competency Information for each type of user. For example, you might define a Competency Update Event Code called Train that you use to represent your organization's training manager. You can use the Competency Update Events program to grant Train the ability to update competency levels for all training competencies.

You then set up a version of the Resource Competency Information program for Train.

Reviewing Competency History for Employees

Each time someone enters or changes competency information for an employee, the system creates a historical record of the new information. You can review this history to determine whether an employee is becoming more proficient in a particular competency.

► **To review competency history for employees**

From the Competency Management menu (G05BC1), choose Competency History.

1. On Work With Competency History, complete any of the following fields, and then click Find:
 - Resource Type
 - Address Number

- Competency Type
- Competency Code

Resource Type	Resource Type Description	Address Numbr	Description	Competency Type	Competency Type Description	Competency Code
01	Individual	7500	McDougle, Cathy	001	Training	BENST
01	Individual	7500	McDougle, Cathy	001	Training	WRIT
01	Individual	7500	McDougle, Cathy	002	Skill	ACCOUNT
01	Individual	7500	McDougle, Cathy	002	Skill	ANALY
01	Individual	7500	McDougle, Cathy	002	Skill	COMM
01	Individual	7500	McDougle, Cathy	002	Skill	COMMIT
01	Individual	7500	McDougle, Cathy	002	Skill	CONFRES
01	Individual	7500	McDougle, Cathy	002	Skill	CONT
01	Individual	7500	McDougle, Cathy	002	Skill	COURT
01	Individual	7500	McDougle, Cathy	002	Skill	CREAT

2. Review the information in the detail area.

Working with Gap Analysis

Gap analysis is the process of comparing the competencies that an employee possesses to the competencies that are required for the employee's current job, or for a job to which the employee aspires. Managers and employees can use gap analysis to develop training plans and career paths for employees who want to examine the possible career opportunities within the organization.

The system includes an online review program that you can use to review gap analysis information for individual employees. Your organization can set up this online review program for self-service so that managers and employees also can access the gap analysis information that is relevant to them.

When you need to review gap analysis information for a group of employees, you can print the Gap Analysis report. To determine which employees are qualified for a particular job, you can print the Job Match report.

To make it easier to determine which employees are competent for a particular type of job, you can define *competency aggregates*, that is, groups of related competencies. You can use the Review Competencies report to determine whether an employee has competencies in a particular competency aggregate.

Before You Begin

- Enter employee and job competency information. See [Working with Job Competency Information](#) and [Working with Employee Competencies](#).

Reviewing Gap Analysis Online

When you need to compare the competencies that an employee possesses with those that are required for a particular job, you can review gap analysis information online. You can use this information to help employees set competency goals. For each employee and job, you can determine whether the employee possesses the required competencies. You can also determine whether the employee's level of competency is sufficient to meet the competency level that is required for the job.

Self-Service Considerations

Your organization might have set up the Competencies Gap Analysis program (P08008) as a self-service application for managers and employees. When you access Competencies Gap Analysis from employee self-service, you can review information about yourself only. If you are a manager who is accessing gap analysis from the Row menu on Manager's Workbench, you can review information only for those employees who report to you.

► **To review gap analysis online**

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Gap Analysis.

1. On Work With Employee Competency Gap Analysis, complete the following fields and click Find:

- Individual Identification
- Job Type/Step
- Organizational Business Unit
- Effective Date
- Type Structure

If you are accessing gap analysis from Managers Workbench or employee self-service, the effective date and type structure are not available to you.

2. Choose a record in the detail area and then click Select.

Competency Type	Competency Type Description	Employee Competency Code	Employee Competency Code Description	Required Level
002	Skill	FORW	Forward Looking	
002	Skill	INNOV	Innovative	
	Weighted Total			

3. On Employee Gap Analysis Detail, review the information in the detail area.
4. To determine whether the employee is performing at the required competency level for the job, compare the values in the following fields:
 - Required Level
 - Employee Level
5. When you have finished reviewing information, click OK.

See Also

- *Reviewing the Gap Analysis Report*

Reviewing the Gap Analysis Report

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Gap Analysis Report.

When you need to compare the competencies that employees possess with those that are required for a particular job, you can review the Gap Analysis report. This report lists detailed gap analysis information for a group of employees. You can use this information to help employees set competency goals. For each employee and job, you can determine whether the employee possesses the required competencies. You can also determine whether the employee's level of competency is sufficient to meet the competency level that is required for the job.

See Also

- Reviewing Gap Analysis Online*

Processing Options for Gap Analysis Report (R080013)

Defaults Tab

Use this processing option to specify the types of job-related information that will appear on the report.

1. Organization Type Structure

Blank = Default organizational structure

Use this processing option to specify the organizational structure to be used in the Gap Analysis report (R080013). This will report the gap analysis of employee competencies as it relates to job competencies for the specified organizational structure.

If this is left blank, the default organizational structure will be used.

2. Job Type

Blank = Employee's current Job Type

Use this processing option to produce a Gap Analysis report (R080013) on a specific job type. If a value is entered, it is also necessary to specify an organizational business unit.

Blank will produce a Gap Analysis report (R080013) of employees in their current job.

3. Job Step

Blank = Employee's current Job Step

Use this processing option to produce a Gap Analysis report (R080013) on a specific job step. If a value is entered, it is also necessary to specify an

organizational business unit and the job type.

4. Organizational Business Unit

Blank = Employee's current

organizational business unit

Use this processing option to identify the organizational business unit for which you want to produce a Gap Analysis report (R080013). If a value is entered, it is also necessary to specify a job type and job step. The default value of Blank will produce the Gap Analysis report (R080013) of all employees in their current job type and step.

5. Date - Effective

Blank = Today's date

Use this processing option to produce a Gap Analysis report (R080013) at a specific point in time. The default value of Blank will produce a Gap Analysis report (R080013) of employees for a current date.

6. Default Job Competency Weight %

Blank = Do not default weights

1 = Default weights

Use this processing option to specify whether to use equal amounts as the default for job competency weight percentages. Equal amounts will be the default for the job competency percentages only if all the job competencies within a particular job are equal to zero. Valid values are:

1 Use equal amounts for competency weight percentages.

Blank Do not use equal amounts for competency weight percentages.

Display Tab

Use this processing option to specify whether Job Option details will appear on the report.

1. Show Job Option Details

1 = Yes (Default)

0 = No

Use this processing option to indicate whether to show details about job

competency options. Valid values are:

- 1 Yes, show the option details (employee competencies) for each job competency. This value is the default.
 - 0 No, do not show detail information.
-

Reviewing the Job Match Report

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Match Report.

When you need to determine the employees who are qualified for a particular job, you can review the Job Match report. This report lists all of the required competencies for the job and the proficiency level that the employee has attained in each of these competencies. You can use a processing option to specify the minimum proficiency level that the job requires, and the report will include only those employees who have attained that minimum proficiency level. When you have a job opening within your organization, you can use this information to help you determine which employees are qualified to fill the opening.

Processing Options for Job Match Report (R080016)

Select Tab

These processing options specify job-related information that will appear on the report.

1. Minimum Job Competency Percent

Achieved

Use this processing option to indicate the minimum job competency percent achieved. The jobs that will be reported on the Job Match report (R080016) will be those where the employee's competencies are high enough that the minimum job competency percent achieved has been reached or exceeded.

2. Job Type

Blank = All Jobs

Use this processing option to search a specific job for the Job Match report (R080016). A blank value has the Job Match report (R080016) search through

all jobs.

3. Job Step

*** = All Job Steps**

Use this processing option to search a specific job for the Job Match report (R080016). A blank value has the Job Match (R080016) report search through all jobs.

4. Job Group

*** = All Job Groups**

Use this processing option to search a specific job group for the Job Match report (R080016). An asterisk (*) has the Job Match report (R080016) search through all job groups.

5. Organizational Business Unit

Blank = All Jobs in all organizational business units

Use this processing option to search through jobs that are in the specified organizational business unit. A blank value indicates that all jobs in all organizational business units will be searched.

6. Date - Effective

Blank = Current date

Use this processing option to select jobs and job competencies as of a specified date. A blank value will report jobs and job competencies for the current date.

Default Tab

Use this processing option to specify the type of organizational structure related to this job.

1. Organization Type Structure

Blank = Default organizational structure

type

Use this processing option to specify the organizational structure. A blank value will produce the organizational structure setup in the HR Constants.

Display Tab

Use this processing option to specify whether job option and job competency details will appear on the report.

1. Show Job Option Details

Blank = Yes

1 = Yes

0 = No

Use this processing option to indicate whether to hide or show job option details. Select 1 to show the option details (employee competencies) for a job competency. Select 0 to hide these details.

2. Show Job Competency Details

Blank = Yes

1 = Yes

0 = No

Use this processing option to hide or show job competency details. A value of 1 will show the job competencies that make up a job. A value of 0 will not show the job competencies.

Defining Competency Aggregates

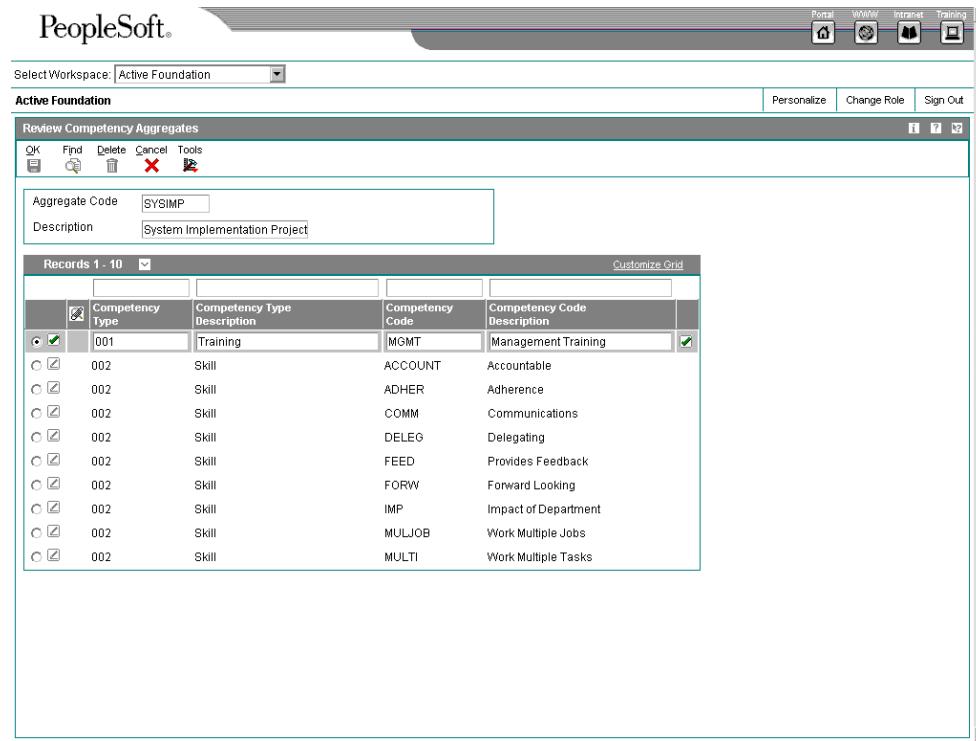
To make it easier to determine which employees are competent for a particular type of job, you can define *competency aggregates*. A competency aggregate is a group of related competencies. These competencies can be from different competency types. For example, you might create a competency aggregate called Manager that includes all of the competencies that apply to management jobs. The Manager aggregate might include the following competencies:

- | | |
|-----------------|--|
| Skills | <ul style="list-style-type: none">• Leadership ability• Conflict resolution skills• Communication skills |
| Training | <ul style="list-style-type: none">• Managing at XYZ company |
| Degree | <ul style="list-style-type: none">• MBA |

► To define competency aggregates

From the Competency Setup menu (G05BC4), choose Competency Aggregates.

1. On Work With Competency Aggregates, click Find to review any existing competency aggregates.
2. Click Add.



3. On Review Competency Aggregates, complete the following fields:
 - Aggregate Code
 - Description
4. To include a competency code in this competency aggregate, complete the following fields in the detail area:
 - Competency Type
 - Competency Code
5. Repeat step 4 for as many competency codes as you want to include in the aggregate, and then click OK.

Reviewing the Review Competencies Report

From the Competency Management menu (G05BC1), choose Review Competency Aggregates.

When you need to determine the employees who have competencies in a particular competency aggregate, you can review the Review Competencies report. For a particular competency aggregate, this report lists each employee competency, including the proficiency level that the employee has attained in the competency.

Processing Options for Review Competencies (R05100A)

Default

1. Aggregate Code

Performance Management

According to an HR study, 52 percent of workers want their supervisors to state performance goals more clearly. Nearly 40 percent of workers want their performance on the job tied closely to their development plans and compensation. The survey also found that 42 percent of workers were at least moderately dissatisfied with the employer system of performance evaluation. The authors of the study linked this dissatisfaction to the absence of a standard appraisal process and failure to define employer performance expectations clearly.

Organizations need to efficiently manage performance appraisals. Automating this process by aligning appraisal criteria with organizational goals and realities increases the use, value, and employee acceptance of this performance management tool. Managers and employees can use performance management to automate the tedious, labor-intensive process of performance appraisals. This software tool integrates performance appraisal criteria with the core competencies of an organization, business unit, and individual job. By connecting appraisal criteria to the goals and objectives of the organization, you can provide a vital, strategic link to improved performance and employee job satisfaction. This integration also helps to reduce employee fears about performance appraisals. The performance management system provides an approach that is fair, concise, and collaborative. Employees can see the links between their own performance criteria and each of the following:

- Goals of the organization
- Compensation increases
- Job promotions
- Focused training
- Development programs

The performance management system uses periodic evaluations for managers and employees to plan, evaluate, and track work performance and personal goals. This system provides an automated approach for managers and employees to electronically document their perspectives, followed by an interview. The system records the final ratings in an employee competency database. Managers and employees can use this approach to accomplish the following:

- Identify strengths
- Identify opportunities for improvement
- Create plans to develop new skills
- Create plans to improve existing skills
- Evaluate performance issues
- Apply historical performance data for compensation considerations

A performance diary, which executes reminder and history functions, provides a quick approach for managers and employees to document performance activities. These performance diary entries can be either negative or positive, as an employee's performance is documented. Diary entries provide a systematic method for recording incidents that might

be important when the manager evaluates subsequent appraisal and reward decisions. Employees can also create and attach diary entries to their self-appraisal.

Employee Goals, a group of programs for setting and tracking job-related objectives, is integrated with the employee competency database and provides an expanded use for the performance management system. Managers can use Employee goals to work closely with an employee and set goals to help the employee improve in specific skills of a job.

The performance management system routes in-process appraisals through an appropriate approval structure, including a final approval or rejection by the employee.

Building upon the multilingual capabilities of employee and job competencies, the J.D. Edwards performance appraisal system also presents appraisal and competency criteria in the individual's native language.

Performance management provides a tool that is valuable for two types of organizations: an organization that is ready to implement a competency-based approach to job descriptions; and an organization that might not be ready to implement a competency-based appraisal system, but still wants to automate standard appraisal templates.

Competency-Based Performance Appraisals

In the competency-based approach to performance appraisals, a hierarchy defines job competencies. For example, a company can define the following:

- Core organizational competencies
- Competencies specific to business units
- Competencies specific to job groups
- Competencies specific to a job

You link the competency hierarchy of a job to the employees in the job. Each job description automatically inherits the competency definitions for each applicable level.

Managers use the performance appraisal to assess the current level and consistent demonstration of each competency and to assign an applicable rating. The system weighs and averages rating factors and then calculates an inclusive performance rating for each employee. The system records the most current performance appraisal rating in the Employee Competency database. The system then records the overall competency or performance rating in the Employee Master table for subsequent consideration in compensation analysis and focal reviews.

Traditional (Non-Competency-Based) Appraisals

For organizations that have not adopted a competency-based approach to human resource management, J.D. Edwards provides a traditional template approach for performance appraisals. These user defined templates can be specific to a particular company within an organization, a business unit, job group, or particular job. The system stores the templates as text objects.

Employees in any given job automatically inherit the performance appraisal template that is specific to their job. Employees complete a self-appraisal, and managers complete a management appraisal, each based on standard templates. The system adds the over-all appraisal rating to the employee master table for subsequent consideration in compensation analysis and focal reviews. Similar to competency-based appraisals, employees and managers can collaborate electronically about their perspectives, followed by an interview.

The template-based appraisal system also routes in-process appraisals through the appropriate approval channels, including the final approval or contest by the employee.

Users can also create the text object templates in multiple languages. You must create a separate text media object template for each language that you support.

Setting Up Performance Management

To implement a performance management system, you must define performance appraisal methods as either competency-based or traditional. You define these methods at the system level; and you can override the settings by company, business unit, or appraisal type. Defining the performance appraisal methods at these levels allows you to implement the performance management system for the whole organization or in steps. For example, you can implement a competency-based method for a selected business unit and use the traditional method to automate text-based appraisals for other business units. You can also define a competency-based appraisal method for appraisals created by managers and a traditional appraisal method for employee self-appraisals.

The performance management system includes a default company definition that specifies a traditional performance appraisal method. You can redefine this method description, add additional method descriptions, or change this method to a competency-based method. You cannot delete the basic company definition.

If you are planning to implement a competency-based performance appraisal method or a combination of competency-based and traditional methods, you must first define the organizational structures for job competencies and enter background competency information.

Before You Begin

- Define organizational structures for job competencies. See *Defining Organizational Structures for Job Competencies*.
- Enter job competency information. See *Working with Job Competency Information*.
- Attach jobs and job competencies to the hierarchical levels within the organizational structure that you created for job competencies. See *Working with Competencies in Organizational Structures*.
- Assign employee competency information. See *Working with Employee Competencies*.

Defining Scales for Performance Management

A competency rating scale is a method of measuring an employee's level of proficiency in a particular skill area or job assignment. One or more competency rating scales must be associated with performance management. You might use different competency rating scales to measure different employee competencies. For example, if an employee must pass an internal certification process as a prerequisite for promotional consideration, an appropriate competency rating scale might include only pass or fail, or a scale of two. If an employee competency requires measured progress toward a goal, then a competency rating scale of five or ten might be appropriate.

The performance management system usually requires new competency rating scales that measure employee performance progress. If only one competency rating scale exists for competency management, and that scale is applicable to all performance management situations, then you can reuse the same scale in performance management. If more than one scale exists for competency management, then you must define one or more competency rating scales for performance management.

When you define rating scales for performance management, you must specify the rating level that represents 100% of the organizational performance expectation. For example, if you use a rating scale of 10, you might define 100% as a rating level of 5. Applying this approach, if a manager rates an employee at a level of 6 for a specific competency, the employee is performing above 100% of the organizational expectation.

You use the Scale Information program (P05103) to create new competency rating scales for performance management. See *Defining Scales for Employee Competencies* for the procedure to setting up the rating scales.

Before You Begin

- Review any rating scales that might exist for competency management. You use the Scale Information (P05103) program to inquire about existing competency rating scales. See *Defining Scales for Employee Competencies*.
- Review the user defined code list for review type codes (06/RV). The codes that you enter in this list correspond to the values that you choose in the Create Performance Appraisals program.
- Review the user defined code list for the relation to employee codes (08/RI). The codes that you enter in this list correspond to the values that you choose in the Daily Diary program.
- Review the user defined code list for the originator type codes (05/G2). The codes that you enter in this list correspond to the values that you enter in the Audience Flag processing option for the Create Group Performance Appraisals and Employee Performance Appraisals programs.
- Review the following user defined code lists for the available values that you can use in setting up the performance management system:
 - Goal status (05/G3)
 - Approval type (05/AP)
 - Gap status (08/GT)
 - Appraisers role (08/AL)
 - Appraisal status (08/SA)

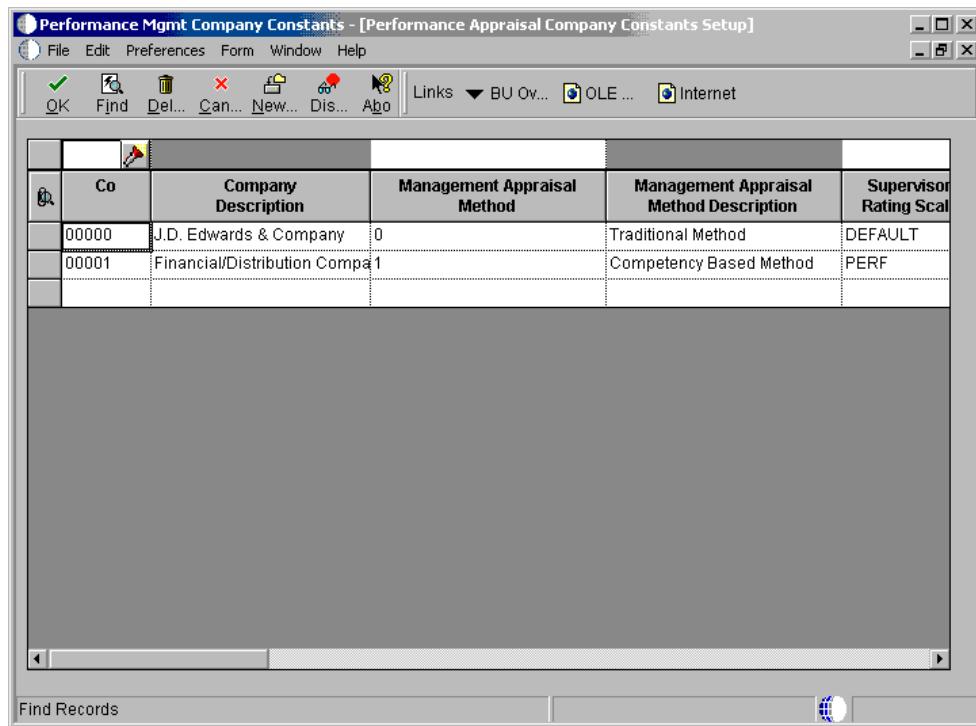
The values in these lists cannot be changed. Adding additional values to this list requires that you customize the system.

Defining Performance Management Company Constants

To customize the performance management system, change the basic company definition or add a new one. The system supplies the default company record 0000. If you do not choose to further refine your performance method by creating an additional company, business unit override, or template override, the system uses the default company settings.

► **To define performance management company constants**

From the Performance Management Setup menu (G08PM4), choose Performance Mgmt Company Constants.



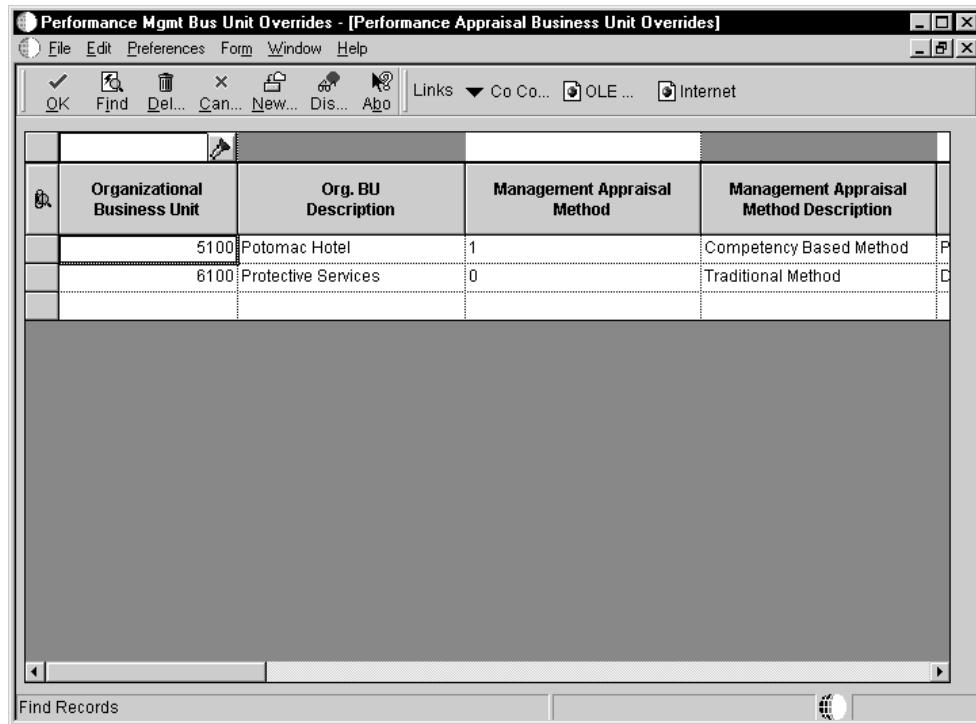
1. On Performance Appraisal Company Constants Setup, click Find, and then complete the following fields:
 - Co
 - Management Appraisal Method
 - Supervisor Rating Scale
 - Required Level
 - Self Appraisal Required
 - Self Appraisal Method
 - Employee Rating Scale
 - Required Self Appraisal Level
2. Click OK.
3. To create a new company performance appraisal method description, tab to a new row and repeat steps 1 and 2.

Defining Performance Management Business Unit Overrides

You can refine your performance appraisal method by defining overrides at the business unit level. This adjustment allows your company to use one performance appraisal method in one business unit and a different method in another business unit.

► **To define performance appraisal business unit overrides**

From the Performance Management Setup menu (G08PM4), choose Performance Mgmt Bus Unit Overrides.



1. On Performance Appraisal Business Unit Overrides, complete the following fields, and then click OK:
 - Organizational Business Unit
 - Management Appraisal Method
 - Supervisor Rating Scale
 - Required Level
 - Self Appraisal Required
 - Self Appraisal Method
 - Employee Rating Scale
 - Required Self Appraisal Level
2. To create a new performance appraisal method description at a business unit level, tab to a new row and repeat steps 1 and 2.

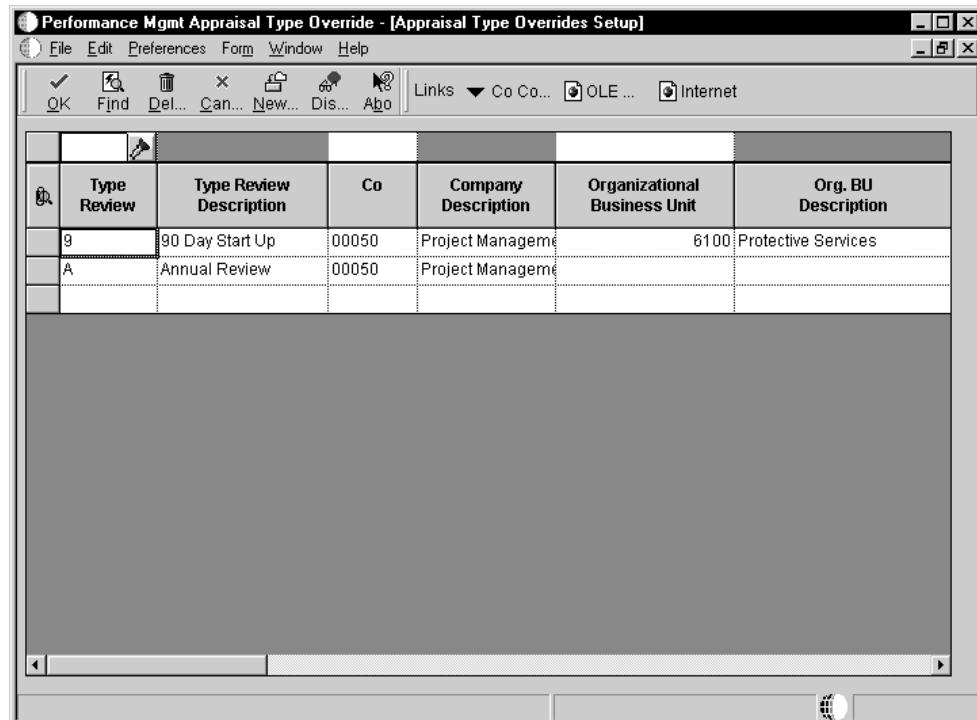
Defining Performance Management Appraisal Type Overrides

In addition to defining your performance appraisal method with business unit overrides, you can further refine your method by defining overrides at the appraisal type level. Using this approach, your company can implement different performance appraisal methods that you can use for various types of reviews. For example, you might want to use different performance appraisal methods for the following types of reviews:

- Merit cycle
- 90-day start-up
- Annual
- Contractual

► To define performance appraisal type overrides

From the Performance Management Setup menu (G08PM4), choose Performance Mgmt Appraisal Type Override.



1. On Appraisal Type Overrides Setup, complete the following fields:

- Type Review
- Management Appraisal Method
- Supervisor Rating Scale
- Required Level

- Self Appraisal Required
 - Self Appraisal Method
 - Employee Rating Scale
 - Required Self Appraisal Level
2. Complete the following optional fields:
 - Co
 - Organizational Business Unit
 3. To create a new performance appraisal method description for an additional performance appraisal type, tab to a new row and repeat Steps 1 and 2.
 4. Click OK.

Setting Up Security for Competency Levels

When a manager creates and reviews a performance appraisal, the system automatically revises the employee's competency ratings, based on your security settings. For example, you can set up system security so that a manager can revise appropriate employee competency ratings that are related to performance issues, but you can reserve the ability to change education competencies for HR. You must create and define a performance management UDC so that managers can update appropriate competency levels.

After creating a new UDC code for performance management, you use this code in the processing options for the Employee Performance Appraisals program (P087712).

You use the Competency Update Events program (P05106) to create and define a UDC to set up security for competency approvals. See *Setting Up Security for Competency Levels* in *Working with Employee Competencies*.

Defining the Approval Hierarchy

The performance management system also automates the approval process for performance appraisals. When a manager completes an appraisal, the system routes it to the person or persons that the administrator designates for review. You can specify any number of management levels for review. You can also specify the highest, final level of review, which is normally the employee. All designated managers must complete their reviews before the system forwards a message to the employee indicating that the appraisal is ready for review.

You use the Define Approval Hierarchy (P05844) program to establish the approval hierarchy before creating new appraisals. You must define at least one performance appraisal UDC so that the company can include the required approval levels. See *Setting Up the Approval Hierarchy* in the *Human Resources Guide*.

The automated approval function of the performance management system, which uses a hierarchy of approving managers, depends on accurate information about the parent-child relationships in your organization. This information is set up and compiled by the Employee/Supervisor Relationship Build report (R05846). This report normally runs daily as part of the compensation management program. If this report is not set up or is not running daily, then choose the Employee/Supervisor Relationship Build report from the Performance Management Advanced and Technical menu (G08PM3) and set up the report to run daily.

Setting Up Traditional Appraisal Templates

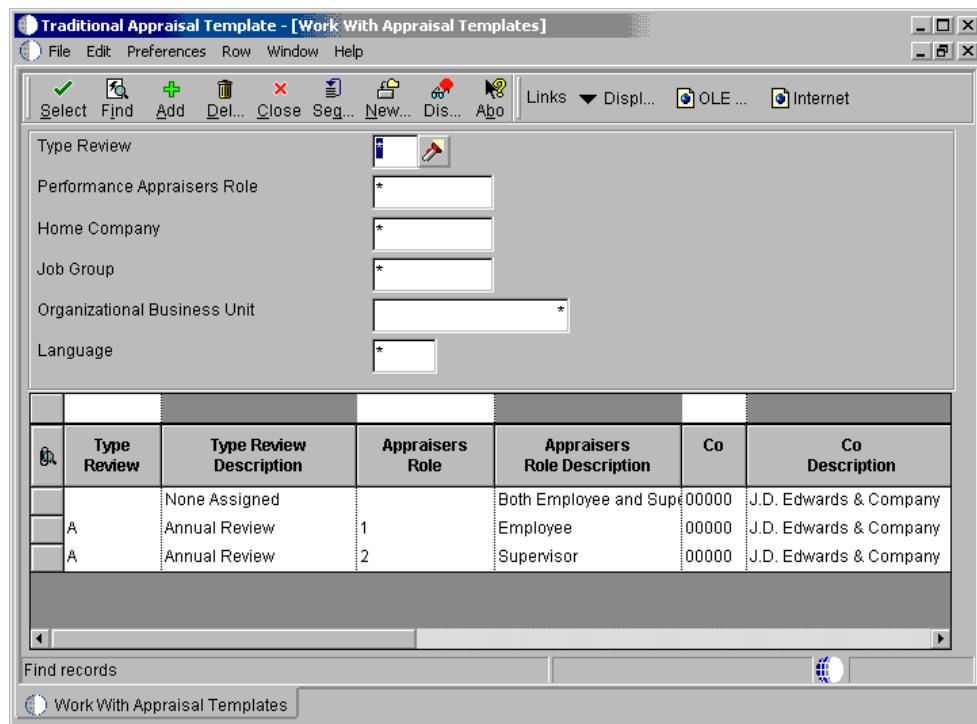
The traditional employee appraisal is similar to paper-based systems currently used by many companies. You create and store media objects, often text-based templates, in your system software. You can also use the daily diary and automated approval features of the J.D. Edwards performance management system with traditional appraisals.

You can also use alternate media objects with the traditional appraisal approach. For example, you can attach any type of file that your system supports to the appraisal, or you can enter a URL that connects a user to an appraisal form that is located on your company's intranet.

The system supplies the default template record for company 0000. You can customize this template or you can create a new one. You cannot delete this record. If you do not choose to create an additional template, the system uses the default template record.

► To set up a traditional appraisal template

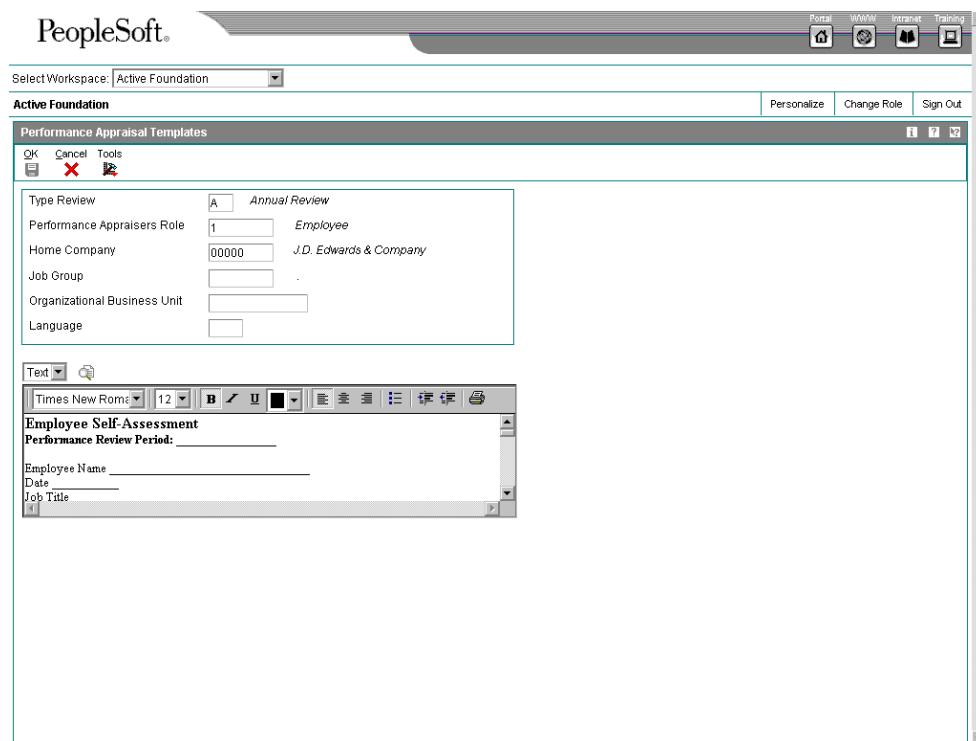
From the Performance Management Setup menu (G08PM4), choose Traditional Appraisal Template.



1. On Work With Appraisal Templates, click Find and review templates that might exist.
You can modify existing review types to suit your company's needs or you can add new ones.
2. To create a new type of review, click Add.
3. On Performance Appraisal Templates, complete the following field:

- Home Company
4. Complete the following optional fields:
- Type Review
 - Performance Appraisers Role
 - Job Group
 - Organizational Business Unit
 - Language

The system uses the language information that is based on your system sign-on. You can choose a different language if you are creating appraisal templates in another language.



5. Attach an appraisal media object and then click OK.

See *Working with Media Objects* for instructions on how to create and attach a template media object or link.

Setting Up Employee Goal Suggestions

You use the Goal Suggestions (P05105A) program to set up employee goal suggestions that you can use when you are creating a career development plan. You can add one or more UDC codes to create additional suggestion types. After creating a suggestion type, you can add a list of suggestions that an employee might use to accomplish a goal.

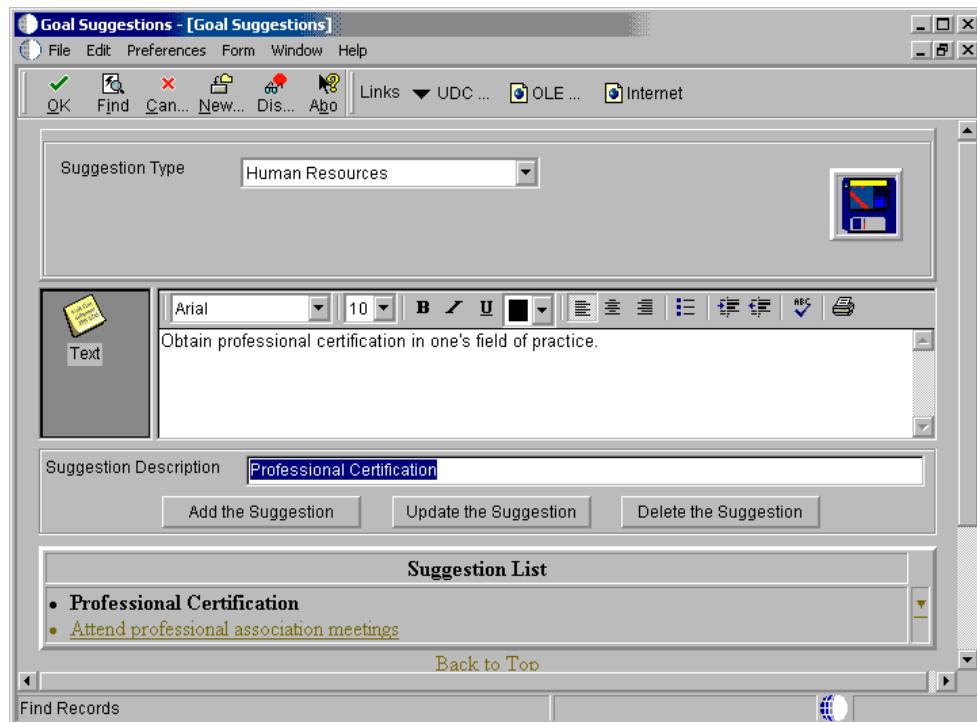
Managers and employees use the Create a Career Development Plan option on the employee performance appraisal to create goal suggestions. You can create suggestion types and ideas for work-related goals and for an employee's personal goals that might be beyond the scope of the company.

Before You Begin

- Review the user defined code list for goal type codes (05/GT). The codes that you enter in this list correspond to the values that you choose in the Goal Action Plans program for competency-based or traditional appraisals.
- Review the user defined code list for suggestion type codes (05/G1). The codes that you enter in this list correspond to the values that you choose in the Goal Action Plans program for traditional appraisals.

► To set up employee goal suggestions

From the Performance Management Setup menu (G08PM4), choose Goal Suggestions.



1. On Goal Suggestions, complete the following field and then click Find:
 - Suggestion Type
To enter suggestions for an employee competency, you must use the Competency Information program (P05104).
2. To add a new suggestion, complete the following field, type the new suggestion into the notes field, click Add the Suggestion, and then click the diskette icon to save the new suggestion:

- Suggestion Description

You can also attach a media object or URL that might support the suggestion. See *Working with Media Objects* in the *OneWorld Xe Foundation Guide* for instructions on how to create and attach a template media object or link.

3. To change an existing suggestion, click the desired entry in the Suggestion List, modify the text in the notes area, and then click Update the Suggestion.
4. To delete a suggestion, click the desired entry in the Suggestion List and then click Delete the Suggestion.
5. When you are finished adding or modifying suggestions, click OK to save the changes and exit the form.

If you click the diskette icon instead of clicking OK, the system saves your suggestions but does not close the form.

Creating Appraisals

The same process creates either competency-based or traditional employee performance appraisals. Competency-based appraisals use an extensive system of job and employee competencies that are defined before appraisals are created. Most of this information is defined when the competency management system is set up.

The traditional appraisal approach uses appraisal templates that are stored in your system as text files and then completed when appraisals are due. An appraisal template can be any media object and is frequently an interactive form on your company's intranet.

After you complete either a competency-based or traditional appraisal, submit it for automatic approval routing, which is based on a user-defined approval hierarchy.

In the competency management system, you define organizational, job, and employee competencies. The competency-based performance appraisal system integrates those competencies with employee performance. You track employee activities throughout the year and create employee performance appraisals that compare employee performance with the required competencies for each job.

When employee performance appraisals are due, either a workforce management administrator or managers can create the appraisals. You can create an appraisal for any employee who is your direct or indirect subordinate. After a workforce management administrator or a manager creates an employee performance appraisal, the manager reviews the appraisal, updates competency ratings as required, adds notes, and attaches pertinent diary entries. See *Maintaining a Performance Diary*.

When creating an appraisal, you can specify whether you will go directly into the review program. This option is available only when you create a single appraisal. Although managers normally revise employee performance appraisals, a workforce management administrator can perform this function if necessary.

After you create the appraisals, the system automatically sends a message to each manager that one or more appraisals are ready for review. If you set up the performance management system to require employee self-appraisals, the system also automatically sends a message notifying each employee that a self-appraisal is due.

Running the Upcoming Reviews Report

From the Performance Mgmt Periodic Processing menu (G08PM2), choose Upcoming Reviews.

The Upcoming Reviews report (R052202) creates report versions that select groups of employees who are due to receive an employee performance appraisal as of a specific date or within a specified number of days. The system generates a list of employees based on the criteria you specify. The Create Performance Appraisals program (P087711) selects the employees, creates appraisals, and sends messages to each of the employees and managers.

You might use this report approach when you are generating employee performance appraisals for the whole company or a specific business unit.

Processing Options for Upcoming Reviews (R052202)

Defaults Tab

These processing options specify information about the employee and supervisor.

1. Employee Number Display

A = Address Book

S = Social Security Number

O = Other Number

Use this processing option to specify the employee number to print on the report. Valid values are:

A

Address book number

S

Employee tax identification number

O

Other number

2. URL For Supervisor Review Instructions

Use this processing option to specify the uniform resource locator for the supervisor review instructions.

Process Tab

These processing options specify the dates for which you want to review appraisals and whether to run the workflow reminder process.

1. Workflow Reminder Process

1 = Run workflow

0 = Don't run workflow

Use this processing option to specify whether to run the workflow reminder process. Valid values are:

0

Do not run the workflow process.

1

Run the workflow process.

2. From Date

Use this processing option to limit reviews. You must enter a date that is less than or equal to the date that you enter in the Thru Date processing option for this program.

3. Thru Date

Use this processing option to limit reviews processed. The date that you enter must be greater than or equal to the date that you enter for the From Date processing option in this program.

4. Days From Today

Use this processing option to limit reviews processed. Enter Days From Today to process all new review dates that are less than or equal to the system date and the number of days entered into the processing option. Enter Date of Thru Date to ignore this option.

Generating Employee Performance Appraisals for a Group

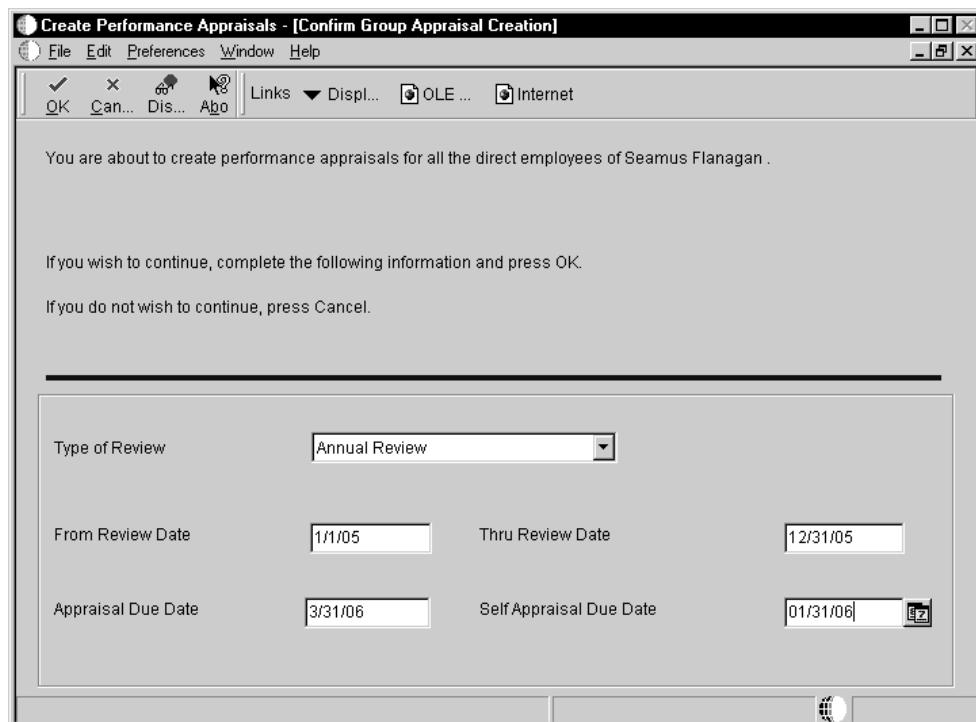
You use the Create Performance Appraisals program (P087711) to select employees and create employee performance appraisals for a group. When creating employee performance appraisals, you can select any of the following for appraisal:

- An individual employee
- All of the employees who report directly to you
- All of the employees who report directly or indirectly to you

► To generate employee performance appraisals for a group

From the Performance Mgmt Periodic Processing menu (G08PM2), choose Create Performance Appraisals.

1. On Create Group Performance Appraisals, complete the following field:
 - Supervisor
2. Choose one of the following options:
 - Direct Reports
 - Direct and Indirect Reports
3. From the Form menu, choose Create Direct or Create All.



4. On Confirm Group Appraisal Creation, complete the following fields and then click OK:

- Type of Review
 - From Review Date
 - Appraisal Due Date
 - Thru Review Date
 - Self Appraisal Due Date
5. The system automatically creates employee performance appraisals for the selected employees and sends a message to each employee and manager.

Processing Options for Create Group Performance Appraisals (P087711)

Defaults Tab

These processing options specify the defaults that the system applies when an HR representative or a manager creates performance appraisals.

1) Audience Flag

Blank = 2

2 = Supervisor

3 = Human Resources

Use this processing option to specify the type of user who is reviewing performance appraisals. Valid values are:

Blank or 2

Supervisor

3

Human Resources

2) Direct or Direct and Indirect Employees

Blank = 0

0 = Direct Only

1 = Direct and Indirect

Use this processing option to specify the group of employees that the system displays, based on the group's reporting relationship to the manager. Valid values are:

Blank or 0

Direct reports only

1

Direct and indirect reports

3) Default Job Competency Weight %

Blank = 0

0 = Do Not default weights

1 = Default weights

Use this processing option to specify whether the system automatically weights competency ratings in the competency-based performance appraisals you create. When you choose to use the default weights, the system enters a default value in the Competency Weight Percentage field. The system determines the default value by dividing 100 by the total number of job competencies. For example, if a job consists of four job competencies, the system completes the Competency Weight Percentage field with 25. The system enters the default value only when the existing percentage amount is zero for all of the job competencies for a particular job. Valid values are:

Blank or 0

Do not use default values

1

Use default value

Versions Tab

These processing options specify the version that the system uses for each program. Each version is a user defined set of specifications that control how programs and reports run. You use versions to group and save a set of user defined processing options, values, data selections, and sequencing options.

Performance Appraisal Revisions

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Performance Appraisal Revisions (P08711) program that the system runs. If you do not specify a version, the system runs version ZJDE0001.

Generating Individual Employee Performance Appraisals

You use the Create Performance Appraisals program (P087711) to choose an individual employee and create an employee performance appraisal.

Additional options exist in this program for creating performance appraisals for groups of employees. See *Generating Employee Performance Appraisals for a Group* for the procedures to create multiple appraisals at one time.

See Also

- *Reviewing a Competency-Based Performance Appraisal* for instructions on how to revise employee performance appraisals using manager self-service

► To generate individual employee performance appraisals

From the Performance Mgmt Periodic Processing menu (G08PM2), choose Create Performance Appraisals.

PeopleSoft®

Alpha Name	Ty Row	Next Scheduled Review Type	Next Scheduled Review Date	Date Started	Emp St	Employment Status	P C	Pay Class
McLind, Rod	A	Annual Review	08/01/05	07/27/05		Full-time Regular	S	Salaried
Ingram, Paul	A	Annual Review	04/01/05	03/15/05		Full-time Regular	S	Salaried
Nguyen, Daniel	A	Annual Review	01/01/00	02/28/99		Full-time Regular	S	Salaried
Escalante, George	A	Annual Review	11/01/05	1/01/04		Full-time Regular	H	Hourly
Ellis, Jody A.	A	Annual Review	07/01/05	06/29/04		Full-time Regular	H	Hourly
Bretton, Josephine	A	Annual Review	12/31/06	11/30/04		Full-time Regular	H	Hourly
Fraser, Carol	A	Annual Review	06/01/05	06/01/04		Full-time Regular	H	Hourly
Kellerman, James	A	Annual Review	01/01/05	09/01/04		Full-time Regular	P	Piecework
Carmichael, Bradley P.	A	Annual Review	09/01/04	08/05/03		Full-time Regular	S	Salaried
Marshall, Anthony	A	Annual Review	01/01/03	09/25/02		Full-time Regular	S	Salaried

- On Create Group Performance Appraisals, complete the following field:
 - Supervisor
- Choose one of the following options, and then click Find:
 - Direct Reports
 - Direct and Indirect Reports
- Choose an employee record and click Select.
- On Create Employee Performance Appraisal, complete the following fields:
 - Type of Review
 - From Review Date
 - Appraisal Due Date
 - Thru Review Date
 - Self Appraisal Due Date
- If you want the system to create the appraisal and automatically proceed to the appraisal review, click the following option:
 - Begin Performance Appraisal Process

The Begin the Appraisal Process option is only available when you select one employee. When you select two or more employee records, this option is not included on the form.

6. Click OK.

The system automatically creates an employee performance appraisal and sends a message to the employee and the manager indicating that the appraisal is ready for review.

7. On Confirmation, click OK.

If you chose the option to begin the appraisal process, the Competency Based Performance Appraisal Revisions form appears.

See *Reviewing a Competency-Based Performance Appraisal* using manager self-service for the steps on how to revise appraisals.

Revising an Employee Performance Appraisal

From the Job Competencies menu (G05JC1), choose Current Performance Appraisal.

After you create one or more employee performance appraisals, and managers receive a message that one or more appraisals are ready for review, a manager reviews each system-generated appraisal. If you set up the system to require employee self-appraisals, the manager also reviews the employee self-appraisal, and then adds or changes information and ratings as appropriate. The manager then schedules a meeting with each employee to discuss the appraisal and obtain feedback.

The manager uses the Current Performance Appraisals program (P087712) to select employees who are due for an appraisal, make changes, and adjust the ratings. If HR selects employees whose appraisals are due and creates the appraisals, then the manager opens the current appraisal and revises the rating if necessary. If HR does not create the appraisals, the manager can use this program to create them.

When you use the competency-based appraisal approach, the system automatically compares job competencies to demonstrated employee competencies. The system rates employee performance and includes this information on the appraisal. When a manager adjust the system-generated rating, the system automatically adjusts the competency ratings accordingly. You use processing options to define the changes that a manager can make.

Applying the traditional appraisal approach, managers use the Upcoming Reviews by Supervisor report to list the employees for whom a performance appraisal is due. Managers use the Current Performance Appraisals program (P087712) to find employees for whom an appraisal is due and manually complete the appraisal from a template. A manager can attach media objects to the appraisal template. An example of a media object might be a link to a report that documents the rating that you assign. If the system requires employee self-appraisals, it sends a message to each employee that their self-appraisal is due.

After completing an appraisal, the manager submits it for review. When the originating manager submits the appraisal, the system locks it, preventing changes. This lock also prevents changes to any performance diary entries that the manager connects to the appraisal. If the second-level manager rejects the appraisal and returns it for additional changes, the system automatically unlocks the appraisal. The system routes the appraisal to each approving manager, following a user defined approval hierarchy.

When the highest level manager in the approval hierarchy completes the review and approves the appraisal, the system sends the originating manager a message to notify the

employee that the appraisal is ready for final review. The manager selects the appraisal record and uses the Notify Employee menu option to send a message to the employee.

After the manager notifies an employee, the employee reviews the manager appraisal from the Employee Self-Service menu and approves or contests it. When the employee takes either action, the system locks the appraisal, preventing any additional changes.

The manager then meets with the employee to discuss the ratings. If a manager needs to enter additional changes, then he or she must create a new appraisal, add the changes, and submit the new appraisal for approvals.

Although HR can review employee performance appraisals and make changes, most companies require that managers perform this function.

See Also

- Reviewing a Competency-Based Performance Appraisal* using manager self-service for the steps on how to revise appraisals.

Working with Self-Service Performance Appraisals

Employee self-service manages performance appraisals. When a performance appraisal is due, either HR or a manager creates an employee performance appraisal and notifies you when it is ready for your review. If your company also uses performance self-appraisals, you will receive a message indicating that you are required to prepare and submit a performance self-appraisal.

Completing a performance self-appraisal includes the following tasks:

- Maintaining a performance diary
- Reviewing a competency-based performance self-appraisal
- Reviewing a traditional performance self-appraisal
- Reviewing a performance appraisal from your manager
- Defining Employee Goals Using Employee Self-Service

A performance self-appraisal evaluates your job performance and provides historic examples of activities that you complete. After you submit your self-appraisal, the system sends a message to your manager indicating that the appraisal is ready for review. If you need to make additional changes to the self-appraisal after you submit it, your manager can reset the appraisal status so that you can enter changes and resubmit it.

After you submit the performance self-appraisal to your manager, the manager reviews it and prepares an employee performance appraisal. The manager submits the appraisal for approval using a predefined approval hierarchy. When all approvals are complete, your manager sends a message to you indicating that the appraisal is ready for your review. You then review the appraisal, and either accept or contest it. The manager then schedules a meeting with you to review the appraisal and obtain feedback. You are normally the final step of the approval process.

Depending on your system settings, you can use one of two performance self-appraisal approaches: competency-based or traditional (text-based). The competency-based performance self-appraisal approach generates an appraisal that compares required job competencies to your demonstrated employee competencies. You use the traditional performance self-appraisal approach to manually complete an appraisal template. You then review the performance self-appraisal and make appropriate changes. You can also attach

appropriate diary entries that provide examples of performance activities. See *Maintaining a Performance Diary*.

Maintaining a Performance Diary

A performance diary is a collection of notes and attachments that you compile throughout the year. These notes document activities and accomplishments in your life that impact your job performance. You can also use the performance diary to maintain notes and attachments regarding a manager's performance or another employee's performance. For example, you might track job-related tasks that you accomplish, the completion of a course of study, client commendations regarding your assistance, or any other activity that might affect your performance appraisal. The Daily Diary program (P087715) records and classifies information by the following criteria:

- Employee
- Subject
- Subject type
- Relation to employee
- Relation to a performance appraisal

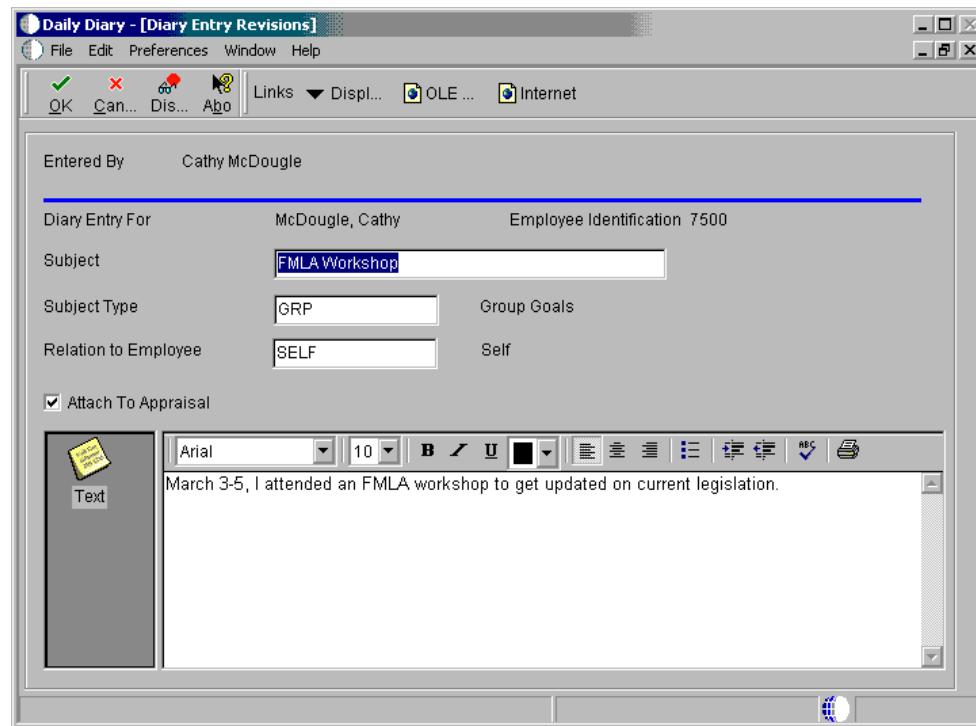
Notes that you create in the Daily Diary program are private unless you attach them to a performance appraisal. The system links your diary entries to your address book number. HR and managers who review your appraisal can view the diary entries that you attach to a performance appraisal.

When you create your performance self-appraisal or revise your employee performance appraisal, you can attach diary entries to the appraisal to document your activities. After you attach diary entries to an appraisal, you can change the text until you approve (or contest) and submit the appraisal. After you submit the appraisal, you cannot change or delete the attached entries from the performance diary.

► To maintain a performance diary

From the Employee Self Service menu (G05BESS1), choose Daily Diary.

1. On Work With Diary Entries, click Add to create a new diary entry.



2. On Diary Entry Revisions, complete the following field:
 - Diary Entry For
3. Complete the following optional fields:
 - Subject
 - Subject Type
 - Relation to Employee
4. Click the following option, if appropriate.
 - Attach To Appraisal
5. Add a text note or attach a media object that documents an employee activity, and then click OK.

Processing Options for Daily Diary (P087715)

Default Tab

This processing option specifies the default that the system uses each time you create a new performance diary entry.

Default

- 1) Default attach to performance appraisal value

0 = No, entry does not apply to a performance appraisal

1 = Yes, entry applies to performance appraisals

Reviewing a Competency-Based Performance Self-Appraisal

From the Employee Self Service menu (G05BESS1), choose Complete My Self Appraisal.

Either HR or a manager creates your competency-based performance appraisal. Your appraisal is a system-generated comparison of job competencies and demonstrated employee competencies. When you receive an e-mail message indicating that a performance self-appraisal is due, you use the Complete My Self Appraisal program (P087712) to perform the following functions:

- Select your current self-appraisal for review.
- Review your self-appraisal for accuracy.
- Revise your self-appraisal based on your knowledge of your performance.
- Add notes that document reasons for the changes.
- Attach performance diary entries that document work or personal activities which support changes to the ratings.
- Submit your self-appraisal to your manager for review.

When you enter the Complete My Self Appraisal program, the system automatically recognizes your address book number and displays the currently active appraisal. If HR set the processing options appropriately, you can change the system-generated ratings for each job and employee competency. You can also change the over-all performance rating and allow the system to change the ratings for each of the job and employee competencies.

See Also

- Reviewing a Competency-based Performance Appraisal* to complete a competency-based performance appraisal

Reviewing a Traditional Performance Self-Appraisal

From the Employee Self Service menu (G05BESS1), choose Complete My Self Appraisal.

Either HR or a manager initiates your traditional performance appraisal. Your appraisal is a template that is stored as a text in your JD Edwards software. When you receive an e-mail message that a performance self-appraisal is due, use the Complete My Self Appraisal program (P087712) to perform the following functions:

- Select your current self-appraisal for review.
- Manually complete all sections of the self-appraisal, including ratings if appropriate.

- Add notes that document reasons for your evaluations.
- Attach performance diary entries that document work or personal activities that support changes to the ratings.
- Submit your self-appraisal to your manager for review.

When you enter the Complete My Self Appraisal program, the system automatically recognizes your address book number and displays the appropriate appraisal template.

See Also

- Completing Traditional Performance Appraisals* to manually complete a traditional performance appraisal

Reviewing a Performance Appraisal From Your Manager

From the Employee Self Service menu (G05BESS1), choose Current Performance Appraisal.

When you receive a message indicating that an employee performance appraisal is ready for your review, you use the Current Performance Appraisal program (P087712) to select your appraisal and review it.

Performance reviews can be either competency-based or traditional. You can add notes and attach performance diary entries to either type of performance appraisal to document your views of ratings contained in the appraisal. See *Maintaining a Performance Diary*.

See Also

- Reviewing a Competency-Based Performance Appraisal* to review and submit a competency-based performance appraisal
- Completing a Traditional Performance Appraisal* for the steps to review and submit a traditional performance appraisal

Defining Employee Goals Using Employee Self-Service

You can create and track personal goals as part of your performance appraisal process. Working closely with your manager, you use the employee goals system to create an action plan for achieving higher levels of performance. You can also use this system to accomplish personal objectives not related to your organization. If your organization uses only a performance appraisal that your manager creates for you, you can work with your manager to create and track your goals. If you also complete a self-appraisal, you can create and track goals for yourself.

Employee goals are linked to a current appraisal. Although the system locks your appraisal after you approve your manager performance appraisal, you can still create and change your goals and goal actions throughout the year.

► To define goals for competency-based appraisals

From the Employee Self Service menu (G05BESS1), choose Complete My Self Appraisal.

1. On Employee Work With Performance Appraisals, choose an appraisal record and then click Select.

2. See *Defining Employee Goals for Competency-Based Appraisals* and begin with step 3.

► To create a career development plan

From the Employee Self Service menu (G05BESS1), choose Complete My Self Appraisal.

1. On Employee Work With Performance Appraisals, choose an appraisal record and then click Select.
2. See *Creating an Employee Career Development Plan* and begin with step 3.

Working with Employee Performance Appraisals

Either HR or managers can create employee appraisals. After you create an appraisal, you revise and approve the appraisal before scheduling a face-to-face review with the employee. Depending on your system settings, you can use either a competency-based or traditional employee performance appraisal approach.

The competency-based employee performance appraisal approach automatically generates an appraisal that compares job competencies to demonstrated employee competencies. You can add notes that explain or support your evaluation to each job and employee competency. You can also attach performance diary entries to each appraisal that cite specific examples of employee performance.

The traditional employee performance appraisal approach stores templates or links to online appraisal forms. You complete the template and rate employee performance manually. You can also attach performance diary entries that support your evaluation to the appraisal. See *Maintaining a Performance Diary*.

After you complete an appraisal, you submit it to the next manager level for approval. The system automatically routes the appraisal, based on the approval hierarchy, ending with the employee. At each level, the approving manager can approve the appraisal or return it to the previous level manager. When the highest level manager in the approval hierarchy approves and submits the appraisal, the system sends a message to you indicating that the performance appraisal is ready for final review. You then use the Notify Employee menu option in the Current Performance Appraisal program (P087712) to send a message to your employee that the appraisal is ready for final review. The employee approval is normally the final step in the approval process.

Employees use the Current Performance Appraisal program to review performance ratings, print the appraisal, review goals, and approve or contest the currently active employee appraisal. When the employee approves or contests the appraisal, the system marks it complete and moves it to historical status. The system also sends a message to a user defined address book number indicating whether the employee is approving or contesting the appraisal. The system prevents any changes to the appraisal after the employee approval.

After the employee approves or contests the appraisal, you schedule a meeting with the employee to discuss the employee competency rating results, career planning, and performance improvement plans that are in the appraisal. If you need to make further changes to the appraisal, you must create a new appraisal and submit it for approvals.

See Also

- *Maintaining a Performance Diary* for instructions on how to create diary notes

Creating Employee Performance Appraisals

HR representatives and managers can use the performance appraisal management system to create, manage, and print performance appraisals. You use the Create Group Performance Appraisals program (P087711) to generate appraisals and evaluate employee job performance. These appraisals provide historic examples of activities that employees complete. Depending on your system settings, employees can create a performance self-appraisal. After the employee submits the performance self-appraisal to the manager, the manager reviews the self-evaluation and prepares the manager performance appraisal.

See Also

- Generating an Employee Performance Appraisal* to create an appraisal
- Creating a Performance Self-Appraisal* to create a self-appraisal

Reviewing a Competency-Based Performance Appraisal

After HR generates a performance appraisal for one of your employees, the system sends a message to you that an appraisal is ready for review. You use the Current Performance Appraisals program (P087712) to locate the appraisal and perform your review.

When you set up system options appropriately and create a performance appraisal, the system will also send a message to your employee that a performance self-appraisal is due. However, you can begin your appraisal review immediately and then make any necessary adjustments to the appraisal when you review the employee self-appraisal. When the employee completes the self-appraisal and submits it, you can then review the appraisal and any diary entries that might be attached.

Depending on processing option settings, you can change the system ratings for job competencies, employee competencies, and the summary rating. You can also change the summary rating for a job competency, and the system automatically re-rates each of the employee competencies.

You can use the top note area on the appraisal form to record applicable comments that apply to your review. When you choose a specific job or employee competency for review, the notes area applies only to the appraisal that you are reviewing and the competency you select. You can add separate notes for each job and employee competency.

The lower note area on the appraisal form can contain a user defined competency description to help you understand and work with job competencies. The notes that the system displays are based on the user profile. For example, you can set up different notes for managers and for employees. The following options might be available:

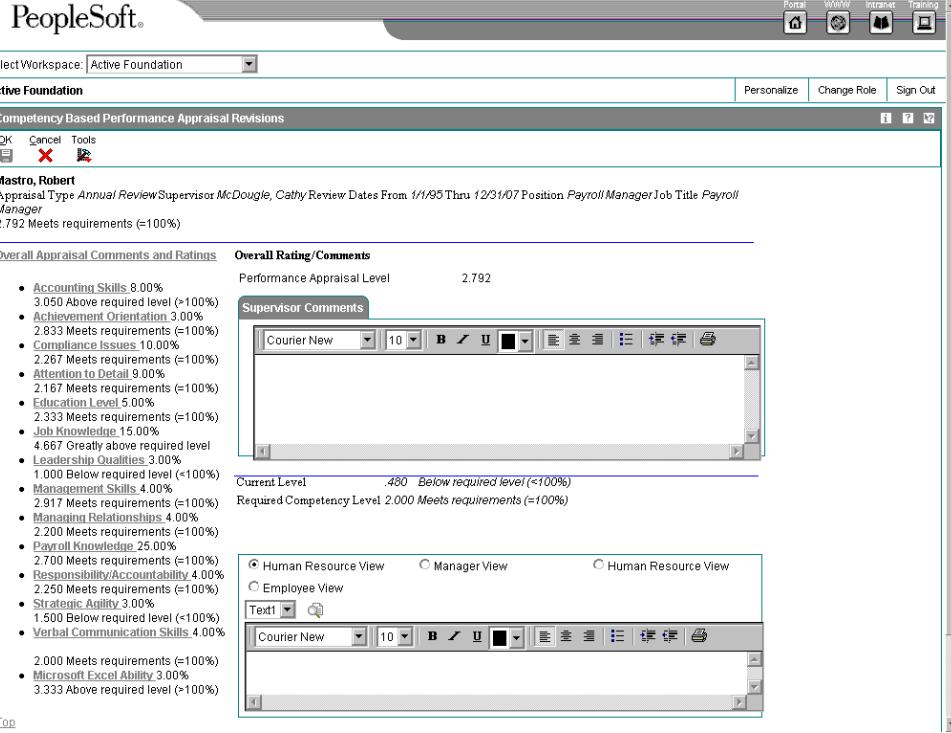
- Human Resources view
- Manager view
- Employee view

You can also attach entries from your daily diary and attach them to the performance appraisal. See *Maintaining a Performance Diary*.

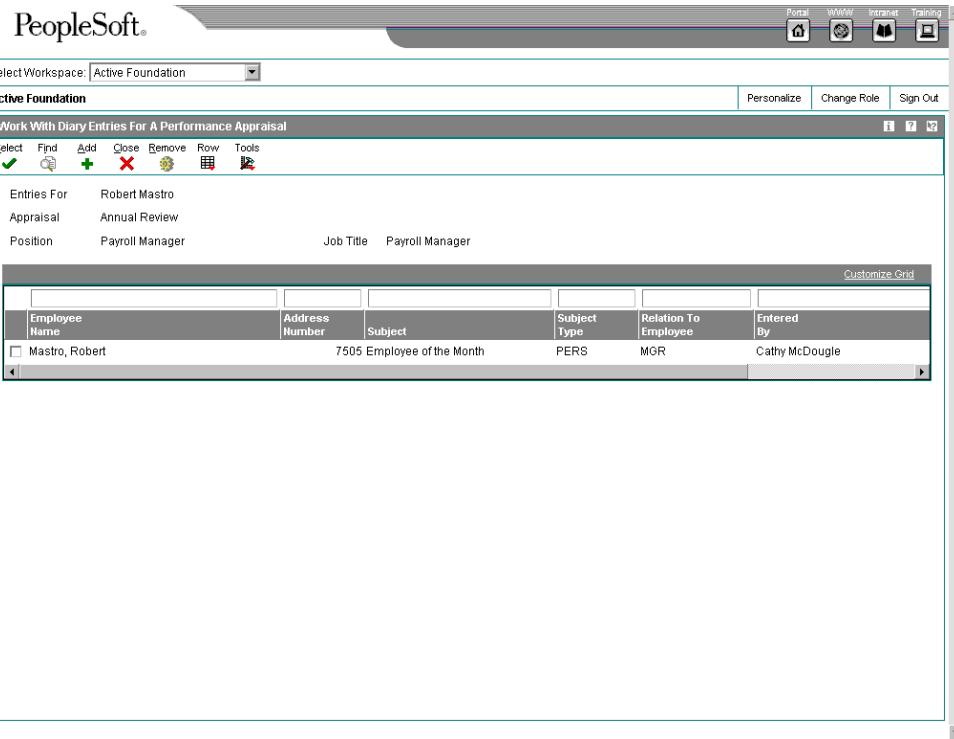
► To review competency-based performance appraisals

From the Manager Self Service menu (G05BMSS1), choose Current Performance Appraisals.

1. On Supervisor Work With Performance Appraisals, choose an employee record and click Select.



2. On Competency Based Performance Appraisal Revisions, click the first job competency and review the rating.
When you click a job competency, a list of related employee competencies automatically appears.
3. Click the first employee competency and review the employee competency ratings. Enter any necessary rating changes, and enter notes as appropriate.
Depending on processing option settings, the system automatically adjusts the job competency and overall performance rating when you change an employee competency rating.
4. Alternatively, you can override the system ratings by entering a value in the following field:
 - Performance Appraisal Level
 The system automatically re-rates the job competencies. If a processing option is set appropriately, you can also change the system rating for a job competency and the system automatically re-rates the employee competencies.
5. To attach a performance diary entry that might support your rating decision, click the link to Appraisal Diary Entries.
The system displays a list of the diary records that are currently attached to the performance appraisal.



6. On Work With Diary Entries For A Performance Appraisal, choose a diary record to review and then click Select.
7. To add diary entries that are not currently attached to the appraisal, click Add
8. Select a diary entry and then click Select.
9. To remove an attached diary records, choose a diary records and click Remove.

Note

Clicking Remove only removes the diary record from the performance appraisal. It does not delete the diary entry from the system.

-
10. Review all remaining job competencies and employee competencies and change ratings as appropriate.
 11. When you have completed rating all competencies, click Submit to Next Level Manager for Approval.

The system sends a message to the next level manager indicating that a performance appraisal is ready for approval.

Processing Options for Current Performance Appraisals (P087712)

Defaults

- 1) Audience Flag

1 = Employee
2 = Manager

3 = Human Resources

2) Performance Appraisal Status

0 = Employee Self Appraisal

1 = Current/Active Performance Appraisals

2 = Historical Performance Appraisals

Display

1) Display Job Title or Job Type/Step Description

Blank = Display Job Title if it exists, otherwise Job Type Step Description

1 = Always display Job Title

2 = Always display the description for Job Type/Step

2) Enter the URL for your performance appraisal guide.

3) Display Job Competency Level

0 = Do not display Job Competency Level (default)

1 = Display Job Competency Level

4) Display Employee Competency Level

0 = Do not display Employee Competency Level (default)

1 = Display Employee Competency Level

Process

1) Update Performance Level for Job Competencies

0 = No, can only change levels for employee competencies

1 = Yes, can change level for a job competency

2) Auto Calculate Employee Competency Levels

0 = No, if job competency levels can be changed, they cannot be used to calculate employee competencies

1 = Yes, if a job competency level is changed, the level is used to calculate the employee competency levels

3) Competency Update Event Code

A valid Competency Update Event Code

4) Address Number of Individual who should be notified once the employee has approved his/her performance appraisal.

0 = Do not notify anyone that appraisal is complete

A valid address number

5) Supervisor Can Create Development Plan

0 = No

1 = Yes

6) Employee Can Create Development Plan

0 = No

1 = Yes

Competency Descriptions

1) User Defined Competency Description Code 1

Blank = Do not display description 1

A valid Competency Description Code
2) User Defined Competency Description Code 2

Blank = Do not display description 2

A valid Competency Description Code
3) User Defined Competency Description Code 3

Blank = Do not display description 3

A valid Competency Description Code
4) User Defined Competency Description Code 4

Blank = Do not display description 4

A valid Competency Description Code
5) User Defined Competency Description Code 5

Blank = Do not display description 5

A valid Competency Description Code
6) User Defined Competency Description Code 6

Blank = Do not display description 6

A valid Competency Description Code
Versions

1) Delegates Version

Blank = ZJDE0001

A valid version

2) Daily Diary Version

Blank = ZJDE0001

A valid version

3) Create Performance Appraisals Version

Blank = ZJDE0001

A valid version

4) Create Goal Version

Blank = ZJDE0001

A valid version

Completing Traditional Performance Appraisals

You use the Current Performance Appraisals program (P087712) to display a traditional performance appraisal template, manually complete all the categories, enter an appropriate rating, and then save it as a new appraisal. You also use the Current Performance Appraisals program to revise the appraisal and enter the rating. You can also attach performance diary entries to the appraisal to support your evaluation.

If you set up system options appropriately, when you create a performance appraisal, the system sends a message to your employee that the performance self-appraisal is due. You can begin your appraisal review immediately and then make any necessary adjustments to the appraisal when you review the employee self-appraisal. When the employee completes

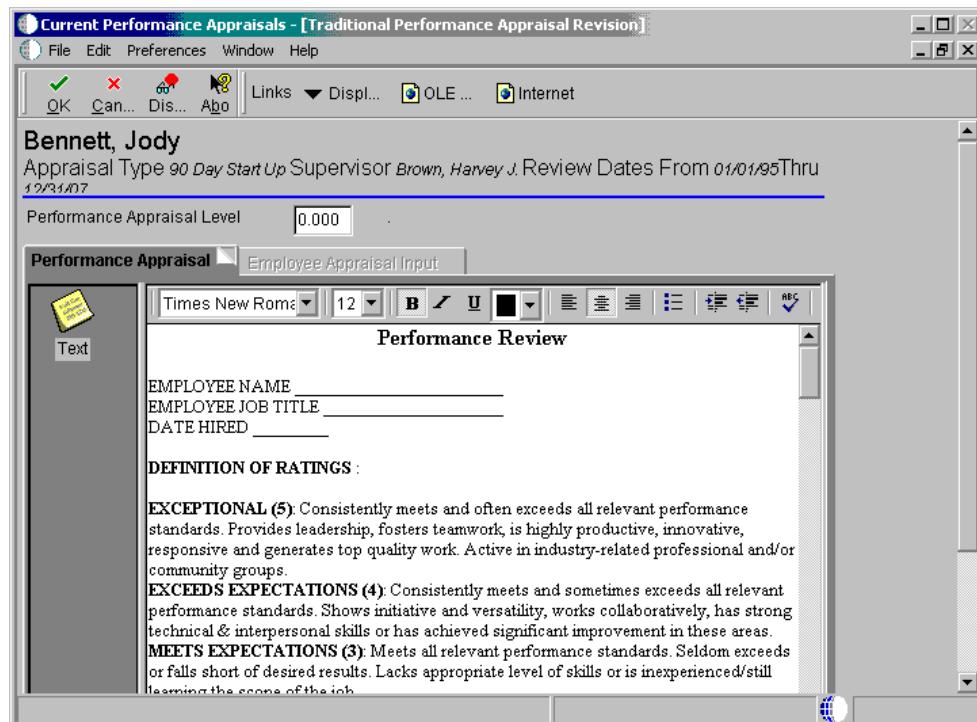
the self-appraisal and submits it, you can then review it and any diary entries that might be attached.

When you submit the appraisal, the system automatically sends a message to the next level manager that an appraisal is ready for review.

► To complete traditional performance appraisals

From the Manager Self Service menu (G05BMSS1), choose Current Performance Appraisals.

1. On Supervisor Work With Performance Appraisals, click on the following option to choose the type of appraisals that you want to review:
 - All Appraisals
2. Click on one of the following options to choose whether to review appraisals for your direct or indirect reports:
 - Appraisals To Complete Reports
 - Appraisals For Current Indirect Reports
3. To select an employee record, complete the following field or click an employee record and then click Select:
 - Employee Identification



4. On Traditional Performance Appraisal Revision, manually complete a performance appraisal template. Alternatively, if you set up another media object or URL link to an interactive appraisal form, you complete the appropriate form.
5. To record the over-all performance rating, complete the following field:
 - Performance Appraisal Level
6. To attach a performance diary entry that might support your rating decision, click the Appraisal Diary Entries link at the bottom of the form.

The system displays a list of diary records that are currently attached to the performance appraisal.
7. On Work With Diary Entries For A Performance Appraisal, choose a diary record to review, and then click Select.
8. To add diary entries that are not currently attached to the appraisal, click Add.
9. Select a diary entry and then click Select.
10. To remove an attached diary records, choose a diary record and then click Remove.

Note

This action only removes the diary record from the performance appraisal. It does not delete the diary entry from the system.

11. After you attach diary entries, select the link Submit to Next Level Manager.

The system automatically routes the appraisal and diary entries to the next level manager in the approval hierarchy.

Defining Employee Goals Using Manager Self-Service

HR specialists know that when organizations treat employees who contribute to the success of an organization as valuable assets, the organization and employees mutually benefit. Employees benefit from establishing specific goals that help increase their skills, perform their job at a higher level, and advance their career.

The employee goals system is linked to the performance management system so that managers have a concise method of measuring employee performance and improvement. You can create employee goals for either competency-based or traditional performance appraisals. When you create a competency-based appraisal, you can create employee goals and goal action suggestions for each employee competency. You can also create a separate, personalized career development plan. Using either appraisal approach, the employee goals system is a tool that you can use to help your employees reach personal and corporate objectives.

You use the Current Performance Appraisals program (P087712) to review an employee appraisal, add employee goals, and create employee goal suggestions. Although you normally create goal suggestions at the same time that you are reviewing an appraisal, you can add and revise them after you finish the appraisal process. After you submit the appraisal and the system locks it to prevent changes to the appraisal, you can still review and change employee goal suggestions.

Your HR department defines the competency information that is used in competency-based performance appraisals and employee goals. You can use existing goal suggestions that

might already exist, or you can use Work With Competency Information (P05104) to add new ones. You can also create additional items in the UDC tables to support employee goals.

Before You Begin

- ❑ Attach goals to competencies, as needed. See *Defining Employee Competencies*.
- ❑ Set up the category codes for employee goals (UDC 05/G1 through 05/G3, and 05/GT). See *Defining Category Codes*.
- ❑ Create, review, and revise an employee performance appraisal. See *Creating Employee Performance Appraisals* for the steps to perform these functions.

Defining Employee Goals for Competency-Based Appraisals

You can create employee goals and goal action suggestions that are linked to employee competencies. The purpose of this approach is to establish specific guidelines that an employee can follow to accomplish at least 100% of the organizational expectation for each employee competency. If an employee has additional goals that might or might not be directly related to job performance, you can also create a career development plan.

► To define employee goals for competency-based appraisals

From the Manager Self Service menu (G05BMSS1), choose Current Performance Appraisals.

1. On Supervisor Work With Performance Appraisals, choose an employee for whom a current appraisal exists, and then click Select.
2. On Competency Based Performance Appraisal Revisions, click a job competency.

The system displays a list of the employee competencies that support the job competency.

The screenshot shows the PeopleSoft interface for defining employee goals. The title bar reads "PeopleSoft". The top navigation bar includes links for Portal, WWW, Intranet, Training, and a sign-out option. The main window is titled "Competency Based Performance Appraisal Revisions" and shows details for an employee named "Mastro, Robert". It lists the appraisal type as "Annual Review", supervisor as "McDougle, Cathy", and review dates from "1/1/95 Thru 12/31/07". The position is "Payroll/Manager" and the job title is "Payroll Manager". A note indicates "2.792 Meets requirements (=100%)".

The "Overall Appraisal Comments and Ratings" section contains a bulleted list of competency requirements and their ratings. For example, "Accounting Skills" is rated at 8.00%, "Achievement Orientation" at 3.00%, and "Compliance Issues" at 10.00%. The "Achievement Orientation" rating is highlighted with a yellow background.

The "Supervisor Comments" section features a rich-text editor where a comment is being typed: "SkillForward Looking 5.000 Expert SkillInnivative 5.000 Expert".

At the bottom, there are sections for "Current Level" (.000 Not Applicable) and "Required Competency Level" (2.000 Meets requirements (=100%)). A note states: "Employees who are highly achievement oriented will demonstrate a positive and teamworking attitude. They will be able to think in terms of the 'big picture' and will be likely to promote rapidly to higher levels of responsibility. Identifying these individuals will be helpful in defining promotion strategies in".

3. Click an employee competency, review any existing Supervisor comments and review the explanatory notes for the competency.
4. Select the link to Create a Development Plan for the Selected Competency.

PeopleSoft

Select Workspace: Active Foundation

Active Foundation

Goal Action Plans

Mastro, Robert

Goal Description: Annual Review 1/1/95 thru 12/31/07

Goal Status: Active

Goal Type: Performance Appraisal

Submit

Suggestion Type: (None)

Display Suggestions

Action Workspace

5. On Goal Action Plans, complete the following fields to create a new employee goal:
 - Goal Status
 - Goal Type
 - Level you would like to achieve:
6. To create a new goal action suggestion, complete the following fields:
 - Action Description
 - Action Status
 - Change Reason
 - Estimate Start Date
 - Estimate End Date
7. If you are updating an existing action suggestion, complete the following fields:
 - Start Date

- End Date
- To move the current goal action suggestion to the Actions list, click the arrow.
 - To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 6-8.
 - When your list of goal action suggestions is complete, click Submit to save, then click Cancel to return to the appraisal form.

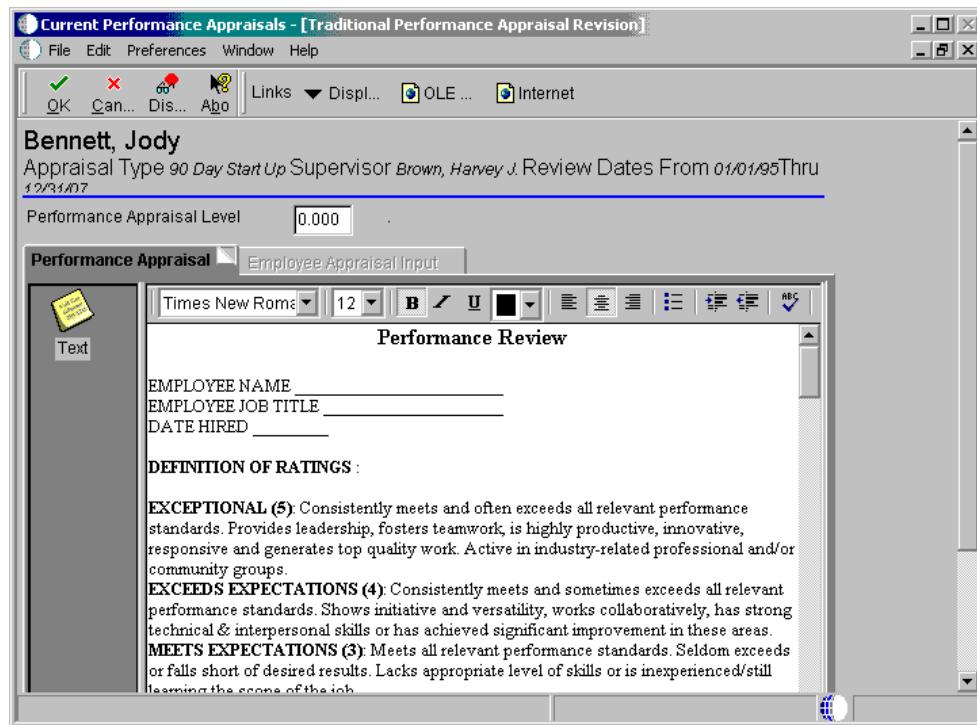
Creating an Employee Career Development Plan

You can create a career development plan when you use either competency-based or traditional performance appraisals. You use this tool to record employee goals and create suggestions for progress toward the goals. These goals can be linked to required job skills or they can support goals that the employee might have that are not related to the organization.

► To create an employee career development plan

From the Manager Self Service menu (G05BMSS1), choose Current Performance Appraisals.

- On Supervisor Work With Performance Appraisals, choose an employee for whom a current, traditional appraisal exists and then click Select.



- On Traditional Performance Appraisal Revision, click Create a Development Plan at the bottom of the form.

3. On Goal Action Plans, complete the following fields:
 - Goal Status
 - Goal Type
4. Choose the Free Form option for the following field:
 - Suggestion Type
5. To create a new goal action suggestion, complete the following fields:
 - Action Description
 - Action Status
 - Change Reason
 - Estimate Start Date
 - Estimate End Date
6. If you are updating an existing action suggestion, complete the following fields:
 - Start Date
 - End Date
7. To move the current goal action suggestion to the Actions list, click the arrow.

8. To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 5-7.
9. When your list of goal action suggestions is complete, click Submit to save. Then click Cancel to return to the appraisal form.

Job Step Progression

You use job step progression to advance employees to the next job level automatically after they meet specified requirements for their current job type and step. Using the step progression rules in the timecard automation module or the business functions in the payroll process, the system recognizes when employees meet the requirements for their current job level and move to the next job level during a payroll cycle. To ensure proper time accounting, and that the employees are paid at the correct rate, new timecards are created to associate the appropriate amount of time with each job level that is worked during the pay period.

You can set up job requirements based on the following methods:

- Hourly - Employees are moved to the next job level after completing a specified number of hours in their current job.
- Daily - Employees are moved to the next job level after completing a specified number of days in their current job.
- Pieces - Employees are moved to the next job level after completing a specified number of pieces in their current job.
- Custom - Employees are moved to the next job after meeting customized requirements that are defined by your organization.

You can process job step progression information during the payroll cycle, or you can process it outside of the payroll cycle as a stand-alone feature. The type of processing that you choose depends on your business processes.

You can process job step progression information only for employees whose timecards are entered into the system before pre-payroll is processed. You cannot process job step progression information for employees whose timecards are created during the pre-payroll process.

Note

The system tracks job step progression information for an employee's primary job only. The system uses the job type and job step from the Employee Master Information table (F060116) to identify an employee's primary job.

Also, Job Step Progression is different from Pay Grade Step Progression. Job Step Progression is based on requirements being met for a particular job level. Pay Grade Step Progression is based on changes in pay grades and requirements being met for a particular pay grade. See *Pay Grade Step Administration* for more information about the differences between Job Step Progression and Pay Grade Step Progression.

Setting Up Job Step Progression Processing

You use job step progression processing to move employees to specified job levels automatically after they meet the requirements of their current job type and step. Before you can use Job Step Progression, you must set up your system to process step progression information.

To process job step progression information, you must set up the following information in the company options for Company 0 (zero):

Step Progression Automation	To select the method of processing for job step progression information, you must enter A or S in the Step Progression Automation field, located on the Additional Company Options form. To process job step progression using the automatic method, enter A in this field. To process job step progression using the stand-alone method, enter S in this field.
Step Progression Process	To process job step progression information, you must enter 1 or 2 in the Step Progression Process field, located on the Additional Options tab on the Company Options form. To track and update job step progression history using Union Code, Job Type, and Job Step, enter 1 in this field. To track and update job step progression history using Union Code, Job Type, Job Step, and Business Unit, enter 2 in this field. If you do not want to allow any companies in your organization to use job step progression processing, enter N in this field.
Note	The value that you enter in this field determines whether the Business Unit field is displayed on the Work With Step Progression Table form.
Pay Rate Source	To process job step progression pay rates correctly, the system must derive employee pay rates using the Pay Rate Tables as the default pay rate source. To do this, you must set up pay rates in pay rate tables, and you must enter a 1 in the Pay Rate Source field, located on the HRM Foundation Position Control Options form. Note If you are using the pieces method to process all job step progression information, you can set up rates in the Item Piece Rate Table or the Union Pay Rate Tables. If the system does not find a rate in the Item Piece Rate Table, it will find the rate in the Union Pay Rate Table.

You must also specify, at the individual employee level, which employees to process through step progression.

After you have set up company and employee step progression information, you must set up job step progression parameters, which contain all of the step progression requirements information for each job type and job step combination. Lastly, if you are using the stand-alone method to process job step progression information, or if you want to process job step progression information using custom rules and functions, you must set up step progression information in the timecard automation module.

Before You Begin

- ❑ Set the company options for Company 0 (zero) to specify the type of step progression processing that your organization uses. See *Setting Up Company Options* for instructions.
- ❑ Set the system options to use pay rate tables as the default pay rate source. See *Setting Up System Options* for instructions.
- ❑ Set up pay rates for each job type and job step combination in the pay rate tables. See *Setting Up Pay Rate Table Information* for instructions.

Setting Up Job Step Progression Information for Employees

Before you can process job step progression information, you must identify the employees that are eligible for job step progression processing. The system tracks employee step progression information only after you set up job step progression information for an employee. The system uses this information to determine when the employee has met the requirements of their current job type and job step. After the requirements are met, the employee is moved to the next job level, using step progression processing.

Note

The system does not track job step progression history information until after you set up the employee as a step progression employee. Therefore, any payroll history that the employee has before they were set up as a step progression employee is not used to determine when the employee meets the requirements for their current job level.

Before You Begin

- Set up each employee for whom you want to use job step progression. See *Employee Information* for more information about entering employees into the J.D. Edwards system.

► To set up job step progression information for employees

From the Employee Management menu (G05BE1), choose Employee Information.

1. On Work With Employee Information, complete the following field and then click Find:
 - Employee No
2. Select the employee and choose Payroll from the Row menu.
3. On Employee Payroll Revisions, enter S in the following field, and then click OK:
 - Employee Classification Status

The screenshot shows the P0801 - Employee Payroll Revisions window. At the top, there's a menu bar with File, Edit, Preferences, Form, Window, and Help. Below the menu is a toolbar with OK, Cancel, Discard, Abort, Links, History, OLE, and Internet buttons. The main area contains several groups of input fields:

- Employee Identification:** Employee Identification number 8446, Employee Name Bennett, Jody, and a green checkmark icon.
- Payroll Processing:**
 - Pay Cycle Code: BW
 - Employee Classification Status: S
 - Work Schedule: (empty field)
 - Record Type: 1
 - Pre-Note Code: N
 - Wage Attachment Payee: (empty field)
 - Vacation Factor: (empty field)
 - Max/Min Net Pay: (empty field)
 - Labor Distribution Method: 0
 - Labor Distribution Multiplier: 1.0000
 - Distribution Rate: (empty field)
- Date Information:**
 - Date Of Last Raise: 09/02/98
 - Date of Next Raise: (empty field)
 - Business Unit - Last Worked: M30
 - Date of Last Check: 07/01/05
- Geographic Tax Data:**

Home State:	(empty field)	Federal (and default)
Home City:	(empty field)	Default Working City
Work State:	(empty field)	Federal (and default)
Work City:	(empty field)	Default Working City

Setting Up Job Step Progression Parameters

You use job step progression to move employees to the next job level automatically after they have completed specified requirements for the current job level. You set up job step progression parameters to identify the following information for each job type and job step combination:

- The number of units that are required to progress to the next job level
- The method that the system uses to track requirements (hours, days, pieces, or custom units)
- The method that the system uses to accumulate the hours from one job level to the next
- The valid pay types that are used to identify time worked towards the required units
- The next job type and job step that the employee will progress to after meeting the specified requirements

Using the Step Progression Parameter Revisions program (P071900), you set up parameter tables. You set up parameter tables for each Union Code and Business Unit combination, or you set up tables for each individual Union Code for which you want to process step progression information. Whether you use Business Unit depends on how the Company Options for Company 0 are set up. The information that you enter in the parameter tables is stored in the Step Progression Parameters table (F06933).

You set up the job step progression parameters differently depending on the methods that you use to calculate job step progression information. You can create custom methods, or you can use one of the following pre-defined methods:

Hourly Method

You use the hourly method if you want employees to move to the next job level after they complete a specified number of hours in their current job level. If you use the hourly method, you must create pay tables before you set up job step progression parameters. These pay tables include all of the valid pay types that can be counted towards the step progression requirements. For example, if the regular time hours (pay type 1) that an employee works can be counted towards the requirements to move to the next job level, you would include pay type 1 in the pay table. If the hours that an employee charges to holiday pay (pay type 800) cannot be counted towards the requirements, you would not include pay type 800 in the pay table. You use the Worker's Compensation Insurance-Basis Tables program (P079071) to enter this information.

In addition to creating pay type tables, you must enter the name of the pay table in the Ins Pay field, and you must enter H in the Method field on the Step Progression Detail form.

Daily Method

You use the daily method if you want employees to move to the next job level after a specified number of days. The system includes all calendar days, including weekends and holidays, when calculating whether the employee meets the requirements to move to the next job level. When you use the daily method, you can use any of the dates that are listed in UDC 06/DT. For example, if you want an employee to move to their next job level 90 days after their start date, you must enter DST (date started) in the Based From field on the Step Progression Detail form. In addition, you must enter D in the Method field.

Pieces Method

You use the pieces method if you want employees to complete a certain number of pieces before they move to the next job level. If you want only certain pieces to be counted towards the requirements for a job level, you must use unique pay types for each piece and set up pay tables with the pay types for each valid piece. For example, you might want an employee to move to the next job level after they complete 50 widgets. However, that employee might complete gadgets as well as widgets during the course of the pay period. If you only want the system to use the number of widgets that the employee completes for job step progression calculations, you must set up a pay type for widgets, and another pay type for gadgets. Then, you must enter the widgets pay type in a pay table.

If you set up pay tables to be used with the pieces method, you must enter the name of the pay table in the Ins Pay field on the Step Progression Detail form. If you do not want the system to differentiate between pieces, you still must set up a pay table; however, you do not need to set up separate pay types for each piece. If you are using the pieces method, you must enter P in the Method field on the Step Progression Detail form.

Custom Method

If the hours, days, and pieces methods do not meet the needs of your organization's business processes, you can create custom step progression methods. For information about creating custom modifications to J.D. Edwards software, contact your system administrator.

Before You Begin

- Set up Worker's Compensation Insurance-Basis Tables for step progression pay types. See *Setting Up Worker's Compensation Insurance-Basis Tables* in the *Payroll Guide* for instructions on setting up these tables.

► **To set up job step progression parameters**

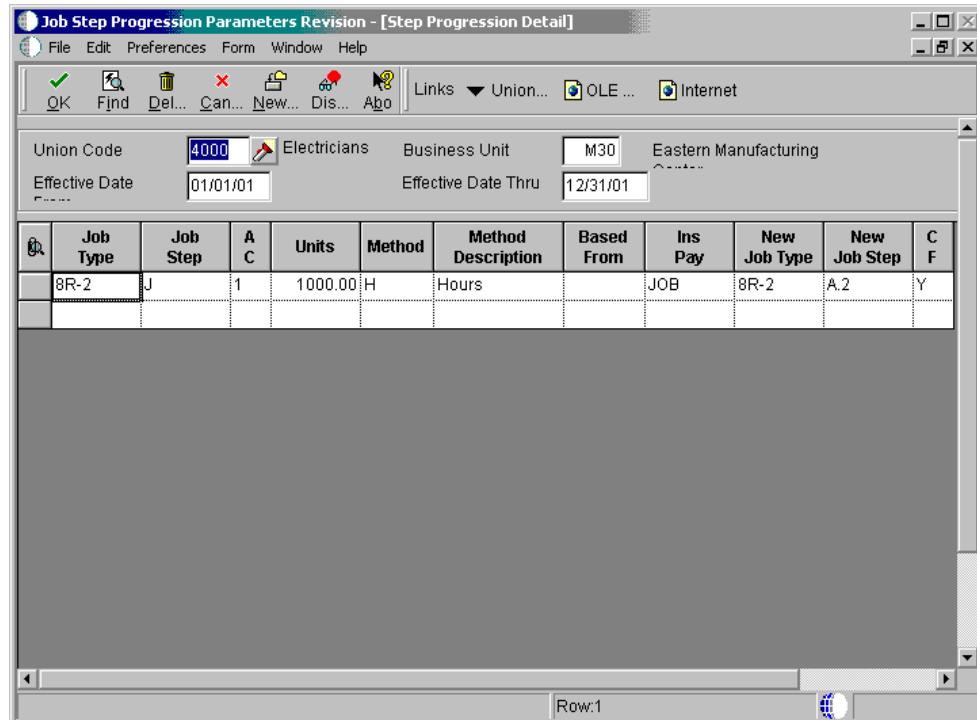
From the Periodic Processing menu (G07STEP2), choose Job Step Progression Parameters Revision.

1. On Work With Step Progression Parameters, click Add.
2. On Step Progression Detail, complete the following fields and click Find:

- Business Unit

Depending on how the company options are set up, this field may not be displayed on the form.

- Union Code
- Date - Beginning Effective
- Date - Ending Effective



3. Complete the following fields:

- Job Typ
- Job Step
- A C
- L R

- S M
 - Based From
 - Ins Pay
 - Job Step
 - C F
4. To review Union Pay Rate Tables, choose Union Rates Table from the Form menu.
See *Setting Up Pay Rate Table Information* for more information.
 5. To review piece rate information, choose Item Piece Rates from the Form menu.
See *Piece Rate Processing* in the *Payroll Guide* for more information.
 6. To review Workers' Compensation Basis Tables, choose WC Basis Table from the Form menu.
See *Setting Up Worker's Compensation Insurance-Basis Tables* in the *Payroll Guide* for more information.
 7. On Step Progression Detail, click OK.

Setting Up Timecard Automation for Stand-Alone Job Step Progression

You use the timecard automation module to process job step progression information using the stand-alone method. First, you must create employee groups that include the employees for which you want to process step progression information.

You also set up timecard automation rule sets to create the appropriate timecards for employees who move to the next job level during the processing period. J.D. Edwards provides the following predefined timecard automation rules to use when setting up rule sets for job step progression processing:

- Hourly
- Daily
- Pieces

You can use these three rules if you want to process job step progression requirements based on employees completing a specified number of hours, days, or pieces before the system moves them to the next job level. If your organization wants to base step progression requirements on measurements other than hours, days, or pieces, you can create custom timecard automation rules.

Note

It is not necessary to set up timecard automation for job step progression if you are using the automatic method of processing step progression information. Using the automatic method, job step progression information is calculated using business functions that are included in the payroll process.

Creating Employee Groups for Stand-Alone Job Step Progression

In order to process step progression information for employees using the stand-alone method, you must create employee groups. Each employee group that you create should include employees whose job type step progression requirements are based on the same units of measure. You can create employee groups for the following types of employees:

- Employees whose step progression requirements are based on hours
- Employees whose step progression requirements are based on days
- Employees whose step progression requirements are based on pieces
- Employees whose step progression requirements are based on a custom function

For example, you would have to set up a minimum of two employee groups to process step progression information for the following employees:

- Employee A must work 500 hours to progress to the next job level
- Employee B must work 1000 hours to progress to the next job level
- Employee C must work 90 days to progress to the next job level

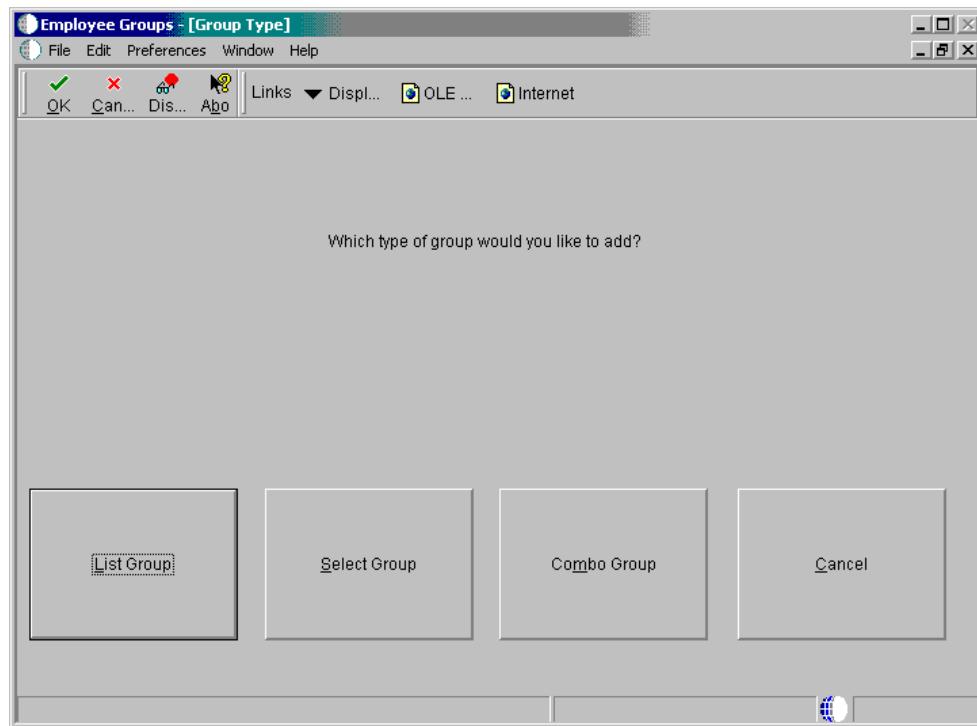
You might want to create an employee group based on hourly requirements to process Employee A and B. You might also create an employee group based on daily requirements to process Employee C. However, you cannot include all three employees in the same employee group, as the requirements for them to move to the next job level are based on different units of measure.

See *Working with Employee Groups* in the *Payroll Guide* for instructions about creating employee groups.

► To create employee groups for stand-alone job step progression

From the Periodic Processing menu (G07STEP2), choose Job Step Progression Groups.

1. On Work With Employee Groups, click Add.
2. On Group Type, choose one of the following options:
 - List Group
 - Select Group
 - Combo Group



3. Complete the steps for creating employee groups.

See *Creating Employee Groups* in the *Payroll Guide* for additional instructions.

Setting Up Rule Sets for Job Step Progression

To ensure proper time accounting and that employees are paid at the correct rate for all hours worked, the system processes step progression information using timecard automation rules. These rules are used to create new timecards for employees who meet the requirements of their current job level and move to their new job level during the processing period. By creating new timecards, you ensure that employees are paid the correct rate for the hours that they work in their current job level and for the hours that they work after moving to their new job level. The following predefined step progression rules are available:

- StepProgressionHoursRule

This rule is used to process employees whose step progression requirements are based on the number of hours worked. All of the hours that an employee works, and that are associated with valid step progression pay types, are counted towards the requirements for moving to the next job level.

- StepProgressionDaysRule

This rule is used to process employees whose step progression requirements are based on the number of calendar days that the employee has been in their current job level. Each day that an employee is assigned to a specified job level, including weekends and holidays, is counted towards the requirements for moving to the next job level.

- StepProgressionPiecesRule

This rule is used to process employees whose step progression requirements are based on the number of pieces completed.

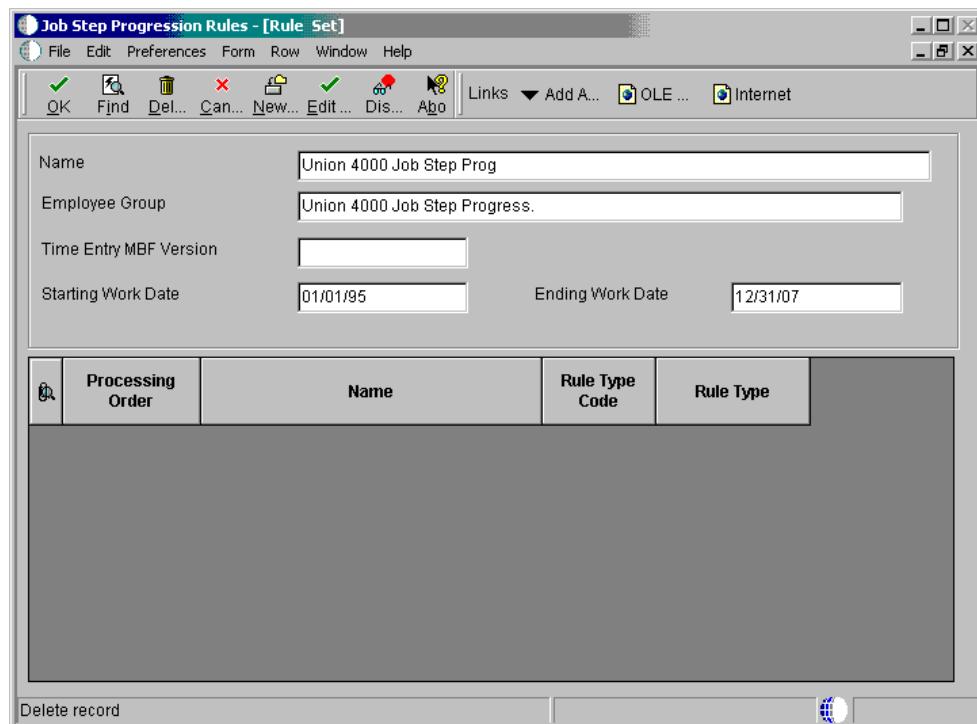
You can also create custom rules to process step progression information using step progression requirements that are specific to your organization.

See *Working with Functions* in the *Payroll Guide* for information about creating, testing, registering, and understanding timecard automation functions and rules.

► To set up rule sets for job step progression

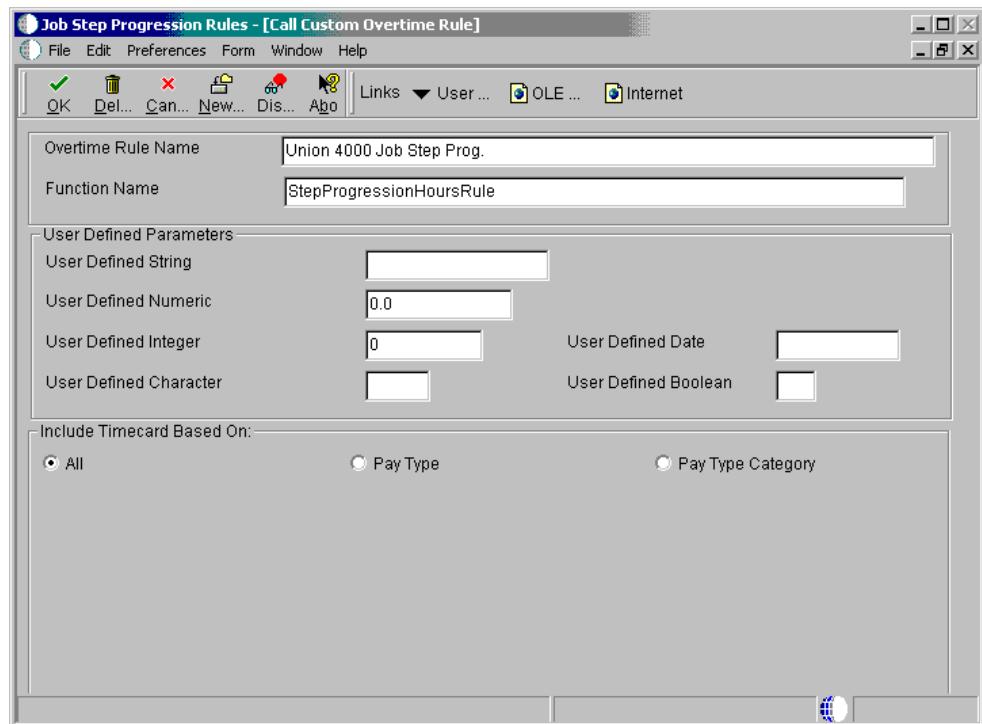
From the Periodic Processing menu (G07STEP2), choose Job Step Progression Rules.

1. On Work With Rule Sets, click Add.
2. On Rule Set, complete the following fields:
 - Name
 - Employee Group
 - Starting Work Date
 - Ending Work Date



3. Leave the following field blank for job step progression rule sets:
 - Time Entry MBF Version
4. Click OK.

5. On Work With Rule Sets, choose the rule you just created and click Select.
6. On Rule Set, choose Add Call Custom Rule Set from the Form menu.
7. On Call Custom Overtime Rule, complete the following field:
 - Overtime Rule Name
8. Complete the following field with the step progression processing rule that you want to use, and then click OK:
 - Function Name



Processing Options for Job Step Progression Rules program (P186401)

Defaults Tab

These processing options determine how the system processes time entry and interim information for step progression rules.

1. Time Entry MBF Version

Use this processing option to specify the default version of the Time Entry MBF to be used when timecards are added as this rule set is processed.

2. Process Interims for overtime processing

N = Do not process Interims (Default)

Y = Process Interims

Use this processing option to specify whether to include timecards associated with interim payments in the calculation of a rule set. If you choose to include interim payment timecards, you must process those interim payments through a payroll cycle. Valid values are:

Y

Apply overtime rule to interim payment timecards

N

Do not apply overtime rule to interim payment timecard

Processing Job Step Progression Information

After you set up your system and your employee information to enable step progression processing, enter step progression parameters for each job level, and create any necessary employee groups, you can process step progression information. You can process step progression information using the automatic method or the stand-alone method.

If you process job step progression using the stand-alone method, you create all job step progression timecards before you process payroll. If you use the automatic method, the system creates job step progression timecards during the pre-payroll process. Regardless of the method that you choose, job step progression timecards must be processed through a complete payroll cycle. The system updates job step progression history when the job step progression timecards are processed through the final update step of the payroll cycle. If an employee moves to the next job level during the payroll cycle, the system automatically updates the Job Type and Job Step fields in the employee's Employee Master Information table (F060116) record. Using the processing options on the Payroll Cycle Workbench program (P07210), you can determine whether the system also updates the Pay Rate field for the employee during final update.

Note

If you are using the automatic method to process step progression information, and you want to include interim payments in the step progression calculation, you must check the Merge Interims option when you process the payroll cycle. If you are processing job step progression information using the stand-alone method, you must set the processing options for the Overtime Rules program (P186401) to include interim payments in the step progression calculations.

After you process job step progression information, you can review job step progression history online or in report form. You can also revise this history information if you determine that the information is not correct.

Note

To ensure that employees are paid the correct overtime rates during job step progression processing, you must create a version of the Time Entry MBF Processing Options program (P050002A) and set up the processing options on the Pay Types tab to identify overtime rates. If you use the automatic method to process job step progression information, you must add this version of the P050002A to the processing options for the Pay Cycle Workbench program (P07210). If you process job step progression using the stand-alone method, you must add this version of the P050002A to the processing options for the Overtime Rules program (P186401).

Also, if you use the Timecard Automation module to process overtime timecards, you must determine in which order to process overtime rules and job step progression rules. The order in which you process these rules depends on your business practices, time entry methods, timecard automation rule and function setup, and desired outcome for overtime calculations. If you determine that you want to process job step progression rules before processing overtime rules, you must use the stand-alone method to process job step progression.

Understanding Job Step Progression Processing Order

If your organization uses timecard automation rules to process overtime, you must determine the order in which you process overtime and job step progression information so that you achieve your desired results. There are many factors that can change the results of overtime and job step progression calculations, which include:

- The method you use to enter timecards
- The charge-to methods you use for timecard automation rules
- Your business practices
- The methods you use to calculate overtime
- The order in which you process information

Note

Due to the large number of factors that can affect the results of job step progression and overtime calculations, it may be necessary for you to test multiple scenarios in order to determine the method that your organization must use to achieve the desired outcome. If you determine that you must process job step progression information before you process overtime, you must use the stand-alone method to process job step progression. You can only use the automatic method to process job step progression information if you decide to process overtime information first.

Before You Begin

- Set up all step progression information, and verify that your company options are set to the correct processing mode for step progression. See *Setting Up Job Step Progression Processing*.

- If applicable to your organization, process overtime timecards using timecard automation. See *Timecard Automation* in the *Payroll Guide* for more information.
- Set up a version of the Time Entry MBF Processing Options program (P050002A) with the appropriate values in the processing options on the Pay Types tab. See *Setting Up MBF Processing Options for Time Entry* for additional information.
- Review the processing options for the Pay Cycle Workbench program (P07210).

Processing Job Step Progression Using the Automatic Method

When you use the automatic method, the system completes all job step progression processing during the payroll cycle. The system automatically determines which step progression rules to use to process step progression information during the pre-payroll step of the payroll cycle. The system uses these rules to create timecards automatically for employees who meet the requirements of their current job level and move to the next job level within the pay period.

For example, if an employee worked 40 hours during the pay period, but only needed 10 hours to meet the requirements to move to the next job level, the step progression function would automatically create new timecards for the employee. The old timecard, which contained 40 hours, would not be processed through the payroll cycle. Instead, the step progression function would create a timecard for 10 hours that is associated with the current job level, and a timecard for 30 hours that is associated with the new job level. This ensures that the employee is paid the correct rate for all of the hours that are worked during the pay period.

After you process job step progression information during pre-payroll, if you reset the payroll, the system gives you the option to delete or to keep the step progression timecards that were created during pre-payroll processing. If you are resetting the payroll to make changes that do not affect the step progression timecards, you might choose to keep them in order to decrease processing time when you resubmit pre-payroll.

During the final update step of the payroll cycle, the system updates job step progression history for all step progression employees. The system also updates employee information for employees that move to the next job level during the payroll cycle. Using the processing options for the Pay Cycle Workbench program (P07210), you can determine which fields the system automatically updates in the Employee Master Information table (F060116).

You use the automatic method to process job step progression information if the following statements are true about your organization:

- You are not concerned about the processing time of your payroll cycle.
Using the automatic method, the system retrieves job step progression history for each job step progression employee during the pre-payroll step of the payroll cycle. This might significantly increase processing time.
- You do not wish to review timecards that are created using timecard automation functions before they are processed through the payroll cycle.

Before You Begin

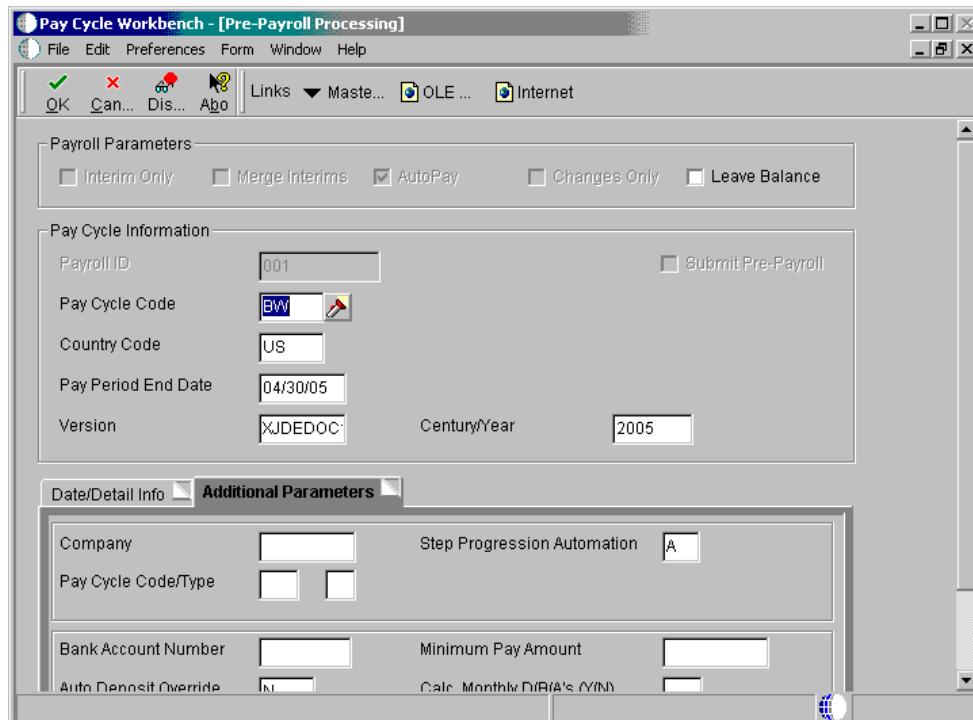
- Create a Payroll ID. See *Creating a New Payroll ID* in the *Payroll Guide* for instructions.

- Set up the Reports Model for the Payroll ID to include step progression reports. See *Setting Up Pay Cycle Reports* in the *Payroll Guide* and *Reviewing Job Step Progression Reports* in this guide for instructions.
- Create a version of the Time Entry MBF Processing Options program (P050002A) and complete the Pay Types tab to ensure that overtime is calculated correctly.
- Verify that the processing options for the Pay Cycle Workbench program (P07210) include the correct version of the Time Entry MBF Processing Options program (P050002A).

► To process job step progression using the automatic method

From the Payroll Workbench menu (G07BUSP11), choose Pay Cycle Workbench.

1. On Work With Pay Cycle Workbench, complete the following optional fields, and then click Find:
 - Payroll ID
 - User ID
2. Choose the payroll ID that you want to process and click Select.
3. On Pre-Payroll Processing, click the Additional Parameters tab and review the following field:
 - Step Progression Automation



4. To include interim payments in the payroll cycle, click the following option:

- Merge Interims
5. Review the remaining fields on the form and click the following option:
- Submit Pre-Payroll

See *Processing Pre-Payroll* in the *Payroll Guide* for more information about submitting pre-payroll.

6. Click OK.
7. On Automatic Step Progression Information, click OK.
8. Complete the remaining steps of the payroll cycle.

See *Payroll Cycle* in the *Payroll Guide* for instructions.

Processing Job Step Progression using the Stand-Alone Method

Using the stand-alone method, you process job step progression information by submitting timecard automation rules. You submit these rules for processing after all timecards have been entered into the system for the current pay period and before you process pre-payroll. The stand-alone method allows you to process job step progression information outside of the payroll cycle to avoid increasing the processing time of the payroll cycle. The stand-alone method also allows you to review and approve timecards that are created by the job step progression rules before they are processed through a payroll cycle. Lastly, the stand-alone method allows you to process job step progression information at one time for employees that are included in different payroll cycles.

For example, you can use the stand-alone method to process job step progression information for employees in Company A at the same time that you process job step progression information for employees in Company B, even if you process separate payroll cycles for each of the companies. After timecards have been entered, but before pre-payroll has been run for either company, you would process step progression information for the employee group, which would include all job step progression employees in Company A and Company B.

Before you process pre-payroll you can review the timecards that are created for employees that move to the next job level within the work dates that you are processing. If necessary, you can modify or delete the timecards that are created. Lastly, you approve the timecards and process the employees through their respective payroll cycles. These timecards must be processed through a complete payroll cycle in order to update job step progression history. The system also automatically updates employee information for all employees who move to the next job level during the payroll cycle. Using the processing options on the Pay Cycle Workbench program (P07210), you can determine which fields are automatically updated.

Note

When you process job step progression timecards that were created using the stand-alone method through the payroll cycle, the system generates a message before pre-payroll is processed asking whether step progression timecards have been approved. This message is a reminder to review and approve timecards before processing them through a payroll cycle. If you do not approve step progression timecards, they will not be included in the payroll process.

You use the stand-alone method of processing step progression information if the following statements are true about your organization:

- You do not want to increase the processing time of your payroll cycle.
- You want to review and approve timecards that are created using timecard automation before they are processed through a payroll cycle.
- You want to process step progression information for employees in different payroll cycles at the same time.

Before You Begin

- ❑ Create employee groups for step progression processing. See *Creating Employee Groups for Stand-Alone Job Step Progression*.
- ❑ Set up job step progression rule sets. See *Setting Up Rule Sets for Job Step Progression*.
- ❑ Enter all timecards into the system. See *Entering Timecards for Employees* in the *Workforce Management Foundation Guide*.
- ❑ If applicable to your organization, process overtime rules. See *Working With Overtime Rule Sets* in the *Payroll Guide* for more information.
- ❑ Create a version of the Time Entry MBF Processing Options program (P050002A) and complete the Pay Types tab to ensure that overtime is calculated correctly.
- ❑ Verify that the processing options for the Job Step Progression Overtime Rules program (P186401) include the correct version of the Time Entry MBF Processing Options program (P050002A).

► To process job step progression using the stand-alone method

From the Periodic Processing menu (G07STEP2), choose Job Step Progression Rules.

1. On Work With Rule Sets, choose the rule set that you want to process, and then choose Submit from the Row Menu.

Note

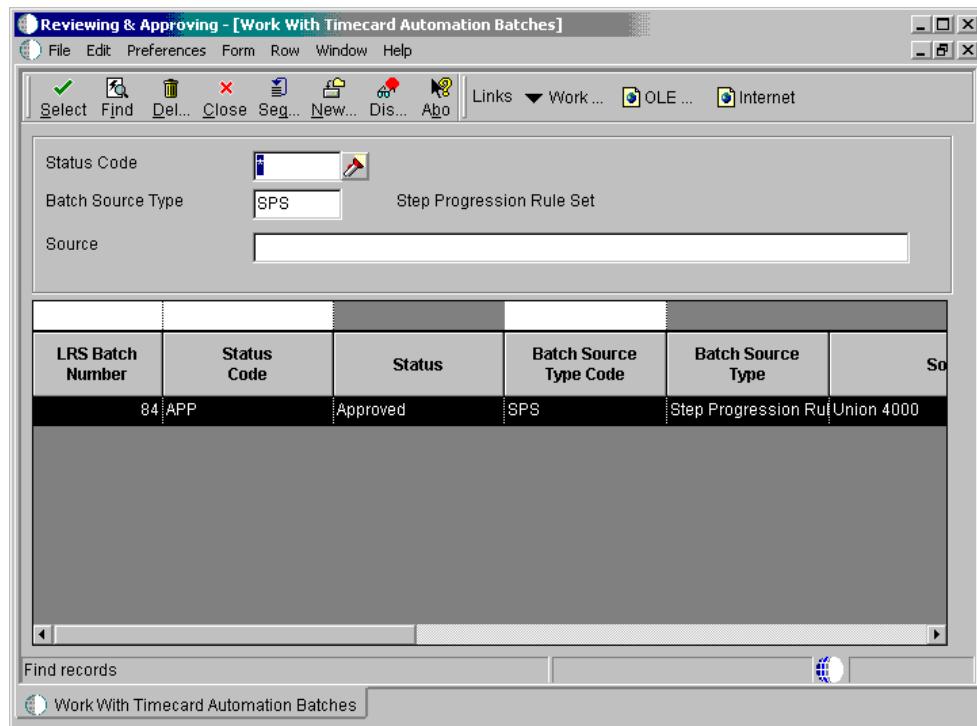
The system automatically produces the Overtime Rule Set Batch Review report (R186404), which you can use to review step progression information after you process job step progression rules.

2. Repeat step 1 until you have processed all of the necessary step progression rules.

► To review, modify, and approve step progression timecards

From the Daily Processing menu (G07STEP1), choose Reviewing & Approving.

1. On Work With Timecard Automation Batches, enter SPS in the following field, and then click Find:
 - Batch Source Type



2. Select the batch that you want to review and choose Time Entry Revs from the Row menu.
3. On Speed Time Entry Revisions, review the timecards, make any necessary revisions, and then click OK. If you do not make any changes, click Cancel.
4. On Work With Timecard Automation Batches, to approve the batch, choose Approve Batch from the Row menu.
5. On Confirmation, click Yes.

See Also

- Working with Timecards for Timecard Automation* in the *Payroll Guide* for more information about timecards batches

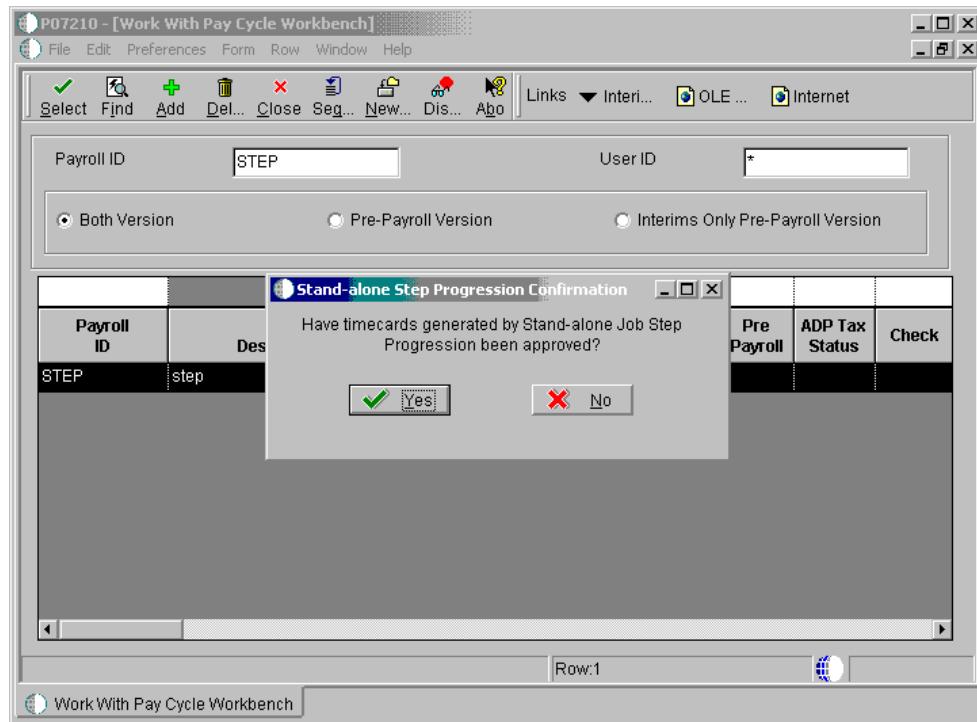
► To process job step progression timecards through the payroll cycle

From the Payroll Workbench menu (G07BUP11), choose Pay Cycle Workbench.

1. On Work With Pay Cycle Workbench, click Find.
2. Choose the Payroll ID that you want to process and choose Pre-Payroll, then choose Submit, and then choose Pre-Payroll from the Row menu.
3. On Manual Step Progression Confirmation, click Yes.

Note

This form is used as a reminder to approve job step progression timecards before they are processed through the payroll cycle. If you click Yes, and the timecards are not approved, the system will not process the timecards through the payroll cycle. Timecards must be approved to be included in the payroll cycle.



4. Complete the remaining steps to process the payroll cycle. See *Payroll Cycle* in the *Payroll Guide* for instructions.

Reviewing Job Step Progression Information

After you process job step progression information, you can produce reports so that you can review the information for accuracy. The Step Progression Timecard Review report (R071911) and the Step Progression Status Report (R071912) can only be produced during the payroll cycle when you are using the automatic method. Additionally, you can produce the Step Progression Historical Report (R071913) whether you are using the stand-alone or the automatic method of job step progression processing. You can also review job step progression historical information online.

Reviewing the Step Progression Timecard Review Report

You run the Step Progression Timecard Review report (R071911) to review and verify the information that was processed for all step progression employees in the payroll process. The report displays totals for each employee as well as grand totals for all job step progression employees included in the payroll cycle. In addition, the report displays any new timecards

that are generated by step progression processing, along with the original timecards that were processed.

This report can only be created if you are using the automatic method of job step progression processing. You must set up this report in the report model that you are using for the payroll process. You might want to set up the report to run during pre-payroll so that you can review the accuracy of the job step progression information before you process additional steps in the payroll cycle. However, you can produce this report during any of the payroll cycle steps except final update.

Reviewing the Step Progression Status Report

You run the Step Progression Status Report (R071912) when you are using the automatic method of step progression processing. To produce the report, you must set up the report to print during the Reports step of the payroll cycle. This report lists the accumulated units, along with the units remaining in a job level for each employee that is processed through job step progression. The report also lists each employee that was moved to the next job level during the payroll cycle.

Note

For employees that move to the next job level during the payroll cycle, the report does not list accumulated hours for the new job level. These hours will be displayed on the report during the next payroll cycle.

Processing Options for the Step Progression Status Report (R071912)

Display Tab

Use this processing option to determine what information is displayed on the report.

Display only promoted employees

Blank = Display all employees

1 = Display only promoted employees

Use this processing option to specify which employees you want to display on the Job Step Progression Status report. You can display step progression information for all step progression employees, or you can display step progression information for only the employees that move to the next job level during the period. Valid values are:

Blank

Display all step progression employees. This is the default.

1

Display only promoted employees.

Reviewing the Step Progression Historical Report

The Step Progression Historical Report (R071913) can be used to review detailed step progression history information for each step progression employee. The report lists units, effective dates, and status information for all of the job levels in which an employee has worked during the period.

You can run this report if you are processing step progression information using the automatic or the stand-alone method. This report should be set up to print during the final update step of the payroll cycle. Alternatively, you can run this report after the final update step of the payroll cycle is completed by choosing Progression Historical Report from the Daily Processing menu (G07STEP1).

Processing Options for the Step Progression Historical Report (R071913)

Default Tab

These processing options identify the type of information that will appear on the report.

1. Display history records:

Blank = Show all history records

A = Show active history records only

This processing option specifies the type of information that you display on the Job Step Progression Historical report. Valid values are:

Blank

Display all step progression history. This option will display step progression history records for all job type and job step combinations in which an employee has worked. This is the default.

1

Display only active records. This option will display step progression history records for the employee's current job type and job step.

Reviewing and Revising Job Step Progression History

After you process step progression information, you can review job step progression history online and revise the information if necessary. Using the Job Step Progression History program (P071901), you can review the step progression information associated with an employee's past job levels or their current job level. All of the historical information that is displayed on this form is stored in the Change Code History File table (F0625).

You can also use the Job Step Progression History program to move an employee back to a previous job level. For example, if an employee was moved to a new job level, but it was later determined that the employee should not have been moved, you can update job step progression history to move the employee back to the previous job level. To do so, you must manually update the employee's record in the Employee Master Information table (F060116) to reflect the previous job type, job step, and rate. You must also change the Step Progression Status field on the step progression history record for the previous job level back to an A to make that job level active again.

Caution

If you void a payment that affects job step progression information, you must manually adjust step progression history in order to avoid discrepancies between payroll history and job step progression history.

You can use attachments to document changes that are made when you revise step progression history using the Job Step Progression History program (P071901), however, this program does not create an audit trail. In addition, any changes that are made to history using this program are not updated to other payroll history tables. This might cause discrepancies between job step progression history and payroll history. This program should be set up with a high level of security.

► To review and revise job step progression history

From the Periodic Processing menu (G07STEP2), choose Job Step Progression History.

1. To review information by employee, on Work With Step Progression History, choose the By Employee tab and complete the following field:
 - Address Number
2. To review information by job, choose the By Jobs/Union tab and complete the following fields to narrow your search:
 - Job Type
 - Job Step
 - Union Code
 - Business Unit
3. Choose one of the following options to select the type of information that you want to review, and then click Find:
 - Historical
 - Current
4. Choose the record for which you want to review detail information and click Select.
5. On Step Progression History Revisions, review the following fields:
 - Address Number

- Union Code
- Business Unit
- Step Progression Status
- Job Type
- Job Step
- Required
- Remaining
- Last Updated

Job Step Progression History - [Step Progression History Revisions]

File Edit Preferences Window Help

OK Cancel Discard Abort Links Disp... Previ... Next OLE... Internet

Address Number	8446	Bennett, Jody	Step Progression Status
Union Code	4000	Electricians	Step Progression Method
Business Unit	M30		
Current Job Level			
Job Type	8R-2	Maintenance Electrician	
Job Step	J	J Journeyman	
Accumulated			
Job Type/Step Units	90.00		
Job Type Units			
Required			
Remaining			
New Job Level			
New Job Type			
New Job Step			
Save record			
Work With Step Progression History		Step Progression History Revisions	

6. Review the following fields and make any necessary changes:
 - Job Type/Step Units
 - Job Type Units
 - New Job Category
 - New Job Step
 - Effective Date
7. Click OK.

Pay-Grade Step Progression

You use pay-grade step progression to automate pay-rate changes for groups of employees. Pay-grade step progression helps you ensure that all employees that perform the same job at the same level receive the same rate of pay, even if the pay rate for that position changes.

The following scenario illustrates how using pay-grade step progression can automate pay-rate changes for a group of employees. Company A negotiates a new contract with a union. The new contract includes a 2.00 USD per hour pay-rate increase for all union-related positions. More than 1000 union employees perform more than 100 different union-related jobs within the company. Using pay-grade step progression, you can automatically update the pay rates for all union-related positions and the employees who perform those jobs.

You can also use pay-grade step progression to establish job paths that employees can follow. Progression paths include predefined pay-grade step levels, each with its own rate of pay. You can automatically move groups of employees to the next level in their progression path and update their pay rates accordingly.

The following scenario illustrates how creating progression paths can automate pay-rate changes for a group of employees. Company B hires a group of employees, all for different positions, at the same time. The company policy states that employees are hired on a 30-day trial basis. After 30 days, the employees are either terminated or they are promoted to the next level and receive an associated pay-rate increase. Using pay-grade step progression, you can automatically move all selected employees to the next level in their progression paths and update their pay rates accordingly.

Automating the process of administering pay-rate changes for a group of employees can significantly decrease data entry time as well as the occurrence of data entry errors. Pay-grade step administration can also help eliminate the possibility of incorrectly excluding an employee from receiving a pay-rate change.

Before You Begin

- Set up pay-grade step tables and assign pay-grade step information to your employees. See [Setting Up Job Information](#) for more information about setting up and assigning pay-grade step information.

Working with Pay Rates for Pay-Grade Steps

Periodically, you might need to adjust the pay rates for your pay-grade steps. For example, you might need to enter a cost-of-living increase for all pay-grade steps, or you might need to make a market adjustment to a particular pay-grade step. You can manually or automatically update the Pay Grade Step table to reflect the new rates.

You can use any of the following three methods to make automated changes to pay rates associated with pay-grade steps:

- Enter a flat amount by which the rate will change.
- Enter a percentage rate change.
- Enter a base rate and a rate multiplier.

You might also find it necessary to make additional entries to your pay grade step tables. For example, you might need to enter new rates for all pay grade steps for the upcoming year. To avoid having to manually enter all of the information into the table for the upcoming year, you can copy existing records in your table and change only the fields in the new records that have different information, such as the rate and date fields.

Before You Begin

- Set up the Pay Grade Step Table and assign pay-grade step information to your employees. See [Setting Up Job Information](#) for more information about setting up the Pay Grade Step Table.

Updating Pay Rates for Pay-Grade Steps

It might be necessary for you to change the rates of existing pay-grade step records. For example, you might need to update a table to reflect new rates for a particular job, or you might want to update pay rates with a market adjustment. You can use the following three methods to update existing pay-grade step records automatically:

- Enter a flat amount by which the rate will change.
- Enter a percentage rate change.
- Enter a base rate and a rate multiplier.

After you have entered rate change information, you can have changes automatically applied to specified pay-grade steps. You can also manually change rates using the Pay Grade Step Table program (P082003).

You use the flat amount method when you want to change all selected pay-grade steps by the same monetary amount. For example, to increase the hourly rate of all selected pay-grade steps by 2.00 USD, you would use the flat amount method to calculate the new rates.

You use the percentage rate method when you want to change all selected pay-grade steps by the same percentage amount. For example, to apply a 5% cost-of-living increase to selected pay-grade steps, you would use the percentage rate method.

You use the base rate and rate multiplier method when you have pay-grade steps for which the pay rates are all based on one rate. To calculate the pay rate for each pay-grade step, the system multiplies the base rate by the rate multiplier associated with each pay-grade step. Each selected pay-grade step must have a rate multiplier. For example, if you entered a base rate of 40,000.00 USD, and a pay-grade step has a rate multiplier of .95, the new pay rate for that pay-grade step would be 38,000.00 USD ($40,000 \times .95 = 38,000$).

Note

To change the rates for existing records in the Pay Grade Step table, wait until those changes are effective to begin the automatic update of the table, or create new records in the table for each pay-grade step that you want to change, and include the effective date of the rate change in the new records. Using the automatic update procedure to update rates for existing pay-grade step records before the rate change becomes effective can cause undesirable results.

► To update pay rates for pay-grade steps

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

1. On Pay Grade Step Table, to locate the pay-grade steps that you need to update, complete any of the following fields and click Find:
 - Pay Class(H/S/P)

- Union Code
 - Locality
 - Pay Grade
 - Effective Date
2. To change pay rates for all selected pay-grade steps simultaneously, complete one of the following fields:
- Step Rate
 - Percent to Apply
 - OR Amount

The screenshot shows the 'Pay Grade Step Table - [Pay Grade Step Table]' application window. The menu bar includes File, Edit, Preferences, Form, Window, and Help. The toolbar contains OK, Find, Copy, Del., Can..., New..., Calc..., Dis..., and Abo buttons. The main interface has two main sections: 'Pay Class(H/S/P)' and 'Std Hrs/Day'. The 'Pay Class(H/S/P)' section contains fields for Union Code, Locality, Pay Grade, and Effective Date, each marked with an asterisk (*) indicating required input. The 'Std Hrs/Day' section contains fields for Std Hrs/Day and Std Days/Year. Below these is a 'Calculation Information' section with fields for Base Rate, Rate Multiplier, OR Percent, and OR Amount (set to 2000). At the bottom is a grid table showing pay grade steps for Pay Grade S1, Grade Step A, with Effective Dates 1/1/05, 1/1/04, and 1/1/03, and corresponding Step Rates of 20,874.000, 20,365.000, and 19,869.000. The grid also shows Next Pay Grade B for all rows. A 'Find Records' button is at the bottom left.

Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade
S1	A			1/1/05		20,874.000	S1
S1	A			1/1/04		20,365.000	S1
S1	A			1/1/03		19,869.000	S1

3. To have the system calculate the new pay rate for each pay-grade step, choose Calculation from the Form menu.

Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade
S1	A			1/1/05		22,874.000	S1
S1	A			1/1/04		22,365.000	S1
S1	A			1/1/03		21,869.000	S1

4. To manually change the pay rate for a pay-grade step, choose the record that you want to change and complete the following field:
 - Step Rate
5. To save the changes that you made to the table, click OK.
6. To restore the data in the table to the way it was before you calculated the rate changes, click Cancel.

Copying Pay-Grade Step Records

You might need to add records to your Pay Grade Step tables that are similar to records that already exist in your tables. To avoid excessive data entry, you can copy existing records and change only the information that is different for the new records. For example, if your pay-grade step rates for the upcoming year are different from the rates for the current year, you might want to create new records rather than update the existing records with the new rates. Copying existing records can significantly reduce the instances of data entry errors. After you have created the new records, you can modify them with any necessary changes.

► To copy pay-grade step records

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

Pay Grade Step Table - [Pay Grade Step Table]

File Edit Preferences Form Window Help

OK Find Copy Del... Can... New... Calc... Dis... Abo Links Pay G... OLE... Internet

Pay Class(H/S/P)	S Salaried	Std Hrs/Day	
Union Code	*	Std Days/Year	
Locality	*		
Pay Grade	*		
Effective Date	*		

..... Calculation Information

Base Rate	*	Rate Multiplier
OR Percent	OR Amount	

Q	Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade	
	S1	A			1/1/05		20,874.000	S1	B
	S1	A			1/1/04		20,365.000	S1	B
	S1	A			1/1/03		19,869.000	S1	B

Find Records

1. On Pay Grade Step Table, to locate the pay-grade steps that you want to copy, complete any of the following fields and click Find:
 - Pay Class(H/S/P)
 - Union Code
 - Locality
 - Pay Grade
 - Effective Date
2. Choose the records that you want to copy and then click Copy.
3. Scroll down to the newly created records, which will appear at the bottom of the Pay Grade Step Table, and make changes to any of the following fields:
 - Pay Grade
 - Grade Step
 - Loc Desc
 - Union Code
 - Effective Date
 - Rate Mult

- Step Rate
- Next Pay Grade
- Next Pay Grade Step
- Remark
- Hrs Day

Note

You must change information in the new records to avoid having duplicate records in the Pay Grade Step table.

4. Click OK.

Creating Progression Work Groups

After you have updated the Pay Grade Step table with rate changes, you can create groups of employees to apply those rate changes to. Creating progression work groups allows you to update all employees within a work group at the same time.

You can also use work groups to select employees that you want to move from one pay-grade step to the next. You do not need to update the Pay Grade Step table with rate changes in order to move employees to the next pay-grade step, as long as the next step is already included in the table.

- *Effective dates for progression groups*
- *New and existing pay-grade steps*
- *To create progression work groups*

Effective Dates for Progression Work Groups

When you create progression work groups, you assign an effectivity date or an effectivity data item to the entire work group. The effectivity data item can be any data item included in UDC 08/DT. The effectivity date is used to determine when the rate change will become effective for the employees included in the work group. You should use an effectivity date or data item that you want to use for all employees included in the work group. However, you can change the date for individual employees after you create the work group.

If the effectivity date falls on or before the system date, the Employee Master table is directly updated when you run the update process. If the effectivity date falls after the system date, the pay-rate change is stored in the Future Data Revisions table. The Employee Master table is then updated during the final update step of the pay period that the effectivity date falls within.

Note

J.D. Edwards recommends using an effectivity date that will update the Employee Master table directly. Processing future data revisions during the final update step of the payroll cycle uses additional system resources and can cause a dramatic increase in processing time. If you use the future data revisions program to update pay-grade information during final update, you must activate the payroll workbench processing option to allow future data processing.

You can set up effectivity dates for pay-rate changes using the following dates:

- | | |
|--------------------------|--|
| System Date | If you leave the Effectivity Date field and the Effectivity Data Item field blank, the system date will be used to determine when the pay-rate changes become effective. |
| Override Date | If you enter a date in the Effectivity Date field, that date will be used to determine when the pay-rate changes become effective. |
| User-Defined Date | If you enter a data item in the Effectivity Data Item field, such as Date of Next Review or Date of Next Raise, the date associated with each employee for that particular data item is the date that is used to determine when the pay-rate changes become effective. You can enter any date included in UDC 08/DT. |

Caution

The effectivity date is not always the date that the pay-rate change becomes effective. If you enter an effectivity date that falls after the system date when you run the update process, the Future Data Revisions table is updated. Future data revisions are not updated to the Employee Master table until the Final Update step of the payroll cycle that the effectivity date falls within. This can cause your pay-rate change to become effective on a date later than the effectivity date. For example, if you use an effectivity date of 06/16/05, and that date falls after the system date, the Future Data Revisions table is updated. If the pay cycle that includes the effectivity date includes work dates of 06/15/05 through 06/30/05, the new pay rate is not updated to the Employee Master table until Final Update of this payroll cycle, and therefore is not used to calculate pay for this payroll cycle. The pay-rate change would be effective during the next payroll cycle, making the actual effective date of the change 07/01/05.

New and Existing Pay-Grade Steps

You can base pay-rate changes on two different pay-grade step options. If you want to change the rate for an existing pay-grade step and update the employees who are currently attached to that pay-grade step with the new rate, use the existing pay-grade step option as the basis for creating the work group. If you want to move employees from one pay-grade step to the next, use the new pay-grade step option as the basis for creating the work group.

Note

If you want to move some employees from one pay-grade step to the next and update other employees with new rates for their current pay-grade steps, you must create more than one work group. You cannot perform both types of updates for one work group.

Before You Begin

- Update the pay-grade steps with the rate changes in the Pay Grade Step table. See [Updating Pay Rates for Pay-Grade Steps](#) for more information.

See Also

- ❑ *Processing Future Changes* for more information about updating future data changes to the Employee Master table

► To create progression work groups

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, click Add.

The screenshot shows the 'Add Progression Work Group' dialog box within the PeopleSoft application. The dialog has several sections:

- Review Group ID:** A text input field containing '100'.
- Description:** A text input field containing 'Cost-of-Living Adjustments'.
- Date change becomes effective:**
 - Effectivity Date (empty field)
 - Effectivity Data Item (text input field containing 'NRDT')
- Pay Grade/Step:**
 - Existing Grade/Step
 - New Grade/Step
- Enter version to build work group:**
 - Build Version:** A text input field containing 'ZJDE0001'.
- Reporting:**
 - Generate Detail Report (unchecked)
 - An Exception Report is always produced.

2. On Add Progression Work Group, complete the following fields:
 - Review Group ID
 - Description
3. To use the system date as the effectivity date for the rate change, click the following option and leave the Effectivity Date field blank:
 - Effectivity Date
4. To use an override date as the effectivity date for the rate change, click the Effectivity Date option and complete the following field:
 - Effectivity Date
5. To use a user-defined date as the effectivity date for the rate change, click the Effectivity Data Item option and complete the following field:

- Effectivity Data Item
6. To choose the basis for the pay-rate change, click one of the following options:
 - Existing Grade/Step
 - New Grade/Step
 7. To produce a detailed report of employees included in the work group, click the following option:
 - Generate Detail ReportAn exception report is always printed, regardless of whether you generate the Detail Report.
 8. Complete the following field and click OK:
 - Build Version

Note

You cannot create progression work groups that contain employees from more than one country. If you have employees in different countries that work in the same pay-grade step, you must create country-specific work groups to update pay grade information. Using data selection, you can specify which country you want to include when creating the work groups. Including employees from more than one country in the same progression work group can cause undesirable results.

Processing Options for Grade/Step Progression Workbench (P082005)

Versions Tab

These processing options specify the versions that are available for you to use.

1. Add new work group version.

Use this processing option to specify the version for the Work Group Build. This version will be used on the Add Progression Work Group form. The version may be changed on the Add form. The default version is ZJDE0001.

2. Proof - Apply pay grade/step changes version.

Use this processing option to specify the version of the Grade/Step Progression Changes program to use in proof mode. The default is ZJDE0001.

3. Final - Apply pay grade/step changes version.

Use this processing option to specify the version of the Grade/Step Progression Changes program to use in Final Mode. The default is ZJDE0002.

Working with Progression Work Groups

After you create progression work groups, you can review detailed information for each employee as well as summary information for the entire work group. You can make changes to employee information and update your work group with your changes without having to rebuild the entire progression work group. You can also delete employees from a work group. However, if you accidentally delete an employee, you must rebuild the progression work group to include that employee in the work group again.

Note

The Create Progression Workgroups program must finish processing before you can review information in your work group. Until the process is complete, you will not see your work group on the Pay Grade/Step Progression Workbench.

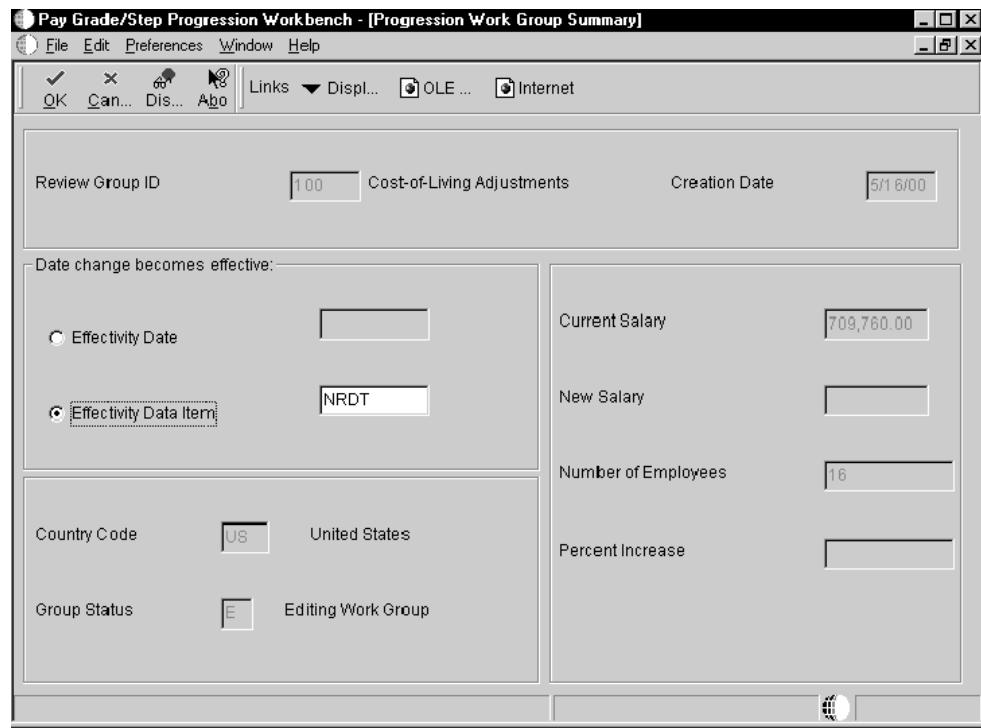
Reviewing Progression Work Group Information

You review work group information to verify that the pay-rate changes that you created are accurate. You can review information for each employee within the progression work group as well as summary information for the entire work group.

► To review progression work group summary information

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:
 - Review Group ID
 - Country Code
 - Group Status
2. To review summary information for the work group, choose the progression work group that you want to review and click Select.



3. On Progression Work Group Summary, review the following fields and click OK:
 - Creation Date
 - Effectivity Date
 - Effectivity Data Item
 - Country Code
 - Group Status
 - Current Salary
 - New Salary
 - Number of Employees
 - Percent Increase

► **To review progression work group detail information**

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:

- Review Group ID
 - Country Code
 - Group Status
2. Choose the work group that you want to review and choose Detail from the Row menu.

Employee Name	Union Description	Locality Description	Curr Grade	Curr Step	Curr Salary	Curr Hourly Rate	Next Grade	Next Step
Abo, Connie	.	Headquarters (default)	S4	B	38,250.000	18.389 S4	C	
Ebby, Chester	.	Headquarters (default)	S3	B	31,000.000	14.904 S3	C	
Hawkins, Jack	.	Headquarters (default)	S4	A	31,500.000	15.144 S4	B	
McLind, Rod	.	Headquarters (default)	S3	C	36,000.000	17.308 S4	A	
Washington, Harold	.	Headquarters (default)	S3	C	36,000.000	17.308 S4	A	
Watkins, Joshua	.	Headquarters (default)	S4	B	38,250.000	18.389 S4	C	

3. On Progression Work Group Detail, review the following fields:

- Employee Name
- Locality
- Curr Grade
- Curr Step
- Curr Salary
- Curr Hourly Rate
- Next Grade
- Next Step
- Next Salary

- Effectivity Date
- Address Number
- Home Business Unit
- Job Type
- Job Step
- FTE
- New Pay Stop Date
- New Pay Start Date
- Days Year
- Hrs Day
- Hrs/ Year

Changing Progression Work Group Information

After you review the information in your progression work group, you might need to make changes to information for the employees included in the work group. You might also need to change the effectivity date for an individual employee or for the entire work group.

For example, if you used effectivity data item NRDT, the date of next raise, you might find that an employee's effectivity date is blank. To correct this, you must enter a date in the employee's Date of Next Raise field. If you leave the effectivity date for an employee in the work group blank, the system date when you run the update process will be used as the effectivity date for that employee.

Note

You can change the effectivity date for an individual in a progression group only if you are using an effectivity data item to determine the date that the changes become effective. Otherwise, you must change the effectivity date for all employees within the progression group.

You might also find that information for a particular employee is incorrect. For example, an employee might be assigned to the wrong job type, business unit, or home company. Before you continue processing, you can correct this information and automatically update the work group to reflect the changes that you make to the employee's information.

► To change the effectivity date for a progression group

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:

- Review Group ID
 - Country Code
 - Group Status
2. To change the effectivity date for the entire work group, choose the work group that you want to update and click Select.

The screenshot shows the 'Progression Work Group Summary' window in PeopleSoft. The window title is 'Progression Work Group Summary'. It contains several input fields and buttons. At the top right are buttons for 'OK', 'Cancel', 'Tools', and 'Update 2000'. Below these are fields for 'Review Group ID' (set to 'UPDT00') and 'Creation Date' (set to '06/19/00'). A section titled 'Date change becomes effective:' has two radio button options: 'Effectivity Date' (selected) with value '01/01/00' and 'Effectivity Data Item' with an empty field. On the left, there are fields for 'Country Code' (set to 'US') and 'Group Status' (set to 'E'). On the right, there are fields for 'Current Salary' (\$211,000.00), 'New Salary' (\$230,882.00), 'Number of Employees' (6), and 'Percent Increase' (0.09).

3. On Progression Work Group Summary, click one of the following options and complete the corresponding field, if necessary:
- Effectivity Date
 - Effectivity Data Item
4. Click OK.
5. To update all effectivity date changes to the work group, on Grade/Step Progression Workbench, choose the work group and choose Detail from the Row menu.
6. On Progression Work Group Detail, choose all records in the detail area and choose Update Work Files from the Row menu.

► To change the effectivity date for an employee

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:
 - Review Group ID
 - Country Code
 - Group Status
2. Choose the work group that you want to change and choose Detail from the Row menu.

Employee Name	Union Description	Locality Description	Curr Grade	Curr Step	Curr Salary
Abbott, Dominique	.	Headquarters (default)	84		38,000.
Abrams, Brooke	.	Headquarters (default)	86		60,000.
Allen, Ray	.	Headquarters (default)	87		75,000.
Anderson, Jeanette	.	Headquarters (default)	85		53,040.
Bellas, Debbie	.	Headquarters (default)	86		53,000.
Chamberlain, Carol M.	.	Headquarters (default)	84		32,000.
Dobson, Jane	.	Headquarters (default)	85		55,750.
Edwards, Angela	.	Headquarters (default)	85		52,520.
Ingram, Paul	.	Headquarters (default)	82		22,250.

3. On Progression Work Group Detail, choose the employee that you want to change and choose Employee Master from the Row menu.
4. On Work With Employee Information, choose the appropriate form or row menu option and make any necessary changes to the employee's effectivity data item.

Note

The employee's effectivity data item can be any date field that is stored in the Employee Master Information table (F060116). Therefore, the form or row exit that you choose from the Work With Employee Information form can vary depending on the field you want to update. For additional information about changing employee information, see *Revising Employee Information*.

5. When all changes for the employee have been completed, click Close.
6. To update all effectivity date changes to the work group, on Progression Work Group Detail, choose a record and choose Update Work Files from the Row menu.

► To change employee information

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:
 - Review Group ID
 - Country Code
 - Group Status
2. Choose the work group that you want to change and choose Detail from the Row menu.

The screenshot shows a Windows application window titled "Pay Grade/Step Progression Workbench - [Progression Work Group Detail]". The window has a menu bar with File, Edit, Preferences, Row, Window, and Help. Below the menu is a toolbar with icons for Find, Del., Close, Seg..., New..., Dis..., Abo, Links, Empl..., OLE..., and Internet. The main area contains several input fields and a large grid table.

Employee Name	Union Description	Locality Description	Curr Grade	Curr Step	Curr Salary
Abbott, Dominique	.	Headquarters (default)	S4		38,000.
Abrams, Brooke	.	Headquarters (default)	S6		60,000.
Allen, Ray	.	Headquarters (default)	S7		75,000.
Anderson, Jeanette	.	Headquarters (default)	S5		53,040.
Bellas, Debbie	.	Headquarters (default)	S6		53,000.
Chamberlain, Carol M.	.	Headquarters (default)	S4		32,000.
Dobson, Jane	.	Headquarters (default)	S5		55,750.
Edwards, Angela	.	Headquarters (default)	S5		52,520.
Ingram, Paul	.	Headquarters (default)	S2		22,250.

3. On Progression Work Group Detail, choose the employee that you want to change and choose Employee Master from the Row menu.
4. On Work With Employee Information, select the appropriate option from the row or form menu, and then make any necessary changes to the employee's information.

Note

The form or row exit that you choose from the Work With Employee Information form can vary depending on the fields that you want to update. For additional information about changing employee information, see *Revising Employee Information*.

5. When all changes for the employee have been completed, click Close.
6. To update employee information changes to the work group, on Progression Work Group Detail, choose a record and choose Update Work Files from the Row menu.

See Also

- Revising Employee Information* for more information about changing employee master information

Deleting Employees from a Progression Work Group

After you review the information in your progression work group, you might notice that an employee has been incorrectly included in the work group. You can delete an employee from the work group and automatically update your work group to reflect this change.

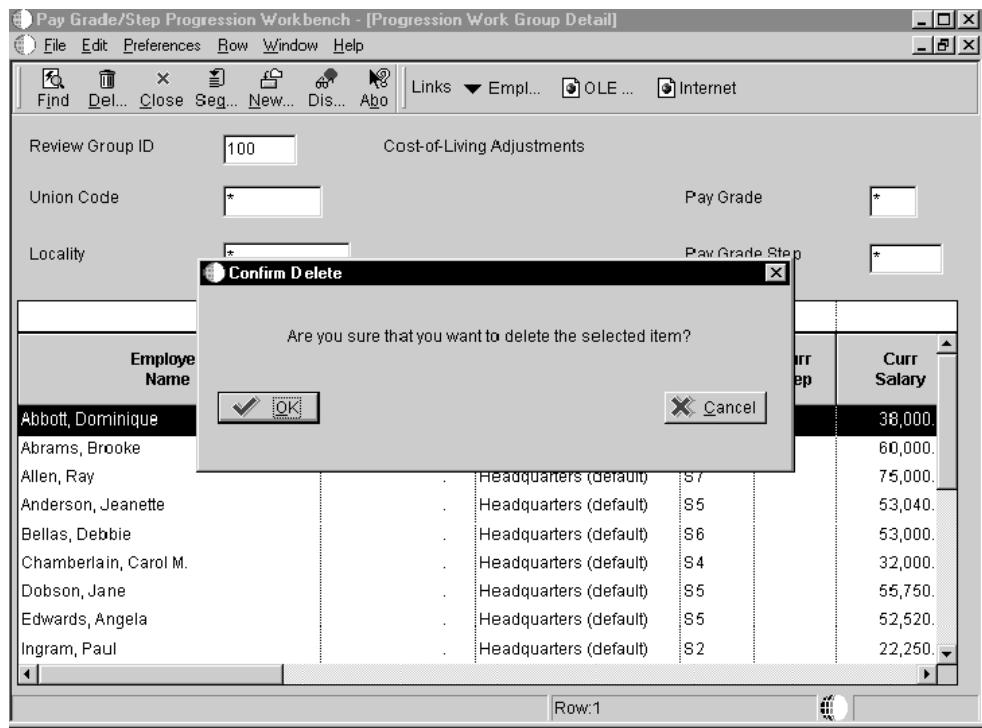
Note

After you choose the employee and click the delete button, the employee is deleted from the work group. You do not need to run the Update Work File process to update the work group. If you accidentally delete an employee, you must rebuild the progression work group to include that employee in the work group again.

► **To delete employees from a progression work group**

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:
 - Review Group ID
 - Country Code
 - Group Status
2. Choose the work group that includes the employee that you want to delete and choose Detail from the Row menu.
3. On Progression Work Group Detail, choose the employee that you want to delete from the work group and click Delete.



- On the Confirm Delete form, click OK.

Updating Pay-Grade Step Changes to the Employee Master

After you have reviewed and updated information in your progression work groups, you can update the employee master with the pay-rate changes. To ensure that the information you are updating is accurate, you can run the process using the proof version and review the information that will be updated before making any changes to employee information.

After you review the proof report for accuracy, you can run the final version. This process updates information to the Employee Master table or the Future Data Revisions table depending on the effectiveness date of the pay-rate changes. If the effectiveness date is before the system date, the Employee Master table is updated. If the effectiveness date is after the system date, the Future Data Revisions table is updated.

J.D. Edwards recommends using an effectiveness date that will update the Employee Master table directly. Processing future data revisions during the final update step of the payroll cycle uses additional system resources and can cause a dramatic increase in processing time. If you use the future data revisions program to update pay grade information during final update, you must activate the payroll workbench processing option to allow future data processing.

Caution

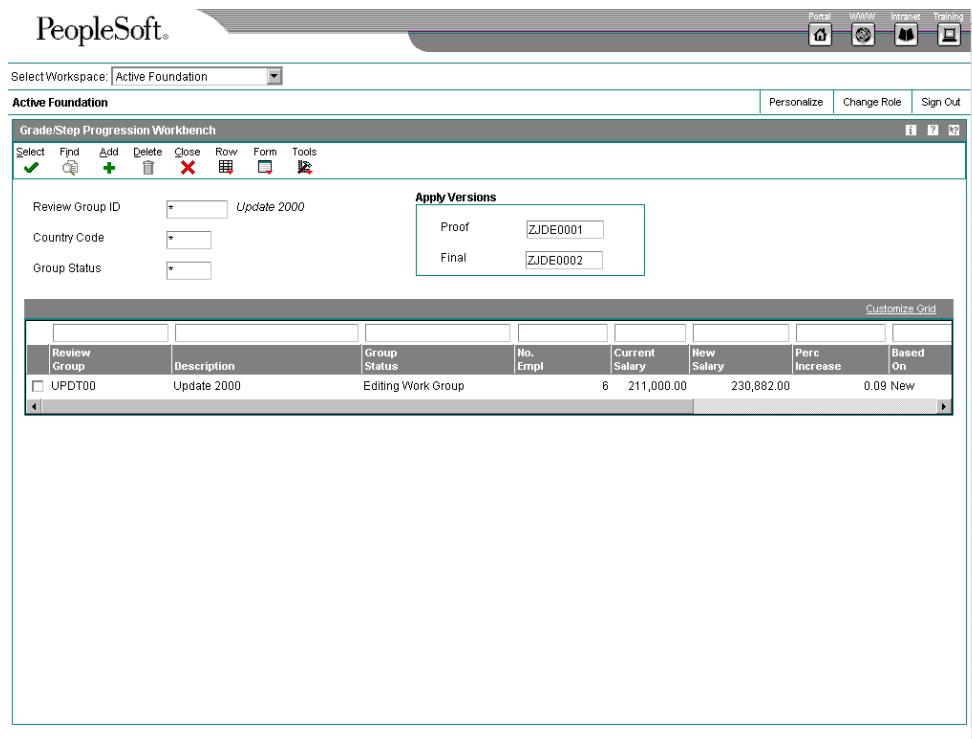
Running the final version of this process directly updates payroll tables. After you have run this process, the only way to restore your information to the way it was before you updated the tables is to make manual corrections to each employee record, or to restore the tables from a backup created before you updated the tables. To avoid this, carefully review the proof report before running the final version.

► To update pay-grade step changes to the Employee Master

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete the following fields:

- Proof
- Final



The screenshot shows the PeopleSoft Grade/Step Progression Workbench. At the top, there's a toolbar with icons for Select, Find, Add, Delete, Close, Row, Form, and Tools. Below the toolbar, there are dropdown menus for Review Group ID (set to Update 2000), Country Code, and Group Status. To the right of these dropdowns is a 'Apply Versions' section with two buttons: 'Proof' (ZJDE0001) and 'Final' (ZJDE0002). Below this is a grid titled 'Customize Grid' with columns for Review Group, Description, Group Status, No. Empl, Current Salary, New Salary, Perc Increase, and Based On. A single row is visible in the grid.

2. Complete any of the following fields and click Find:

- Review Group ID
- Country Code

- Group Status
3. To run the proof version, choose the progression work group that you want to update and choose Proof - Apply from the Row menu.
 4. To run the final version, choose the progression work group that you want to update and choose Final - Apply from the Row menu.
 5. On Confirm Apply Employee Master Changes, click OK.

Processing Options for Pay Grade to Employee Master Update (R082008)

Process Tab

Use these processing options to specify the default values that the system will use when updating the Employee Master table.

1. Generate Detail Report

Use this processing option to specify whether to create a report of updated records. An exception report will always be generated.

- 1 Create a report of updated records.
- Blank Do not create a report of updated records.

2. Change Reason

Use this processing option to add the change reason to the employee history or future data files.

3. Automatically Delete Workgroup

Use this processing option to automatically delete the work group when the update is completed.

- 1 Delete the workgroup.
 - Blank Do not delete the workgroup.
-

Deleting a Progression Work Group

After you review the information in your progression work group and update the changes to the employees in the work group, you can delete the work group.

To be sure that work groups are accurate and that they reflect the latest changes in your employee base, J.D. Edwards recommends that you delete work groups when you have completed the update process and that you create new work groups to process pay-grade step progression changes at a later date. Creating new work groups at the time you want to process pay-grade step progression changes ensures that you include all necessary employees in the work group.

► To delete a progression work group

From the Pay Grade/Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, choose the work group that you want to delete, and click Delete.
 2. On Confirm Delete, click OK.
-

Note

You can also delete a work group during the update process by activating the processing option for the Update Pay Grade to Employee Master program.

See Also

- *Updating Pay-Grade Step Changes to the Employee Master* for more information about deleting progression work groups using processing options

Time Accounting

Time accounting is a process that includes all aspects of the Time Entry system within the Workforce Management Foundation system. Time accounting begins with creating timecards and ends with processing journal entries and updating the general ledger.

Time accounting includes a choice of programs for entering timecards, and batch processing for uploading timecard information from third-party software. The time entry program that you choose will depend on the structure of your company.

For example, you can enter time daily or enter time per pay period for a group of employees. If you have many sites where employees enter their time into a third-party source, you can use time entry batch processing to upload the timecard information into the J.D. Edwards Time Entry system to create timecards.

In all the time entry programs, the system can automatically supply a value for certain fields on each timecard that you enter. This can save data entry time if you have employees who share the same time-entry information. You can also define system-supplied values for time entry.

Processing journal entries updates the general ledger with labor, payroll burden, and equipment expenses. The way in which you process journal entries depends on whether you are using the J.D. Edwards Payroll system.

Working with Employee Timecards

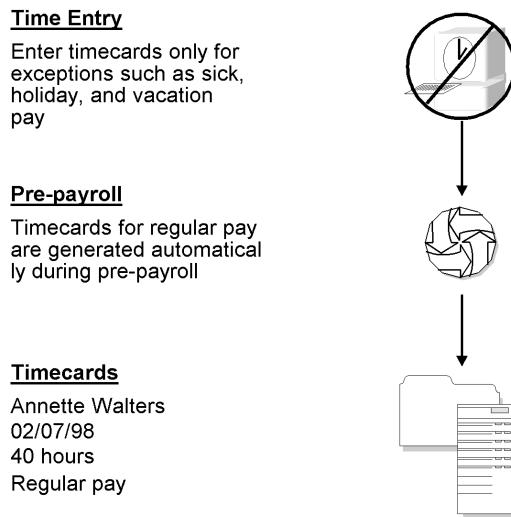
To facilitate the process for entering timecards, you can select employees that you need to enter time for based on shared information such as business unit and supervisor. After selecting the employees, you can review the information and enter timecards for the employees.

You can enter timecards manually or allow the system to generate them automatically during payroll-cycle processing. The Time Entry system helps reduce data entry time and typing errors by automatically creating timecards for the following types of employees:

- Salaried employees
- Hourly employees for whom you entered standard hours when you entered their pay and tax information

Employees whose timecards are automatically generated are classified as autopay employees. For autopay employees, you must enter exception timecards for time other than regular work hours, such as holiday and vacation time. You can also override the default timecard information for an employee.

The following graphic illustrates how the system processes time entry information for autopay employees:



You can choose from various methods to enter employee timecards into the Payroll system. Consider the following when deciding which process to use:

- How many employees will I be entering timecards for?
- Have autopay timecards already been created which need modifications?
- Will I be entering timecards for groups of employees who work in the same location?
- Will I be uploading timecard information from another source, such as a separate time and attendance system or a spreadsheet?
- Will I need to refer to a timecard that has already been processed for an employee to enter a timecard in the current period?
- Will I need to refer to a timecard that has already been entered but not yet processed for an employee in the current period?
- Will I be entering a timecard for a lump sum such as a bonus, pay advance, or pay adjustment?

The time entry method that you choose depends on the criteria that you use to select employees before entering timecards.

The methods of manually entering timecards are Daily Time Entry, Time Entry by Individual, Time Entry by Time Sheet Group, and Speed Time Entry

To enter daily timecards, timecards for time sheet groups, or timecards per pay period, you must first select employees for which you want to enter timecards using time entry filters. You can select employees from the Employee Master table (F060116), select employees who have unprocessed timecards, or select employees with processed time cards.

After the employees have been selected, you can enter timecards for them using Daily Time Entry or Time Entry By Individual. As you save each timecard for an employee, the system displays a blank timecard for the next employee in the group. You can also enter time using Time Entry by Time Sheet Groups. By entering time using time sheet groups, you can automatically populate a single timecard for each employee in the selected group with information that is similar for the group, such as work date, batch number, pay type, number of hours, or lump sum amount. Batch totals are automatically created for you to use to

validate the number of employees and hours that were entered for each batch of timecards. You use Speed Time Entry to enter timecards for employees in a batch or to enter timecards for employees individually based on their employee number.

Time Entry By Individual is used to enter timecards for one employee at a time. This method is beneficial when you are entering time for an employee with multiple timecards or multiple pay types. Only one pay type is allowed per line of time entry. If you have set your processing options to automatically supply the address number and pay types, you are able to increase efficiency and avoid duplication of data entry.

Speed Time Entry and Time Entry by Time Sheet Groups differ from Time Entry By Individual in that it allows you to enter multiple employees per form. You can use Speed Time Entry and Time Entry by Time Sheet Groups when entering timecards for groups of employees who have similar timecard data such as a group of employees who worked the same number of hours, charged to the same pay type, and worked in the same location during the period. As with time entry By Individual, you can set your processing options to copy the address number and pay type from the previous timecard to increase efficiency. You cannot use time entry filters to select employees for time entry if you are using Speed Time Entry.

For all four methods of entering time, each line in the time entry grid represents one timecard. If you are paying an employee multiple pay types, then each line of time entry goes onto its own line in the time entry grid because only one pay type can be associated with each line of time entry.

The first step in entering timecards for a group of employees is to select the employees for whom time is to be entered. Three filters are available from which to select employees. The Employee Master filter allows you to select from all employees, active or inactive. The Current Transactions filter allows you to select from employees for whom a timecard has been entered but not yet processed. The Historical Transactions filter allows you to select from employees for whom a timecard has been posted to history. Each of these filters allows you to search for and select employees based on information they have in common, such as employees who reside in the same business unit or employees who share the same work location.

For a group of employees, you can enter timecards daily or enter timecards per pay period. Or you can use Speed Time Entry or Time Entry by Time Sheet Group to enter timecards for employees in a certain batch or enter timecards for employees individually based on their employee number. Speed Time Entry allows you to enter timecards per pay period only. If you need to enter daily time for employees, you cannot use Speed Time Entry (P051121).

To enter timecards with Speed Time Entry, you do not need to select a group of employees first, although you can select employees by batch number or by individual employee number on the Speed Time Entry form.

For all time entry programs, you can complete fields in the tabbed areas of the form so that certain values, such as shift code or job location, are automatically supplied for each timecard that you create. Completing these fields saves you from entering the same information for each timecard.

You can set your processing options to automatically copy information from one timecard to the next to facilitate timecard entry. If you are entering time either by individual or using Speed Time Entry, after you have entered the first timecard the system automatically supplies the address number and pay type from the previous line of time entry. You can use this feature when you are entering multiple timecards for the same employee or when you are entering timecards for multiple employees with the same pay type.

You can also define system-supplied values for timecards when you set up the Master Business Function processing options for Time Entry (P050002A).

Selecting Employees for Time Entry

You must choose one of the following methods to select employees for time entry:

- *Selecting employees from the Employee Master table*
- *Selecting employees who have unprocessed timecards*
- *Selecting employees who have processed timecards*

All of these selection methods use inquiry forms that might include tabs with job-related, organization, and category code fields to narrow your employee search.

Selecting employees from the Employee Master table (F060116) allows you to select a group of employees who have common information such as a home business unit, supervisor, category code, work schedule, job type, check route code, or a combination of this information.

Selecting employees who have unprocessed timecards allows you to select a group of employees from the Employee Transaction Detail table (F06116) who have timecards that have not yet been through payroll. A Subledger tab with Subledger and Subledger Type fields allows you to narrow your search.

You might want to use this method to select a group of employees for whom you enter timecards each day. For example, as part of your daily tasks, you might need to enter time for a group of employees in Business Unit 9. After completing the Business Unit field, the system displays all the employees in Business Unit 9 who already have timecards in the Employee Transaction Detail File table (F06116).

Selecting employees who have processed timecards allows you to select employees whose timecards have already been processed and posted to the Time Card History table (F0618). You might want to use this method if you want to review employee timecard history from the Employee Transaction History table (F0618) before entering time.

You must set the processing options for Selecting Employees for Time Entry (T051191) for the tabs to appear on the forms.

After selecting employees for time entry, you can enter timecards using time sheet groups, daily timecards, or timecards per pay period. You access daily and per pay period time entry from a Row exit and you access time sheet group time entry from a Form exit.

To facilitate timecard entry, you can set your processing options so that the system copies certain information from one timecard to the next. For example, the system can supply the address number and pay type from the timecard that you previously entered.

You can also set your Master Business Function processing options for Time Entry (P050002A) to allow certain pay information to automatically be supplied on each employee's time entry form. For example, you can set your processing options to allow the system to assign a next number to the Batch field and to supply a pay rate.

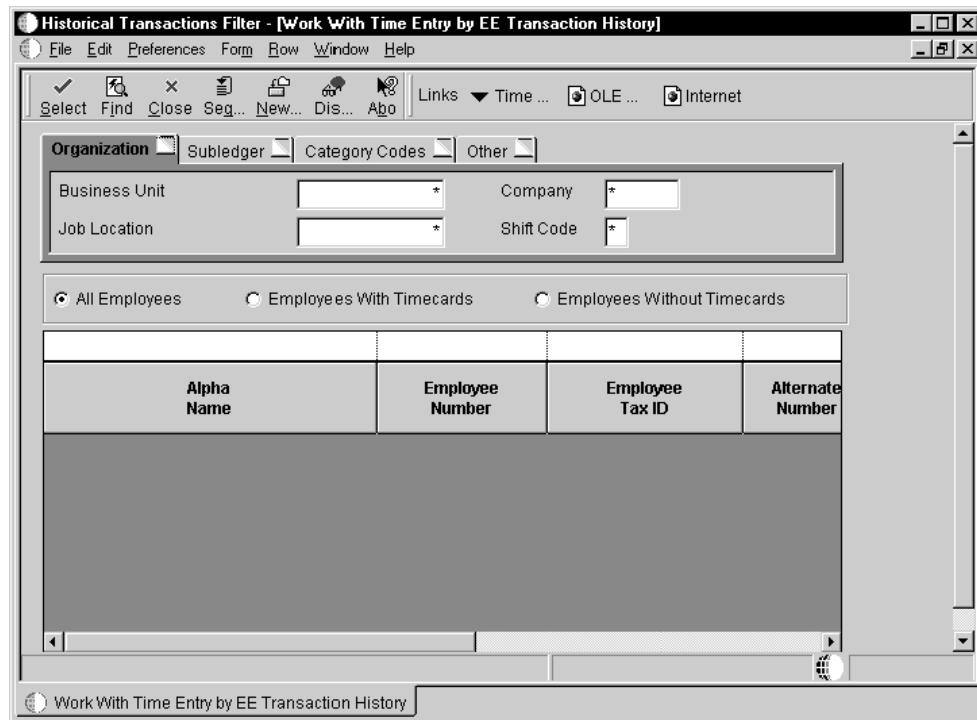
Before You Begin

- ❑ Enter labor distribution instructions for the employee. See [Entering Labor Distribution Instructions](#).
- ❑ Define your Master Business Function processing options for Time Entry. See [Setting Up Master Business Functions](#).
- ❑ Set up equipment numbers on the Equipment Master form. See [Creating an Equipment Master](#).

- Set up equipment-rate tables and equipment-rate groups in the Job Cost system. See [Setting Up Equipment Billing Information](#).
- Set up an AAI table for all journal types. See [Setting Up AAIs for Payroll and Time Accounting](#).

► **To select employees from the Employee Master table**

From the *Time Entry* menu (G05BT1), choose *Employee Master Filter*.



1. On Work With Time Entry by Employee Master, click one of the following options:
 - All Employees
 - Employees With Timecards
 - Employees Without Timecards
2. To narrow your search to employees from categories 1-20, click the appropriate tab (1-8, 9-16, or 17-20), and complete any Category code fields that apply.
Category codes 1-4 are reserved for time entry. For J.D. Edwards demo data, category codes 1-4 are Superintendent, General Foreman, Foreman, and Work Area, respectively.
3. Click the Organization tab and complete any of the following fields to search for employees who have shared organization information:
 - Home Business Unit

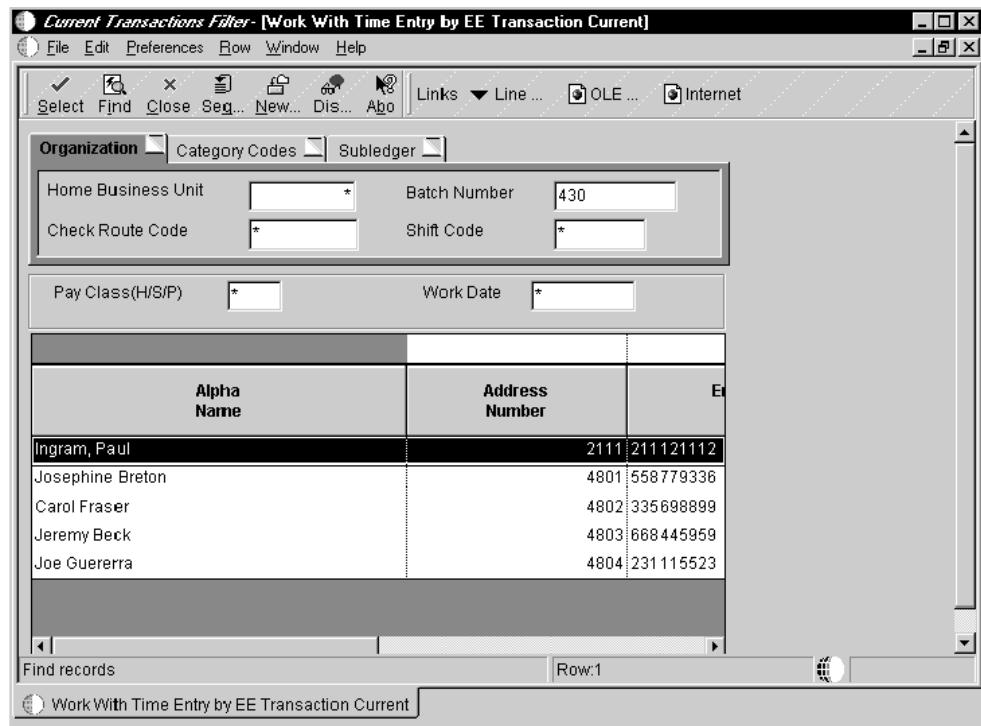
- Home Company
 - Supervisor
 - Security Business Unit
 - Check Route Code
4. Click the Other tab and complete any of the following fields to search for employees who have shared job information and click Find:
- Business Unit - Last Worked
 - Benefit Group
 - Job Type
 - Shift Code
 - Job Step
 - Pay Class(H/S/P)
 - Work Schedule
 - Pay Cycle Code

Your selected group of employees appears.

Proceed to *Entering Timecards for Employees*.

► **To select employees who have unprocessed timecards**

From the Time Entry menu (G05BT1), choose Current Transactions Filter.



1. On Work With Time Entry by EE Transaction Current, complete the following fields:
 - Work Date
 - Pay Class(H/S/P)
2. Complete any of the following fields on the Organization tab to search for employees who have shared organization information:
 - Home Business Unit
 - Check Route Code
 - Batch Number
 - Shift Code
3. To narrow your search to employees from categories 1-4, click the Category Codes tab and complete any of the Category Code fields to help narrow your employee selection.
Category codes 1-4 are reserved for time entry. For J.D. Edwards demo data, category codes 1-4 are Superintendent, General Foreman, Foreman, and Work Area, respectively.
4. Click the Subledger tab.
5. Complete both of the following fields to search for employees who are associated with an account in the general ledger and click Find:

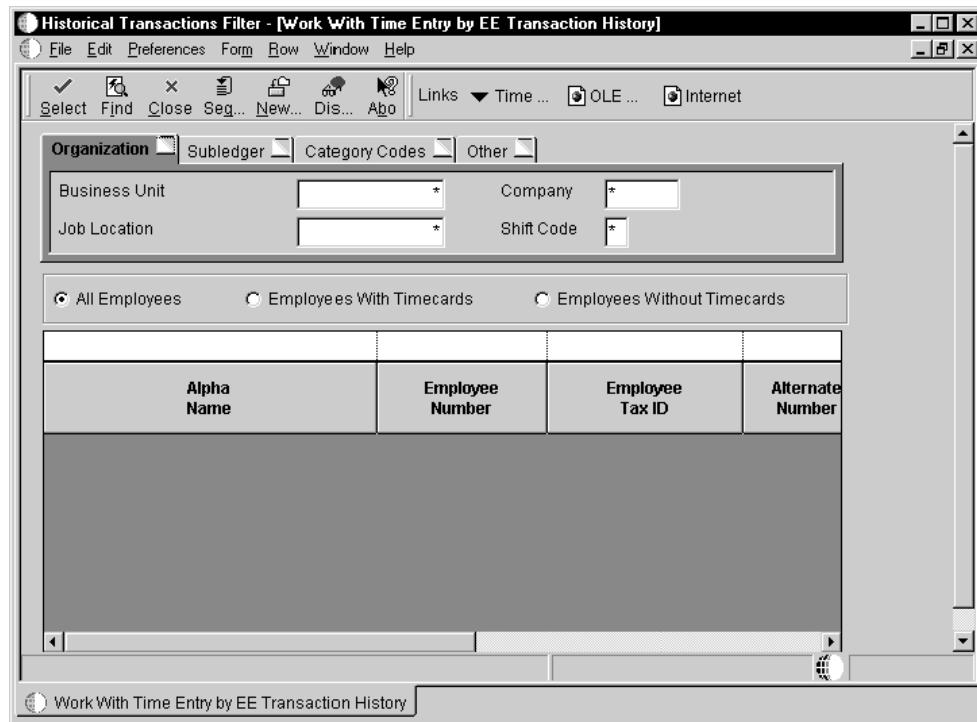
- Subledger
- Subledger Type

Your selected group of employees appears.

Proceed to *Entering Timecards for Employees*.

► To select employees who have processed timecards

From the Time Entry menu (G05BT1), choose Historical Transactions Filter.



1. On Work With Time Entry by EE Transaction History, click one of the following options:
 - All Employees
 - Employees With Timecards
 - Employees Without Timecards
2. Click the Organization tab and complete any of the following fields to search for employees who have shared organization information:
 - Business Unit
 - Job Location
 - Company

- Shift Code
3. Click the Subledger tab and enter both of the following fields to search for employees who are associated with an account in the general ledger:
 - Subledger
 - Subledger Type
 4. To narrow your search to employees from categories 1-4, click the Category Codes tab and complete any of the Category Code fields to help narrow your employee selection.

Category codes 1-4 are reserved for time entry. For J.D. Edwards demo data, category codes 1-4 are Superintendent, General Foreman, Foreman, and Work Area, respectively.
 5. Click the Other tab and complete the following fields:
 - Pay Class(H/S/P)
 - Pay Period Ending Date
 6. Click Find.
- Your selected group of employees appears.

Proceed to the task *Entering Timecards for Employees*.

Processing Options for Time Entry Floods (P051191)

Display

1. Employee Master Tabs

Category Codes 001 - 008

0 = Hide Tab

1 = Display Tab

Category Codes 009 - 016

0 = Hide Tab

1 = Display Tab

Category Codes 017 - 020

0 = Hide Tab

1 = Display Tab

Organization

0 = Hide Tab

1 = Display Tab

Other

0 = Hide Tab

1 = Display Tab

2. Current Transactions Tabs

Organization

0 = Hide Tab

1 = Display Tab

Subledger

0 = Hide Tab

1 = Display Tab

Category Codes (001-004)

0 = Hide Tab
1 = Display Tab
3. Historical Transactions Tabs

Organization

0 = Hide Tab

1 = Display Tab

Subledger

0 = Hide Tab

1 = Display Tab

Category Codes (001-004)

0 = Hide Tab

1 = Display Tab

Line Detail Time Entry

1. Time Entry Changes

1 = Prevent changes

0= Do not prevent changes

2. Time Entry Version

Enter a specific version

Blank = Default version

3. Line Detail Display Tabs

Category Codes

0 = Hide Tab

1 = Display Tab

Organization

0 = Hide Tab

1 = Display Tab

Subledger

0 = Hide Tab

1 = Display Tab

Daily Time Entry

1. Time Entry Week Begin Day

2. Time Entry Changes

1 = Prevent changes

0 = Do not prevent changes

3. Time Entry Version

Enter a specific version

Blank = Default version

4. Daily Time Entry Display Tabs

Category Codes

0 = Hide Tab

1 = Display Tab

Organization Tab

0 = Hide Tab

1 = Display Tab

Subledger Tab

0 = Hide Tab

1 = Display Tab

Time Sheet Time Entry

1. Time Entry Version

Enter a specific version
Blank = Default version

2. Time Sheet Display Tabs

Category Codes

0 = Hide Tab
1 = Display Tab
Organization

0 = Hide Tab
1 = Display Tab
Subledger

0 = Hide Tab
1 = Display Tab
Pay Info

0 = Hide Tab
1 = Display Tab

3. Time Entry Defaults

Address Number

1 = Supply address number
0 = Enter address number
Pay Type

1 = Supply pay type
0 = Enter pay type manually
Localization

1. New Zealand Holiday Pay Act.

- 0 - Do not apply Act rules.
 - 1 - Do apply Act rules.
-

Entering Timecards for Employees

After you select employees for whom you want to enter time using the time entry filters, you can enter timecards for those employees. Each row in which you enter information in the detail area of a time entry form is one timecard. The minimal information needed to create a timecard for a non-autopay employee consists of the following fields:

- Date / Batch
- Pay
- Hours

After you have selected the employees for whom you want to enter timecard information, you must choose one of the following methods for entering timecards:

- Per pay period time entry
- Daily time entry
- Time sheet group time entry

Entering timecards per pay period allows you to summarize an employee's hours with each row (timecard) that you enter in the detail area of the form. Entering daily timecards for

employees allows you to enter hours for each day of the week on one row of the Daily Time Entry form. Entering timecards using time sheet groups allows you to enter timecards for multiple employees on the same form.

All of these time entry methods can track various equipment information, including:

- Equipment ID number
- Number of hours that the employee used the equipment
- Equipment billing rates
- Equipment costs and expenses

When you enter timecards, the system updates the Employee Transaction Detail table (F06116).

Entering Timecards Per Pay Period for Employees

Entering timecards per pay period allows you to summarize an employee's hours with each row (timecard) that you enter in the detail area of the form. Nothing prevents you from entering daily time on the Time Entry Revisions form. However, you would need to enter a row for each day of the week, and this might result in less efficient system performance when you run a payroll.

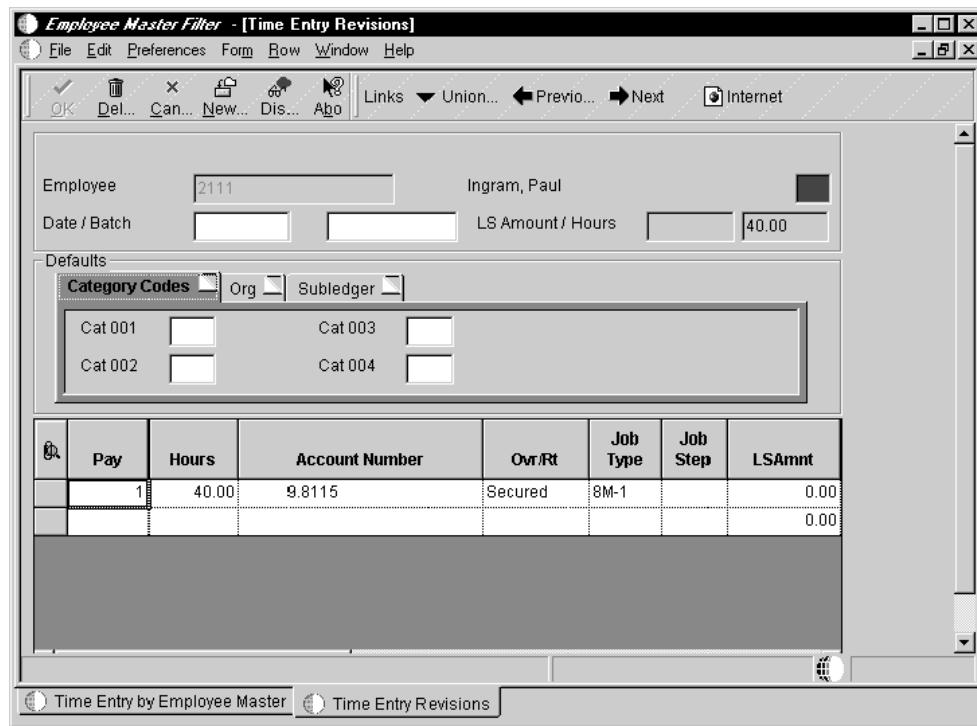
When you enter time per pay period, you can choose an option from the form menu on the Time Entry Revisions form to copy labor distribution instructions for an employee. After you enter the essential timecard information, you can copy an employee's labor distribution instructions to avoid entering timecard information such as the associated account number, job type, and business unit. The system automatically copies the employee's labor distribution rules that you entered in Labor Distribution Rules (P050151). You might enter labor distribution instructions for employees who typically charge time to the same pay types and accounts for each pay period.

If you need to enter a separate timecard for a bonus or a lump sum amount, you must create an additional timecard. You can also override system supplied information. For example, you might need to override the account number and job location when an employee works a job other than his or her regular job. The system uses this override information only once for the pay period.

► To enter timecards per pay period for employees

You enter time per pay period for employees after you have selected your employees for time entry. See [Selecting Employees for Time Entry](#) or proceed to the following steps.

1. On Work With Time Entry by Employee Master, Work With Time Entry by EE Transaction Current, or Work With EE by Transaction History, from the list of employees, choose the first employee for whom you are entering time. Then choose Line Detail from the Row menu.



2. On Time Entry Revisions, complete any of the Category Code fields on the Category Codes tab with information that you want to appear on every timecard that you enter. Complete fields on this tab to track time entered for employees in category codes 1-4. For example, if category codes 1-4 are defined as Superintendent, General Foreman, Foreman, and Work Area, the system will track time entered for these category codes.
3. Click the Organization tab and complete any of the following fields to have organization information supplied automatically to every timecard that you enter. Complete these fields to track detailed information about a job site and to enter timecards by job or business unit.
 - Job Location
 - Check Route Code
 - Shift Code

When you enter a shift code on a time entry form, and the system finds a blank shift differential method (in the Shift table F069246), it uses the shift differential method associated with the pay type from the Pay Type table (F069116). When you don't enter a shift code, the system uses the shift differential method associated with the pay type.
4. Click the Subledger tab and complete any of the following fields to have an account number automatically appear on every timecard that you enter:
 - Subledger Type

- Subledger
- Work Order

To enter work-order information, you must complete the Subledger and Work Order fields. You can override this information in the detail area of the form for individuals who have different work-order information.

5. Review the following field in the detail area:

- Lock Code

6. To enter a timecard, complete the following fields:

- Date / Batch

7. Complete one of the following fields:

- Hours
- LSAmnt

If you are entering a timecard for hours worked, complete the Hours field. If you are entering a timecard for a bonus or lump sum amount, complete the LS Amnt field.

The Batch, Pay, and Hours or LS Amnt fields provide the minimal information needed to create a timecard.

8. If you have entered a timecard for a lump sum amount and you need to create an additional timecard, repeat steps 6-7 for the next row in the detail area. Or to enter a timecard for the next employee, go to step 14.
9. If you need to override a DBA amount for the employee, choose the timecard and choose One Time Override from the Row menu. Proceed to the task, [Overriding DBA Amounts One Time](#).
10. To copy labor distribution instructions, choose Copy Labor Instr from the Form menu. The labor distribution instructions appear. If necessary, make changes to any of the fields as needed for this entry.
11. Complete or override system-supplied values in any of the following fields:

- Account Number

As you enter one timecard after another, you can save time and reduce typing errors in the Account Number field by using certain formulas. See [Duplicating Account Number Segments](#).

- Ovr/Rt

If you need to override the hourly rate, proceed to the task [Overriding an Hourly Rate for an Employee](#).

- Work Date
- Job Type

- Job Step
- Equipment Worked On
- Union
- Position ID
- Uprate
- Shift Diff.
- %/ Amt
- Home Co
- Home BU
- Tax Area
- Pce/Rt
- Pieces
- Phase
- Explanation
- Record Type
- WCI Code
- Transaction Number
- Linked Information Not Found
- Piece Rate Item Number

You need to complete the Position ID field if you want to allocate hours and pay to a specific position budget.

12. To charge for equipment use, complete the following fields:

- Hours Equipment
- Equipment Worked On

13. To identify the billing information for the equipment that the employee used, complete the following fields:

- Bill RtCd
- Equip Obj
- Equipment Billing Rate

14. Click OK and then click Next to display the next employee.

The system automatically adds the time entry record when you click OK and displays the next employee in the group when you click Next. You must click OK to save your time entry information before continuing to the next employee. You can click Previous to display the previous employee in the group.

Values that you entered in the tabbed fields are automatically supplied to the next employee's timecard record.

15. Repeat steps 5 through 14 for any additional employees for whom you want to enter timecard information.
16. When you finish entering timecards for all employees, click OK.

Entering Daily Timecards for Employees

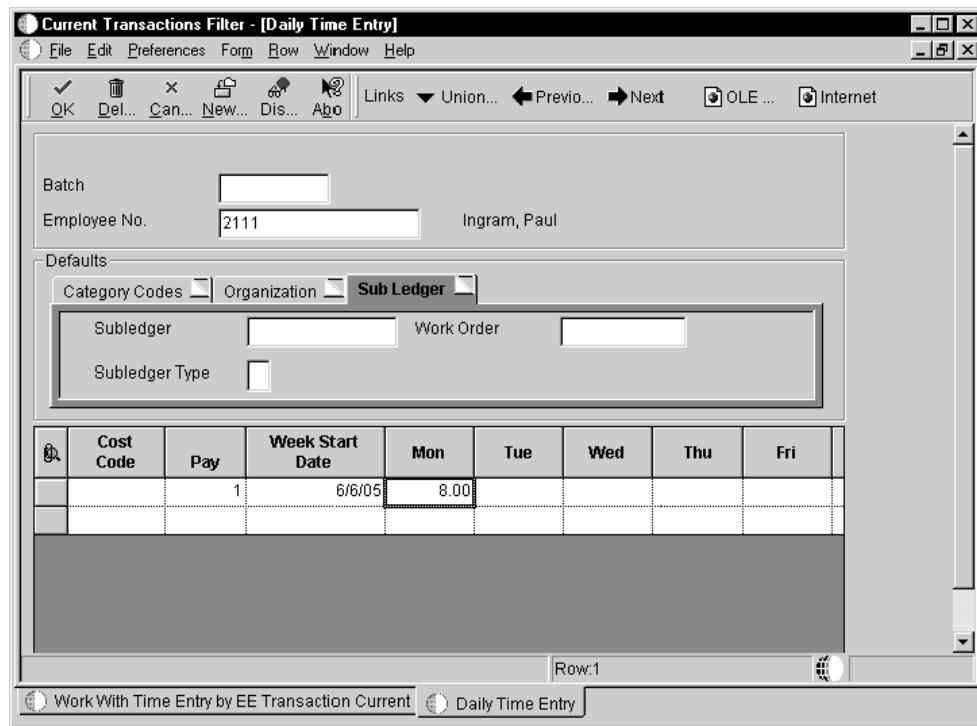
Entering daily timecards for employees allows you to enter hours for each day of the week on one row of the Daily Time Entry form. Use this method if your company needs to post labor to the general ledger every day.

If you need to enter a separate timecard for a bonus or a lump sum amount, you must create an additional timecard. You can also override system supplied information. For example, you might need to override the account number and job location when an employee works a job other than his or her regular job. The system uses this override information only once for the pay period.

► To enter daily timecards for employees

You enter daily timecards for employees after you have selected your employees for time entry. See [Selecting Employees for Time Entry](#) or proceed to the following steps.

1. On Work With Time Entry by Employee Master, Work With Time Entry by EE Transaction Current, or Work With EE by Transaction History, from the list of employees, choose the first employee for whom you are entering time. Then choose Daily from the Row menu.



2. On Daily Time Entry, complete any of the Category Code fields on the Category Codes tab with information that you want to appear on every timecard that you enter. Complete fields on this tab to track time entered for employees in category codes 1-4. For example, if category codes 1-4 are defined as Superintendent, General Foreman, Foreman, and Work Area, the system will track time entered for these category codes.
3. Click the Organization tab and complete any of the following fields to have organization information supplied automatically on every timecard that you enter. Complete these fields to track detailed information about a job site and to enter timecards by job or business unit.
 - Job Location
 - Check Route Code
 - Shift Code

When you enter a shift code on a time entry form and the system finds a blank shift differential method (in the Shift table F069246), it uses the shift differential method associated with the pay type from the Pay Type table (F069116). When you don't enter a shift code, the system uses the shift differential method associated with the pay type.
4. Click the Sub Ledger tab and complete any of the following fields to have an account number automatically appear on every timecard that you enter:
 - Subledger

- Subledger Type

- Work Order

To enter work-order information, you must complete the Subledger and Work Order fields. You can override this information in the detail area of the form for individuals who have different work-order information.

5. Review the following field in the detail area:

- Pay

6. To enter a timecard, complete the following fields:

- Lock Code
- Batch

7. Enter the number of hours worked for one of the following days or complete the LS Amnt field:

- Mon
- Tue
- Wed
- Thu
- Fri
- Sat
- Sun

If you are entering a timecard for hours worked, complete one of the day fields. If you are entering a timecard for a bonus or lump sum amount, complete the LS Amnt field.

The Batch, Pay, and one of the day fields or the Lump Sum Amount field provide the minimal information needed to create a timecard.

8. If you have entered a timecard for a lump sum amount and you need to create an additional timecard, repeat steps 6-7 for the next row in the detail area. Or to enter a timecard for the next employee, go to step 14.

9. Complete the following field:

- Week Start Date

10. To track time by job or business unit, complete the following field:

- Cost Code

11. To override system-supplied information, complete any of the following fields:

- Account Number

As you enter one timecard after another, you can save time and reduce typing errors in the Account Number field by using certain formulas. See Duplicating Account Number Segments in the *General Accounting Guide*.

- Ovr/Rt

If you need to override the hourly rate, proceed to the task Overriding an Hourly Rate for an Employee.

- Record Type
- Job Type
- Job Step
- Piece Rate Item Number
- Equipment Worked On
- Union
- Position ID
- Uprate
- Shift Diff.
- %/ Amt
- Home Co
- Home BU
- Tax Area
- Pieces
- Pce/Rt
- Phase
- Explanation
- WCI Code
- SC/ WC
- Linked Information Not Found

You need to complete the Position ID field if you want to allocate hours and pay to a specific position budget.

12. To charge for equipment use, complete the following fields:
 - Hours Equipment
 - Equipment Worked On
13. To identify the billing information for the equipment that the employee used, complete the following fields:
 - Bill RtCd
 - Equip Obj
 - Equipment Billing Rate
14. Click OK and then click Next to display the next employee.

The system automatically adds the time entry record when you click OK and displays the next employee in the group when you click Next. You must click OK before you continue to the next employee if you want to save time entry information. You can click Previous to display the last employee for whom you entered time.

Values that you entered in the tabbed fields are automatically supplied to the next employee's timecard record.
15. Repeat steps 5 through 14 for each additional employee for whom you want to enter timecard information.
16. When you finish entering timecards for all employees, click OK.

Entering Timecards Using Time Sheet Groups

You can use Time Entry by Time Sheet Groups (P051122) to enter timecards for groups of employees on the same time entry form. Using time sheet groups can be a useful method for entering timecards if you need to enter similar timecards for multiple employees. For example, if you have a group of employees for which you would need to enter timecards that include the same pay type and number of hours, you can do so using time sheet groups.

Time Entry by Time Sheet Groups creates one time entry record for each employee that you select. To use this time entry method, you must first select employees for whom you want to enter timecards using the time entry filters because this program is accessible only from a Form menu option from the time entry filter programs. You can use either of the following methods to enter timecards:

- Time Sheet All
- Time Sheet Select

After you have created a list of employees using a time entry filter, you can enter timecards for all of the employees that you have selected using the filter, or you can create timecards for selected employees within the list of employees generated by the time entry filter. If you want to enter timecards for all of the employees generated by the time entry filter, choose the Time Sheet All option from the Form menu. If you want to select a group of employees from the list generated by the time entry filter, choose Time Sheet Select from the Form menu.

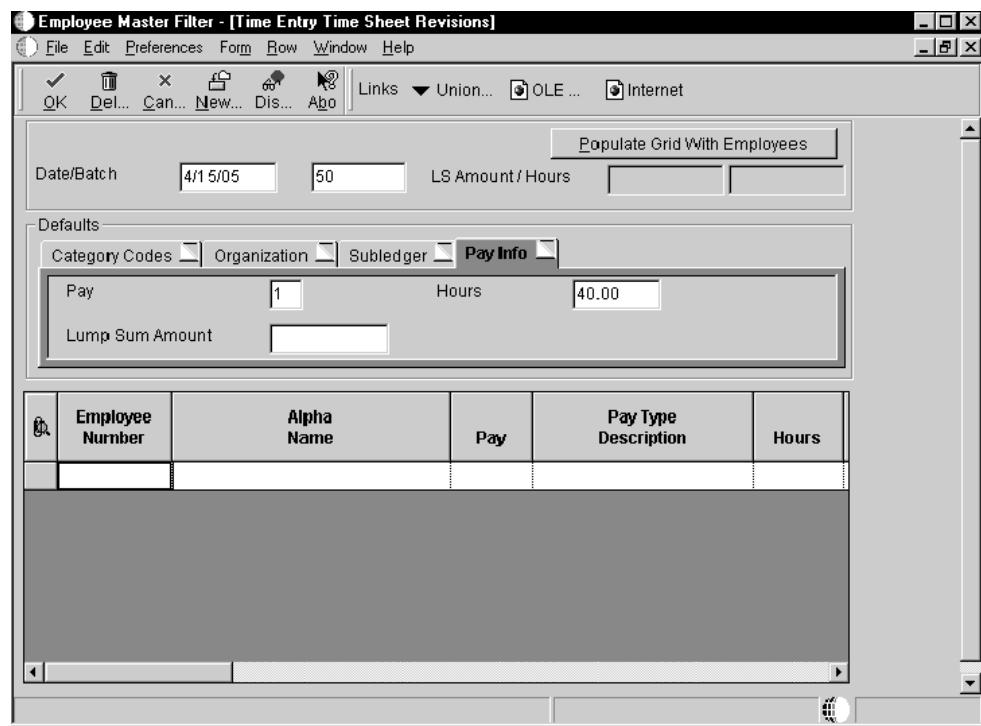
If you need to enter a separate timecard for a bonus or a lump sum amount, you must create an additional timecard. You can also override information that the system supplies. For example, you might need to override the account number and job location when an employee

works a job other than his or her regular job. The system uses this override information only once for the pay period.

► To enter timecards using time sheet groups

You enter timecards using time sheet groups after you have selected your employees for time entry. See *Selecting Employees for Time Entry* and then proceed to the following steps.

1. To enter timecards for all of the employees listed on the form, from Work With Time Entry by Employee Master, Work With Time Entry by EE Transaction Current, or Work With EE by Transaction History, choose Time Sheet All from the Form menu.
2. To enter timecards for selected employees listed on the form, choose the employees for whom you want to enter timecards and choose Time Sheet Select from the Form menu.
3. On Time Entry Time Sheet Revisions, complete the following fields with information that you want to appear on every timecard that you create:
 - Work Date
 - Batch



4. On Time Entry Time Sheet Revisions, complete any of the Category Code fields on the Category Codes tab with information that you want to appear on every timecard that you create.

Complete fields on this tab to track time entered for employees in category codes 1-4. For example, if category codes 1-4 are defined as Superintendent, General Foreman, Foreman, and Work Area, the system will track time entered for these category codes.

5. Click the Organization tab and complete any of the following fields to have organization information supplied automatically on every timecard that you create. Complete these fields to track detailed information about a job site and to enter timecards by job or business unit.

- Job Location
- Check Route Code
- Shift Code

When you enter a shift code on a time entry form and the system finds a blank shift differential method (in the Shift table F069246), it uses the shift differential method associated with the pay type from the Pay Type table (F069116). When you don't enter a shift code, the system uses the shift differential method associated with the pay type.

6. Click the Subledger tab and complete any of the following fields to have an account number automatically appear on every timecard that you enter:

- Subledger Type
- Subledger
- Work Order

To enter work-order information, you must complete the Subledger and Work Order fields. You can override this information in the detail area of the form for individuals who have different work-order information.

7. Click the Pay Info tab and complete any of the following fields to have pay information supplied automatically on every timecard that you enter:

- Pay Type Description
- Lump Sum Amount
- Hours

8. Click the Populate Grid with Employees button.

Employee Master Filter - [Time Entry Time Sheet Revisions]

File Edit Preferences Form Row Window Help

OK Del... Can... New... Dis... Abo Links Union... OLE... Internet

Date/Batch 4/15/05 50 LS Amount / Hours 160.00 Populate Grid With Employees

Defaults Category Codes Organization Subledger Pay Info

Pay	1	Hours	40.00
Lump Sum Amount			

Employee Number	Alpha Name	Pay	Pay Type Description	Hours
2111	Ingram, Paul	1	Regular	40.00
2275	Nguyen, Daniel	1	Regular	40.00
2428	Escalante, George	1	Regular	40.00
2479	Ellis, Jody A.	1	Regular	40.00

Row:4

9. Review the following field in the detail area:

- Lock Code

10. To override system-supplied information, complete any of the following fields:

- Account Number

- Ovr/Rt

If you need to override the hourly rate, proceed to the task [Overriding an Hourly Rate for an Employee](#).

- Record Type
- Job Type
- Job Step
- Equipment Worked On
- Union
- Position ID
- Uprate
- Shift Diff.

- %/ Amt
- Linked Information Not Found
- Home Co
- Home BU
- Tax Area
- Piece Rate Item Number
- Pieces
- Pce/Rt
- Phase
- Explanation
- WCI Code
- SC/ WC

You need to complete the Position ID field if you want to allocate hours and pay to a specific position budget.

11. To charge for equipment use, complete the following fields:

- Hours Equipment
- Equipment Worked On

12. To identify the billing information for the equipment that the employee used, complete the following fields:

- Bill RtCd
- Equip Obj
- Equipment Billing Rate

13. Click OK.

Selecting Employees for Speed Time Entry

The Speed Time Entry program (P051121) allows you to enter timecards for multiple employees per pay period. If you need to enter daily timecards, you cannot use this program. The system does not require you to select employees for Speed Time Entry before entering timecards. However, selecting employees is beneficial if you need to review certain information before you enter timecards.

To select employees for Speed Time Entry you must choose one of the following selection methods:

- *Selecting an employee by employee number*

- *Selecting employees by batch number*

Selecting employees by employee number is preferable if you need to review certain timecard information before entering another timecard for that employee. When you select employees by employee number, the system displays all the employee's timecards from the Employee Transaction Detail table (F06116) by batch number. You can review certain timecard information such as work date, home business unit, home company, pay, hours, lump sum amount, subledger, and sub type.

Selecting employees by batch number is preferable if you always enter timecards according to the batch number. The system displays the batch number that you entered and batch information such as the number of timecards in the batch, the number of employees in the batch, batch hours, and the batch lump sum amount. You can enter all timecards for every employee on one form.

Both methods of selecting employees access the same Speed Time Entry Revisions form (W051121C), which allows you to enter all timecards on one form. Each row that you enter represents one timecard per employee.

The system locates information for Speed Time Entry in the Employee Transactions Detail table (F06116).

After selecting employees for Speed Time Entry, the system automatically supplies a form for you to enter timecards per pay period.

Before You Begin

- ❑ Enter labor distribution instructions for the employee. See [Entering Labor Distribution Instructions](#).
- ❑ Define your Master Business Function processing options for Time Entry. See [Setting Up Master Business Functions](#).
- ❑ Set up equipment numbers on the Equipment Master form. See [Creating an Equipment Master](#).
- ❑ Set up equipment-rate tables and equipment-rate groups in the Job Cost system. See [Setting Up Equipment Billing Information](#).
- ❑ Set up an AAI table for all journal types. See [Setting Up AAIs for Payroll and Time Accounting](#).

► To select an employee by employee number

From the Time Entry menu (G05BT1), choose By Individual.

On Work with Time Entry by Individual, complete the following field and click Find:

- Employee Number

The system displays all timecards for the employee.

Review the information and then proceed to the task [Entering Timecards for Employees Using Speed Time Entry](#).

► To select employees by batch number

From the Time Entry menu (G05BT1), choose Speed Time Entry.

On Work With Speed Time Entry, complete the following field and click Find:

- Batch Number

The system displays all batches associated with the user's ID.

Review the batch information and then proceed to the task *Entering Timecards for Employees Using Speed Time Entry*.

Entering Timecards for Employees Using Speed Time Entry

You can enter timecards for employees using Speed Time Entry after you have selected employees for Speed Time Entry. If you do not want to select employees before entering their timecards, you must enter timecards from either the By Individual or Speed Time Entry menu options. Either menu option supplies the same time entry form.

If you need to enter daily timecards, you cannot use this program. You can use Speed Time Entry to enter timecards for employees per pay period only. Using Speed Time Entry allows you to enter all your employees timecards on the same form using each row as a timecard.

For employees who work with equipment, you can track the following equipment information on their timecards:

- Equipment ID number
- Number of hours that the employee used the equipment
- Equipment billing rates
- Equipment costs and expenses

To facilitate timecard entry, you can set your processing options so that the system copies certain information from one timecard to the next. For example, after you enter the minimal amount of information needed to create a timecard, the system can supply the business unit, work order, and account number from the timecard that you previously entered.

You can also set your Master Business Function processing options for Time Entry (P050002A) to allow certain pay information to automatically be supplied on each employee's time entry form. For example, you can set your processing options to allow the system to assign a next number to the Batch field and to supply a pay rate.

► To enter timecards for employees using Speed Time Entry

You can enter time for employees using Speed Time Entry after you have selected your employees for Speed Time Entry. See [Selecting Employees for Speed Time Entry](#). Or if you do not select employees, from the Time Entry menu (G05BT1), choose By Individual or Speed Time Entry.

1. On Work with Time Entry by Individual or Work With Speed Time Entry, if you selected employees first, choose a record and then click Select. If you did not select employees first, click Add.

	Address Number	Alpha Name	Pay	Pay Type Description	Hours
	7500	McDougle, Cathy	1	Regular	40.00

2. On Speed Time Entry Revisions, complete the following fields:
 - Work Date
 - Batch
3. Complete any of the Category Code fields on the Category Codes tab to have the information supplied automatically to every timecard that you enter.
Complete these fields to track time entered for employees in category codes 1-4. For example, if category codes 1-4 are defined as Superintendent, General Foreman, Foreman, and Work Area, the system will track time entered for these category codes.
4. Click the Organization tab and complete any of the following fields to have organization information supplied automatically to every timecard that you enter.
Complete these fields to track detailed information about a job site and to enter timecards by job or business unit.
 - Job Location
 - Check Route Code
 - Shift Code

When you enter a shift code on a time entry form, and the system finds a blank shift differential method (in the Shift table F069246), it uses the shift differential method associated with the pay type from the Pay Type table (F069116). When you don't enter a shift code, the system uses the shift differential method associated with the pay type.

5. Click the Subledger tab and complete any of the following fields to have an account number automatically appear on every timecard that you enter:

- Subledger
- Subledger Type
- Order Number

To enter work-order information, you must complete the Subledger and Work Order fields. You can override this information in the detail area of the form for individuals who have different work-order information.

6. Review the following field in the detail area:

- Lock Code

7. Complete the following field in the detail area:

- Pay

8. Complete one of the following fields:

- Hours
- LS Amnt

If you are entering a timecard for hours worked, complete the Hours field. If you are entering a timecard for a bonus or lump sum amount, complete the LS Amnt field.

The Batch, Pay, and Hours or LS Amnt fields provide the minimal information needed to create a timecard.

9. If you have entered a timecard for a lump sum amount and you need to create an additional timecard, repeat steps 7-8 for the next row in the detail area. Or to enter a timecard for the next employee, go to step 13.
10. If you need to override a DBA amount for the employee, choose the timecard and select One Time Overrides from the Row menu. Proceed to the task, *Overriding DBA Amounts One Time*.
11. To copy labor distribution instructions, choose Copy Labor Instr from the Form menu. The labor distribution instructions appear. If necessary, make changes to any of the fields as needed for this entry.
12. To override system-supplied information, complete any of the following fields and click OK:

- Account Number

As you enter one timecard after another, you can save time and reduce typing errors in the Account Number field by using certain formulas to key in. See *Duplicating Account Number Segments* in the *General Accounting Guide*.

When multi-currency time accounting is enabled and you are entering recharge information on a timecard, if you are uncertain about the correct account number, choose Markup Table from the Form menu, enter P in the Gen Type column header, and click Find to locate the accounts that are set up for recharge entries.

- Ovr/Rt
If you need to override the hourly rate, proceed to the task *Overriding an Hourly Rate for an Employee*.
- Work Date
- Job Type
- Job Step
- Piece Rate Item Number
- Union
- Job Location
- Position ID
- Pieces
- Uprate
- Shift Code
- Shift Diff.
- %/ Amt
- Home Co
- Home BU
- Tax Area
- Pce/Rt
- Phase
- Explanation
- Record Type
Only record types 2 and 3 apply to recharge (multicurrency time accounting) transactions.
- WCI Code
- SC/ WC
- Transaction Number
- Linked Information Not Found

13. Tab to the next row and then review the following multicurrency fields:

- Foreign Bill Rate
- Base Cur Code
- Rech Cur Code
- Linked Information Not Found

If the recharge rate or the bill rate is incorrect, review the effective account dates in the Markup Table. If the date on the timecard does not fall within the effective dates, the system uses default rate information from the Employee Master.

You can enter an override rate in the unlocked rate field. The field that you use depends on your processing option settings. See *Processing Options for Batch Time Entry File Revisions (P05116Z1)* for information about these processing options.

If no rate is found in the Billing Markup table, the system uses the employee recharge rate.

14. If you selected employees first, click Next to display the next employee or the next batch of employees. You can click Previous to display the last employee that you entered time for.

Values that you entered in the tabbed fields are automatically copied into the next employee's timecard record.

15. To assign a default interim ID to all of the timecards that are displayed in the detail area, click the following option on the Category Codes tab:

- Assign Timecards Default Interims

The Time Entry Interim Generator must be enabled to assign an Interim ID to timecards. See *Creating Interims with the Time Entry Interim Generator* in the *Payroll Guide* for more information.

16. When you finish entering timecards, click OK.

Processing Options for Speed Time Entry (P051121)

Time Entry

1. Time Entry Changes

1 = Prevent changes

0 = Do not prevent changes

2. Time Entry Version

Enter a specific version

Blank = Default version

Defaults

1. Address Number

1 = Supply address number

0 = Enter address number manually

2. Pay Type

1 = Supply pay type
0 = Enter pay type manually
Manufacturing
1. Manufacturing Time Entry

1 = Manufacturing Time Entry
0 = Payroll Time Entry
Localization Selections
1. Enter a 1 to invoke the New Zealand
Holiday Pay (1981) Act logic for Leave
(Holidays) Taken

Overriding Timecard Information

When you enter the minimal timecard information needed to create a timecard, the system can supply additional information depending on how you've defined your processing options and system setup. For example, the employee's pay rate might come from the Pay Rate table, and the account number might come from automatic accounting instructions (AAIs).

You can temporarily override the DBA amount that the system normally calculates. For example, you might need to override DBA amounts for employees who began employment in the middle of a pay period. You can override the DBA amount when you enter a timecard for an employee, but you do not need to actually enter the hours that the employee worked to override a DBA amount. For example, you can override the DBA amount for an autopay employee or enter the hours worked for an hourly employee later.

In some cases, you might need to temporarily override an employee's system-supplied hourly rate. For example, an employee might receive a higher rate for working in a job other than the employee's regular job. You can use time entry to override an employee's hourly rate for the current timecard.

See Also

- Timecard Derivation Sequence* for information about how the system derives timecard information

Overriding DBA Amounts One Time

To override DBA amounts, change the monetary amount (or the hour amount for an hourly accrual) that the system calculates for that DBA during payroll-cycle processing. You can enter zero or any adjusted amount.

When you override DBA amounts, the system updates the Deduction/Benefit/Accrual Ledger File table (F0709).

When you review timecards, the system does not indicate that a DBA one-time override exists.

► To override DBA amounts one time

You override DBA amounts one time when you are entering time for an employee. See *Entering Timecards for Employees* or *Entering Timecards for Employees Using Speed Time Entry*. You can override DBAs after you have selected your employees for Speed Time Entry.

See *Selecting Employees for Speed Time Entry*. Or if you do not select employees, from the Time Entry menu (G05BT1), choose By Individual or Speed Time Entry.

1. On Work with Time Entry by Individual or Work With Speed Time Entry, if you selected employees first, choose a record and then click Select. If you did not select employees first, click Add.
2. On Speed Time Entry Revisions or Time Entry Revisions, choose the record for which you need to override a DBA and choose One Time Overrides from the Row menu.

DBA	Description	Amount	Basis	Union	Job Typ	Job Step	Business Unit
1016	LTD Coverage	29.40					
1017	STD Coverage	21.84					
1020	Dental EE+1	66.00					
1320	United Way	30.00					
3002	Life Ins.	210.00					
4003	Med-EE	72.00					
5105	Life 10K	72.00					
5502	Vision EE+1	18.30					
7000	401(k)	499.97					
Σ		1,019.51					

3. On One Time Overrides, review the information and revise any of the following fields for a specific DBA:
 - Amount
 - Basis
 - Union
 - Job Typ
 - Job Step
 - Business Unit
 - Company
 - Work Tax Area
4. To override voucher information, complete the following fields:

- A/P Voucher
 - Payee No
5. If you are overriding a wage attachment deduction, complete the following field:
 - Wage Att
 6. If you need to review or revise a DBA in the database, choose the DBA and choose PDBA Setup from the Form menu. Proceed to the task [Setting Up Essential DBA Information](#).
 7. Click OK.

Overriding an Hourly Rate for an Employee

When you enter time for an employee, you typically do not need to enter an hourly pay rate. The system derives the hourly rate in the following sequence using the information that is entered and stored in these programs and tables:

16. Time Entry (P051121 and P051191) - Hourly rate

The value in the Hourly Rate field is used as it is entered on the time entry forms for P051121 and P051191.

17. Union Rates Master Revisions (P059121) - Union and Job type

This information is obtained from the Union Rates table (F069126).

18. Occupational Pay Rates (P050231) - Job type and Job step

This information is obtained from the Employee Pay Rates table (F060146).

19. Employee Information (P0801) - Hourly rate

This information is obtained from the Employee Master table (F060116).

Unless you set up your processing options differently, the system uses this sequence to derive an employee's hourly rate. For each employee, the system starts searching with the time entry programs and stops when it finds an hourly rate.

To override an employee's system-supplied hourly rate for a timecard, you can enter the hourly rate on a time entry form.

If you change the pay rate for an employee on the Employee Information form after entering time for that employee, you must revise the timecard and remove the value from the Override/Rate field. The system obtains the new rate and recalculates the gross pay for that timecard.

► To override an hourly rate for an employee

You override an hourly rate for an employee when you are entering time for an employee. See Entering Timecards for Employees or Entering Timecards for Employees Using Speed Time Entry. You can override hourly rates for employees after you have selected your employees for Speed Time Entry. See Selecting Employees for Speed Time Entry. Or if you do not select employees, from the Time Entry menu (G05BT1), choose By Individual or Speed Time Entry.

1. On Work with Time Entry by Individual or Work With Speed Time Entry, if you selected employees first, choose a record and then click Select. If you did not select employees first, click Add.
2. On Speed Time Entry Revisions or Time Entry Revisions, complete the following field to override the system-supplied hourly rate:
 - Ovr/Rt
3. Complete any of the following fields and click OK:
 - Uprate
 - Shift Code
 - Shift Diff.
 - %/ Amt

Working with Time Entry Batch Processing

Time entry batch processing is a process that uploads timecard information from a third-party source to the J.D. Edwards Payroll system. When you upload timecard information, the system converts it so that the information can be used to create timecards in OneWorld. You might upload timecard information from any of the following third-party sources:

- A remote PC time entry program
- Custom systems
- Electronic Data Interchange (EDI) transactions

The J.D. Edwards Interoperability model makes possible the sharing and processing of information between a third-party source and J.D. Edwards software. Inbound transactions are possible for release B73.3.1 and later. That is, you can upload timecard information from a third-party source. A future release will allow outbound transactions also. That is, you will be able to download timecard information to a third-party source.

The Batch Time Entry File Upload (R47002C) program verifies that the information entered into the Employee Transactions Batch table (F06116Z1) is processed correctly and copied to the Employee Transactions Detail table (F06116). After the information is in the F06116Z1 table, you can create timecards.

You can upload timecard information from a third-party source as a flat file that will correspond to J.D. Edwards time entry forms. You might need to format the timecard information in your third-party source so that the information uploads in a corresponding tabular format.

The uploaded timecard information is stored in the Employee Transactions Batch table (F06116Z1) until you process the information. When you process the information, the system creates timecards and stores them in the Employee Transactions Detail table (F06116) with all other timecards.

Before you create timecards from uploaded information, you can review and revise the information in the table for accuracy. You can use the Batch File Register report to verify that the uploaded batches are accurate.

After you have reviewed and revised a batch of uploaded timecard information, you can use the information to create timecards. After creating the timecards, you can include those timecards in payroll-cycle processing.

If your processing options are set up appropriately when you create the timecards, the system automatically purges the processed batches from the Employee Transactions Batch table (F06116Z1). Purging conserves computer disk space and makes it easier for you to locate unprocessed batches.

Setting Up a Flat File Cross-Reference

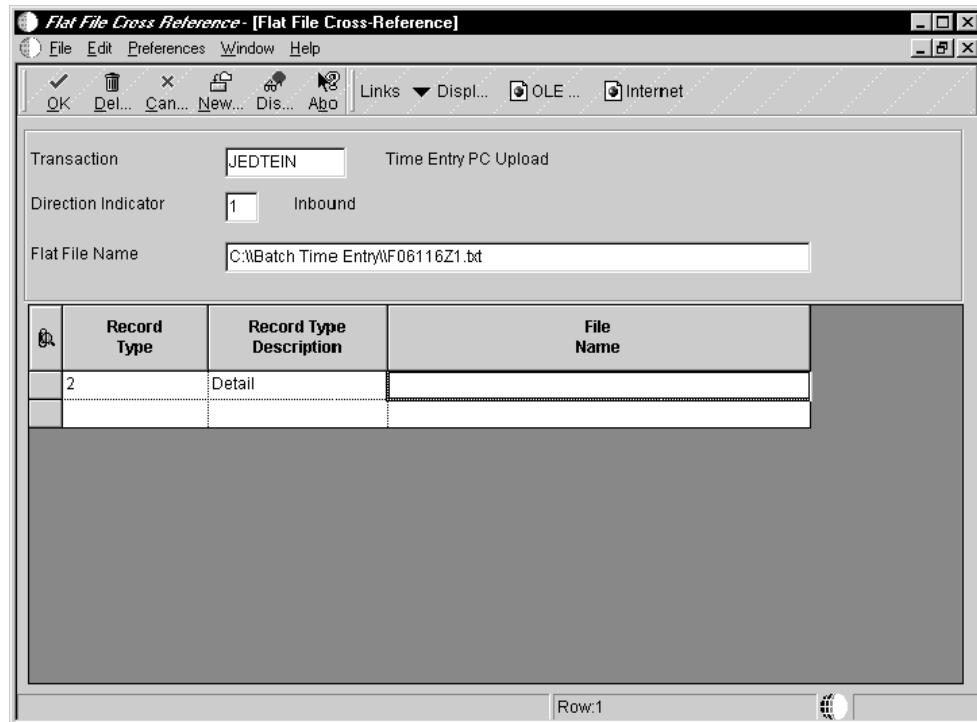
The system needs to identify the flat file with the timecard information before it can upload data from a third party source. When you upload timecard information, the system retrieves the data from the flat files and stores it in the Employee Transactions Batch table (F06116Z1). You use flat file cross-reference information for the following conditions:

- For inbound transactions, if the third party source cannot write data to the interface tables in the required format for OneWorld. The third party source can write the data to a specific flat file for each transaction and record type.
- For uploading information, if the third party source is a new or different source.

► To set up a flat file cross-reference

From the Personic menu (G05BPP41), choose Flat File Cross Reference.

1. On Work With Flat File Cross-Reference, click Add.



2. On Flat File Cross-Reference, enter JDETEIN in the following field:

- Transaction

3. Type 1 in the following field:
 - Dir Ind
4. In the following field, type a filename for the flat file that the data will be uploaded to:
 - Flat File Name

Note

Any folders in the filename path *must* already exist. OneWorld will not create the folders. Also, use double backslashes (\\\) in the filename (for example, c:\\Batch Time Entry\\F06116Z.txt).

5. Type 2 in the following field:
 - Record Type
6. Click OK.

Completing Required Fields for the Employee Transactions Batch Table (F06116Z1)

When you upload flat file information to the Employee Transactions Batch table (F06116Z1), the system must store the information in required fields on the table. These fields correlate with a OneWorld timecard. You must enter required fields in a custom program so that the system can identify the information and then create a timecard with another program.

Review the following tables for the field names, alpha names, explanations, and values of required fields needed for the Employee Transactions Batch table (F06116Z1).

Required Transaction Fields

The following fields must be completed in a custom program for the system to identify the transaction and put the values in the Employee Transactions Batch table (F06116Z1):

VLEDUS (User ID)	Enter the ID of the user entering the transactions.
VLEDTN (User Transaction Number)	Enter a number to identify a specific transaction within a batch.
VLEDLN (Line Number)	Enter a number to identify each line within a given transaction.
VLEDDT (EDI Transmission Date)	Enter the Julian date of the transmission.
VLEDER (Send/Receive Indicator)	Enter R for inbound transactions. This indicates that the record was written by a system external to OneWorld with the intent that the transaction be received in OneWorld.
VLEDSP (Processed Flag)	Enter 0 for inbound transactions. When the system finishes uploading the information, it updates this field to 1.
VLEDTA (Action Flag)	Enter either A for add or D for delete. (Left justified)
VLEDTR (Transaction Type)	Enter 1 for the inbound transaction.

VLEDBT (User Batch) Enter a batch number to identify a specific transaction for the specific user ID.

Note

VLEDUS, VLEDBT, and VLEDTN must contain values that identify the transaction within the table. You can complete any combination of these three fields to identify the transaction during the interface processing.

Required Data Fields

You must complete the following fields for the system to accept the transaction:

VLAN8 (Address Number) Enter the employee's address book number.

VLPTRR (Transaction Number) Enter a unique number assigned within the batch.

VLPHRW (Hours Worked) Enter a number with implied decimals.

VLDWK (Date Worked) Enter the date used as the actual work date or pay period ending date in Julian format.

VLpdba (Pay Type Code) Enter a pay type. The pay types are controlled by table F069116.

VLICU (Batch Number) Enter a number assigned to a batch of timecards. This can be the same as EDBT (User Batch).

Optional Fields

See *Optional Fields for the Employee Transactions Batch table (F06116Z1)*.

Uploading Timecard Information

From the Batch Time Entry Processing menu (G05BBT3), choose Batch Time Entry File Upload.

If you use a third-party source to store timecard information, you need to upload the information from a flat file into the Employee Transactions Batch table (F06116Z1) before you can create timecards. For example, if you keep timecard information in an Excel spreadsheet, you need to import that information into the J.D. Edwards Time Entry system in order to create timecards.

Always run the default version XJDE0031. This version is set up with the proper processing options attached to it.

After uploading timecard information, review the information before you create timecards. See [Revising Uploaded Timecard Information](#).

Processing Options for Inbound Flat File Conversion (R47002C)

Transaction

1. Enter the transaction to process.

Separators

1. Enter the field delimiter.

2. Enter the text qualifier.

Process

1. Enter the inbound processor to run after successful completion of the conversion.
 2. Enter the version for the inbound processor. If left blank, XJDE0001 will be used.
-

What You Should Know About Processing Options

The following table lists information about using certain values for these processing options:

Transaction tab	JDETEIN is the default value and is set up as the Time Entry PC Upload transaction type.
Separators tab	<ol style="list-style-type: none">1. Enter a value that the system recognizes as the beginning and end of the text within each cell or field when creating a flat file.2. Enter a value that allows the system to recognize a new field or cell when creating the flat file.
Process tab	<ol style="list-style-type: none">1. Enter the program number for Batch Time Entry Processor, R05116Z1I, if you want the system to automatically create timecards from the uploaded timecard information. If you want to review and revise your batch after uploading the timecard information, do not enter a value.2. Enter the version of the processor program R05116Z1I.

Revising Uploaded Timecard Information

When the system uploads timecard information, it often identifies one or more inbound transactions that contain invalid transactions. For example, an employee might have an invalid employee number. In this case, the system does not add the record to the Employee Transactions Batch table. Instead, it e-mails the user's Employee Work Center Queue indicating the transaction number for the transaction that is in error.

After uploading timecard information to the Employee Transactions Batch table (F06116Z1), you should review the information and correct any errors before you create timecards. This process helps prevent errors on timecards and in your timecard tables.

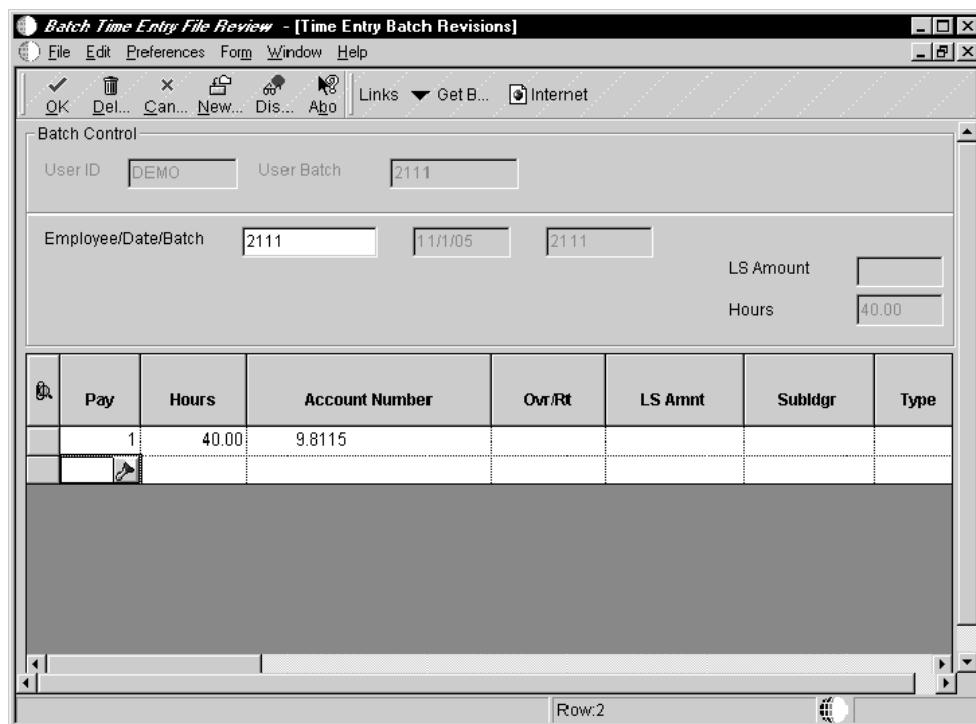
Before You Begin

- View your employee work center queue for transaction errors. See [Viewing Messages](#).
- You can run the Batch Time Entry File Register report as an alternative to reviewing timecard information errors online. See [Reviewing the Batch Time Entry File Register Report](#).

► To revise uploaded timecard information

From the Batch Time Entry Processing menu (G05BBT3), choose Batch Time Entry File Revisions.

1. On Work with Time Entry Batch File Revisions, complete the following fields:
 - User ID
 - Batch Number
2. To further limit your search, complete one or more of the following optional fields and click Find:
 - From Date
 - Thru Date
3. Choose a record and then choose Time Entry from the Row menu.



4. On Time Entry Batch Revisions, enter corrections or override information and click OK.
The server completes blank fields during processing.

Reviewing the Batch Time Entry File Register Report

From the Batch Time Entry Processing menu (G05BBT3), choose Batch Time Entry File Register.

After you revise uploaded timecard information, you should run the Batch Time Entry File Register report to verify that the information is correct.

Processing Options for Batch Time Entry File Register (R053001Z)

Defaults Tab

Use these processing options to specify the type of information that is included on the report.

1. Time Card Type

L = Labor Time Cards

R = Recharge Time Cards

E = Equipment Time Cards

Enter the type of Time Card to be printed.

Valid values are:

L= Labor Time Cards

R = Recharge Time Cards

E = Equipment Time Cards

2. Employee Number Format

A = Address Number

O = Alternate Number

S = Tax ID

If printing Labor Time Cards (type 'L') then enter the type of Employee Number to be printed. Valid values are:

A = Address Number

O = Alternate Number

S = Tax ID

3. Print GL Account Number and Tax Area

Blank = 0

0 = No

1 = Yes

Enter a value to specify if the GL Account Number and Tax Area will be printed. Valid values are:

Blank = 0

0 =No

1 = Yes

4. Print EE Totals

Blank = 0

0 = No

1 = Yes

Enter a value to specify if the Employee Totals will be printed.

Valid values are:

Blank = 0

0 =No

1 = Yes

Creating Timecards from Uploaded Information

From the Batch Time Entry Processing menu (G05BBT3), choose Batch Time Entry Processor.

After you review and revise uploaded timecard information, you can create timecards. You then include those timecards in your usual payroll-cycle processing.

When you create timecards from uploaded timecard information, the system verifies the information against constants tables in the Payroll system.

To create timecards, the system transfers the uploaded information from the Employee Transactions Batch table (F06116Z1) to the Employee Transactions Detail table (F06116).

You need to set up your processing options for Batch Time Entry Processor (R056116Z1I) to run this program in proof or final mode. When you run the program in proof mode, the system prints the Employee Transaction Update report and the Transaction Errors report without updating the Employee Transactions Detail table (F06116). Correct any errors before resetting your processing options to run the program in final mode.

When you run the program in final mode, the system does the following:

- Uses next numbers to assign batch numbers and transaction numbers for each timecard
- Creates and prints the Employee Transaction Update report and the Transaction Errors report
- Marks transactions as processed
- Supplies any applicable default values in the optional timecard fields

If no errors appear on the Transaction Errors report, the system creates timecards in the Employee Transactions Detail table (F06116). If errors occur, the system does not create

timecards, but sends an error message to the appropriate person as defined in your processing options.

If errors occur, correct the errors and run the batch again. If processing options are set up appropriately the system automatically purges the records from the Employee Transactions-Batch table (F06116Z1) when the batch runs successfully.

You cannot use the Time Entry Batch Revisions form to revise processed batches. If you find an error in processed batches, you must make revisions on individual time entry forms.

See Also

- Revising Uploaded Timecard Information* for information about making corrections

Processing Options for the Time Entry Batch Processor Program (R05116Z1I)

Processing Tab

Use these processing options to determine whether this report runs in final or proof mode, whether the system purges processed transactions from the Employee Transactions - Batch File (F06116Z1), and how the system processes employee records that are locked to a payroll.

1. Version - Time Entry MBF

Enter a specific Time Entry MBF Version

Blank = Default version (ZJDE0001)

Use this processing option to override the processor for standard time entry. The default version for Time Entry Master Business Function (P050002A) is ZJDE0001. Additional versions might be required to meet new requirements. For example, you might need to create a new version of the Time Entry MBF for employee assignment. To change the default, enter a different version number. Only persons responsible for system-wide setup should change this option

2. Final Flag

Blank = Proof

1 = Final

Use this processing option to specify the mode in which to run the UBE. Valid values are:

Blank

Process batch information in proof mode. The system generates a report but does not update tables. This option allows you to preview the results that occur when you process batch information in final mode.

1

Process the batch information in final mode. The system updates batch information in the relevant tables. To automate time entry template generation for Employee Assignment, you should set this option to 1

3. Purge Flag

Blank = Do Not Purge

1 = Purge

Use this processing option to specify whether the system purges processed transactions from the Employee Transactions Batch table (F06116Z1) when the transactions are complete. Valid values are:

1

Automatically purge processed transactions from the batch file.

Blank

Flag transactions as processed, but do not purge transactions from the batch file

4. Payroll Lockout Processing

1 = Error Message, No Upload

2 = Warning Message, Upload

3 = No Message, Upload

Use this processing option to specify how the system manages an employee record that is locked out of a payroll. Valid values are:

1

Report an error for a specific employee record that is locked out of a payroll. The system does not upload time for the locked employee record.

2

Report a warning for a specific employee address book number. The system sends a warning message to the message center indicating the employee address book number and payroll ID that caused the error, but the system uploads time for the employee. This setting can force an active payroll into a changes-only run.

3

Receive no messages. The system uploads time for the employee. This setting can force an active payroll into a changes-only run

Select Tab

Use these processing options to specify the Payroll ID, Pay Cycle Code, and the pay period number that the program uses, and the records to select.

1. Self-Service TE

Blank = Select all records

1 = Select approved records

Use this processing option to specify the data source of the records that you want to upload. Valid values are:

Blank

Transfer all records. (Use this option when Employee Self-Service Time Entry is not implemented.)

1

Transfer records that are approved and records that do not require approval

2. Payroll ID

Use this processing option to specify a regular payroll ID (pre-payroll version) that the program uses to select records that are transferred. If this option is specified, then the Start Date, Stop Date, Pay Cycle Code, and Pay Period Number entered on this PO tab are ignored because the system retrieves and uses the values that are associated with this payroll ID

3. Pay Cycle Code

Use this processing option to specify the Pay Cycle Code. Valid values include:

W

Weekly

BW

Biweekly

SEMI

Semi-monthl

4. Pay Period Number

Use this processing option to specify the pay period number. If the pay period number is not specified, then the system uses a pay period number that includes the system date. When the system uses a pay period number that includes the system date, the start and stop dates are based on values from the Master Pay Cycle.

Pay periods are sequentially numbered from the first of the year. For example, a monthly payroll cycle beginning in January has a total of 12 periods, with October as period number 010. Valid value ranges include:

001-052 (Weekly payroll cycle)

001-026 (Biweekly payroll cycle)

001-024 (Semi-monthly payroll cycle)

001-012 (Monthly payroll cycle)

001-004 (Quarterly payroll cycle)

001-001 (Annual payroll cycle)

Refer to the Master Pay Cycle settings to determine how your pay periods are defined

5. Starting Date

Use this processing option to select records that include a date worked that is equal to or greater than the current date

6. Ending Date

Use this processing option to select records that include a date worked that is less than or

equal to the current date

Messages Tab

Use this processing option to specify the person who will receive messages directed to the Work Center.

1. User ID for Work Center Messages

Use this processing option to choose the person who receives PPAT error messages. Enter a user address book number. If you leave this field blank, the system sends error messages to the person who is running the batch application

Interims Tab

Use this processing option to specify version information for the Batch File Upload.

1. Default Interim Payroll Version for Batch File Upload:

Use this processing option to identify the valid interim ID that is assigned to timecards that are created using the upload process

Purging Processed Payroll Batches

From the Batch Time Entry Processing menu (G05BBT3), choose Purge Batch Time Entry.

After you create timecards, you should purge the processed batches if your processing options are not set up to do so automatically. Purging batches conserves disk space and makes it easier to locate unprocessed batches. When you purge processed batches, the system removes records from the Employee Transactions Batch table (F06116Z1).

Piece Rate Processing

You use piece rate processing if you want to pay employees in your organization by the number of units they produce or complete, as opposed to paying them by the number of hours they work or on a salaried basis. To pay employees using piece rate processing, you must set up the following:

- Company options to identify whether your organization uses piece rate processing
- Basic compensation information for each employee to identify which employees are piecework employees
- Processing options for the Time Entry Master Business Function (P050002A) to identify which table the system uses to retrieve piecework rates

- Employee piecework rates if the system derives rates from the Employee Master Information table (F060116)
- Item master records for each piece that you want to track using piece rate processing
- Rates for each item that you want to track using piece rate processing
- Pay types to enter piece rate information on employee timecards
- Federal and state minimum wage rates
- Timecard automation employee groups to process overtime and minimum wage calculations
- Timecard automation rule sets to calculate minimum wage requirements
- Timecard automation rule sets to calculate the hourly rate for overtime calculations

After you set up this information, you can enter timecards for piece rate employees into the system using any of the J.D. Edwards time entry programs. Depending on how you set the processing options for the Time Entry Master Business Function (P050002A), the system derives the piecework rate from either the Employee Master table (F060116) or the Piece Rate Item tables (F07918). After you enter the timecards, you can process the timecard automation rule sets to calculate minimum wage and overtime adjustments, and then you can process the piece rate timecards through a regular payroll cycle. During the payroll cycle, you can review piece rate information on payroll reports, you can print payments that include piece rate information, or you can review piece rate information online.

After you process the timecards through the final update step of the payroll cycle, you can review piece rate history for all employees that have been processed using piece rate information.

Before You Begin

- Set the Pay Class field on the Basic Compensation form to P for employees that are paid using piece rate processing. See *Entering Basic Compensation Information* in the *HR & Payroll Foundation Guide* for instructions.
- Set up the processing options for the Time Entry Master Business Function (P050002A) to specify how the system retrieves rates for piece rate employees. See *Setting Up MBF Processing Options for Time Entry* in the *HR & Payroll Foundation Guide*.
- Set up pay types for piece rate processing. See *Setting Up Pay Types* in the *HR & Payroll Foundation Guide* for instructions.
- Create employee groups that include all of the employees for which you want to process piece rate information. See *Working With Employee Groups* for instructions.

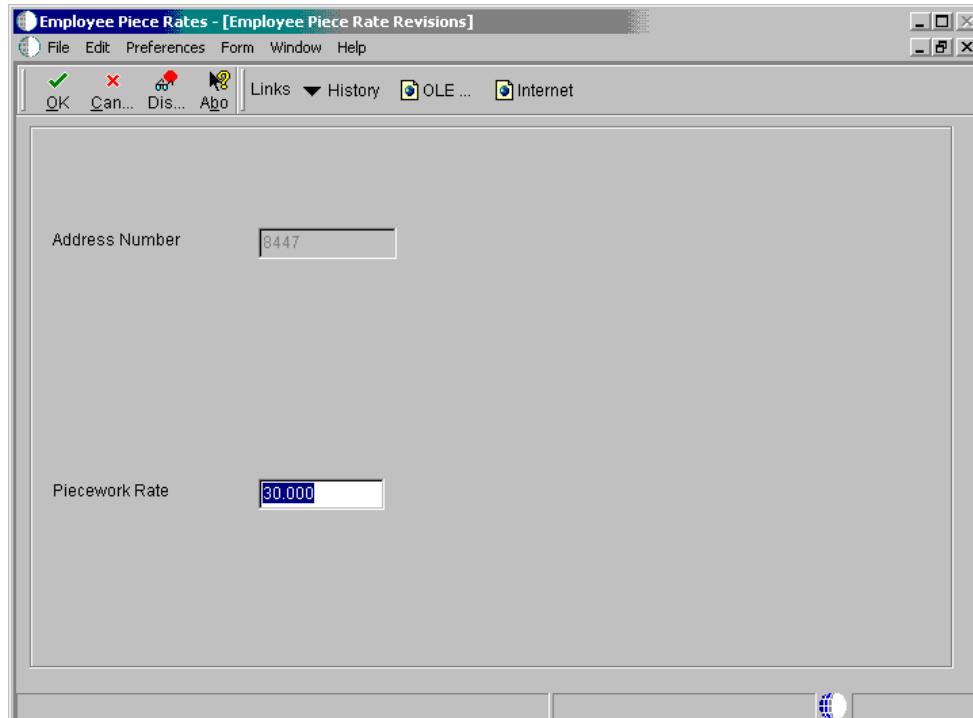
Setting Up Employee Piece Rates

You can specify a piecework rate at the employee level so that regardless of which items the employee completes, they are always paid the same piecework rate. In order for the system to retrieve the employee's piece rate, you must set up the processing options for the Time Entry Master Business Function (P050002A) to retrieve the piece rate from the Employee Master Information table (F060116).

► To set up employee piece rates

From the Piece Rate menu (G07BPR) choose Employee Piece Rates.

1. On Work With Employee Piece Rates, complete the following field and then click Find:
 - Address Number
2. Choose the record in the detail area that you want to update, and then click Select.
3. On Employee Piece Rate Revisions, complete the following field and then click OK:
 - Piecework Rate



Setting Up Piece Rate Item Masters

Before you can process piece rate information in the Payroll system, you must enter the pieces or items into the system. You use the Item Master program (P07916) to enter a record for each item or piece into the Piecework Item Master table (F07916). This table stores information that is specific to each item that is used for piece rate processing.

You can enter an item into the system multiple times if that item is measured or quantified using more than one unit of measure. For example, if some employees are paid by the number of pieces of an item they produce, and other employees are paid by the number of pounds that they produce of that same item, you can enter multiple Item Master record for the item.

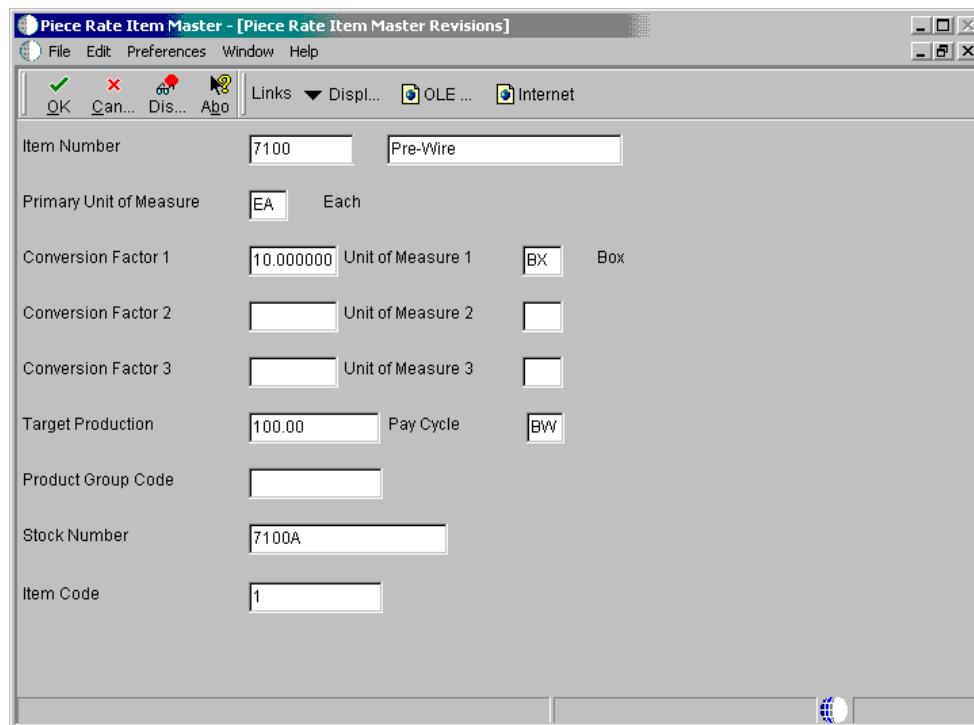
► To set up a piece rate item master

From the Piece Rate menu (G07BPR), choose Piece Rate Item Master.

1. On Work With Piece Rate Item Master, click Add.

2. On Piece Rate Item Master Revisions, complete the following fields and then click OK:

- Item Number
- Primary Unit of Measure
- Conversion Factor 1
- Conversion Factor 2
- Conversion Factor 3
- Unit of Measure 1
- Unit of Measure 2
- Unit of Measure 3
- Target Production
- Pay Cycle
- Product Group Code
- Stock Number
- Item Code



Setting Up Item Piece Rates

After you set up items in the Item Master table, you must enter rates for those items so that employees that are processed through payroll using piece rates are paid correctly. Using the Item Piece Rate Revisions program (P07918), you can set up multiple rates for each item that is stored in the Piecework Item Master table (F07916). Item piece rates are stored in the Piece Rate File table (F07918). You can enter multiple piece rate records into the F07918 for an item if the piece rate record consists of a unique combination of the following information:

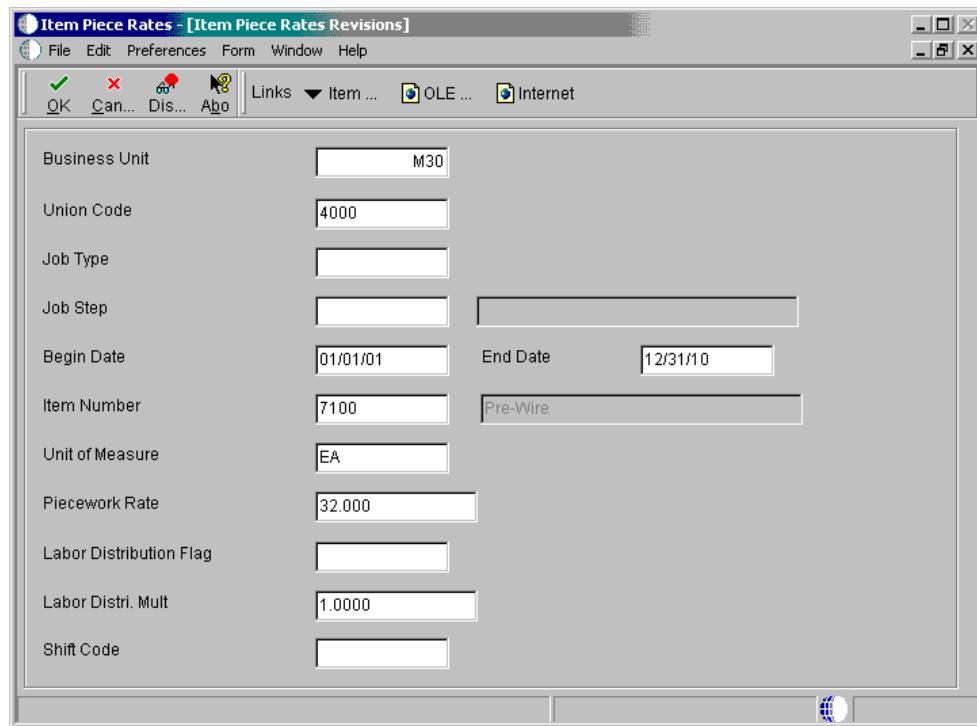
- Business unit
- Union code
- Job type
- Job step
- Effective date
- Item number
- Unit of measure

For example, you might pay employees in different unions different rates for completing the same piece. The system uses the information on employee timecards to determine which rates to retrieve from the Piece Rate File table.

► To set up item piece rates

From the Piece Rate menu (G07BPR), choose Item Piece Rates.

1. On Work With Item Piece Rates, click Add.
2. On Item Piece Rates Revisions, complete the following fields:
 - Business Unit
 - Union Code
 - Job Type
 - Job Step
 - Begin Date
 - End Date
 - Item Number
 - Unit of Measure
 - Piecework Rate
 - Labor Distribution Flag
 - Labor Distri. Mult
 - Shift Code



3. To view the item master for an item, choose Item Master from the Form menu, review the information, and then click Close.
4. On Item Piece Rates Revisions, click OK.

Before You Begin

- Enter Item Master records for each piece for which you want to set up rates. See *Setting Up Item Masters for Piece Rate Processing* for instructions.

Setting Up Minimum Wage Information for Piece Rate Processing

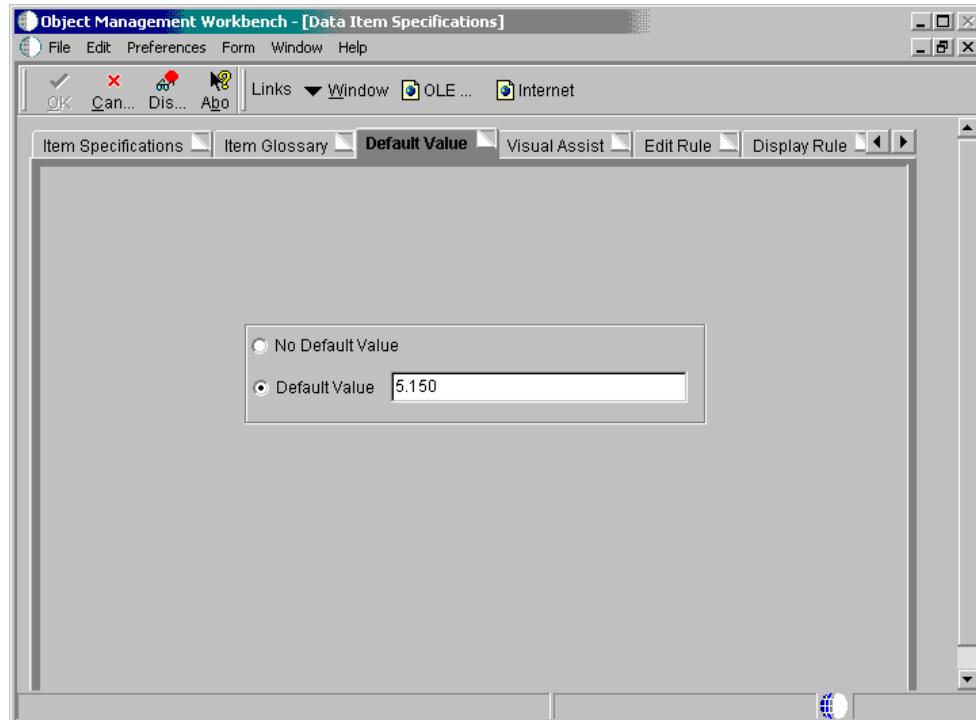
When you pay employees using the piece rate method, you must verify that each employee is paid enough so that they meet the legal minimum wage requirements that are defined by the federal government. If the minimum wage rate is higher in your state than the rate determined by the federal government, you must verify that each employee meets your state's minimum wage requirements.

Minimum wage laws are used to ensure that employees are paid at or above a specified pay rate for each hour of labor that they perform. When you pay an employee using piece rate processing, you do not necessarily pay the employee an hourly wage. Therefore, you must determine whether the pay that an employee receives for completing a specified number of pieces, along with any other wages received, meets or exceeds the minimum wage when divided by the number of hours worked.

Using timecard automation rules and functions, the system can calculate whether an employee meets the minimum wage requirements. If an employee does not meet the

minimum wage requirement, the system automatically creates additional timecards to ensure that the employee does meet the wage requirements.

You must enter the federal minimum wage rate in the default value for data item FMRT (Minimum Wage Rate). See *Setting Default Triggers* in the for instructions.



If any of the states in which your organization does business have a minimum wage rate that is higher than the federal rate, you must also set up state minimum wage rates. To do so, you must first add the value MW to UDC 06/TX. Then you must set up tax area information for the state using the two-digit GeoCode for the state as the tax area and MW as the tax type. Additionally, you must enter the minimum wage rate for that state in the Tax Adjustment Limitation field. For instructions on modifying a UDC or setting up tax area information, see *Adding a User Defined Code*, or *Setting Up Tax Area Information*.

Entering Piece Rate Timecards

After you set up your system to process piece rate information, you can enter employee timecards that include pieces and piece rates. You can enter piece rate information using any of the J.D. Edwards time entry programs. Regardless of which program you use to enter employee timecards, in order for piece rate information to be processed correctly, at a minimum, you must include the following information on each timecard that you enter for piece rate employees:

- Pay Type (which should be set up as a piece rate pay type)
- Hours
- Item Number
- Number of Pieces

Note

If you set up multiple piece rates for a single item, you will need to include additional information on the timecards to ensure that the system retrieves the correct piece rate.

For example, if you set up a piece rate of 10 USD for item 100 and job type A, and you set up a piece rate of 12 USD for item 100 and job type B, you would need to include job type information on timecards that are entered for item 100. The system uses the item number and the job type on the timecard to correctly determine which piece rate to use for the employee.

See *Working With Employee Timecards* in the *HR & Payroll Foundation Guide* for instructions about entering timecards.

Processing Overtime and Minimum Wage Requirements for Piecework

When you pay employees by the number of pieces that they complete, you must make sure that the pay that they receive meets federal and state minimum wage requirements. You must also determine what the employee's average hourly rate is in order to pay the employee the correct rate for any overtime that they work.

Using the Timecard Automation module, you can automatically change existing timecards and create additional timecards to make sure that the employee is paid at the correct rate and according to legal requirements. To process timecard automation rules for overtime and minimum wage requirements, you must first create employee groups that include all of the piecework employees that you want to process. After you create the employee groups, you must process the groups using the piece rate overtime rule and the minimum wage requirement rule.

You use the following functions to set up the rule sets that you use to process overtime and minimum wage requirements for piecework:

- OCR_MinWageAdjustment_1
- OHRF_AverageRateBasedOnLumpSum

After you process these rule sets, you can review the timecards that the system automatically creates for the employees before you process the timecards through a payroll cycle. See *Timecard Automation* for information and instructions about working with employee groups, setting up rule sets, working with functions, and reviewing timecards.

Reviewing Piece Rate History

After you process piece rate information through a payroll cycle, piece rate history is updated to the Piecework History table (F0623). Using the Piecework History program (P0623), you can review online the piece rate history that is stored in this table by employee, business unit, item number, and unit of measure. You can also create the Time and Pay Piecework Register (R078001) to review piece rate history. You can set up the Time and Pay Piecework Register to run during the Final Update step of the payroll cycle, or you can run it directly from the Piece Rate menu (G07BPR).

► To review piece rate history online

From the Piece Rate menu (G07BPR), choose Piece Rate History.

1. On Work with Piecework History, complete any of the following fields and then click Find:

- Employee Number
 - Business Unit
 - Item Number
 - Unit of Measure
 - Year
2. Choose a record in the detail area and then click Select.
3. On Piecework by Payroll Month, review the employee's history information and then click OK.

Piece Rate History - [Piecework by Payroll Month]

File Edit Preferences Form Window Help

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Employee No.	5055	Kellerman, James	Year	5
Business Unit	5100	Potomac Hotel		
Item Number	60003	Bike Rack - Trunk Mount		
Unit of Measure	EA	Each		
Company	00050	Project Management Company	Tax ID	840782700

Month	Amount	Hours	Pieces
January	1,250.00	80.00	50.00
February	2,525.00	90.00	101.00
March			
April			
May			
June			
July			
August			
September			
October			

Processing Options for the Piecework Register (R078001)

Defaults

1. Type of Timecards

P = Piecework Timecards

L = Labor Timecards

Blank = Piecework and Labor Timecards

2. Employee Number

A = Address Number

S = Social Security Number

T = Third Employee Number

3. Print the General Ledger Account Number.

Y = Yes

N = No

Processing Journal Entries

You process journal entries to update the general ledger with labor, payroll burden, and equipment expenses. The way in which you process journal entries depends on whether you are using the J.D. Edwards Payroll system.

If you are using the J.D. Edwards Payroll system, you process journal entries as part of each payroll cycle. You also process journal entries when you process an interim payment for an employee. In some cases, you might choose to process journal entries at other times during a pay period. For example, labor-intensive organizations might need to monitor and analyze labor expenses daily. These organizations can process journal entries for timecards daily.

If you are not using the J.D. Edwards Payroll system but you are using the time accounting features of the Workforce Management Foundation system to enter timecards and to track labor and equipment expenses, you can process journal entries for timecards.

You process the following two types of journal entries for payroll and time accounting:

Pro forma journal entries Preliminary, review-level journal entries that the system stores in the Compressed Payroll Journal workfile (F063951).

Actual journal entries Journal entries that the system posts to the Account Ledger table (F0911) and, optionally, the Account Balances table (F0902).

When you process journal entries for Payroll, you create pro forma journal entries during each payroll cycle. After you review the pro forma journal entries, you can create the actual journal entries that you post to the general ledger. You can set up your company options so that the system automatically posts actual journal entries during the final update step of the payroll cycle. If your company options are set up so that the system does not post the actual journal entries automatically, you or someone in your accounting department must post the journal entries manually. You also must post the actual journal entries manually when an error prevents the system from posting them automatically.

When you process journal entries for timecards, you run a batch program to create the pro forma journal entries. After you review the pro forma journal entries and correct any errors, you run another batch program to create the actual journal entries and post them to the general ledger.

You can create journal entries for the following document types:

Document types for payroll

- T1 Payroll disbursement
- T2 Payroll labor distribution
- T3 Actual burden
- T4 Labor billing distribution
- T5 Equipment distribution
- T6 Payroll accruals and deferrals
- T7 Payroll vouchers

The system creates document-type T7 journal entries only when your Payroll system is integrated with the J.D. Edwards Accounts Payable system.

Document types for time accounting

- T2 Payroll labor distribution
- T4 Labor billing distribution
- T5 Equipment distribution

You process pro forma journal entries for timecards only when you are not processing the journal entries associated with a payroll cycle. You can use the Journal Batch Proof report to review the pro forma journal entries before you post them to the general ledger. You also can use this report to review the pro forma journal entries that the system created during a payroll cycle. If errors occur in the journal batch, you can correct the errors, delete the batch, and reprocess the pro forma journal entries.

When the pro forma journal entries are error-free and approved for posting, you post them to the general ledger. You can post either of the following types of pro forma journal entries:

- Timecard journal entries
- Payroll journal entries that were not posted during the payroll cycle, either because of errors or because of the way in which your company options are set up

When you post journal entries, the system creates, posts, and removes the timecard batch details from the Payroll Journal Compression workfile (F063951) and updates the Account Ledger table (F0911) and the Account Balances table (F0902) with the timecard transactions.

Caution

You must run the full journal entry process either in WorldSoftware or in OneWorld.

See Also

- Interactive Versions for Applications*

Processing Pro Forma Journal Entries for Timecards

From the Timecard Post/History Update menu (G05BT11), choose Generate Timecard Journals.

You process pro forma journal entries for timecards only if you are not creating the journal entries associated with a payroll cycle.

When you process pro forma journal entries for timecards, the system converts the Employee Transaction Detail table (F06116) into the Compressed Payroll Journal Workfile (F063951) and the Burden Distribution file (F06241). When you process these journal entries, you can do the following:

- Define the general ledger date for the journal entries
- Select timecards based on a range of dates

In addition to generating pro forma journal entries, this program generates the Journal Batch Proof report. You review this report to verify the accuracy of the transactions that the system generated from the journal data. This report includes individual entries and totals for document type, period, and company, as well as a grand total for the batch report. If necessary, you can rerun this report without rerunning the pro forma journal entries.

See Also

- ❑ *Processing Pro Forma Journal Entries* for information about processing journal entries during a payroll cycle
- ❑ *Reviewing the Journal Batch Proof Report* for more information about that report

Processing Options for Generate Timecard Entries (R052901)

Date Tab

This processing option determines the date the system uses to post journal entries.

General Ledger Date

1. G/L Date

Blank = System Date

Use this processing option to define whether the program uses the G/L date or the system date when it posts journal entries. To use the system date, leave this processing option blank. Timecards that have multiple work dates are posted on the date that you define in this processing option. To account for daily timecards, you must run this program every day with the processing option set to the system date.

Process Tab

These processing options determine certain values for processes related to Benefits, Intercompany Settlements, Components, and Premium.

1. Benefits

0 = Do not process benefits and accruals.

1 = Process non-monthly benefits and accruals.

2 = Process monthly and non-monthly benefits and accruals.

Use this processing option to define how the system processes benefits and accrual when it posts journal entries for timecards. Valid values are:

- 0 Do not calculate any benefits or accruals for the employees.
- 1 Calculate only non-monthly benefits and accruals for the employees.
- 2 Calculate monthly and non-monthly benefits and accruals for the employees. Enter this value only when you are processing the last timecards for calendar month. The system uses the month that corresponds to the general ledger date.

Non-monthly benefits and accruals are those for which you entered M in the fifth Pay Period of the Month field on the Basic DBA Information form (W059116E). An M in this field indicates that the system calculates the benefit or accrual during daily timecard post.

Monthly benefits and accruals are calendar-month DBAs, including those that are non-monthly, that have the following characteristics:

- o Are set up to calculate for the employee for an entire calendar month
- o Have a value of 2 or Blank in the Limit Method field on the Advanced DBA Information form (W059117A).

2. Intercompany Settlements

1 = Process intercompany settlements.

0 = Do not process intercompany

settlements.

Use this processing option to define whether you want to process intercompany settlements when you post timecard journal-entries. Valid values are:

- 1 Process intercompany settlements. When processing intercompany settlements, the system uses the general accounting constants and the company number on the timecard.
- 0 Do not process intercompany settlements

This processing option applies only when the journal type IC is set up in the Debit/Credit-Accruals Clearing table (P069041).

3. Components

1 = Distribute time billed from parent item

to components.

0 = Bill only for parent item.

Use this processing option to define how you want to post timecard journal-entries for equipment time when the equipment is used to build an item that is comprised of multiple components.

Valid values are:

- 1 Distribute equipment time billed from the parent item to its components.
- 0 Bill equipment time to parent item only.

In the Asset Master table (F1201), you define the parent/child relationship between parent items and their components. You enter billing rates for the components in the Equipment Rates table (F1301).

4. Premiums

1 = Updates units field with premium.

0 = Does not update units field with premium.

Use this processing option to define how you want to update the Account Ledger table (F0911) for premium labor entries. Premium labor entries are entries for pay types that have a pay type multiplier greater than 1. Valid values are:

- 1 Update labor hours to the Units field for premium labor entries. Choose this option when you want journal type PR to include labor hours in the Units field.
- 0 Do not update labor hours to the Units field for premium labor entries. Choose this option when you want only journal type LD to include labor hours in the Units field.

This processing option applies only when the Debit Burden/Premium Labor Distribution table (P069042) is set up in the following way:

- o The journal type PR has been added to the table.
- o The company burden rules are set up to separate the premium portion of a pay type from the regular portion.

5. Summarization Rules

1 = Override summarization rules:

Create Journal Entries in full detail.

0 = Do not override summarization rules.

(Default = 0)

Use this processing option to define how Journal Entries are created and printed. Each account number has a summarization rule defined for it in the Journal Summarization Rules program (P06914). This processing option enables you to override the summarization code, so it will be a Type 6, so you can see the Journal Entries in the highest level of detail possible. Valid values are:

- 1 This option overrides any summarization rules, making the summarization

code a Type 6. Choose this option when you want the Journal Entries to be created and printed in full detail.

- 0 This option is the default, so the pre-defined summarization rule will be used.
-

Reviewing the Journal Batch Proof Report

From the Timecard Post/History Update menu (G05BT11), choose Journal Batch Proof.

After you process pro forma journal entries, you review the Journal Batch Proof report. The system prints this report when you do either of the following:

- Process pro forma journal entries for timecards
- Process the journal entry step of a payroll cycle

Use this report to review the accuracy of the journal entries before you post the information to the general ledger.

The Journal Batch Proof report lists the journal entry information by document types. Grouping journal entries by document types enables you to separate various types of accounts. The system uses the following document types to group payroll journal entries:

- T1 - Payroll Disbursement
- T2 - Payroll Labor Distribution
- T3 - Actual Burden
- T4 - Labor Billing Distribution
- T5 - Equipment Distribution
- T6 - Payroll Accruals and Deferrals

Caution

If you find errors on the Journal Batch Proof report, you must correct the errors and rerun the pro forma journal entries.

The following list contains examples of what might cause errors to appear on the Journal Batch Proof report:

- Inaccurate AIs.
- An account number not yet added to the chart of accounts.
- Incorrect setup of nontaxable benefits or accruals that were processed in the journal entries step.
- Incorrectly entered timecard information. (In this case, if you are processing journal entries for a payroll cycle, you also must rerun pre-payroll.)

The system does not recognize the corrections until you rerun the pro forma journal entries. If you do not rerun the pro forma journal entries after you correct the errors, the system creates the actual journal entries with errors.

When you are processing journal entries as part of a payroll cycle and you have not yet printed the payments, you can complete the following procedure to correct inaccurate timecard information:

- Rerun the journal entries step and delete the previous journal entries to remove the lockout code on the timecards.
- Correct the inaccurate timecards.
- Run a changes-only pre-payroll.
- Rerun the journal entries step.

You can reprint the Pay Period Journal Batch Proof report when you want to print the report without re-creating the pro forma journal entries. The system prints the same proof report that was created during the last iteration of the process. The related payroll ID appears on the report when you reprint it. You can print this report as many times as necessary before you run the final update. After you run the final update, the system clears the Summarized Journal Entry Workfile, and the report does not produce any information.

See Also

- ❑ *Processing Pro Forma Journal Entries*
- ❑ *Setting Up AAIs for Payroll and Time Accounting*
- ❑ *Setting Up Deductions, Benefits, and Accruals*
- ❑ *Processing Changes-Only Pre-Payroll* in the Payroll Guide
- ❑ *Verifying the Journal Entry Post* for common error messages associated with journal entries

Processing Options for the Journal Batch Proof Report (R05229)

Defaults

1. Enter the Batch Number to print.

Batch Number

2. Enter a '1' to send ALL errors to the report. If left blank, errors will be sent to the Employee Work Center.

Errors to Report

Reviewing Batches of Journal Entries

From the Timecard Post/History Update menu (G05BT11), choose Timecard Journal Batch Review.

After you generate pro forma journal entries, you can review them to verify that they are correct. You can review batches of journal entries based on your user ID, the batch number, a posting status, or a specific date range. You can review batches of pro forma journal entries to verify that they are error-free before you post them. You can review the pro forma journal entries that were generated from the payroll cycle, as well as those that were generated from timecards.

You also can review actual journal entries that the system creates when you post timecard journal entries to the general ledger, as well as the actual journal entries that were created during the final update step of the payroll cycle. Depending on how your company options are set up, the system might automatically post these actual payroll journal entries.

The system uses batch types to group the various kinds of journal entries. You can review the following batch types:

- 51** Timecard pro forma journal entries. You can review summary information only. Use the Journal Batch Proof report to locate any errors.
- 41** Payroll pro forma journal entries. You can review summary information only. Use the Journal Batch Proof report to locate any errors.
- P** Actual timecard journal entries that have been posted to the general ledger.
- 7** Actual payroll journal entries that have been posted to the general ledger.

If you discover errors when you review batches of pro forma journal entries, you must delete the entire batch, correct the errors, and then generate the pro forma journal entries again.

If you discover errors when you review batches of actual journal entries, you can use the General Journal Review program to do any of the following to individual journal entries:

- Revise unposted journal entries
- Delete unposted journal entries
- Void posted journal entries

You can revise and delete actual journal entries only. You cannot revise or delete pro forma journal entries.

See Also

- Reviewing Journal Entries* for the steps to review and revise journal entries
- Deleting a Batch of Pro Forma Journal Entries*
- Deleting an Unposted Journal Entry*
- Voiding a Posted Journal Entry*

Deleting a Batch of Pro Forma Journal Entries

From the Timecard Post/History Update menu (G05BT11), choose Batch Delete.

You delete an unposted batch of pro forma journal entries when the batch contains errors and you must correct the timecard entries before you regenerate the corrected batch.

Processing Options for Batch Delete (R05227)

Select Tab

Use this option to select the Daily Timecard Journal Batch that you wish to delete. Use caution when exercising this option, because you cannot recover batches after they have been deleted.

1. Batch Number

Enter the batch number that the system assigned to the Daily Timecard Journal Batch that you wish to delete. Use caution when exercising this option,

because you cannot recover batches after they have been deleted.

Posting Journal Entries for Payroll or Time Accounting

From the Timecard Post/History Update menu (G05BT11), choose Post Journals to General Ledger.

Alternatively, from the Payroll Workbench menu (G07BUSH11), choose Manual Payroll Journal Post.

For time accounting, you must run a program to post the batch of timecard journal entries to the general ledger. The batch that you post for timecards contains pro forma journal entries. During the posting process, the system creates the actual journal entries in the Account Ledger table (F0911) and automatically posts them to the Account Balances table (F0902).

For payroll journal entries, you can set up your company options for either of the following:

The system automatically posts actual journal entries during final update	You use the manual post program only if an error occurred during final update that prevented the system from posting the journal entries.
The system does not automatically post actual journal entries	After you run the final update, you run the manual post program to post the actual journal entries to the general ledger. You or someone in your accounting department might need to approve the batch before you run the post program.

If the Pre-Post General Ledger program encounters errors, the system creates the actual journal entries in the Account Ledger table but does not post them. After you have corrected the actual journal entries, you must resubmit the batch for posting. Since the batch contains actual journal entries, you must use a General Accounting post program.

When you run the manual post program, the system prints the General Ledger Post report. If errors occurred during the posting process, the system also prints the Post Detail Error report. Review these reports to verify that the journal entries were posted successfully.

The General Ledger Post report lists all journal entries. The column titles and information are similar to the Journal Batch Proof report. However, the General Ledger Post report prints the journal entry number, general ledger date, and account descriptions instead of the document reference numbers.

Before You Begin

- Review the batch of journal entries to verify that it is approved for posting. You might need to approve the batch before posting can occur. See [Approving Batches of Journal Entries for Posting](#).

See Also

- *Posting Journal Entry Batches* for information about using a General Accounting program to post batches
- *Verifying the Journal Entry Post* for information about the General Ledger Post report and the Post Detail Error report

Processing Options for Post Journals to General Ledger (R09801)

Print

- 1) Enter which Account Number to print on the report. '1' = Structured Account; '2' = Short Account ID; '3' = Unstructured Account; '' = Default Account Format.

Account Format

Versions

- 1) Enter a version of the Detailed Currency Restatement (R11411) to execute. If left blank, Detailed Currency Restatement entries will not be created. (i.e. ZJDE0001)

Detailed Currency Restatement Version

- 2) Enter a version of the Fixed Asset Post (R12800) to execute. If left blank, Fixed Asset Post will not be executed. (i.e. ZJDE0001)

Fixed Asset Post Version

- 3) Enter a version of the 52 Period Post (R098011) to execute. If left blank, 52 Period Post will not be executed. (i.e. ZJDE0001)

52 Period Post Version

Edits

- 1) Enter a '1' if you wish to update Account ID, Company, Fiscal Year, Period Number, Century, and Fiscal Quarter in records being posted, prior to editing and posting the records.

Update Transaction

Taxes

- 1) Enter when to update the Tax File (F0018). '1' = V.A.T. or Use Tax only; '2' = for all Tax Amounts; '3' = for all Tax Explanation Codes; '' = no update to Tax File (Default).

Update Tax File

- 2) Adjust V.A.T. Account for Discount Taken. The Tax Rules file must be set to Calculate Tax on Gross Amount, including Discount and Calculate Discount on Gross Amount, including Tax. Tax explanation must be a 'V'.

'1' = Update VAT only; '2' = Update VAT, Ext. Price and Taxable. (for discounts taken)

- 3) Adjust V.A.T Account for Receipt Adjustments and Write Offs. Tax explanation must be a 'V'.

'1' = Update VAT only; '2' = Update VAT, Ext. Price and Taxable. (for receipt adjustments and write offs)

Process

- 1) Enter a '1' if you wish to explode parent item time down to the assembly component level. Component billing rates will be used. (This applies to batch type 'T' only.)

Explode parent item time.

Cash Basis

- 1) Enter a '1' to create and post Cash Basis accounting entries. (Applies to batch types G, K, M, W, RB only.)

Obsolete

- 2) Enter units ledger type for Cash Basis Accounting entries. (Default of blank will use "ZU" ledger type.)

Units Ledger Type

- 3) Enter a version of "Create Cash Basis Entries" (R11C850) to execute. (Default of blank will use version ZJDE0001.)

Obsolete

Global Leave Administration

Most organizations need to track the time that employees are on leave. While various payroll software products can track basic accrual balances and timecard history, many organizations need additional planning and tracking tools that capture more detail and allow managers to evaluate and act upon trends. Global leave administration offers robust time reporting and payroll features that establish leave eligibility, accruals, and balance tracking. This software allows you to immediately validate leave availability during time entry. The system also provides an automated workflow feature that enhances the management approval process.

Global leave administration includes Family and Medical Leave Act (FMLA) tracking and administration (medical and maternity leave in countries other than the United States). The

system captures advanced information that is necessary for medical leave approval. After medical leave begins, the system continues to track the progress of each approved leave and collects information that is necessary to meet governmental requirements.

The setup processes for global leave administration include the following:

- Setting up system controls
- Setting up leave types

The Employee Self-Service portion of global leave administration includes the following features:

- Viewing leave balances
- Requesting leave time
- Canceling or modifying existing requests
- Submitting FMLA requests and information

The Manager Self-Service portion of global leave administration includes the following features:

- Viewing requests and available balances
- Approving, modifying, or rejecting leave requests
- Viewing scheduled leave in the Work Order Employee Scheduling module
- Reviewing leave trends

Global Leave Administration Setup

The setup process for global leave administration includes entering appropriate system settings that enable certain software capabilities, defining medical leave policy, and specifying leave types. After you complete these setup procedures and set appropriate processing options for the interactive programs, employees and managers can enter leave requests, track medical leave information, and review pertinent leave-related information.

Setting Up Global Leave System Controls

You use Leave Administration Setup (P07600) to specify company constant settings and to define the basic parameters for the company medical leave policy. Among the setup parameters, you can specify the following:

- Whether you want the system to automatically create timecards for leave requests
- Whether resource scheduling software is enabled
- Whether medical leave software is enabled.

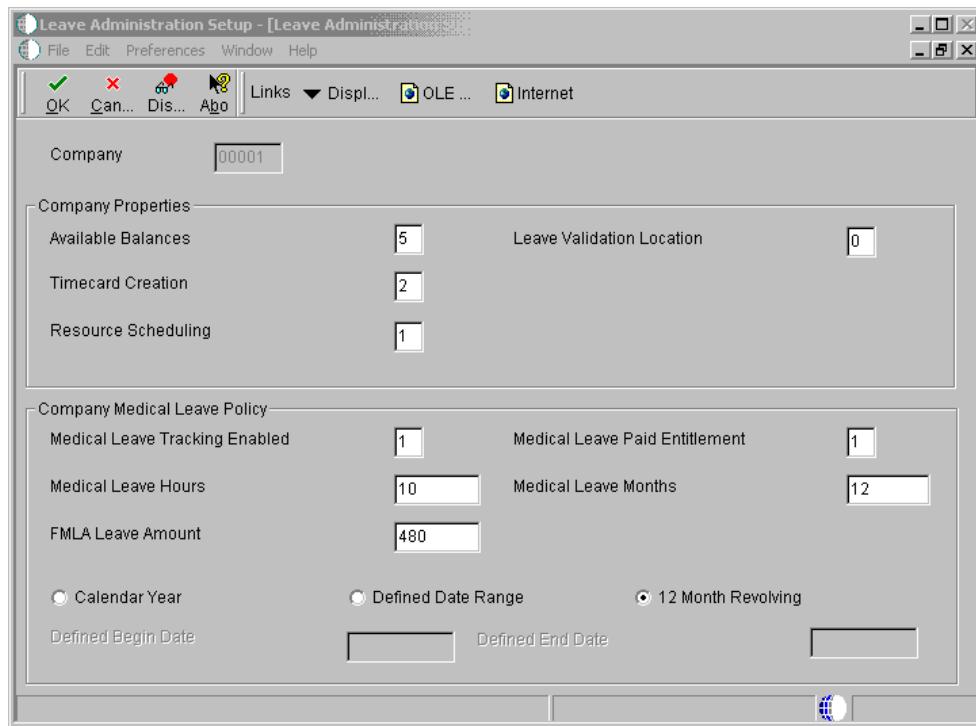
When you enable automatic timecard creation, the system automatically generates a timecard for the leave period each time that an employee creates a leave request and a manager authorizes the request. If you enable the resource scheduling, the system copies approved leave requests into the resource scheduling tables. If you enable medical leave tracking, then the system captures time entry and leave information that is required by the Family and Medical Leave Act (FMLA).

The system stores the setup information that you enter in the Leave Administration Control table (F07600).

► **To set up global leave system controls**

From the Leave Administration Setup menu (G07GLVA1), choose Leave Administration Setup.

1. On Work With Leave Administration Setup, to create new company settings, click Add:



2. On Leave Administration Setup, complete the following field:
 - Company
3. On Leave Administration Setup, complete the following Company Properties fields:
 - Available Balances
 - Timecard Creation
 - Resource Scheduling
 - Leave Validation Location
4. Complete the following Company Medical Leave Policy fields:
 - Medical Leave Tracking Enabled
 - Medical Leave Hours

- FMLA Leave Amount
 - Medical Leave Paid Entitlement
 - Medical Leave Months
5. To define the date basis for your company leave administration setup, choose one of the following options:
- Calendar Year
 - Defined Date Range
 - 12 Month Revolving
6. If you choose Defined Date Range in step 4, complete the following fields and then click OK:
- Defined Begin Date
 - Defined End Date
7. Click Cancel to close Leave Administration Setup.
8. On Work With Leave Administration Setup, click Find to display all global leave company settings.
9. Review the following fields to verify correct settings for each company:
- Company
 - Medical Leave Tracking Enabled
 - Available Balances
 - Timecard Creation
 - FMLA Yearly Limit (Hours)

Setting Up Leave Types

You use the Leave Type Setup program (P07601) to define leave types. Setting up leave types involves three primary functions:

- Enabling leave types
- Defining the relationship of a leave type to a pay type
- Defining the leave type display sequence

You can define existing leave types that are included in UDC 07/LV and add additional leave types to this table that meet the needs of your organization. When you specify that a leave type is active, the system automatically displays the leave type in employee self-service. Employees use leave types in the Employee Self-Service Planning and Request program (P07620). The sequence number that you specify determines the order in which the system displays the leave types.

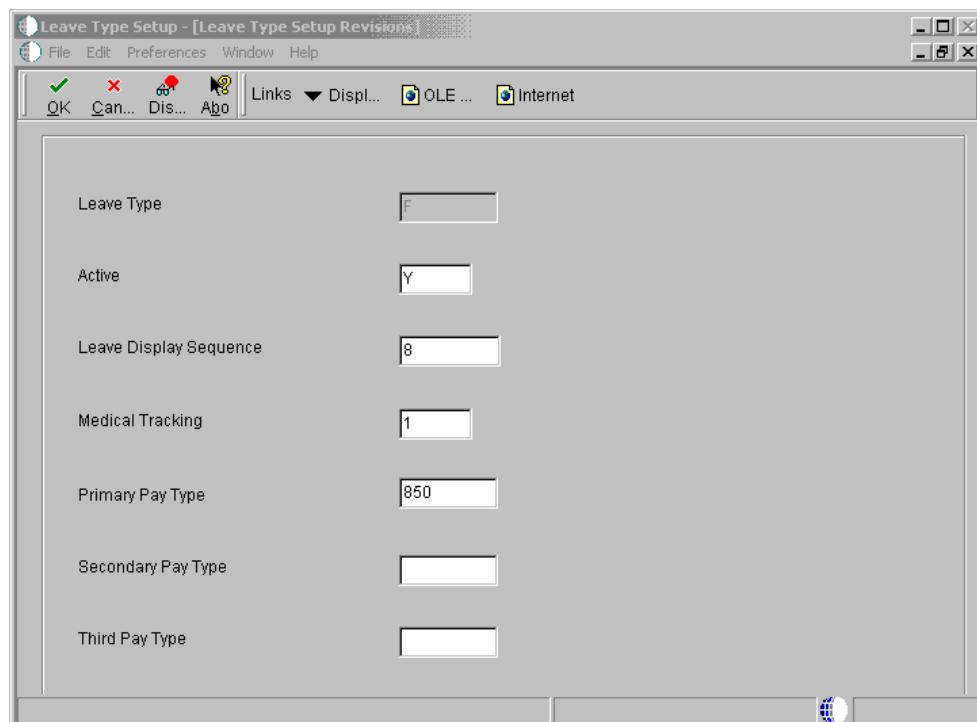
You can enable medical leave tracking in this program and in the Leave Administration Setup program (P07600). If you enable this feature in Leave Administration Setup, then enabling medical tracking in the Leave Type Setup program activates additional information tracking when an employee requests leave time.

The system stores leave type setup information in the Leave Type Setup Table (F07601).

► To set up leave types

From the Leave Administration Setup menu (G07GLVA1), choose Leave Type Setup.

1. On Work With Leave Type Setup, to define new leave types, click Add.



2. On Leave Type Setup Revisions, complete the following fields:

- Leave Type
- Active
- Leave Display Sequence
- Medical Tracking
- Primary Pay Type
- Secondary Pay Type
- Third Pay Type

You can use the secondary and third pay types when you manually enter a time card. You can enter a pay type on a manual time card only if you specify the pay type here.

3. Click OK to save the new information.
4. To define additional leave types, repeat steps 2 and 3.
5. When you are finished defining leave types, click Cancel to close Leave Type Setup Revisions.
6. On Work With Leave Type Setup, complete the following field and then click Find to display all of the leave types.
 - Active
7. Review the following fields for each leave type to ensure the correct settings:
 - Leave Type
 - Active Leave
 - Primary Pay Type
 - Leave Display Sequence
8. When your review is complete, click Close.

Purging Leave Requests

From the Period Processing menu (G07GLVA3), choose Purge Leave Request.

You can use the Purge Leave Request program (R07520) to clean up the Employee Leave Request table (F07620). In some instances, this file might contain approved requests for leave time that the employee did not take. It might also contain denied requests that you want to remove. In the first case, the user may have chosen not to take approved leave time. The employee, unless he or she reviews leave requests, might not be aware that the leave request is still active. In the second case, after a manager denies the request, the record remains in the system so that the leave request originator can review the record, including any notes that the manager includes in the response.

You can delete records using the following criteria:

- Date range
- Denied leave requests
- Completed requests for leave time that the employee takes
- Approved leave requests

When you set a processing option to run this program in the proof mode, you can produce a report and view requests that the system purges prior to purging them.

Processing Options for Purge Leave Request Report (R07520)

Purge Selections

1. Purge Date

Purge records with leave end dates prior to the date entered.

2. Purge Types

Enter 'D' to purge all denied leave request records

Enter 'T' to purge all completed (taken) leave request records

Enter 'A' to purge all approved leave request records

Blank will purge all leave request records with leave end dates prior to the date entered in the processing option.

Mode

1. Enter a '1' to run the report in Proof mode. A report will be generated, but no records will be deleted.

Enter Blank to run the report in Final mode. A report will be generated and records will be deleted.

Planning, Requesting, and Reviewing Leave Time

Employees and managers can use global leave administration for planning, requesting, and approving leave requests. Employees can use the Employee Leave Request program (P07620) to plan and input requests for leave time. Users can choose one of three options:

- Plan and request leave time
- Review or update previously requested leave time
- Review existing leave balances

Using this web-based program, the system leads you through three forms that provide an intuitive approach to capture your request information. Upon completion of the planning stage, you can use this program to submit a request to your manager. You can also submit your request to the Workforce Management department if your request includes medical leave. When you submit a request, the system automatically sends a message to the employee work center for manager review. Managers can review the pending request from the work center and then approve, decline, or indicate that the leave request is under review.

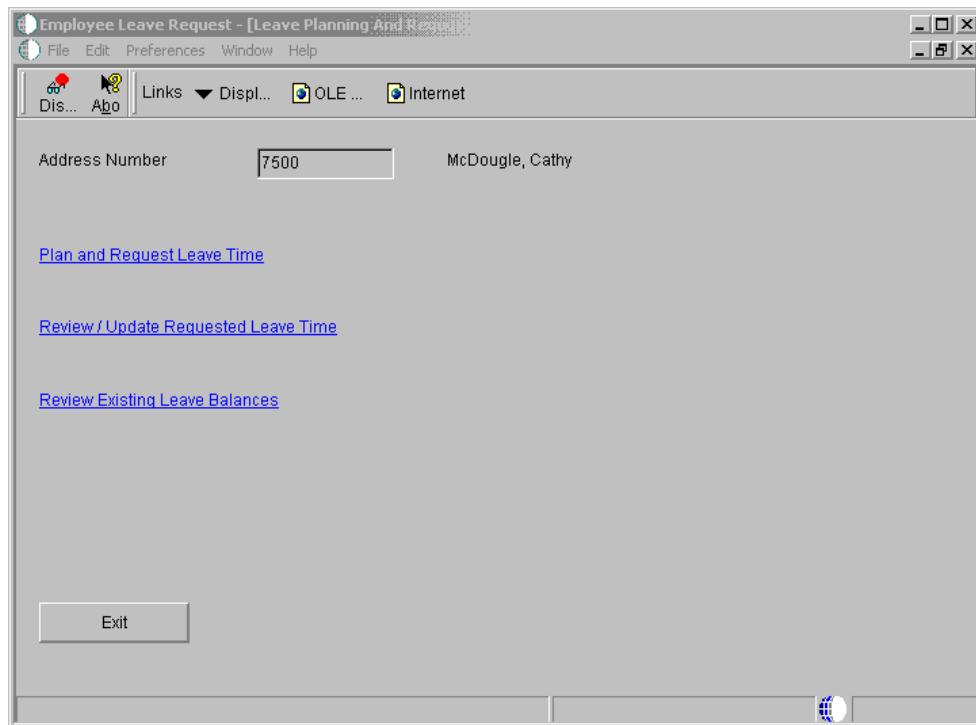
When a manager enters a decision for a pending request, the system automatically sends a response to the employee work center that notifies the originating user about the pending leave request.

Managers can also use the Attendance Trend Summary Review program (P076310) to review employee leave trends. For example, you can use this program to review patterns such as the number of hours that employees have taken off on Mondays within a specific date range.

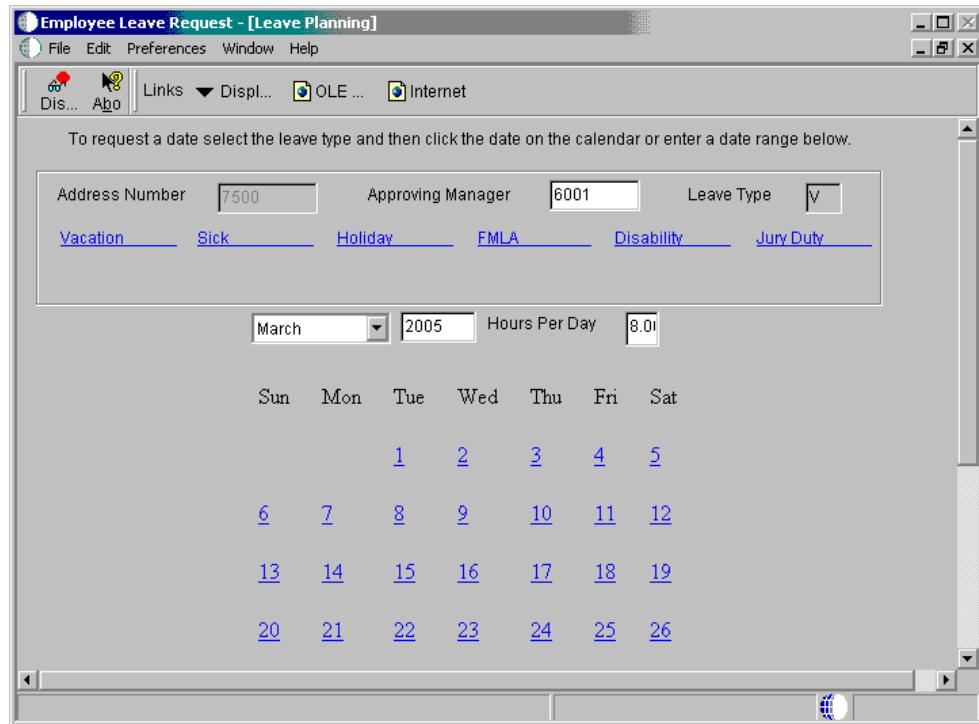
The system stores employee leave request information in the Employee Leave Request table (F07620).

► To plan and request leave time

From the Daily Processing menu (G07GLVA2), choose Employee Leave Request.



1. On Leave Planning And Request Director, choose the following option:
 - Plan and Request Leave Time



2. On Leave Planning, complete the following field:
 - Approving Manager
A processing can be set so that the system automatically provides this value.
3. Complete the following field by clicking one of the provided leave types:
 - Leave Type
The underlined leave types are links. Clicking one of the leave types the Leave Type field.
4. Complete the following fields:
 - Month
 - Year
 - Hours Per Day
5. Click each day of leave that you are planning or requesting on the calendar and then click Finish Leave Planning.

Instead of clicking days on the calendar, you can complete the following fields in Leave Request Date Range 1:

- Leave Start Date
- Leave End Date

- Hours Per Day

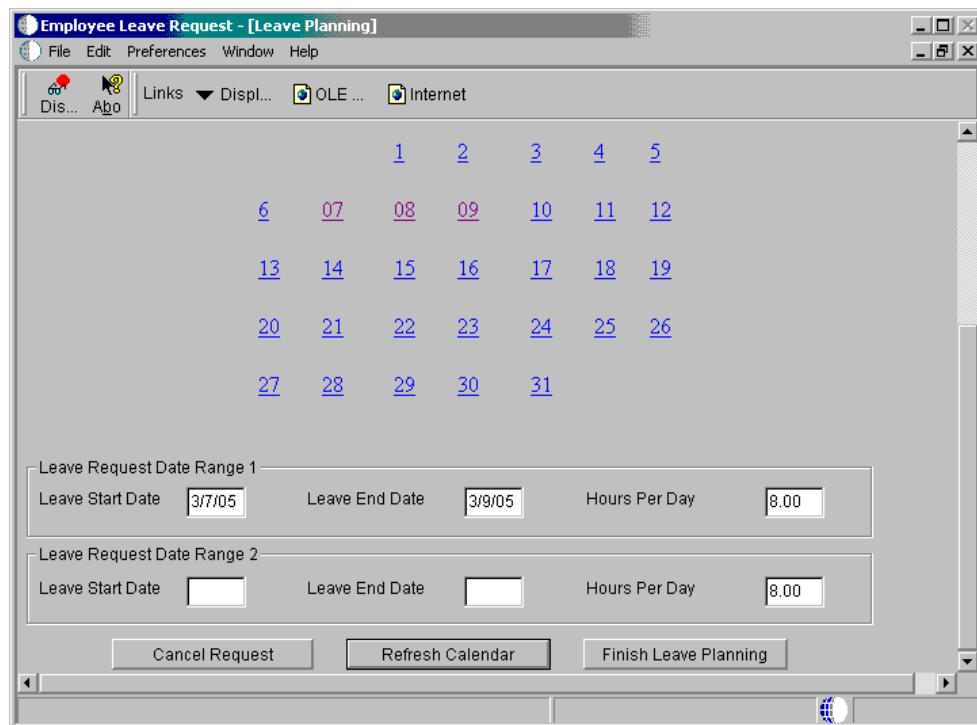
You can complete two date ranges on the same leave request by completing the following fields in Leave Request Date Range 2:

- Leave Start Date
- Leave End Date
- Hours Per Day

Note

When you enter a date range, the system includes weekends and holidays. If the dates that you choose include weekend or holidays, and you do not want to specify those days as leave, either use the calendar to choose individual days or specify more than one leave request date range. You can also create multiple leave requests if needed.

6. When you are finished choosing leave dates, click Finish Leave Planning.



7. On Review/Update Requested Leave Time, review the following fields:

- Request Number
- Approving Manager
- Leave Hours Available

- Leave Type
 - Leave Duration
 - Predicted Ending Balance
8. Review the information in the following columns:
- Request Number
 - Line Number
 - Leave Status
 - Leave Date
 - Leave Duration

The screenshot shows a software application window titled "Employee Leave Request - [Review / Update Requested Leave Time]". The window has a menu bar with File, Edit, Preferences, Window, and Help. Below the menu is a toolbar with New..., Dis..., Abo, Links, Disp..., OLE..., and Internet buttons.

In the center of the window, there is a message: "Included in the grid below is the leave you have requested to review/update. To update a record, highlight the row in the grid, make the appropriate changes, then click Submit Request".

Below this message, there is a section titled "Current Leave Request" containing the following fields:

Leave Request Number	98	Leave Type	V
Approving Manager	6001	Current Leave Duration	48.00
Previous Leave Requested Not Yet Approved	0.00	Previous Leave Requested and Approved	0.00
Leave Hours Available	0.00	Predicted Ending Balance	-48.00

At the bottom of the window, there is a grid table with columns: Request Number, Line Number, Leave Status, Leave Date, and Leave Duration. The grid contains three rows of data:

	Request Number	Line Number	Leave Status	Leave Date	Leave Duration
	98	5.000	P	3/7/05	8.00
	98	6.000	P	3/8/05	8.00
	98	7.000	P	3/9/05	8.00

You can change the values in any of the fields, and you can add leave days to your request by completing additional rows.

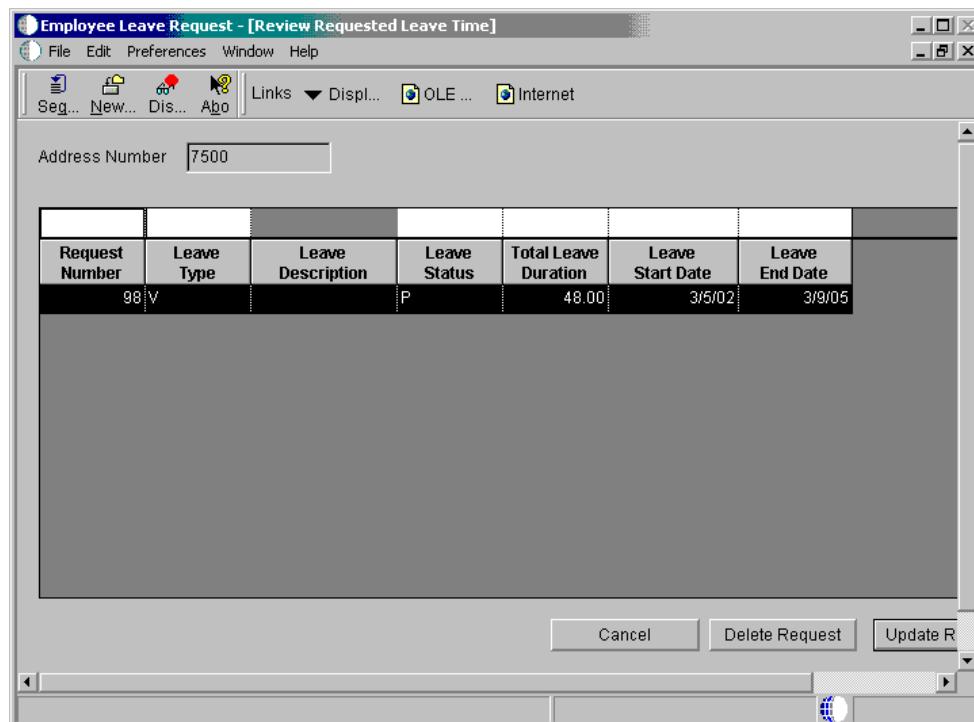
9. When your leave request is complete, click Submit Request.

The system automatically provides a confirmation notice that your request has been successfully completed and has been submitted for approval.

► To review or update requested leave time

From the Daily Processing menu (G07GLVA2), choose Employee Leave Request.

1. On Leave Planning And Request Director, choose the following option:
 - Review/Update Requested Leave Time
2. On Review Requested Leave Time, review any pending leave requests. The fields that you can review for each request are as follows:
 - Request Number
 - Leave Type
 - Leave Status
 - Total Leave Duration
 - Leave Start Date
 - Leave End Date



3. To enter changes to a leave request, choose a request and then click Update Request.
4. On Review/Update Requested Leave Time, review the following fields and enter changes as necessary:
 - Request Number
 - Line Number
 - Leave Status

- Leave Date
- Leave Duration

The screenshot shows a Windows application window titled "Employee Leave Request - [Review / Update Requested Leave Time]". The window has a menu bar with File, Edit, Preferences, Window, and Help. Below the menu is a toolbar with New..., Dis..., and Abo buttons, along with Links, Disp..., OLE..., and Internet buttons. A status bar at the bottom indicates "Row:1".

Current Leave Request:

Leave Request Number	98	Leave Type	V
Approving Manager	6001	Current Leave Duration	48.00
Previous Leave Requested Not Yet Approved	0.00	Previous Leave Requested and Approved	0.00
Leave Hours Available	0.00	Predicted Ending Balance	-48.00

Leave Requests Grid:

Request Number	Line Number	Leave Status	Leave Date	Leave Duration
98	5.000	P	3/7/05	8.00
98	6.000	P	3/8/05	8.00
98	7.000	P	3/9/05	8.00

You can enter changes only to the leave date and leave duration fields.

- When your leave request is complete, click Submit Request.

The system automatically provides a confirmation notice that your request has been successfully completed and has been submitted for approval.

► To review existing leave balances

From the Daily Processing menu (G07GLVA2), choose Employee Leave Request.

- On Leave Planning And Request Director, choose the following option:
 - Review Existing Leave Balances
- On Paid Time Off, review your existing leave balances in the following fields:
 - Beginning balance
 - Additions
 - Taken
 - Available
 - Accrued but not yet available

The system lists this information by leave type, and includes all accruals as of your last paycheck date.

Processing Options for Employee Leave Request (P07620)

Defaults

1. Approvals

1 = Allow employees to edit the approving manager field.

0 = Force employees to submit leave requests to their supervisor in F060116.

Use this processing option to specify whether the user is allowed to edit the Approving Manager field. If you do not allow users to edit the field, the manager from the Employee Master Information table (F060116) is populated in this field and cannot be edited. Valid values are:

1

Allow user to edit the field. (Default)

0

Do not allow user to edit the field.

2. Enter the version for P053020.

Default = ZJDE0001

► To review leave trends

From the Daily Processing menu (G07GLVA2), choose Attendance Trend Summary Review.

1. On Review Time Attendance Trends, complete any of the following fields to sort employee leave request records:

- Company
- Job Type / Step
- Job Step
- Employee
- Union Code
- Shift Code
- Request Number

- Business Unit
- Week Day
- Leave Type
- PDBA Code
- Work Date From
- Work Date Through
- Fiscal Year

Attendance Trend Summary Review - [Review Times]

File Edit Preferences Window Help

Find Close Seg... New... Dis... Abo Links Disp... OLE... Internet

Company	00001	Financial/Distributi	Union Code	*	Business Unit	9
Job Type / Step	*	*	Shift Code	*	Week Day	*
Employee	*		Request Number	*	Leave Type	*
PDBA Code	*	Work Date From	*	Work Date Through	*	Fiscal Year
Attendance Trend Summary						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
2	2	2	1	1	0	0
Total Occurrences		8.00	Total Hours		64.00	

Employee Number	Employee Name	Leave Request Number	Leave Type	Work Date	Day Of The Week	Hours	PDBA Code
8013	Washington, Haro	0	V	8/19/02	Monday	8.00	801
8013	Washington, Haro	0	V	8/20/02	Tuesday	8.00	801

2. Review the following Attendance Trend Summary fields:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

- Total Occurrences
 - Total Hours
3. To review detailed information about each record, review the following fields and click Close:
- Employee Number
 - Leave Request Number
 - Leave Type
 - Work Date Through
 - Hours
 - PDBA Code
 - Amount
 - Company
 - Union Code
 - Home Business Unit
 - Job Typ
 - Job Step

Approving Leave Requests

Managers can review pending leave requests from the work center and then approve, decline, or indicate that the leave request is under review. You can also use the Manager Self-Service Leave Review program (P076311) to review leave requests and leave trends. Because managers can see all pending and historical leave requests for their employees in this program, they can identify potential problems and make better decisions about pending leave requests. When a manager enters a decision for a pending request, the system automatically sends a response to the employee work center that notifies the originating user about the pending leave request.

You can choose to display leave requests by any combination of the following criteria:

- Employee address number
- Leave status
- Leave type
- Leave request number

Review the Leave Status field before choosing a leave request record on the first form. If the status for a given request is anything other than P (pending), you cannot enter changes to the record on the following form.

If the system is set up to automatically create timecards, you can change an approved leave request by entering changes to the timecard. If you delete a leave request record, the system automatically removes the associated timecard. When you delete a timecard that is associated with a leave request, the system automatically removes the associated leave request.

When you respond to a leave request, you can click any of the following buttons to enter the associated action:

Selection Choice	Manager Action
	Approval: the leave request is approved.
	Denial: the leave request is not approved.
	Pending: the leave request is on hold, pending further action.

You can enter text in the Leave Action window to explain the response. Although you can enter text to accompany any response, you normally associate an explanation when you deny a request or assign a pending status to a request.

The Manager Self-Service Leave Review program displays information from and records information into the Employee Leave Request table (F07620):

Changes that you enter into this program can also affect the following tables that the system uses in time entry and employee self-service time entry:

- Employee Transaction Detail File (F06116)
- Employee Transactions - Batch File (F06116Z1)

► To approve leave requests

From the Daily Processing menu (G07GLVA2), choose Manager Self-Service Leave Review.

1. On Work With Manager Self Service Leave Review, complete the following field (if necessary) and then click Find to display leave requests for all of your employees.
 - Approving Manager

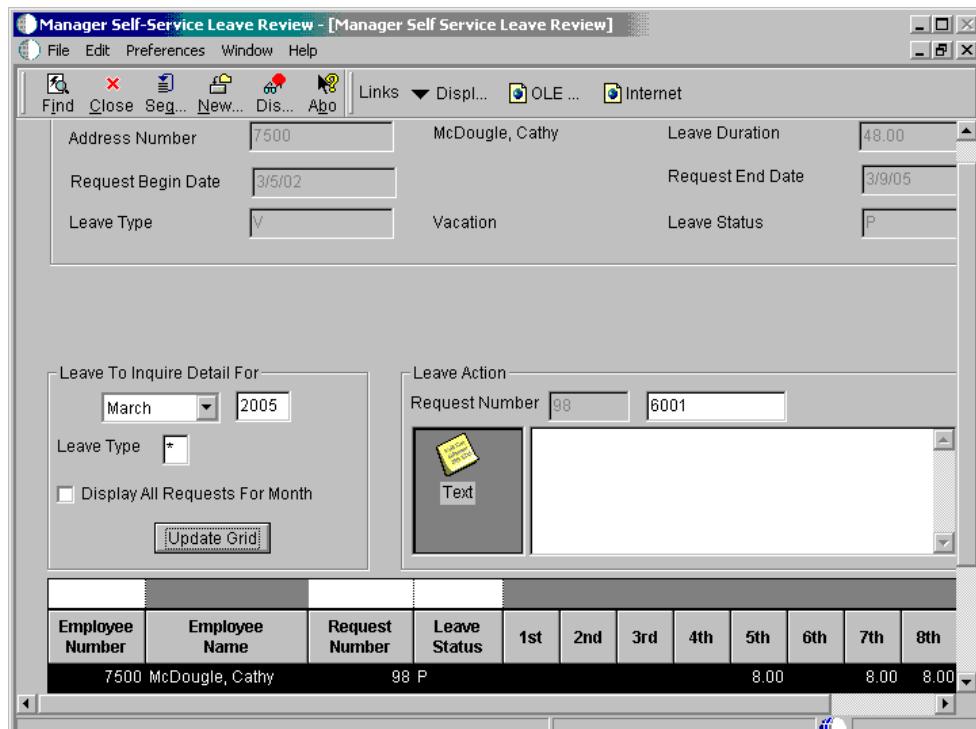
The screenshot shows the 'Manager Self-Service Leave Review' application window. At the top, there is a toolbar with icons for Select, Find, Close, Seg., New..., Dis..., Abo, Links, Disp..., OLE..., and Internet. Below the toolbar, the title bar displays 'Manager Self-Service Leave Review - [Work With]'. The main area has a header 'Approving Manager' with a dropdown menu set to '6001' and a label 'Allen, Ray'. Below this are several search fields: 'Address Number' (with a required asterisk), 'Leave Status' (with a required asterisk), 'Leave Type' (with a required asterisk), 'Request Number' (with a required asterisk), 'Request Start Date' (with a required asterisk), and 'Request End Date' (with a required asterisk). A large table below lists leave request records:

Address Number	Request Number	Leave Status	Leave Type	Request Start Date	Request End Date	Leave Duration	Approving Manager
7500	98	P	V	3/5/02	3/9/05	48.00	6
8011	88	A	V	2/11/02	2/12/02	16.00	6

2. Choose a leave request record and then click Select.
3. On Manager Self Service Leave Review, review the following fields:
 - Address Number
 - Request Begin Date
 - Leave Type
 - Leave Duration
 - Request End Date
 - Leave Status

Note

These fields display information about the leave request record from the previous form. The table displays all of the leave request records for the approving manager.



4. Use the following fields to display the leave request records that you want to review and then click Update Grid:
 - Month
 - Year
 - Leave Type
 - Display All Requests For Month
5. Choose the Display All Requests for Month option to include all request records for the month that you specified.
6. Choose a leave review record and review the following fields:
 - Employee Number
 - Request Number
 - Leave Status
7. Review the list of dates for requested time off, illustrated by the following fields:
 - 1st
 - 2nd
 - 3rd

8. Click one of the decision options:
 - Approved (checkmark button)
 - Declined (X button)
 - Pending (question-mark button)
9. Review and enter a decision for additional leave requests as necessary and then click Close.

Processing Options for Manager Self-Service Leave Review (P076311)

Defaults

1. Enter "1" to allow changes to the approving manager field. Enter "0" or blank to not allow changes to the approving manager field. Default = blank.
 2. Enter the Time Entry version to process
-

Tracking Medical Leave Information

You can use the Medical Leave Tracking program (P076210) to review medical leave information and track employee health progress while an employee is on medical leave. You also use this program to implement approval actions and submit forms for employees to complete when they return to work. When medical leave tracking is enabled in the Leave Type Setup program (P07601), employees can use the Employee Leave Request program (P07620) to submit requests for medical leave. When an employee enters time for a medical leave request, the system displays the Medical Request Information form to gather additional information about the leave. When an employee submits a medical leave request, the system sends a message to a supervisor. The supervisor uses the Medical Leave Tracking program (P076210) to accomplish any of the following tasks:

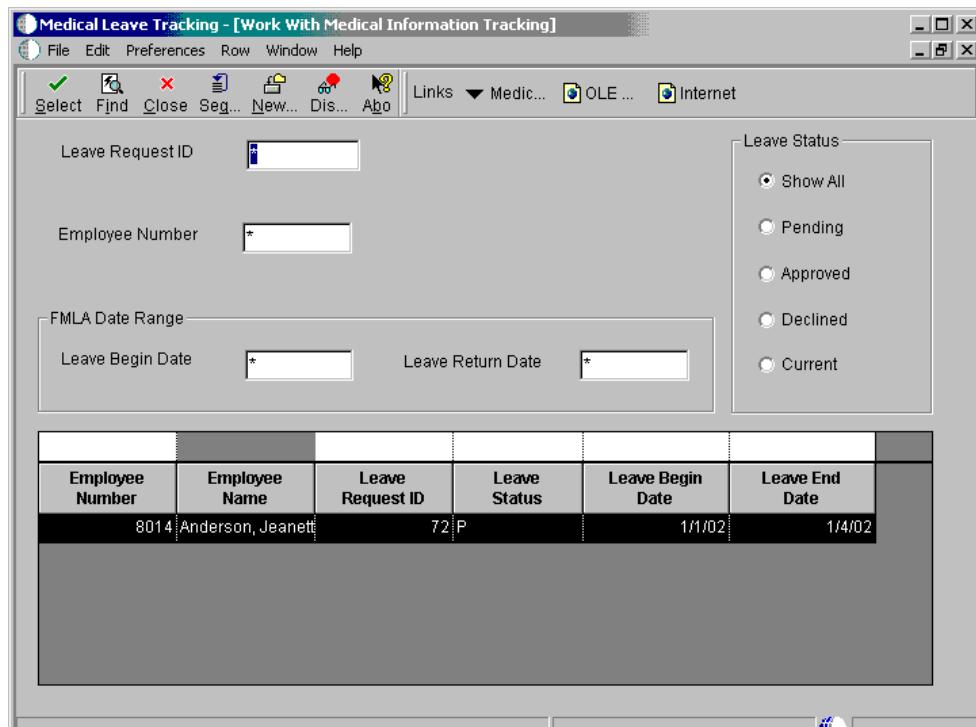
- Review pending medical leave requests
- Gather additional information about a leave request
- Record medical opinions
- Act on medical leave requests

The supervisor uses the Medical Leave Tracking program to approve or decline requests, or to assign to the request a status of pending. Medical leave requests are typically assigned a status of pending, because additional information is required. The supervisor can choose among several forms that the system sends to the employee with the medical leave request status. The supervisor can also attach medical opinion records and track historical medical opinions from doctors, providing important information about the progress and status of an employee medical condition and the employee's fitness for work.

The system stores medical leave information in two tables: the Employee Leave Request table (F07620) and the Employee Medical Leave Information table (F07621). The employee's manager and a Workforce Management administrator must approve each medical leave.

► To track medical leave information

From the Daily Processing menu (G07GLVA2), choose Medical Leave Tracking.



1. On Work With Medical Information Tracking, complete any of the following fields:
 - Leave Request ID
 - Employee Number
 - Leave Begin Date
 - Leave Return Date
2. Click one of the following Leave Status options and then click Find:
 - Show All
 - Pending
 - Approved
 - Declined
 - Current
3. Choose a record and click Select.

Medical Leave Tracking - [Medical Information Tracking]

File Edit Preferences Form Window Help

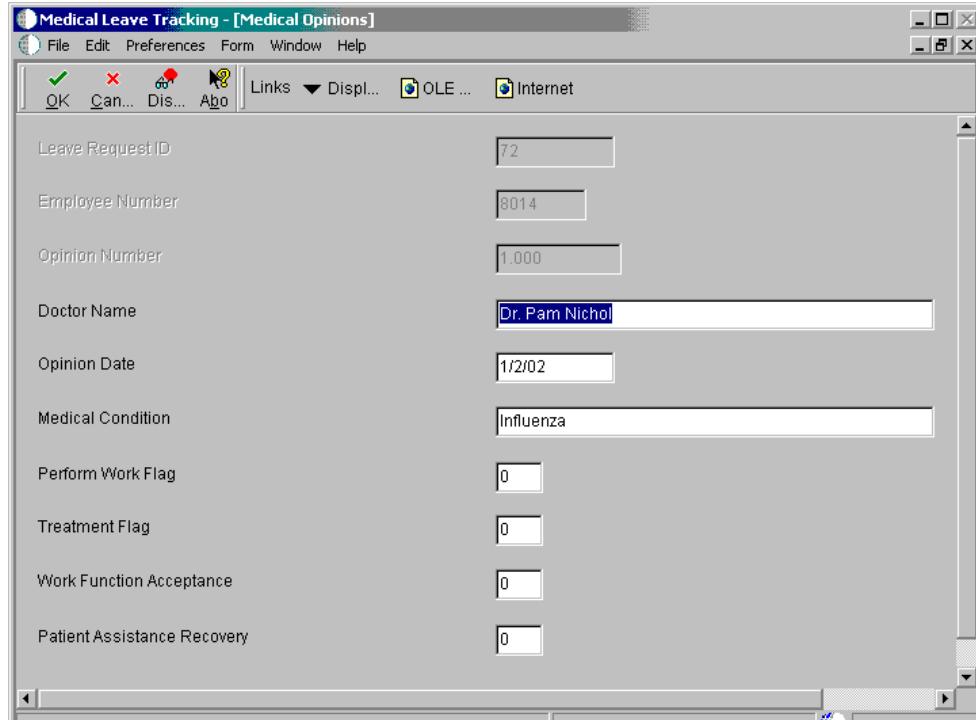
OK Cancel Discard Abort Links Medic... OLE... Internet

Leave Request ID	72	Approval Action	<input checked="" type="checkbox"/> <input type="checkbox"/>
Employee Number	8014	Scheduled Leave Begin	1/1/02
Current Status	P	Scheduled Leave End	1/4/02
Person With Medical Condition	Jeanette Anderson		
Employee Relationship	E		
Employee Form Notification			
<input type="checkbox"/> Fitness Certification		<input type="checkbox"/> Key Employee Status	
<input type="checkbox"/> Medical Certification - Employee		<input type="checkbox"/> Job Restoration Denial	
<input type="checkbox"/> Medical Certification - Family Member			

4. On Medical Information Tracking, review the following fields to verify the information:
 - Leave Request ID
 - Employee Number
 - Current Status
 - Person With Medical Condition
 - Employee Relationship
 - Scheduled Leave Begin
 - Scheduled Leave End

5. Click any of the following form options to specify the forms that you want to send to the employee with your response:
 - Fitness Certification
 - Medical Certification - Employee
 - Medical Certification - Family Member
 - Key Employee Status
 - Job Restoration Denial

6. If the employee provides a doctor's medical opinion that you want to associate with the leave request, choose Medical Opinion from the Form menu.
7. On Work With Medical Opinions, click Find to review previous opinion records.
8. To create a new medical opinion record, click Add.



9. On Medical Opinions, complete the following fields:
 - Leave Request ID
 - Employee Number
 - Doctor Name
 - Opinion Date
 - Medical Condition
 - Perform Work Flag
 - Treatment Flag
 - Work Function Acceptance
 - Patient Assistance Recovery
10. To include additional notes or to attach a file, such as a scanned file of a doctor opinion, choose a leave request record, and then choose Attachments from the Form menu.

11. Choose New from the File menu.
12. Choose an appropriate media object option.

Depending on the media object that you choose, you might need to enter text, a URL, or browse to choose a file name.
13. Choose Save & Exit from the File menu.
14. On Medical Opinions, click OK.
15. On Work With Medical Opinions, click Close.
16. On Medical Information tracking, click one of the Approval Action options:
 - Approve
 - Deny
 - Pending
17. On Work With Medical Information Tracking, click Find to review the revised leave request record or to choose an additional record.

Tracking Leave History and Accrual Balances

You can use the Tracking Leave History By Employee program (R07531, version ZJDE0001) and the Tracking Leave History By Leave Type program (R07531, version ZJDE0002) to review employee leave information and make informed decisions about authorizing future leave requests. J.D. Edwards provides two versions of this program so that you can automatically produce leave history reports that the system organizes by employee or by leave type. You can also set processing options to sort leave information by the following parameters:

- Leave type
- Business unit
- Company

You can also set processing options to specify whether the system displays paid and unpaid totals. If you choose neither of these options, the system does not display paid and unpaid totals.

Both versions of this program display leave information with company, employee, and business unit totals. Depending on processing options settings, individual reports can display total paid hours and total unpaid hours for each category. For example, if you run the Tracking Leave History By Employee report and enter B (for business unit) in the processing option on the Totals tab, the system displays the following:

- Employee total
- Company total
- Business unit total
- Business unit paid hours
- Business unit unpaid hours.

If you leave the processing option on the Totals tab blank, the system does not display paid or unpaid hour totals.

You can use the Accrual Roster report (R074501) to review accrued leave time and evaluate the value of the time to the organization. You can set processing options to specify whether the information is based on historical information for a fiscal anniversary or payroll month. You can also specify whether values are expressed in current or historical dollars.

Tracking Leave History by Employee

From the Periodic Processing menu (G07GLVA3), choose Leave History Tracking By Employee.

You can use the Leave History Tracking By Employee report (R07531, version XJDE0001) to review employee leave information. Although this report provides information by employee, you can use processing options to choose how the system refines and sorts the information that appears. For example, you can specify whether the system:

- Includes paid and unpaid totals for each employee
- Sorts by leave type
- Sorts by business unit
- Sorts by company
- Includes all totals

The system gathers the information for this report from the Employee Transaction History table (F0618).

Tracking Leave History by Leave Type

From the Periodic Processing menu (G07GLVA3), choose Leave History Tracking By Leave Type.

You can use the Leave History Tracking By Leave Type report (R07531) to review employee leave information. Although this report provides information by leave type, you can use processing options to specify how the system refines and sorts the information that appears. For example, you can specify whether the system:

- Includes paid and unpaid totals for each employee
- Sorts by leave type
- Sorts by business unit
- Sorts by company
- Includes all totals

This system gathers the information for this report from the Employee Transaction History table (F0618).

Processing Options for Leave History Tracking Report (R07531)

Totals

1. Print Paid and Unpaid Totals:

Type 'E' to print paid and unpaid totals for each employee.

Type 'L' to print for each leave type.

Type 'B' to print for each business unit.

Type 'C' to print for each company.

Type 'A' to print all totals.

Leave blank to print no paid and unpaid totals.

Tracking Accrual Balances

From the Periodic Processing menu (G07GLVA3), choose Accrual Roster.

You can use the Accrual Roster (R074501) report to track and review leave balances for employees. You can display accrued hours and the value of accrued time in current or historical dollars. For example, an employee might accrue leave time during the previous year and then carry that time over to the current year. If the employee had earned a lower rate of pay when the time was accrued than the current rate of pay, then the value of the current time is different than that when the leave time was accrued.

You can set processing options to specify date ranges and DBAs. You can also specify whether the system gathers information from the Employee Master Information table (F060116) based on historical information for fiscal anniversary or on payroll month.

Processing Options for Accrual Roster Report (R074501)

Defaults

1. Source Table

1 = Fiscal Anniversary history

Blank = Payroll Month history

Use this processing option to specify whether you want the system to retrieve information from the Payroll History table or the Fiscal Anniversary History table. Valid values are:

1

Retrieve balances from the Fiscal Anniversary Table.

Blank

Retrieve balances from the Payroll Month History table

2. Print Dollars

1 = Print dollar amounts.

Blank = Print hours.

Use this processing option to specify whether you want to print dollars or hours on the report. Valid values are:

1

Print dollars

Blank

Print hour

3. Employee Number

A = Address Number

T = Tax ID number

O = Other ID number

Use this processing option to specify which employee number you want to print on the report. Valid values are:

A

Address Number

T

Tax ID Number

O

Other ID Numbe

4. Current Dollars

1 = Print current dollars.

Blank = Print historical dollars.

Use this processing option to specify whether the system prints current or historical dollars. Current dollars are calculated by multiplying the historical hours by the current pay rate in F060116. Valid values are:

1

Print current dollars

Blank

Print historical dollar

Dates

1. Enter the from date for the range from which the data will be reported.

Use this processing option to specify the beginning date of the date range that the system uses when running the report. If left blank, the system date is used

2. Enter the thru date for the range from which the data will be reported.

Use this processing option to specify the ending date of the date range that the system uses when running the report. If this option is left blank, the system date is used

DBAs

1. Enter up to 5 DBA's to process or leave blank to process all DBA's.

Employee Assignment

Companies that hire many different people to perform a wide range of tasks for different departments and companies with divergent payment arrangements need the ability to create flexible work assignments and payment arrangements that outstrip many time entry and payroll system capabilities. For example, one employee might work different assignments for different companies on one day in the same pay period. When you activate employee assignment to work with payroll time entry, the system uses factors that are assignment-specific, such as pay and billing rates, Workers Compensation, and tax basis.

Even when companies do not require the complexity of employees working multiple assignments in the same pay period, they can benefit from the ability to pre-populate time entry with information collected from employee assignments information.

Setting Up Employee Assignment

Before you enter new employee assignments and generate new time entry templates, you need to set up critical values in your software to enable and automate the process. You need to set processing options on the Pay Rates and Processing tabs, that are specific to employee assignment, in the Master Business Functions Processing Options for Time Entry. See *Setting Up MBF Processing Options for Time Entry* for specific setup instructions. You also need to set up default pay type cross-references.

See Also

- Understanding Master Business Functions*
- About Master Business Functions*

Setting Up Default Pay Type Cross-References

When you use the employee assignment program to create time entry templates, you specify the payment method that you are using by choosing one of the following options on the Basic tab of the Time Entry Template form:

- Pay Basis
- Pay Type

If you choose to use the Pay Basis option, then you need to use the EE Assignment Default Pay Type program (P0716704) to create cross-reference records in the Employee Assignment Default Pay Types table (F0716704) that the system uses in time entry processing. If you choose to use the Pay Type option instead of the Pay Basis option on the time entry template form, then you do not need to use this setup procedure.

The following pay bases currently exist in UDC 07/AB:

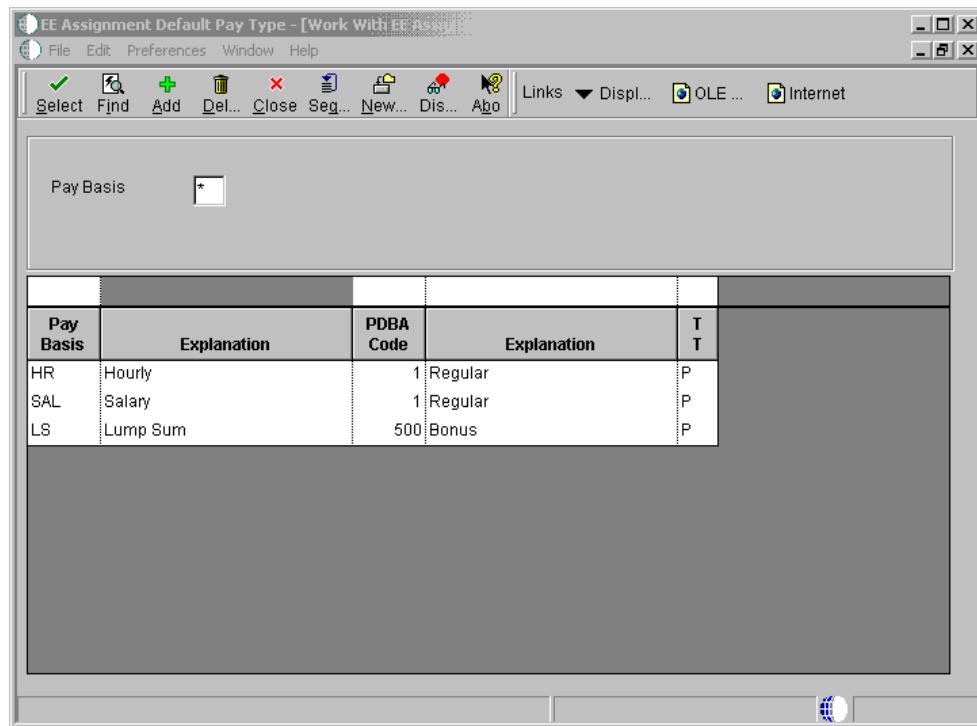
- HR (Hourly)
- LS (Lump Sum)
- SAL (Salary)

You can create additional pay bases as required to meet organizational needs. These pay bases are available options that you can choose when you complete the TE Template form in the Employee Assignment program (P0716701). Choosing one of these options determines the pay basis for an employee assignment.

► To set up default pay type cross-references

From the Employee Assignment menu (G05EA10), choose EE Assignment Default Pay Type.

1. On Work With EE Assignment Default Pay Types, choose Add.



2. On EE Assignment Default Pay Types, complete the following fields:
 - Pay Basis
The UDC Code that you reference in the Pay Basis field must already exist in UDC 07/AB.
 - PDBA Code
 - Explanation
3. Enter additional records as required.
4. When finished adding records, click OK.

Creating Employee Assignments

You can use the Employee Assignment program (P0716701) to create employee assignments and to define time entry templates. This assignment approach allows a Work Force Management administrator to create flexible employee assignments that are specific to a range of work assignments that use various billing rates, recharge arrangements, and so on. After all assignment and time entry template information is complete, the administrator can use a single batch process to automatically generate time entry templates that contain all required information and are ready for time entry. A Work Force Management administrator can then use the Speed Time Entry Revisions program (P051121) to locate employee time cards by batch number and enter time worked.

The employee assignment process performs two functions:

- Creates employee assignments
- Defines time entry templates

If employee assignments already exist, you can choose existing records and complete time entry template setup procedures. If employee assignment records do not exist, then you begin the process by creating new records. Creating new assignment records must include the following:

- Creating a job description

When the system processes employee assignment information in Service Billing, the job description is printed as an explanation on the bill.

- Setting up pay rates

You need to set up a billing rate if you don't use a markup table. You must set up at least one pay rate, and a billing rate if applicable, for regular pay. You can also set up pay rates for additional pay types if you do not use the pay type multiplier.

If a job description is not entered and pay rate information is not set up, the system does not create an assignment record.

The employee assignment number that the system creates for each record is a unique, automatically assigned number that the system generates from the next numbers feature of your software. This number is not accessible for manual changes.

On the T/E Template form, the fields on the series of tabs provide an opportunity for you to temporarily override, but not permanently overwrite, information in the Employee Master table (F060116). If you wish to use the default information from this table, you do not need to enter values.

The tables that the system uses when you are setting up employee templates with the employee assignment program are as follows:

- Employee Master Information (F060116)
- Employee Assignment T/E Template Information (F0716701)
- Resource Assignments (F48311)

If you are using timecard automation, you need to set up overtime rules in UDC 07/OR before you create employee assignments. You use overtime rule codes to create selection criteria for an employee group in timecard automation. Once these employee groups exist, you apply a specific overtime rule to this group. For example, your company pays union employees at an overtime rate that is different from non-union employees. To accomplish this distinction, you can create and assign overtime rule code 555 to union employee assignments. You then create an employee group based on overtime rule code 555 and apply the overtime rule to this group.

A non-union employee might receive a different overtime rate, so you apply a different overtime rule to those employees by including them in a separate group with its own overtime rule. Although this UDC is specific to Employee Assignment, you can use this functionality to separate employees or employee groups for overtime processing when you create employee assignments.

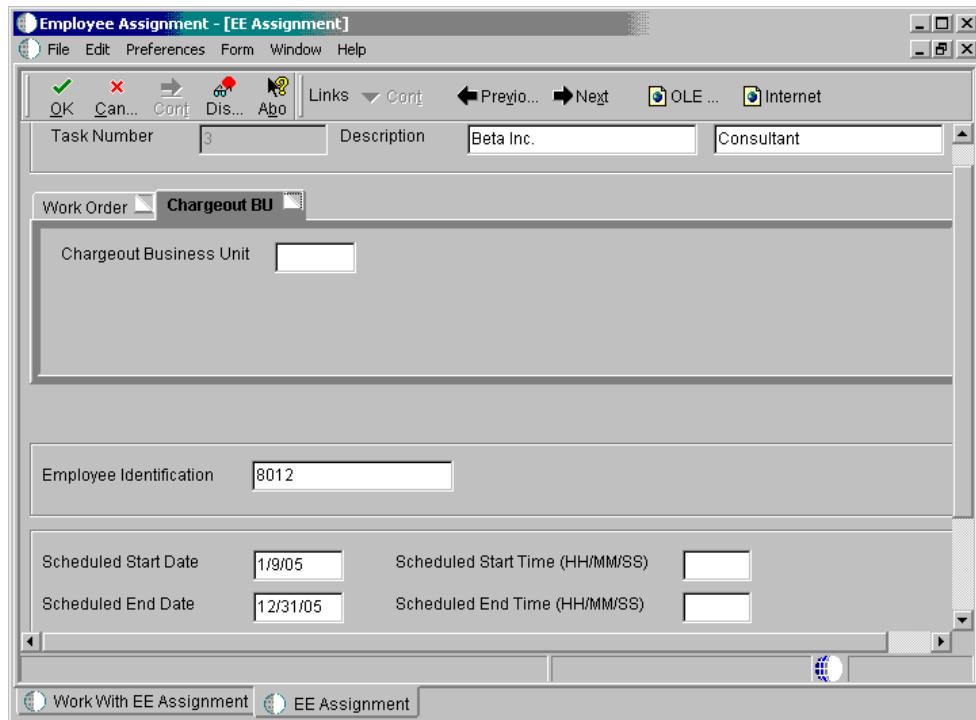
Before You Begin

- Set up overtime rules in UDC 07/OR.

► To create employee assignments

From the Employee Assignment menu (G05EA10), choose Employee Assignment.

1. On Work With EE Assignment, click Find to display existing employee assignment records.
2. To enter employee assignment overrides to an existing record, go to Step 14.
3. To add a new employee assignment record, click Add.



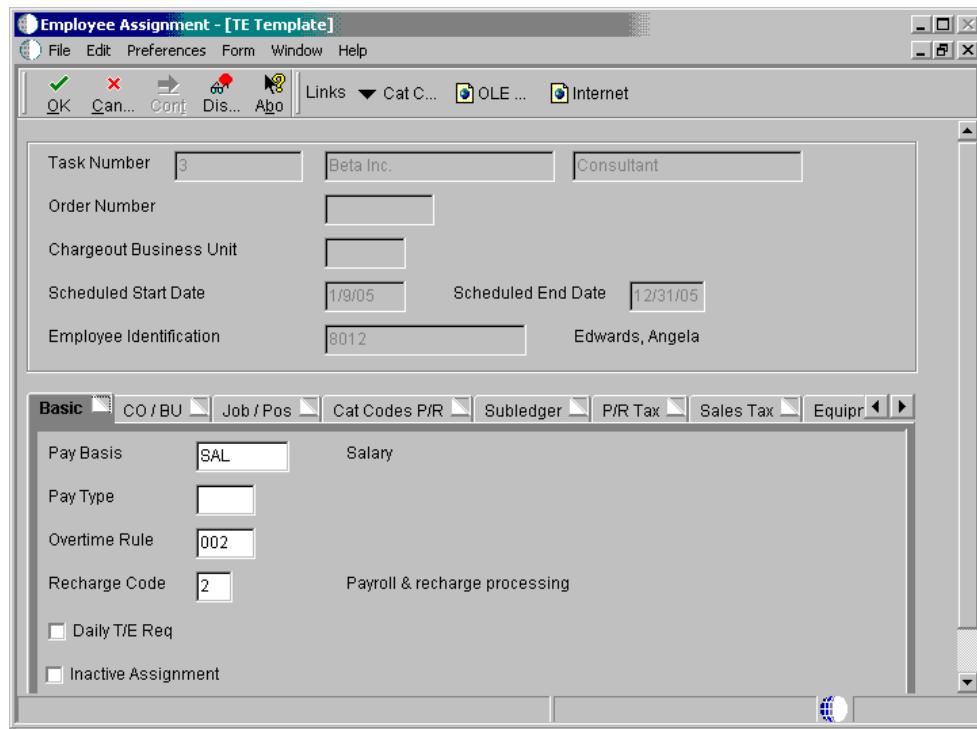
4. If a work order exists for the assignment, go to Step 7.

You can use either a work order number or a chargeout business unit to identify the employee assignment, but not both. The system does not require either of these options to enter a new employee assignment.

5. If a chargeout business unit exists for the assignment, go to Step 8.
6. On EE Assignment, if no work order or chargeout business unit exists for the assignment, complete the required first field and the second field if necessary for additional information:
 - Description
 - Description Line 2
7. On EE Assignment, if a work order exists, complete the field on the Work Order tab:
 - Order Number

If the work assignment is outside the employee business unit, the work order normally includes the business unit to which the work is billed.

8. If a chargeout business unit exists, complete the following field on the Chargeout BU tab:
 - Chargeout Business Unit
9. If you enter an existing work order number or chargeout business unit, you can check the following option so that the system automatically completes the required Description field:
 - Copy WO or Chargeout BU description to Task Description
10. Complete the following fields:
 - Employee Identification
 - Scheduled Start Date
 - Scheduled End Date
11. Complete the following optional fields and then click OK to save the record:
 - Scheduled Start Time (HH/MM/SS)
 - Scheduled End Time (HH/MM/SS)
 - Assigned Hours
 - Assignment Percentage
 - Date Assigned
12. To display the new record, choose the Work With EE Assignment tab and click Find.
13. Choose an assignment record and then choose TE Template (Time Entry Template) from the Row menu.



14. On TE Template, complete one of the following fields on the Basic tab:

- Pay Basis
- Pay Type

An error results if you enter values in both fields. The employee assignment must be based on either the employee pay basis or pay type.

15. Complete the following optional fields:

- Overtime Rule

Complete this field only if you are using timecard automation.

- Recharge Code

If you enter a 3 in this field, you should also enter a value in the Remit To Rate field on the EE Assignment Pay/Bill Rates form. This form appears when you complete Step 26 of this task. If you use recharge, then the assignment must be billed out, as opposed to payment through the payroll system.

16. Click the following optional options:

- Daily T/E Req

When you choose this option, daily time entry records are required. When you generate new time card templates, the system generates daily time cards. If you leave this option blank, only one time card is required for each time reporting period.

- Inactive Assignment

Choosing Inactive Assignment deactivates the employee assignment even if the end date of the assignment is still in the future. The system does not create timecard templates.

17. On the CO/BU tab, complete the following optional fields:

- Company - Home
- Home Business Unit
- Chargeout Business Unit
- Account Number
- Customer Number
- Check Route Code

18. On the Job/Pos tab, complete the following optional fields:

- Job Type / Step
- Position ID
- Union Code
- Equipment Worked On
- Amount - Uprate
- Shift Code
- Shift Differential
- Percent or Amount

19. On the Cat Codes P/R tab, complete the following optional fields:

- Cat 001
- Cat 002
- Cat 003
- Cat 004

20. On the Subledger tab, complete the following optional fields:

- Subledger
- Subledger Type

21. On the P/R Tax tab, complete the following optional fields:

- Tax Area (Work)
 - Worker's Comp
 - Sub Class
22. On the Sales Tax tab, complete the following optional fields:
- Tax Expl Code
 - Tax Rate/Area
 - GeoCode Ship From
 - GeoCode Order Accept
 - Vertex Transaction Type
 - Vertex Product Category
- You can use these fields for information only. Unless custom modifications are made to your service billing software, the system does not use this information.
23. On the Equipm Bill tab, complete the following optional fields:
- Equipment Worked
 - Equipment Rate Code
 - Equipment Object Account
 - Billing Rate
24. To assign an employee assignment job description, choose Job Desc from the Form menu.

Employee Assignment - [EE Assignment Job Description]

File Edit Preferences Form Window Help

OK Find Del... Can... New... Cont Dis... Abo Links Cont OLE... Internet

Task Number	3	Beta Inc.	Consultant												
Order Number															
Chargeout Business Unit															
Scheduled Start Date	1/9/05	Scheduled End Date	12/31/05												
Employee Identification	8012	Edwards, Angela													
Date Effective	*														
<table border="1"> <thead> <tr> <th></th> <th>Date Effective</th> <th>Job Code</th> <th>Job Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1/9/05</td> <td>CON</td> <td>Consultant</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>					Date Effective	Job Code	Job Description	1	1/9/05	CON	Consultant				
	Date Effective	Job Code	Job Description												
1	1/9/05	CON	Consultant												

25. On EE Assignment Job Description, complete the following fields:

- Date Effective
- Job Code
- Job Description

26. To save the employee assignment job description, click OK.

27. To set up rates that the system uses when processing a payment to a contracting entity, choose Pay Rates from the Form menu.

28. On EE Assignment Pay/Bill Rates, complete the following fields:

- Date Effective
- PDBA Code
- Description
- UM
- Pay Rate
- Billing Rate
- Remit To Rate

This is a field that is reserved for use with custom programming. You enter a value in this field when you need to manually pay a third party instead of an

employee. If you use this field, you should enter 3 for the Recharge Code on the Basic tab of the TE Template form.

The screenshot shows a Windows application window titled "Employee Assignment - [EE Assignment Pay/Bill Rates]". The window has a menu bar with File, Edit, Preferences, Form, Window, and Help. Below the menu is a toolbar with icons for OK, Find, Del, Can, New, Finish, Dis, Links, Internet, and OLE. The main area contains the following fields:

Task Number	3	Beta Inc.	Consultant
Order Number			
Chargeout Business Unit			
Scheduled Start Date	1/9/05	Scheduled End Date	12/31/05
Employee Identification	8012	Edwards, Angela	

Below these fields is a section for "Date Effective" with a calendar icon and a "PDBA Code" field containing a asterisk (*).

	Date Effective	PDBA Code	Description	UM	Pay Rate	Billing Rate	Remit To Rate
	1/9/05	1	Regular		40.000	250.000	
					0.000		

29. To save the employee assignment rates record, click OK.
30. On TE Template, to save your assignment record, click OK.

Processing Options for Employee Assignment (P0716701)

Defaults/Basic

1. Pay Basis
2. Pay Type
3. Overtime Rule
4. Recharge Code
5. Daily Time Entry Required

Defaults/Cat Codes P/R

1. Category Codes - Payroll1
2. Category Codes - Payroll2
3. Category Codes - Payroll3
4. Category Codes - Payroll4

Defaults/Subledger

1. Subledger - G/L
2. Subledger Type

Manufacturing

1. Manufacturing (future use)

Recharge

1. Enable Multicurrency Functionality (future)
 2. Recharge Mode
-

Generating and Saving Time Entry Templates

You use the Generate Timecard Templates program (R0716711) to create new employee time entry templates. When you generate new time entry templates, the system creates the new template records in the Employee Transactions - Batch File (F06116Z1). The system uses this temporary table initially so that if employee self-service features are enabled, employees can enter their time without affecting live tables.

You then need to use the Time Entry Batch Processor program (R05116Z1I) to save the template records from the temporary F06116Z1 table in the Employee Transaction Detail File (F06116). If you use employee self-service, you run this report after employees complete their time entry. If you are using regular time entry, and you are not using employee self-service, you can automate this procedure when you create the time entry templates. To run the Batch Time Entry Processor program automatically, you need to create a new version of the program and then enter the new version number in a processing option for the Generate Timecard Templates program. Then when you run the Generate Timecard Templates program, the system automatically runs the Time Entry Batch Processor program to move the template files to the live table.

You can purge records from the F06116Z1 table after copying them to the F06116 table by setting the Purge Flag processing options appropriately.

Generating Time Entry Templates

From the Employee Assignment menu (G05EA10), choose Generate Timecard Template.

After employee assignment records are created and the setup process for time entry templates is complete, you need to create and save time entry templates. You use the Generate Timecard Template report (R0716711) to automatically create time entry templates that are ready for time entry.

The Generate Timecard Template report creates template records in the Employee Transactions - Batch table (F06116Z1) that you then need to record in the Employee Transaction Detail File (F06116). If employee self-service time entry is not implemented in your software, you can automatically move the processed records to the F06116 table. After you run the R0716711 report, if processing options are set appropriately, the system automatically runs the Time Entry Batch Processor report (R05116Z1I). If you do not automate this process using processing options, then you must run the R05116Z1I report separately and specify a version each time the report is run.

A Work Force Management representative can then use the Speed Time Entry Revisions program (P051121) to locate employee time cards by batch number and enter time worked.

The system uses the following tables when creating time entry templates:

- Employee Transactions - Batch File (F06116Z1)
- Employee Transaction Detail File (F06116)
- Employee Master Information (F060116)
- Employee Assignment T/E Templates Information (F0716701)
- Resource Assignments (F48311)

If you use a regular Payroll ID value in the processing options to identify a group of employees for whom you are processing payroll, then you can set up the Generate Timecard Template report on a scheduled basis to run automatically. If you do not use a Payroll ID, then you must manually set the processing options each time you run the report.

Processing Options for the Generate Timecard Template Program (R0716711)

Selection Tab

Use these processing options to specify Payroll information that the system uses to select records and generate the template.

1. Payroll ID

Use this processing option to specify a regular payroll ID (pre-payroll version) that the program uses to select records that are transferred. If this option is specified, then the Start Date, Stop Date, Pay Cycle Code, and Pay Period Number entered on this PO tab are ignored because the system retrieves and uses the values that are associated with this payroll ID

1.1 Use data selection of Payroll ID

Blank = Default (Do not use data selection)

1 = Use data selection of Payroll ID's

Version.

Use this processing option to specify the Pay Cycle Code. Valid values include:

W

Weekly

BW

Biweekly

SEMI

Semi-monthly

2. Pay Cycle Code

W = Weekly

BW = Biweekly

SEMI= Semi-monthly etc.

Use this processing option to specify the pay period number. If the pay period number is not specified, then the system uses a pay period number that includes the system date. When the system uses a pay period number that includes the system date, the start and stop dates are based on values from the Master Pay Cycle.

Pay periods are sequentially numbered from the first of the year. For example, a monthly payroll cycle beginning in January has a total of 12 periods, with October as period number 010. Valid value ranges include:

001-052 (Weekly payroll cycle)

001-026 (Biweekly payroll cycle)

001-024 (Semi-monthly payroll cycle)

001-012 (Monthly payroll cycle)

001-004 (Quarterly payroll cycle)

001-001 (Annual payroll cycle)

Refer to the Master Pay Cycle settings to determine how your pay periods are defined

3. Pay Period Number

Default = System date falls within pay period

Use this processing option to select records that include a date worked that is equal to or greater than the current date

4. Pay Period Start Date

Use this processing option to select records that include a date worked that is less than or equal to the current date

5. Pay Period End Date

Use this processing option to generate one template for each day of the pay period or to generate one template per pay period. Valid values are:

Blank

One per pay period (the work date is the same as the pay period end date)

1

One template per day, within the pay period start and end dates

The Generate Timecard Template program can automatically override the Daily Time Entry setting in the Employee Assignment program (P0716701) for this processing option. If the system detects that a change in the rate or job description occurred during the pay period, then the system automatically creates daily time entry templates

Time Entry Tab

Use these processing options to specify whether the system creates assignment records in the Employee Transaction Detail File and the version to use if the assignment records are created.

1. Create assignment records in EE Transaction Detail File F06116

Blanks = Do not create records in F06116 (Default)

1 = Create assignment records

(UBE R05116Z1I PO # 2 Final Flag must be turned on)

Use this processing option to create time entry records in the Employee Transaction Detail File (F06116). Valid values are:

Blank

Do not create time entry records. You can create these records at a later time by running the Time Entry Batch Processor program (R05116Z1I).

1

Automatically create time entry records. In R05115Z1I, the Final Flag option in processing option number 2 must be set to 1

2. Batch Time Entry Processor Version to Submit, if records are to be created in EE Transaction Detail File F06116

Default: 'XJDE0001'

Use this processing option to enter a batch time entry processor version (R05116Z1I) . The system uses the default version (XJDE0001) if you leave this field blank. For the system to create time entry records automatically in the Employee Transaction Detail File (F06116), you must set the Final Flag to 1 in processing option number 2

Edits Tab

Use this processing option to specify the assignment records that the system displays.

Print All or Print only Exceptions

Blanks = Print Only Exceptions (Default)

1 = Print All

Use this processing option to determine whether the system displays only exceptions or displays all assignment records that are processed. If you leave this field blank, the system displays only exceptions. The system does not process records with exceptions. You need to correct all errors and then run this program again. Valid values are:

Blank

Display only exceptions.

1

Display all processed records

Archiving and Restoring Employee Assignments

From the Employee Assignment menu (G05EA10), choose Archive EE Assignment T/E Information.

You can use the Archive EE Assignment T/E Information report (R0716709) to store old, closed assignments in a history file.

You can use the Employee Assignment program (P0716701) to view the historical records. Choose the Restore History option from the Row menu. The Restore History option copies the historical records into the live table.

The system uses the following tables when archiving historical records:

- Employee Assignment T/E Template Information (F0716701)
- Resource Assignments (F48311)

Archiving Employee Assignments

From the Employee Assignment menu (G05EA10), choose Archive EE Assignment T/E Information.

You can use the Archive EE Assignment T/E Information report (R0716709) to store old, closed assignments in a history file.

The system uses the following tables when archiving historical records:

- Employee Assignment T/E Template Information (F0716701)
- Resource Assignments (F48311)

Processing Options for the Archive EE Assignment T/E Information Report (R0716709)

Dates Tab

Use these processing options to specify an ending date or a number of days prior to the current system date.

1. Prior To Date

Use this processing option to specify an ending date. You normally use this option when you run the program manually. The system archives all records with a scheduled end date that is less than the date entered. If you specify a date, then do not enter a value for the Prior To Number Of Days option

2. Prior To Number Of Days

Use this processing option to specify a number of days prior to the current system date. You normally use this option when you run the program using the scheduler. The system calculates a date by subtracting the number of days that you enter from the current system date and then archives all records prior to this date. If you specify a value for the number of days, then do not enter a value for the Prior To Date option

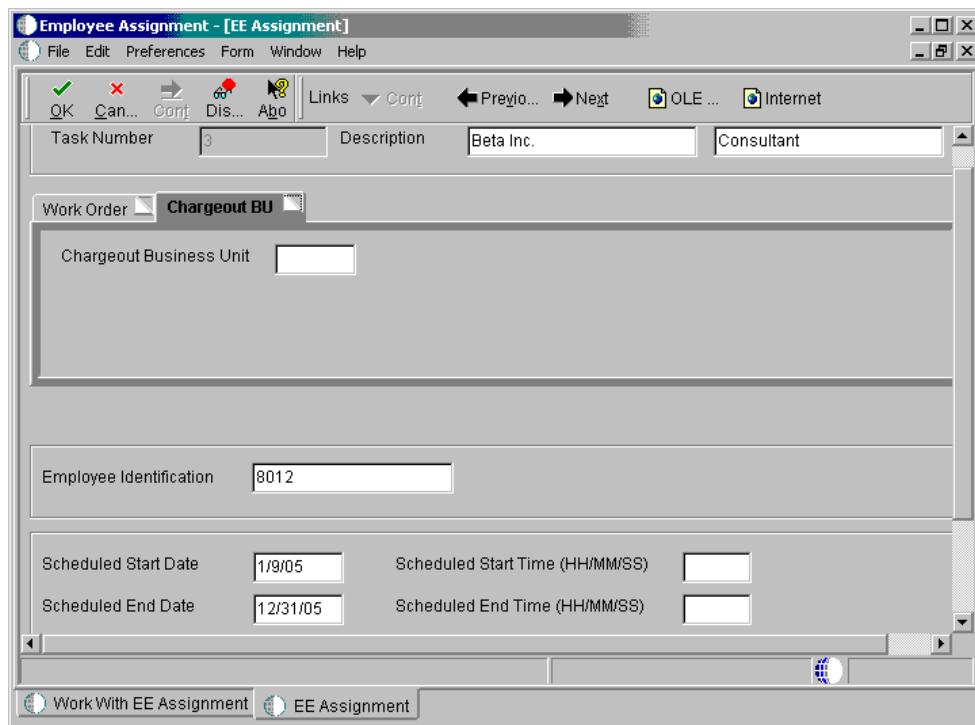
Restoring Employee Assignments

You can use the Employee Assignment program (P0716701) to view historical assignment records. When you choose the Restore History option, the system copies the historical records into the live table. You can review, change, and reprocess these records.

► To restore employee assignments

From the Employee Assignment menu (G05EA10), choose Employee Assignment.

1. On Work With EE Assignment, click Find to display existing employee assignment records.



2. On Work With EE Assignment, review the following column of the employee assignment records:
 - Arch FlagA value of 1 in this field indicates that this record exists in the EE Assignment T/E Template Info History table (F0716709).
3. Choose one or more records that indicate existing history records.
4. Choose Restore History from the Row menu.
5. After the history records are restored, click Find to display the new records.

Multicurrency Time Accounting

Companies that do not use the full J.D. Edwards payroll system often use time entry features to enter time and costs into the system. To properly account for activities across company business units that require internal billing rates and use different currency codes, you can use multicurrency time accounting.

The existing time entry programs include multicurrency time accounting features. When multicurrency time accounting is enabled, each of these programs uses the currency

information from specified accounts to provide domestic and foreign recharge rates. The journal process uses the currency information derived during time entry to determine correct amounts for entries to the general ledger.

The multicurrency time accounting feature uses currency as follows:

- The base currency is the currency of the employee home business unit.
- The transaction currency is the currency of a job to which time is charged.

Multicurrency time accounting uses a base currency that is the basis for recharge rates. This currency and related rates remain consistent for each time entry transaction. The recharge rates associated with transaction currency, usually a foreign currency, fluctuate due to exchange rate changes. You can use either of these currencies as the fixed currency for a timecard.

For example, if an American employee works on a job in a Japanese company, the rate can be based on the employee home business unit, expressed in American dollars, and then converted to Japanese yen. In this case, the fixed currency is USD. Conversely, the recharge rate for work performed in Japan can be derived from the Japanese job, expressed in yen, and then converted to dollars. The fixed currency in this case is Japanese yen.

Using the Billing Markup Table from the Service and Contract Billing system adds flexibility to your intercompany rate approach. For example, if an American consultant works on two Japanese jobs in different positions with different recharge rates, you can account for the additional recharge rate. After creating a user-defined generation type, you can retrieve payroll recharge rates from the Billing Rate/Markup Table (P48096). You implement this option by adding a value of Payroll Recharge Rates (P) in UDC 48/GT.

You can use either of the following approaches to establish recharge rates in the Billing Rate/Markup Table:

- Rate override
- Cost markup

To create a billing rate override, you define a specific billing rate that is higher than the normal employee rate. To define a cost markup, you enter a percentage value that the system adds to the normal rate.

Note

Although you can gain access to the Cost Component Table and the Invoice/Revenue Component Table in the Billing Rate/Markup table program, multicurrency time accounting does not use these features.

The system manages multicurrency time accounting for OneWorld Xe through the following tag files:

- Time Entry Tag File (F06116T)
- Time Entry History Tag File (F0618T)
- Payroll Journal Detail Tag File (F05290T)
- Payroll Journal Tag File (F063951T)
- Batch Time Entry Tag File (F06116TZ)

After payroll processing is complete, the only file that retains records is the Payroll History file.

When multicurrency time accounting is enabled, the following reports contain multicurrency time accounting information:

- Payroll Journal Proof/Edit (R05229)

This report shows a pro forma version of the final general ledger post for timecard entries.

In addition to normal payroll information, the currency code is displayed for each time card entry. See *Processing Pro Forma Journal Entries for Timecards* for information about this report.

- Time and Pay Entry Register (R053001)

This report shows the detail of all of the time card records that you include in a batch. When multicurrency time entry is enabled, this report includes currency information. See *Reviewing the Batch Time Entry File Register Report* for information about how to run this report and how to set related processing options.

See Also

- ❑ *Multicurrency Setup* in the *OneWorld Xe General Accounting Guide* to set up multicurrency, domestic currency codes, and exchange rates
- ❑ *User Defined Codes* in the *OneWorld Xe Foundation Guide* to set up UDC codes

Setting Up Multicurrency Time Accounting

To set up multicurrency time accounting, you need to perform the following:

- Ensure that currency conversion is enabled
- Define default multicurrency time accounting information for one or more companies within your organization
- Set prerequisite processing options
- Set up a billing rate/markup table
- Set up employee Payroll information
- Enter multi-currency timecards

The setup procedures listed below apply only to multicurrency time accounting; separate procedures exist for setting up time accounting in general. You set up multicurrency time accounting in the Company Options (P05001C) program.

Multicurrency time accounting cannot coexist with the WorldSoftware Payroll system. Multicurrency time accounting can coexist with the WorldSoftware General Accounting system. However, the WorldSoftware general ledger post process cannot be used while this function is active.

Set Up a Billing Rate/Markup Table

You need to specify information in the Billing Rate/Markup table (P48096) to supply information that the system uses in multi-currency time accounting. See *Defining Billing Rate/Markup Rules* for the procedures to enter information into this table.

You can use the following information header information:

- Generation Type – P (Recharge rate)

- Key Type – 6 (Job or Business Unit), or any other valid key type
- Table Key – the recharge business unit, or any other valid table key
- Begin Date
- End Date

You can use the following information in the detail area:

- Object From and Object Thru
- Markup Amount and/or Markup Percent and/or Markup Rate Override, according to your business needs

Set Up Employee Payroll Information

You need to set up employee payroll information for each selected employee. See *Entering Payroll Information for Employees* for the appropriate procedures. Use the following information that is specific to multi-currency time accounting:

- Record Type – 2 (Payroll & recharge processing)

Note

Setting this option in the employee record is optional. Instead, you can enter 2 for payroll or a 3 for recharge processing in the Record Type field during timecard entry.

- Add a distribution rate or verify that a rate is on the record.

See Also

- Setting Up MBF Processing Options for Time Entry*
- Setting Up Company Options*

Setting Up Processing Options for Multicurrency Time Accounting

To use multicurrency time accounting, you need to set processing options for the Batch Time Entry File Revisions program (P05116Z1) and the Time Entry MBF program (P050002A). Processing options in P05116Z1 enable multicurrency time accounting, specify whether amounts that you enter are in the domestic currency of a contract or the foreign currency of a supplier, and specify whether the system dynamically creates new accounts. Processing options in P050002A also enable multicurrency time accounting. The processing options in P050002A also specifies how the system can use the Billing Rate/Markup Table (F48096), and whether the system dynamically forces account creation.

In OneWorld Xe software, the Time Entry MBF Multicurrency Processing Options program (P050002M) exists for the sole purpose of providing processing options that are essential to the operation of multicurrency time accounting. This program is accessible only through the OneWorld Xe Interactive Versions utility.

In the Time Entry MBF program, you can choose whether to specify the following options:

- Enable multicurrency time accounting
- Business Unit Currency for Base Amount

Uses the Recharge Business Unit currency or the Home Business unit currency from the Employee Master Information table (F060116). For example:

- If the employee home business unit is 9, which is under USD Company 00001, the Billing Rate/Markup table must be defined for USD currency.
- If the recharge business unit is Business Unit 77 (for labor expenses) in a company that uses Canadian currency, the Billing Rate/Markup table must be defined for CAD currency.
- Use the Billing Markup Table for Rate Lookup
Uses the Billing Rate / Markup table (F48096) to retrieve rates.
- Generation Type (For billing Markup Table)
Uses a generation type for Recharge Rage (P).
- Action if No Markup Table Found
Uses the employee cost rate.
- Billing Markup Table Version (P48096)
Uses version ZJDE0001.
- Force Dynamic Account Creation

The dynamic account creation process creates a valid account when you enter a timecard that includes an account number that is not active in the system. However, the account number must exist in the model business unit. Dynamic account creation does not create records in the Billing Rate / Mark up Table (F48096).

Note

If you use the Billing Markup Table, you need to enter recharge account numbers, specify billing rate information, and define effective dates in this table. The system does not require that accounts entered into this table are active. The dynamic account creation process creates a valid account when you enter a timecard that includes an account number that is not active in the system. The account number must exist in the model business unit. Dynamic account creation does not create records in the Billing Markup Table (F48096).

See Also

- ❑ *Setting Up MBF Processing Options for Time Entry*
- ❑ *Processing Options for Batch Time Entry File Revisions (P05116Z1)*
- ❑ *Working with Interactive Versions*
- ❑ *Defining Billing Rate/Markup Rules*

Entering Multicurrency Time Cards

The basic procedures for multicurrency time accounting are the same as for normal time entry. This topic provides the additional steps required to use multicurrency features.

In the processing options for Time Entry by Individual (P051121) or Speed Time Entry (P051121), enter the version that you set up for the Time Entry MBF Processing Options program (P050002A) in the Time Entry Version processing option on the Time Entry tab.

After multicurrency time accounting is enabled, four additional fields appear in each of the time entry programs. They provide the following information:

- Recharge rate

The system generates the recharge rate from the rate information in the Billing Markup table (F48096).

- Base currency

The system obtains base currency information from the currency designation for the home company in the Company Constants table (F0010). Depending on how a processing option is set for the Time Entry MBF Multicurrency Processing Options program (P050002M), the system chooses information from the home business unit or a recharge business unit.

- Currency code

The system obtains the currency code from the client company designation in the Company Constants table.

- Billing rate

The system generates the billing rate from the rate information established in the Billing Markup table.

When you enter timecard information, you can enter account numbers that identify multicurrency accounts. You can use the Billing Markup Table from the Form menu to find these account numbers. Each attempt to look up rate information for these accounts is date sensitive. If you encounter an error in one of the fields above, check the effective dates in the Billing Markup Table. Also check the dates for the major and minor keys. The date that you enter on each timecard must fall within the effective dates of the account number.

If you need to review or change processing options for this program, see *Processing Options for Speed Time Entry*.

Review the Foreign Bill Rate field. The system generates the billing rate from the rate information established in the Billing Rate/Mark up Table based on how the processing options for the Time Entry MBF Processing Options program (P050002A) have been defined and on the currencies of the home business unit from the Employee Master record and the business unit of the charges.

Verify the bill rate. In the following example, the conversion is from CAD to USD. The Company Constant Multi Currency Conversion flag is set to use the divisor of .66666667. The calculation is $250.00 / .66666667 = 375.00$.

Bill Rate	Foreign Bill Rate	Base Cur Code	Rech Cur Code
375.000	250.000	USD	CA

The following fields appear only when Multicurrency Time Accounting is activated:

- Bill Rate
- Foreign Bill Rate
- Base Currency Code

- Recharge Currency Code

You should make a note of the batch number so that you can use it to review timecard information. The system creates entries in the Employee Transaction Detail File table (F06116) when you click complete time entry.

Example: Multicurrency Timecard Entries

Setup

Employee Information

Hourly Rate (PHRT, hourly wage on employee's Compensation form) = 25.00

Distribution Rate (PBRT, on employee's Payroll form) = 45.00

Home Business Unit = 9, attached to Company 00001, USD (US currency)

Exchange Rates

To CAD from USD

Dates	Multiplier	Divisor
01/01/05	2.0	.50
02/01/05	1.50	.6666667
03/01/05	1.50	.6666667

To USD from CAD

Dates	Multiplier	Divisor
04/01/05	1.50	.6666667
05/01/05	1.50	.6666667
06/01/05	1.1764706	.85

General Accounting Constants

Multicurrency Conversion = Y (multiply)

Foreign x Exchange Rate = Domestic

Domestic / Exchange Rate = Foreign

Labor Account

77.1341 Business Unit, CAD (Canadian currency)

Test Cases

Note

The following test cases are based on using the home business unit of the employee (USD).

Time Entry MBF Processing Options (P050002A), Recharge Tab, processing option 2
 (Business Unit Currency for Base Amount) = 0 (Home BU of Employee)

Billing Rate / Markup Table

Gen Type	Key Type	Table Key	Curr Code	Begin Date	End Date	Markup Rate Override	Markup Percent	Markup Amount
P	6	9	USD	01/01/05	01/31/05	250.00		
P	6	9	USD	02/01/05	02/28/05		150.00	
P	6	9	USD	03/01/05	03/31/05			100.00

Timecard Entry with Override Rate

Date	Pay	Hours	Account Number	Foreign Bill Rate	Base Curr	Curr Code	Bill Rate	Home BU
01/01/05	1	1	77.1341	500.00	USD	CAD	250.00	9

Bill Rate = Markup rate override from the Billing Rate / Mark up Table

Foreign Bill Rate = Domestic Bill Rate x Exchange Rate Multiplier (USD to CAD)

$$250.00 \times 2.0 = 500.00$$

Timecard Entry with Percent

Date	Pay	Hours	Account Number	Foreign Bill Rate	Base Curr	Curr Code	Bill Rate	Home BU
02/01/05	1	1	77.1341	93.75	USD	CAD	62.50	9

Bill Rate = Hourly Rate (PHRT) + Markup

$$25 + 150\% \text{ Markup} = 62.50$$

Foreign Bill Rate = Domestic Bill Rate x Exchange Rate Multiplier (USD to CAD)

$$62.50 \times 1.50 = 93.75$$

Timecard Entry with Amount

Date	Pay	Hours	Account Number	Foreign Bill Rate	Base Curr	Curr Code	Bill Rate	Home BU
03/01/05	1	1	77.1341	187.50	USD	CAD	125.00	9

Bill Rate = Hourly Rate (PHRT) + Markup Amount

$$25 + 10 = 125.00$$

Foreign Bill Rate = Domestic Bill Rate x Exchange Rate Multiplier (USD to CAD)

$$125.00 \times 1.50 = 187.50$$

Note

The following test cases are based on using the Recharge business unit.

Time Entry MBF Processing Options (P050002A), Recharge tab, processing option 2
(Business Unit Currency for Base Amount) = 1 (Recharge Business Unit)

Billing Rate / Mark up Table

Gen Type	Key Type	Table Key	Curr Code	Begin Date	End Date	Markup Rate Override	Markup Percent	Markup Amount
P	6	77	CAD	04/01/05	04/31/05	250.00		
P	6	77	CAD	05/01/05	05/28/05		150.00	
P	6	77	CAD	06/01/05	06/31/05			100.00

Timecard Entry with Override Rate

Date	Pay	Hours	Account Number	Foreign Bill Rate	Base Curr	Curr Code	Bill Rate	Home BU
04/01/05	1	1	77.1341	250.00	USD	CAD	375.00	9

Foreign Bill Rate = Domestic Bill Rate x Exchange Rate Multiplier (CAD to USD)

$$250.00 \times 1.50 = 375.00$$

Timecard Entry with Percent

Date	Pay	Hours	Account Number	Foreign Bill Rate	Base Curr	Curr Code	Bill Rate	Home BU
05/01/05	1	1	77.1341	62.50	USD	CAD	93.75	9

Foreign Bill Rate = Hourly Rate (PHRT) + Markup

$$25 + 150\% \text{ Markup} = 62.50$$

Bill Rate = Foreign Bill Rate x Exchange Rate Multiplier (CAD to USD)

$$62.50 \times 1.50 = 93.75$$

Timecard Entry with Amount

Date	Pay	Hours	Account Number	Foreign Bill Rate	Base Curr	Curr Code	Bill Rate	Home BU
06/01/05	1	1	77.1341	125.00	USD	CAD	147.059	9

Foreign Bill Rate = Hourly Rate (PHRT) + Markup Amount

$$25 + 10 = 125.00$$

Bill Rate = Foreign Bill Rate x Exchange Rate Multiplier (CAD to USD)

$$125.00 \times 1.1764706 = 147.06$$

Setup

General System Setup

Before using any features in your Workforce Management Foundation system, you need to define critical information that the system uses for processing. You also need to define information that you will use to enter data throughout the system.

This information consists of the following:

System controls	Set up system controls to activate specific features and systems, such as the following: <ul style="list-style-type: none">• Country-specific Workforce Management system• Personic Workflow
System options	Set up system options to define default information and to activate processes, such as the following: <ul style="list-style-type: none">• History tracking• Recruitment management• Pay grade step management• Position budget management
Company options	Set up company options to define default information that applies to all of the employees in a particular company within your organization. For example, company options let you define different standard hours per day for each company within your organization.
Business-unit constants	Set up business unit constants to define default information associated with a business unit.
Common settings	Set up common settings to control specific display or processing features of benefits enrollment, compensation management, and self-service applications.
Employee information	Set up employee information to do the following: <ul style="list-style-type: none">• Track information that is unique to your organization or your industry• Define the fields for which you will allow future changes
Employee history and turnover tracking	Set up employee history and turnover tracking to track historical records of employee information.
Job information	Set up job information to track complete information about the jobs within your organization.
Earnings information	Set up earnings information to define the types of pay that your employees receive.
Tax information	If you are using the Payroll system, set up tax information so that you can process payroll for employees.

See Also

- *Working with Employee Timecards* for time entry procedures

Setting Up System Controls

You use system controls to control specific features or activate various modules within OneWorld. For example, if you are using OneWorld in conjunction with Personic Workflow or Criterion Blueprint, you need to activate the Personic or Criterion modules.

System Controls for System Activation

Consult the following table to understand the data items that you can activate for certain OneWorld HR and Payroll processes in the System Control table:

To activate French Canadian Specific HRM Foundation system	SY05QU. Use HRM Foundation-French CDN Specific. Set this data item to Yes if you have the French Canadian version of Foundation. You need to do this in addition to entering the Country Code on User Profile Revisions.
To activate the U.S. specific Workforce Management Foundation system	SY05U. Use HRM Foundation-U.S. Specific. This data item allows the system to provide U.S.-specific fields and forms in the Workforce Management Foundation system.
To activate the Canadian specific Workforce Management Foundation system	SY05C. Use HRM Foundation-Canadian Specific. This data item allows the system to provide Canadian-specific fields and forms in the Workforce Management Foundation system.
To activate Payroll B73.3 or later	SY07P733. Use OneWorld Payroll B73.3 Or Later. Set this data item to Yes if you are using OneWorld Payroll B73.3 and above. If this data item is set to Yes, the system searches for history records in the F07*tables. If this data item is not set to No, the system searches for history records in the F06* tables.
To activate Criterion	SY05CRTN. Use Criterion Integration.
To activate Personic	SY05PRSC. Use Personic Integration.
To activate ADP	SY08ADP. Use ADP Integration.

System Controls for Processes and Features

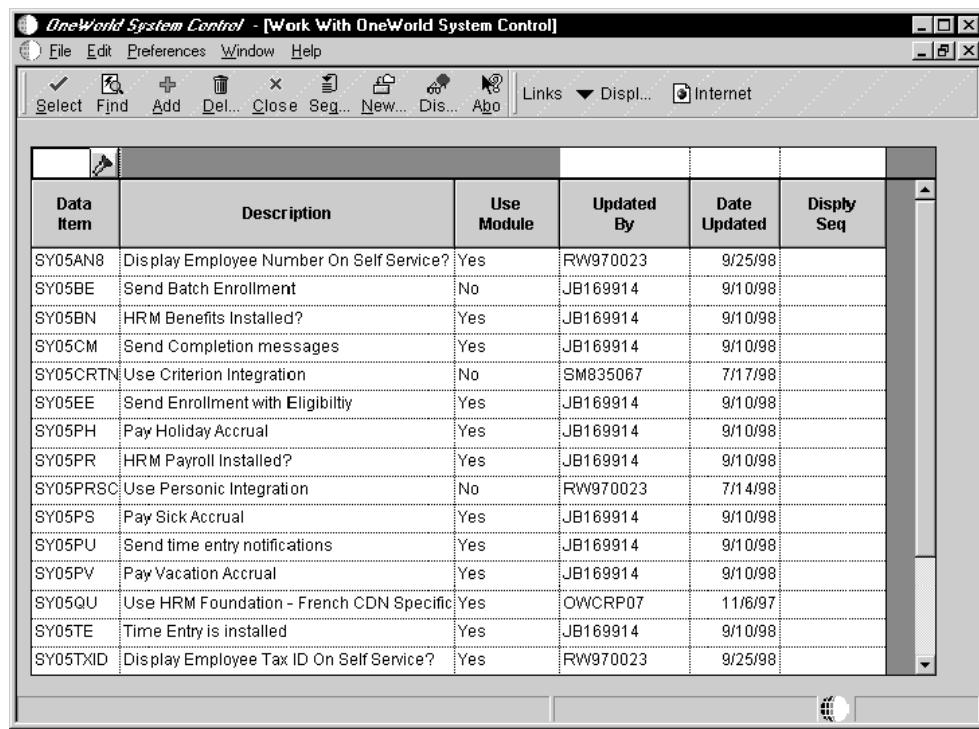
To activate Wage and Salary Administration	SY08W. Use HRM Wage and Salary Administration. This system control will be available in a future release.
To activate the Quantum GeoCoder	HRGEO. Set this option to Yes to use the Quantum GeoCoder to automatically assign tax area information to employee and business unit records. This option is available for U.S. and Canadian Payroll only.

See Also

- About Criterion Blueprint*
- About Personic Workflow*

► To set up system controls

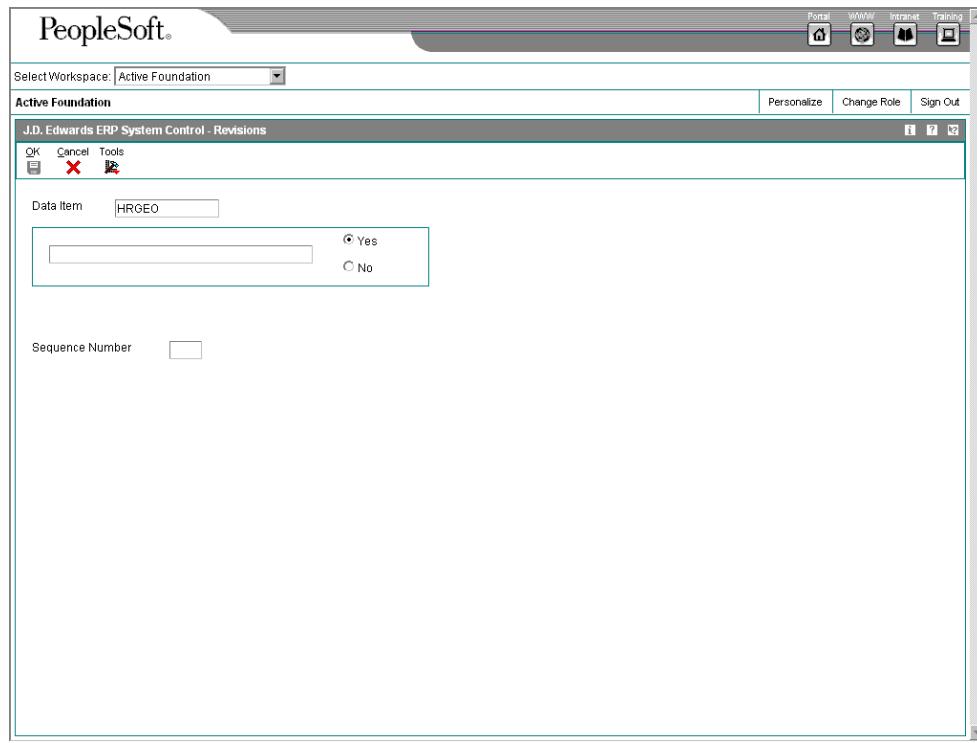
From the HRM Setup menu (G05B4), choose OneWorld System Control.



The screenshot shows a Windows application window titled "OneWorld System Control - [Work With OneWorld System Control]". The window has a menu bar with File, Edit, Preferences, Window, and Help. Below the menu is a toolbar with icons for Select, Find, Add, Del., Close, Seq..., New..., Disp..., and Abo. To the right of the toolbar are buttons for Links, Disp..., and Internet. The main area is a grid table with columns: Data Item, Description, Use Module, Updated By, Date Updated, and Disply Seq. The table contains 15 rows of system control settings. The last row, SY05TXID, is highlighted with a gray background.

Data Item	Description	Use Module	Updated By	Date Updated	Disply Seq
SY05AN8	Display Employee Number On Self Service?	Yes	RW970023	9/25/98	
SY05BE	Send Batch Enrollment	No	JB169914	9/10/98	
SY05BN	HRM Benefits Installed?	Yes	JB169914	9/10/98	
SY05CM	Send Completion messages	Yes	JB169914	9/10/98	
SY05CRTN	Use Criterion Integration	No	SM835067	7/17/98	
SY05EE	Send Enrollment with Eligibility	Yes	JB169914	9/10/98	
SY05PH	Pay Holiday Accrual	Yes	JB169914	9/10/98	
SY05PR	HRM Payroll Installed?	Yes	JB169914	9/10/98	
SY05PRSC	Use Personnic Integration	No	RW970023	7/14/98	
SY05PS	Pay Sick Accrual	Yes	JB169914	9/10/98	
SY05PU	Send time entry notifications	Yes	JB169914	9/10/98	
SY05PV	Pay Vacation Accrual	Yes	JB169914	9/10/98	
SY05QU	Use HRM Foundation - French CDN Specific	Yes	OWCRP07	11/6/97	
SY05TE	Time Entry is installed	Yes	JB169914	9/10/98	
SY05TXID	Display Employee Tax ID On Self Service?	Yes	RW970023	9/25/98	

1. On Work With OneWorld System Control, choose the row containing the data item that you want to activate and click Select.



2. On OneWorld System Control - Revisions, click Yes, and then click OK.

Setting Up System Options

To define default information that applies to your entire system, you set up system options. These options control the types of information that you track and the rules that the system uses to perform certain calculations. For example, you use system options to specify the date that the system will use for tracking changes.

You use system options to control the following types of information:

Pay information	To ensure that you enter acceptable pay rates for employees, set up the system to verify appropriate pay types for an employee's pay grade or pay-grade step.
Employee history and turnover	To define whether you want to keep historical records of employee information, set up employee history and turnover options. These options are crucial to successful history and turnover tracking.
Recruitment	To automate the process of creating and maintaining requisitions, set up requisition information.
Position control information	To create, monitor, and control position budgets, set up position information.

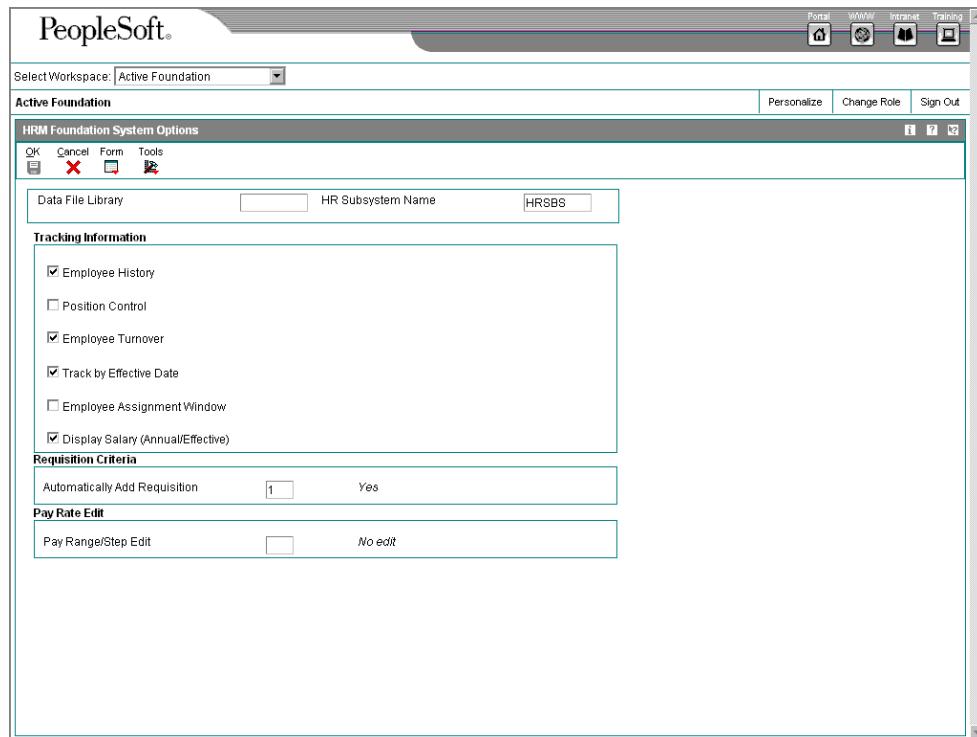
Before You Begin

- ❑ Choose data for history tracking. Also, research whether you should add employee records to the database before or after setting up employee history and turnover tracking options. See [Setting Up Employee History and Turnover Tracking](#).

► To set up general options

From the HRM Setup menu (G05B4), choose System Options.

1. On Work with HRM Foundation System Options, if you are using the World Human Resources or Payroll system in conjunction with the OneWorld system, click the Co-Existence Flag option to turn it on.
2. Click Select.



3. On HRM Foundation System Options, click any of the following options that you want for the default system:
 - Employee History
 - Position Control
 - Employee Turnover
 - Track by Effective Date
 - Employee Assignment Window
 - Display Salary (Annual/Effective)
4. Complete the following fields:
 - Automatically Add Requisition
 - Pay Range/Step Edit

- If you are tracking history and turnover, and you are using the OneWorld Human Resources system in conjunction with the World Human Resources system, you must complete the following field in the World Human Resources system:

- HR Subsystem Name

See *Setting Up History and Turnover Constants* for World software.

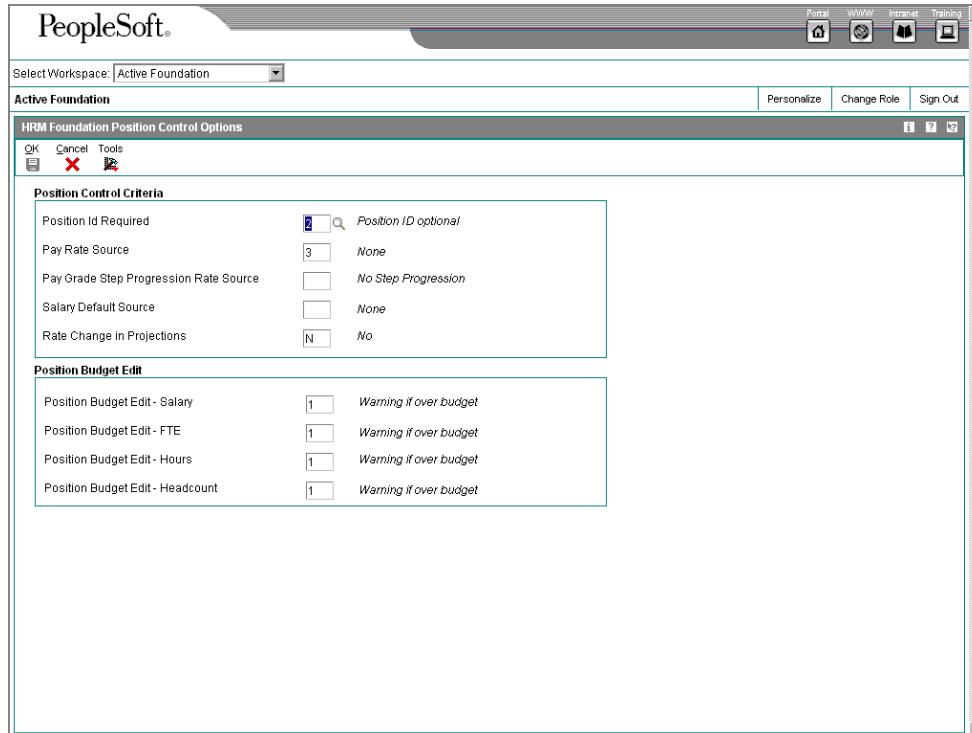
If you clicked the Position Control option, complete the steps to set up position control options.

► To set up position control options

From the HRM Setup menu (G05B4), choose System Options.

Set up position control options if you clicked the Position Control option when you set up general system options.

- On Work with HRM Foundation System Options, choose Position Control from the Row menu.



- On HRM Foundation Position Control Options, complete the following fields:

- Position Id Required
- Pay Rate Source
- Pay Grade Step Progression Rate Source
- Salary Default Source

- Rate Change in Projections
- Position Budget Edit - Salary
- Position Budget Edit - FTE
- Position Budget Edit - Hours
- Position Budget Edit - Headcount

Setting Up Company Options

You set up company options to define default information that applies to all of the companies within your organization, and to define additional information that is specific to individual companies within your organization.

Typically, you first set up options for the default company, Company 0 (zero). You can also set up company options for each company within your organization. If you do not set up company options for a company within your organization, the system uses the default company options when processing information for that company.

If you set up company options for each company within your organization, you can override some of the default company options. For example, you can enter standard hours per year for a particular company that vary from the standard hours per year that you entered for the default company.

Some of the default company options apply to all of the companies within your organization, and cannot be overridden at the individual company level. For example, if you signify that you are not using accounts payable integration or step progression processing at the default company level, none of the companies within your organization can use these options. However, if the default company options are set to activate these options, it is not necessary for all companies in your organization to use them. For example, if you have only one company within your organization that processes step progression information, you must set the default company options to allow step progression processing.

You also set up company options to control payroll processing for the employees of each company. For example, you define the following information at the default company level:

- How the system retrieves PDBA history
- Whether the system overrides home company information on timecards
- Whether each company and business unit use the same debit account for automatic deposit processing
- How the system determines payment dates during payroll processing

You must set up company options for the default company before you can process a payroll or account for labor.

Note

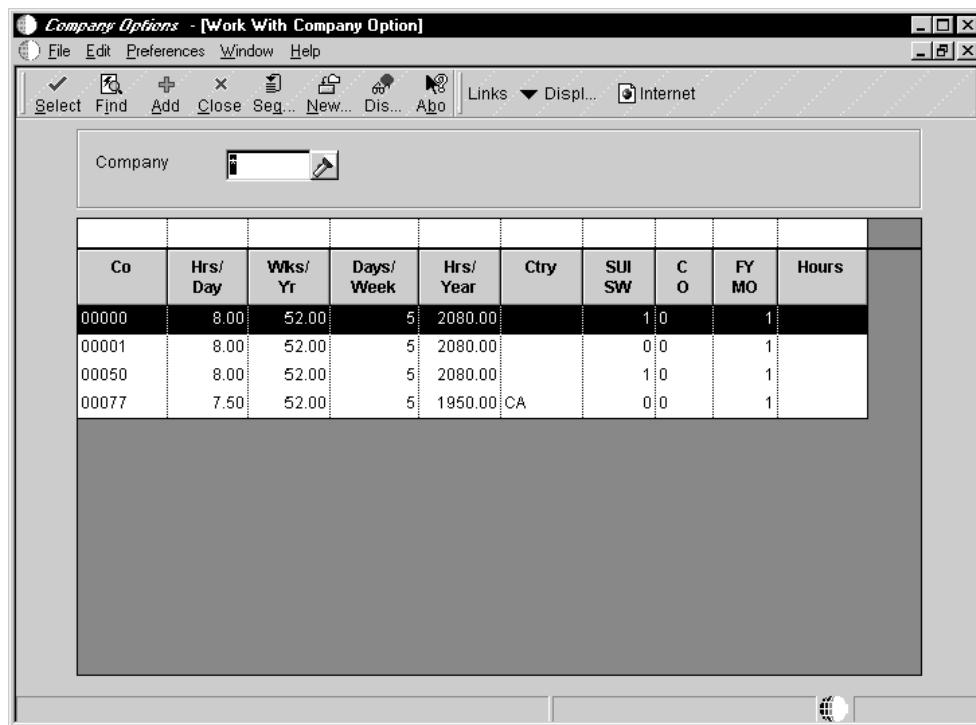
If you use the J.D. Edwards General Accounting system, you must set up separate company options for that system. See the General Accounting Guide for further instructions.

Before You Begin

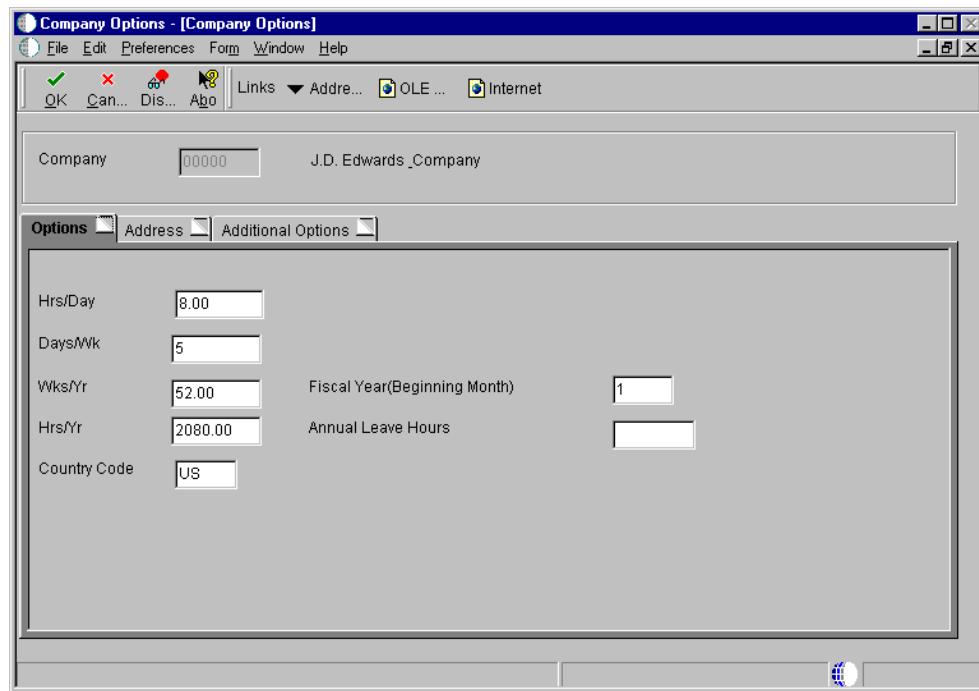
- Verify that the companies within your organization have been set up in the General Accounting system. Typically, the Accounting Department is responsible for setting up companies.

► To set up company options

From the HRM Setup menu (G05B4), choose Company Options.

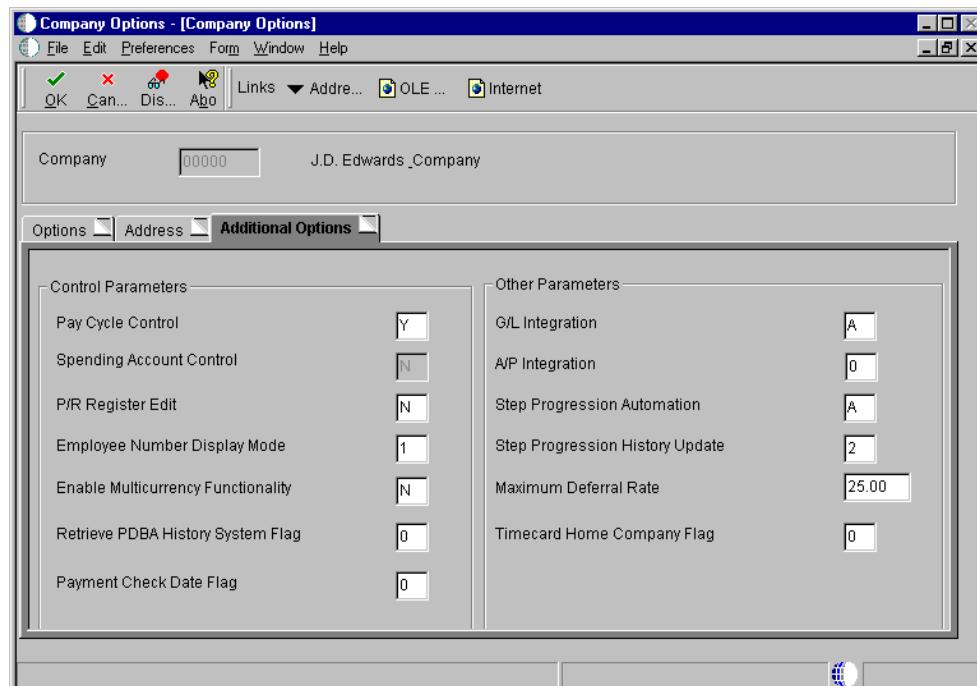


1. On Work With Company Option, to revise existing company options, choose a company and click Select.
2. To delete an existing company option, choose a company and click Delete.
3. On Confirm Delete, click OK.
4. To add new company options, click Add.



5. On Company Options, complete the following field:
 - Company
6. To define standard working times, on the Options tab, complete any of the following fields:
 - Hrs/Day
 - Days/Wk
 - Wks/Yr
 - Hrs/Yr
7. To define a country code for the default company, or to use a country code for this company that varies from the country code at the default company level, complete the following field:
 - Country Code
8. To define payroll information, complete the following fields:
 - Fiscal Year(Beginning Month)
 - Annual Leave Hours
9. Click the Address tab and complete the following fields that are not already provided by default information:

- Mailing Name
 - Address Line 1
 - Address Line 2
 - Address Line 3
 - Address Line 4
 - City
 - State
 - Postal Code
 - County
10. If you are setting up company options for the default company, click the Additional Options tab and complete the following fields:
- Pay Cycle Control
 - Spending Account Control
 - P/R Register Edit
 - Employee Number Display Mode
 - Linked Information Not Found
 - Retrieve PDBA History System Flag
 - Payment Check Date Flag
 - G/L Integration
 - A/P Integration
 - Step Progression Automation
 - Step Progression Process
 - Maximum Deferral Rate
 - Timecard Home Company Flag
 - Process Employees by Business Unit



11. Click OK.

See Also

- *About Accounts Payable Integration* for more information about creating vouchers for payroll taxes and liabilities.
- *Understanding Accounts Payable Integration* for more information about creating vouchers for payroll taxes and liabilities
- *Setting Up Debit Account Information for Automatic Deposits* for more information about creating automatic deposit bank files

Setting Up Business-Unit Constants

You set up business-unit constants to define default information that is associated with a business unit. Default business-unit information expedites data entry for time entry and payroll information.

Setting up business-unit constants also allows you to do the following:

- Define taxing authorities for a business unit.
- Apply flat burden rates to a specific business unit.
- Set up the business unit to act as a certified job for governmental reporting purposes. Job information for the business unit will be included in certified payroll reports.

You can associate a business unit with one company only.

When you set up a business unit, the system adds that business unit to the Business Unit Master table (F0006) if the business unit does not already exist in that table. In many

companies, business units are set up in the J.D. Edwards General Accounting system by the Accounting department.

You must use the General Accounting system and not the Payroll system to change any of the following information:

- Posting Edit - Business Unit
- Level of Detail - Business Unit
- Company
- Equipment Rate Code
- Address Number

► To set up business-unit constants

From the HRM Setup menu (G05B4), choose Business Unit Constants.

1. On Work With Business Unit Constants, click Add.

The screenshot shows the PeopleSoft Business Unit Constants Revisions window. At the top, there are buttons for OK, Cancel, Form, and Tools. Below this is a toolbar with icons for Print, Refresh, and Help. The main area is divided into two sections: Business Unit Information and Default Payroll Information. In the Business Unit Information section, fields include Business Unit (5352), Posting Edit Code, Level of Detail (9), Company, Equipment Rate Code, and Job Address Number. In the Default Payroll Information section, fields include Tax Area-Payroll (06), Labor Dist Method (1), Labor Dist Multiplier (1.3200), Certified Job (Y/N), and Pay Cycle Group Code. A note 'Default (Non-Group)' is shown next to the Pay Cycle Group Code field.

2. On Business Unit Constants Revisions, complete the following field:
 - Business Unit
3. Complete the following optional fields under the Default Payroll Information heading:
 - Tax Area-Payroll
 - Labor Dist Method

- Labor Dist Multiplier
 - Pay Cycle Group Code
-

Note

If you use the GeoCoder, the system uses the address information for the business unit to determine the GeoCode for the Tax Area – Payroll field. The system automatically populates this field if there is only one possible GeoCode available. If you are using the GeoCoder interactively to assign tax area information and the field remains blank, or if you use the batch GeoCoder, see *Assigning Tax Area Information using the GeoCoder* for additional information.

4. For governmental reporting in the U.S. only, complete the following optional field and click OK:
 - Certified Job (Y/N)
5. To set up automatic deposit information for this business unit, on Work With Business Unit Constants, choose Auto Deposit from the Row menu.

You only need to set up automatic deposit information for individual business units if each business unit uses a unique bank account for payroll transactions.
6. On Auto Deposit Instructions for Company – [Account Setup Instructions], complete the following fields and then click OK:
 - Bank Transit Number
 - Bank Account Number
 - Auto Deposit Company Identification
 - Company Name
 - Immediate Destination for AutoDeposit
 - Immediate Origin for AutoDeposit
 - Batch Number
 - SCC
 - Discretionary Data
 - File ID Modifier
 - Header Record for Auto Deposits
 - Trailer Record for Auto Deposits

Setting Up Common Settings for Human Resources

You use the common settings for human resources to control specific features of several human resources processes, such as benefits enrollment, compensation management, and self-service applications.

Setting up the common settings updates the Common Setting for Human Resource Employee Self Service table (F05004).

Categories of Common Settings

The common settings for human resources are grouped into the following categories:

- *Common Settings for Benefits Enrollment*
- *Common Settings for Compensation Management*
- *Common Settings for self-service applications*

Data Item	Description	Current Setting	Updated By	Date Updated
ACBEN	Associate Beneficiaries to Plans?	Yes	KT6078909	10/14/99
ACDEP	Associate Dependents To Benefit Plans?	Yes	TRN8015	5/9/00
BDRQD0B	Date of Birth Required for Dep/Ben?	Yes	KT6078909	10/14/99
BDRQTXID	Tax ID Required for Dep/Ben?	Yes	KT6078909	10/14/99
CMPBDGT	Eligibility Override Reflected in Budget	No	KT6078909	12/7/99
CMPOPEN	Open Compensation Review Process	No	KT6078909	12/7/99
CMPOVEL	Allow Override of Increase Eligibility	No	KT6078909	12/7/99
CMPPRFT	Use prorate factor in Compens.Review	No	KT6078909	12/7/99
CMPSPNT	Use Prorate amount as Spent Amount	No	KT6078909	12/7/99
CMPSYNC	Synchronize Compensation Work Tables	No	KT6078909	12/7/99
ENDSS	Display Employee Number on Self Service?	Yes	MS238060	3/8/99
MXDP	Maximum Number of Dependents	No	KT6078909	10/14/99
PNDSS	Display Participant No. on Self Service?	Yes	MS238060	3/8/99
SHCEOV	Display Overrides Outside Benefit Group?	Yes	KT6078909	10/14/99
SHPER	Display Personal Tab in Self Service?	Yes	KT6078909	10/14/99

Common Settings for Benefits Enrollment

Setting up the common settings for benefits enrollment allows you to specify whether to link dependents and beneficiaries to benefit plans and whether to require date of birth and tax ID when adding a new dependent or beneficiary.

The following table describes the common settings for data items on Work With HRM Common Display Settings. You can specify the current setting for each of these data items for enrolling dependents and beneficiaries in benefit plans on OneWorld System Control - Revisions.

Associate Beneficiaries to Plans?	This common setting indicates whether to associate beneficiaries to benefit plans. If you want to require that beneficiaries be associated with a plan when you are enrolling beneficiaries in benefit plans, set this setting to Yes.
Associate Dependents To Benefit Plans?	This common setting indicates whether to associate dependents to benefit plans. If you want to require that dependents be associated with a plan when you are enrolling dependents in benefit plans, set this setting to Yes.
Date of Birth Required for Dep/Ben?	This common setting indicates whether date of birth is required for dependents and beneficiaries. If you want the date of birth to be required when you add a new dependent or beneficiary, set this setting to Yes.
Tax ID Required for Dep/Ben?	This common setting indicates whether tax ID is required for dependents and beneficiaries. If you want the tax ID to be required when you add a new dependent or beneficiary, set this setting to Yes.

See Also

- *Employee Self-Service Setup*

Common Settings for Compensation Management

Setting up the common settings for compensation management allows you to specify whether the application will perform certain processes, and how.

The following table describes the common settings for data items on Work With HRM Common Display Settings. You can specify the current settings for these data items for compensation management on OneWorld System Control - Revisions.

Eligibility Override Reflected in Budget	If you want the salary of an employee whose eligibility you overrode to be included in budget calculations, you need to set this setting to Yes.
Open Compensation Review Process	When HR gives access to the supervisors to open the compensation review process, you need to set this setting to Yes. While you are setting up compensation management and after the managers have finished the review process, set this setting to No.
Allow Override of Increase Eligibility	If you want to allow the manager to override the default eligibility of an employee for an increase type, set this setting to Yes.
Use Prorate Factor in Compensation Review	If you want to use prorate factors in the compensation review, you need to set this setting to Yes.
Use Prorate amount as Spent Amount	If you chose to use prorate factors and you want the prorated amount to be reflected in the spent calculations, you need to set this setting to Yes. If you want the full increase amount to be reflected in the spent calculations, set this setting to No.
Synchronize Compensation Work Tables	This common setting indicates whether to synchronize the compensation work tables with employee changes. After the compensation work tables are built, set this setting to Yes to keep the compensation review work tables built, set this setting to Yes to keep the compensation review work tables synchronized with employee changes made to the employee master table. After HR closes the compensation review process to the managers, set this setting to No.

See Also

- Setting Up Compensation Management*

Common Settings for Self-Service Applications

When you set up common settings for self-service applications, you specify whether to display employee numbers, employee tax identification numbers, and participant numbers of benefit plans in the upper left corner of all self-service web pages, except for the W-4 program. You can also specify whether to limit the number of dependents that an employee can enroll in one of his or her plans through self-service, whether to display for self-service enrollment any benefits that are outside an employee's benefit group but in which the employee is enrolled, and whether to display the Personal tab for adding and viewing dependents and beneficiaries.

The following table describes the common settings for data items on Work With HRM Common Display Settings. You can specify the current settings for these data items for self-service applications on OneWorld System Control - Revisions.

Display Employee Number on Self Service?	This common setting specifies whether to display the employee number on the top left corner of all employee self service application, such as Name and Address Change.
Maximum Number of Dependents	This common setting denotes the maximum number of dependents that may be enrolled in a benefit plan.
Display Participant Number on Self Service?	This common setting specifies whether to display the participant number on the top left corner of all employee self service applications, such as Name and Address Change.
Display Overrides Outside Benefit Group?	This common setting indicates whether to show current enrollment overrides outside employee's benefit group in P08530.
Display Personal Tab on Self Service?	This common setting indicates whether to show the personal tab in benefit enrollment.
Display Tax ID on Self Service?	This common setting indicates whether to display the employee tax ID on the top left corner of all employee self service applications, such as Name and Address Change.

See Also

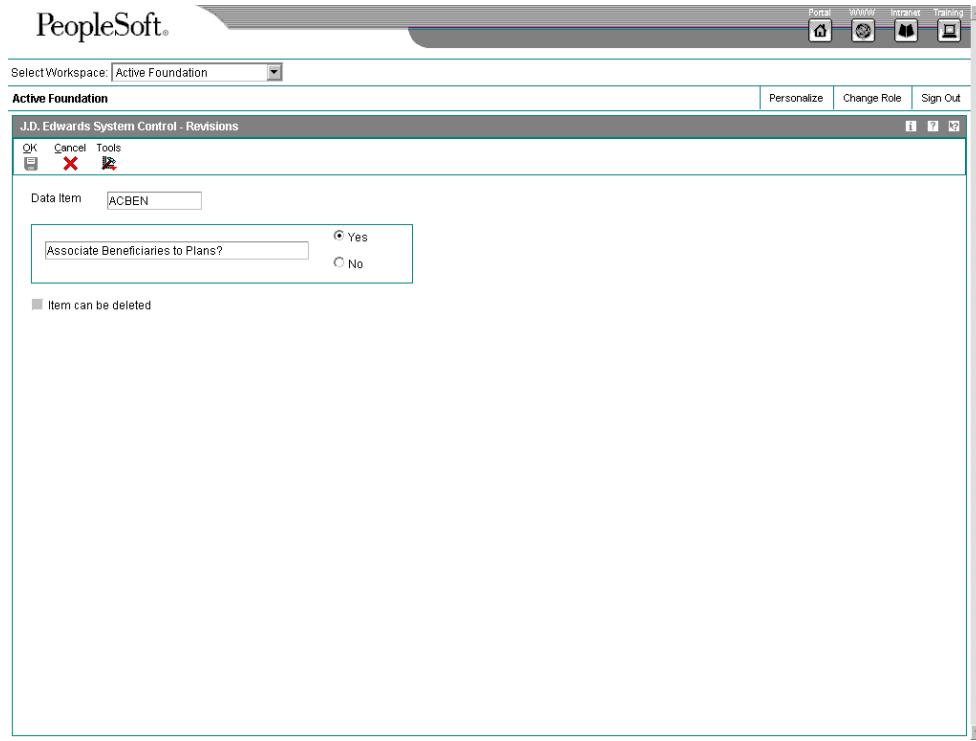
- Self-Service Setup*

► To set up common settings for human resources

From the Self Service Setup menu (G05BESS4), choose Common Settings for EE Self Service Appl. Alternatively, from the Compensation Mgmt System Setup menu (G08CM14), choose HRM Common Settings.

1. On Work With HRM Common Display Settings, choose the row containing the data item for which you want to change the current setting and click Select.

You cannot delete these data items from the system.



2. On OneWorld System Control – Revisions, click the Yes or No option to specify the current setting and then click OK.
 3. To add extra data items, on Work With HRM Common Display Settings, click Add.
 4. On OneWorld System Control – Revisions, complete the following field:
 - Data Item
 5. Click the Yes or No option to specify the current setting and then click OK.
 6. If you need to delete a data item that you have added, on Work With HRM Common Display Settings, choose the data item and click Delete.
- You cannot delete system-supplied data items from the system.

Setting Up Employee Information

Before you begin adding employee records to your system, you should set up employee information. If you need to track information that is unique to your organization or your industry, you can define category codes. To allow users to enter future changes for specific types of information, you can choose fields for future data revisions.

Before You Begin

- Set up the user defined codes for employees. See *User Defined Codes for Workforce Management Foundation*.

Defining Category Codes

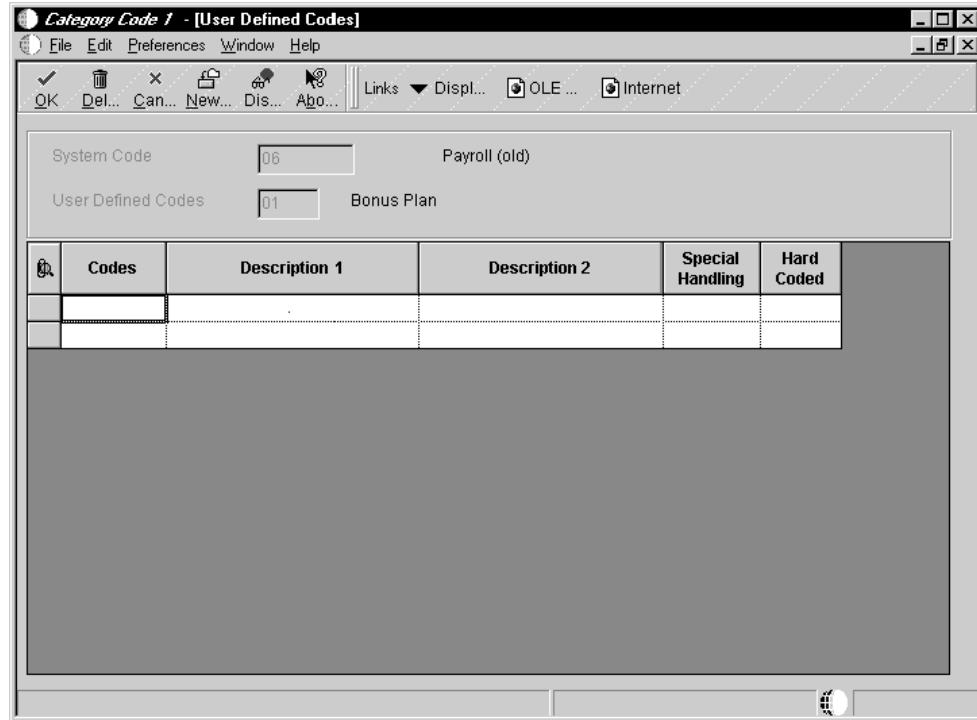
You might need to track information that is unique to your organization or your industry. For example, you might need to track the employees who are participating in the company stock purchase plan. J.D. Edwards provides category codes that you can define to track any type of additional information that your organization needs.

Category codes are a type of user defined code that you use to classify employees for tracking and reporting. You can define up to 20 category codes to meet the specific requirements of your organization.

► To define category codes

From the Employee Category Codes menu (G05BE41), choose an option.

1. On Work With User Defined Codes, click Add.



2. On User Defined Codes, complete the following fields:
 - Codes
 - Description 1
3. Complete the following optional field and click OK:
 - Description 2

Choosing Fields for Future Data Revisions

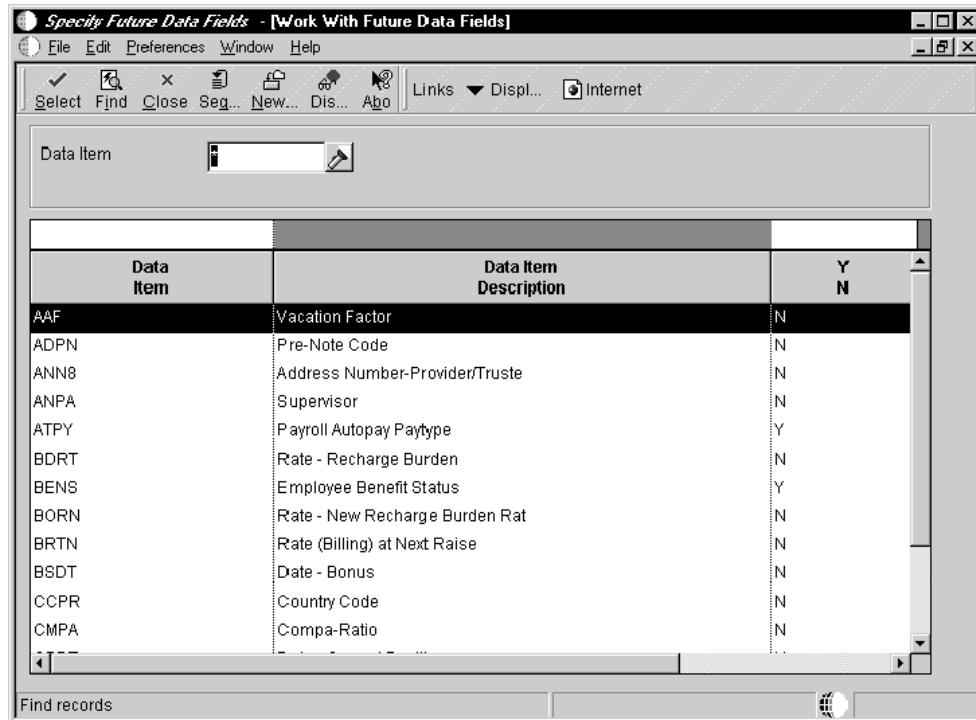
Choosing fields for future data revisions activates data items in the Employee Master table so that they can be updated using the future data forms. For example, you activate the Marital Status field so that, in the event of marriage, you can change the employee's marital status in the Employee Master table using a future data form.

Note

Some fields have default activation values that you cannot change.

► To choose fields for future data revisions

From the Employee Management Setup menu (G05BE4), choose Specify Future Data Fields.



1. On Work With Future Data Fields, complete the following field and click Find:
 - Data Item
2. For each data item, review the value in the Y/N field.
You can enter future data changes for data items for which you enter a Y (yes) value.
3. To indicate that you want to allow future data revisions for a data item, choose a data item that has N in the Yes or No field and click Select.

4. On Change Verification, click Yes to accept the change.
5. Repeat steps 2-4 for each data item for which you want to allow future data revisions.

Setting Up Employee History and Turnover Tracking

To help you manage your employee information, you can set up your system to store historical records of employee information. This means that when you enter or update employee information, the system creates a historical record of the old information. For example, when an employee receives a promotion or changes marital status, you can update the employee's current information to reflect the change and store the previous information in historical records.

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

You can use history and turnover information to do the following:

- Review the employee's job progression since you began tracking history
- Review salary increases given at the same time that a job change was made
- Analyze historical changes to employee information
- Monitor employee movement within your company

When you initialize history and turnover tracking, the system creates initial history records for all employee records in the Employee Master table. Furthermore, the system tracks history only for specific fields that you choose to track before you initialize. The history records are dated so that you can determine when you began tracking history and turnover.

You can track history and turnover for any fields that the system stores in the Employee Master table (F060116). It is important to choose these fields before initializing to eliminate cluttering the History table (F08042) with unneeded history information.

Setting up history and turnover tracking also includes enabling your history and turnover tracking options in System Options, and entering all employee records in the database. Whether you need to initialize history and turnover tracking depends on the order in which you complete these tasks and your history record specifications. The following table explains when you might or might not initialize history:

Do not initialize history and turnover tracking	Choose data for history tracking purposes and then enable the history and turnover system options. After enabling the history and turnover system options, enter or upload all employee records into the database. In this case you might not want to initialize history. The system creates initial history records for all employees as they are entered into the system. This option is preferable if you want history records for every employee on the date that they are entered into the system. However, you do not get the chance to verify the employee information before creating history records.
Initialize history and turnover tracking	Choose data for history tracking purposes and then enter or upload all employee records into the database. After entering employee records, enable the history and turnover system options, and then initialize history and turnover tracking. This option allows you to verify your employee records before creating initial history records. This process is preferable if you want to avoid adding and then deleting incorrect history records from the History table. The system creates history records beginning with the date that you determine in your Initialize Employee History and

Turnover Processing Options.

See Also

- ❑ *Setting Up System Options* for information about enabling the history and turnover tracking options
- ❑ *Adding Employee Records One at a Time* for information about adding employee records to the database

Choosing Data for History Tracking Purposes

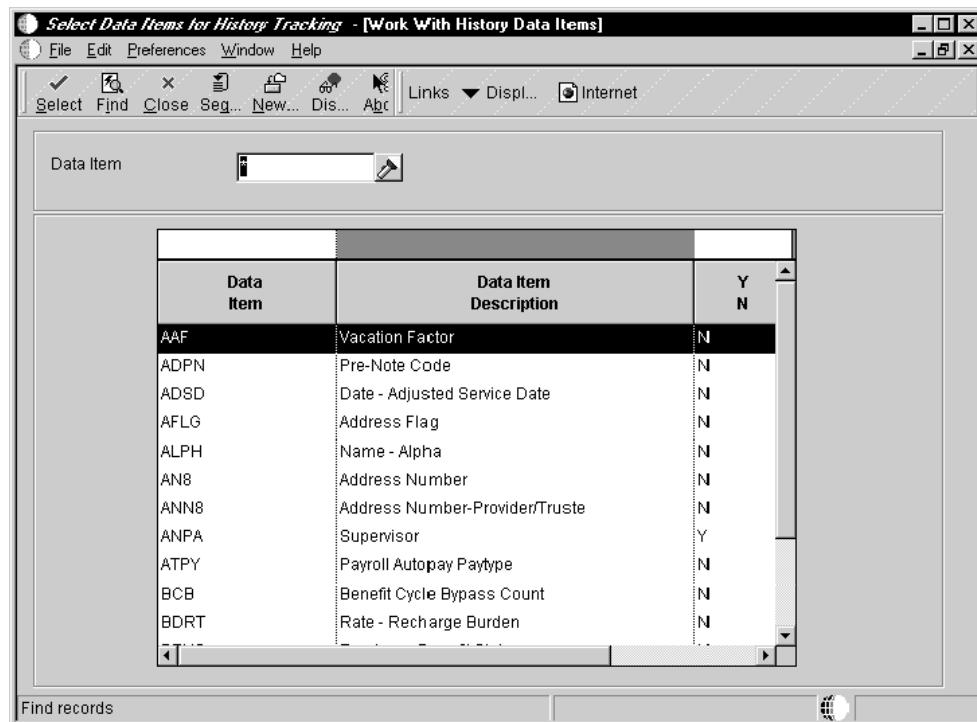
You choose the data items for which you want to track history before you initialize history and turnover tracking. Limiting the data items for which you track history makes it easier to locate information when you review history records. For example, you might choose to track history for data items such as Marital Status, Employment Status, Salary, and Pay Status, but not for items that rarely change, such as Gender and Tax ID.

If you do not choose data for history tracking purposes before you initialize, the system will automatically track history for every item on the Employee Master table.

After initializing, you can deactivate certain Employee Master table data items if you do not want to track certain history items anymore.

► To choose data for history tracking purposes

From the Employee History Setup menu (G05BH4), choose Select Data Items for History Tracking.



1. On Work With History Data Items, complete the following field and click Find:

- Data Item
2. For each data item, review the value in the following field:
- Y N
- The system tracks history for data items that display a Y value.
3. To specify that you want to track history for a data item, choose a data item that has an N in the Yes or No field and click Select.
 4. On Change Verification, click Yes to accept the change.
 5. Repeat steps 3 and 4 for each data item for which you want to track history.

Initializing History and Turnover Tracking

From the Employee History Setup menu (G05BH4), choose Initialize History & Turnover.

After choosing data for history tracking, you initialize history and turnover tracking. The system activates history tracking for your chosen fields on the Employee Master table (F060116). You can review which fields are on the Employee Master when you choose data for history tracking purposes.

If you set up your system options for history and turnover tracking before you begin entering employee records, you do not need to initialize history and turnover tracking. In this case, the system automatically creates history and turnover records when you add new employee records.

You need to run this program only if you begin using the history and turnover features after you have been using the system for a while. You can use these initial history and turnover records to determine when you began tracking history and turnover. After initializing, the system continues to create history and turnover records each time you change employee information fields that update the Employee Master table.

Before You Begin

- Add all employee records to your system. See [Adding Employee Records One at a Time](#).

Processing Options for Initialize Employee History & Turnover

Initialize

- 1) Enter a date to be used as the Effective Date for all history records. Blank will default the date when each employee record was last changed.

Effective Date

- 2) Choose what files to initialize given the following choices:

H = Initialize History file only. (Default)

T = Initialize Turnover file only.

B = Initialize both History and Turnover files.

Initialize which file(s).

- 3) To clear records from the indicated file(s) before initialization, enter one of the following values:

1 = Clear the entire selected file(s).

2 = Clear History/Turnover records for the selected employees only.

'' = Do not clear records. (Default)

Clear Mode

- 4) Enter a change reason for initial turnover and history records. A blank will default a change reason of '001' (New Hire).

Change Reason

What You Should Know About Processing Options

Effective dates (1)	J.D. Edwards recommends that you enter an effective date for this processing option. The effective date should be a day prior to the date of your first date for reporting turnover. The system considers employees active as of the initialize effective date.
Change reason (4)	Enter a numeric change-reason code for this processing option.

Pay Rate Source Setup

Before you enter employee compensation, you must choose an appropriate pay-rate source based on your business purpose and organizational structure. The Workforce Management Foundation system provides the following pay-rate source options:

- *Pay Rate table*
- *Pay-Grade Step table*
- *None (no default pay rate source)*

Pay Rate Table

When you need to associate pay rates with a specific group of employees, such as members of a union, you can use the Pay Rate table as the default pay rate source. The Pay Rate table, as set up in Union Rates and Master Revisions (P059121), associates job types and steps with union codes. Therefore, specific hourly rates are attached to union codes when you set up hourly rates with job types and steps.

Pay rate tables are useful for positions that are compensated based on a flat rate rather than a pay range. Pay rates can be used with hourly jobs, for which an employee is paid a set hourly rate regardless of performance or seniority. For use with unions, pay rate ranges would usually need to accommodate only seniority adjustments. However, the use of pay rates can include performance adjustments. To recognize performance, you would need to set up a pay type, such as bonus pay, or change the employee's job type to a job type attached to an increased pay rate.

The Pay Rate table is frequently used by the public sector and other industries that are closely linked to unions.

See Also

- Setting Up Pay Rate Tables*

Pay-Grade Step Table

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

Using the Pay Grade Step table is convenient for a company whose structure consists of many positions that allow for progressive advancement. Using the Pay Grade Step table to

enter compensation also saves data entry time and reduces calculation errors and compensation inconsistencies.

On the Pay Grade Step table, a pay grade consists of a group of jobs that are equal in pay range. For example, assume all junior accountant positions and junior graphic artists in a company are in pay grade A and pay grade A represents a pay range of 30,000-40,000. Therefore, all junior accountant and junior graphic positions need to be compensated within this pay range.

However, within each pay grade, you set up pay grade steps that represent a specific salary or hourly rate. For example, in pay grade A are pay steps A1, A2, and A3. Employees in step A1 receive 15.00 per hour, employees in step A2 receive 15.50 per hour, and employees in step A3 receive 16.00 per hour.

Setting up pay-grade steps lets you automate the process of entering compensation information for employees. When you enter employee information, the system automatically calculates the employee's salary or hourly rate, based on the pay-grade step that you enter for the employee.

When you define pay-grade steps, you can also save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then you enter a pay-rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step's pay-rate multiplier.

You might also prefer to use pay grades without using pay grade steps to calculate compa-ratios for pay-grades. Compa-ratios are helpful calculations for management to determine equitable pay increases for employees.

See Also

- Setting Up Pay Grades*
- Setting Up Pay-Grade Steps*

None (No Default Pay Rate Source)

If in your organization, employees' salaries and hourly rates are not associated with specific amounts for a job or pay grade steps, you can use no default pay rate source. If you choose this option, you will need to enter each salary or hourly rate individually.

This is a good option for companies that do not use predefined rates for all employees in like jobs. This may also be preferable for an organization with fewer positions and fewer job types.

Compa-ratios can be determined by calculating salary midpoints on the Job Information table (F08001).

Setting Up Job Information

Before you can use your system to define the jobs within your organization, you must define pay and job evaluation information. You define pay information to set up the pay ranges or amounts associated with each job. You define job evaluation information to define the methods that you use to evaluate jobs. You use job evaluations to determine equitable pay ranges for jobs. You also can set up a cross-reference table by business unit to define default job information for employees in a specific business unit.

You can set up job-classification constants to maintain various classifications of jobs related to job type, job step, union, and business unit. For payroll, you can identify combinations of job types and job steps that you want to print on the Certified Payroll Register report to meet taxing authority regulations.

Before You Begin

- Set up the user defined codes for jobs. See [User Defined Codes for Workforce Management Foundation](#).
- Review the pay range and step information that you have set up in your system options. See [Setting Up System Options](#).

Setting Up Pay Grades

To create categories for grouping employees according to pay ranges, you can define pay grades for each pay class within your organization. A pay class defines how an employee is paid, such as salaried, hourly, and so on. For example, within the pay class Salaried you can define pay grades 1 through 10. For each of these pay grades, you define a minimum, midpoint, and maximum salary amounts. These amounts define the pay range for the pay grade. For example, the pay range for pay-grade 1 might be:

- Minimum = 20,000.00
- Midpoint = 25,000.00
- Maximum = 30,000.00

This means that the annual salary for an employee in pay-grade 1 can be any amount between 20,000.00 and 30,000.00.

For each pay grade, you can define a separate pay range for each of the following factors:

- Locality
- Union
- Salary data source
- Effective date

For example, if your organization has three locations in different areas of the country, you might want the pay ranges for employees in the same job to vary according to the location where the employees work. When you create a pay grade, you can define a separate pay range for each of the three locations:

West Area	Minimum = 25,000 Midpoint = 30,000 Maximum = 35,000
Midwest Area	Minimum = 28,000 Midpoint = 33,000 Maximum = 38,000
East Area	Minimum = 31,000 Midpoint = 36,000 Maximum = 41,000

When you define pay grades by class, you create a record of the pay ranges for your organization's pay grades. The system uses these pay ranges to calculate compa-ratios for the employees whom you assign to these pay grades. When you enter employee information, either an error or a warning message appears when you enter a rate that is not within the pay range for an employee's pay grade. The type of message that appears depends on how you set up your system options.

If you are using pay-grade steps, you can define pay grades at the same time that you define pay-grade steps. You do not need to define pay grades by class to use the Pay Grade Step table.

The Pay Grades by Pay Class program updates the Pay Grade and Salary Range table (F082001).

► To set up pay grades

From the Job Specifications Setup menu (G05BJ4), choose Pay Grades by Class.

Pay Grade	Locality	Source	Effective Date	Union Code	Minimum Salary	2nd Quartile Salary	Midpoint Salary	8th Quartile Salary	Maximum Salary
S1			01/01/99		18,000.000		20,125.000		22,250.000
S2			01/01/99		19,500.000		24,250.000		29,000.000
S3			01/01/99		25,000.000		31,000.000		37,000.000
S4			01/01/99		31,500.000		38,250.000		45,000.000
S5			01/01/99		38,000.000		47,000.000		56,000.000
S6			01/01/99		46,500.000		55,750.000		65,000.000
S7			01/01/99		55,000.000		62,500.000		70,000.000
S1			01/01/00		18,450.000		20,628.000		22,806.000
S2			01/01/00		19,988.000		24,856.000		29,725.000
S3			01/01/00		25,825.000		31,775.000		37,925.000

1. On Pay Grades by Pay Class, complete the following fields:

- Pay Class(H/S/P)
- Pay Grade
- Minimum Salary
- Maximum Salary

- Midpoint Salary
 - Effective Date
2. Complete any of the following optional fields and click OK:
- Locality
 - Source
 - 2nd Quartile Salary
 - 4th Quartile Salary
 - Remark
 - Union Code

Setting Up Pay-Grade Steps

To ensure that all of the employees working in a job receive the same rate of pay, and to establish progression within a pay grade, you can set up pay-grade steps. For example, you might have a pay grade A that contains pay steps A1, A2, and A3. Employees in step A1 receive 15.00 per hour, employees in step A2 receive 15.50 per hour, and employees in step A3 receive 16.00 per hour.

Setting up pay-grade steps lets you automate the process of tracking pay information for employees. You can set up your system options so that, when you enter employee information, the system automatically calculates the employee's salary or hourly rate, based on the pay-grade step that you enter for the employee.

When you define pay-grade steps, you can save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then you enter a pay-rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step's pay-rate multiplier.

When you set up pay-grade steps individually, you enter a pay rate for each pay-grade step. When you set up pay-grade steps using a pay-rate multiplier, you enter a base pay rate and apply a pay-rate multiplier to each pay-grade step.

You can define pay grades at the same time that you define pay-grade steps. You do not need to define pay grades by class to use the Pay Grade Step table.

The Pay Grade Step Table program updates the Pay Grade and Salary Range table (F082001).

► To set up pay-grade steps individually

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

PeopleSoft®

Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade	Next Pay Grade Step	Remark
S1	A			01/01/05		20,874.000	S1	B	
S1	A			01/01/04		20,365.000	S1	B	
S1	A			01/01/03		19,869.000	S1	B	
S1	A			01/01/02		19,384.000	S1	B	
S1	A			01/01/01		18,911.000	S1	B	
S1	A			01/01/00		18,450.000	S1	B	
S1	A			01/01/99		18,000.000	S1	B	
S1	B			01/01/05		23,339.000	S1	C	
S1	B			01/01/04		22,770.000	S1	C	
S1	B			01/01/03		22,241.000	S1	C	
S1	B			01/01/02		21,712.000	S1	C	
S1	B			01/01/01		21,183.000	S1	C	
S1	B			01/01/00		20,654.000	S1	C	
S1	B			01/01/99		20,125.000	S1	C	

- On Pay Grade Step Table, complete the following field and click Find:
 - Pay Class(H/S/P)
- To define information that applies to all or most of the pay-grade steps that you need to add, complete any of the following fields and click Find:
 - Union Code
 - Locality
 - Std Hrs/Day
 - Std Days/Year
 - Effective Date
- For each step that you need to set up, move to a blank line in the detail area and complete the following fields:
 - Pay Grade
 - Grade Step
 - Step Rate
- Complete the following optional fields:

- Next Pay Grade
 - Next Pay Grade Step
5. To define information for this step that varies from the information that you entered for the pay class, complete the following fields and click OK:
- Union Code
 - Loc Desc
 - Effective Date
 - Hrs Day
 - Days Year

► **To set up pay-grade steps using a multiplier**

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

1. On Pay Grade Step Table, complete the following field:
 - Pay Class(H/S/P)
2. To define information that applies to all (or most) of the pay-grade steps, complete any of the following fields:
 - Union Code
 - Locality
 - Std Hrs/Day
 - Std Days/Year
 - Effective Date
3. Complete the following field:
 - Step Rate
4. For each step that you need to set up, complete the following fields:
 - Pay Grade
 - Grade Step
 - Rate Mult
5. Complete the following optional fields:
 - Next Pay Grade
 - Next Pay Grade Step

6. To define information for this step that varies from the information that you entered for the pay class, complete the following fields:

- Union Code
- Loc
- Effective Date
- Hrs Day
- Days Year

7. Click Calculate.

Setting Up Pay-Range Formulas

When the pay ranges for your organization's pay grades are based on variable factors, you can set up pay-range formulas that the system uses to automatically calculate pay ranges for each pay grade. These formulas are based on the job evaluation points. In addition, if a job pays more in one region of the country than in another, you can enter a geographic multiplier in the pay-range formula. The system calculates different minimums, midpoints, and maximums for the different areas, based on the minimum, midpoint, and maximum multipliers, as well as the geographic multiplier.

To use pay-range formulas, you must evaluate the jobs within your organization. You evaluate jobs to determine equitable pay ranges for them.

► **To set up pay-range formulas**

From the Job Specifications Setup menu (G05BJ4), choose Define Pay Range Formulas.

1. On Work With Pay Range Formulas, click Add.

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Effective Date	01/01/05
Pay Class(H/S/P)	S
Locality	EAST Headquarters (default)
Pay per Point	24.0000
Based On Amount	30,000.00
Multiplier for Minimum	0.800
Multiplier for Maximum	1.250
Geographic Multiplier	1.250
Rounding Factor	100

2. On Pay Range Formulas, complete the following fields:
 - Effective Date
 - Pay Class(H/S/P)
 - Locality
 - Pay per Point
 - Based On Amount
 - Multiplier for Minimum
 - Multiplier for Maximum
 - Geographic Multiplier
3. Complete the following optional field and click OK:
 - Rounding Factor

See Also

- ❑ *Entering Job Evaluation Information* for information about evaluating the jobs within your organization

Defining Job Evaluation Factors

To determine equitable pay ranges for the jobs within your organization, you can evaluate jobs. Before you can evaluate jobs, you must define evaluation methods. Typical evaluation methods include the following:

- Degree (Simple Subjective Point System)
- Evalucomp
- Factor comparison
- Point factor
- Hay

For each evaluation method, you must define the factors that you use to gauge the scope of each job. Typical evaluation factors include the following:

- Problem-solving abilities
- Technical skills
- Working conditions
- Leadership qualities
- Know-how
- Accountability

To enable you to rate and compare jobs, you assign points or degrees to each evaluation factor.

► To define job evaluation factors

From the Job Specifications Setup menu (G05BJ4), choose Evaluation Factors Table.

1. On Work With Evaluation Factors Table, click Add.

The screenshot shows the 'Evaluation Factors Table Review' window in the PeopleSoft application. At the top, there are buttons for OK, Find, Delete, Cancel, and Tools. Below these are fields for 'Job Evaluation Method' (set to 'D') and 'Degree Method' (set to 'Detailed spec of degree'). Another field shows 'Job Evaluation Type' (set to '2'). A 'Total Evaluation Points' field contains the value '1,300'. The main area is a grid titled 'Customize Grid' with columns labeled 'Factor Number', 'Description', 'Evaluation Points', and 'Points 10' through 'Points 2'. The first row shows '1 Know How' with values 500, 500, 450, 400, 350, 300, 250, 200, 150, and 100 respectively. Subsequent rows show '2 Problem Solving' and '3 Accountability' with their respective point values.

Factor Number	Description	Evaluation Points	Points 10	Points 9	Points 8	Points 7	Points 6	Points 5	Points 4	Points 3	Points 2
<input checked="" type="checkbox"/> 1	Know How	500	500	450	400	350	300	250	200	150	100
<input type="checkbox"/>	2 Problem Solving		350	350	250	175	125	100	80	60	40
<input type="checkbox"/>	3 Accountability		450	450	425	375	350	300	250	200	150
<input type="checkbox"/>											

2. On Evaluation Factors Table Review, complete the following fields and click OK:
 - Job Evaluation Method
 - Job Evaluation Type
 - Factor Number
 - Evaluation Points
 - Description
 - Points 1 through
 - Points 10

Setting Up a Cross-Reference Table by Business Unit

When you define a job, you can enter a benefit group, union code, and workers compensation information for it. Entering this information at the job level simplifies the process of entering employee information because it eliminates the need to enter that information for each employee who is assigned to the job. You can override this default job information for individual employees, if necessary.

In some cases, you might need to override default job information for all of the employees who work in a specific business unit. In this case, you can set up a cross-reference table for the job ID and business unit. For example, assume the following scenario:

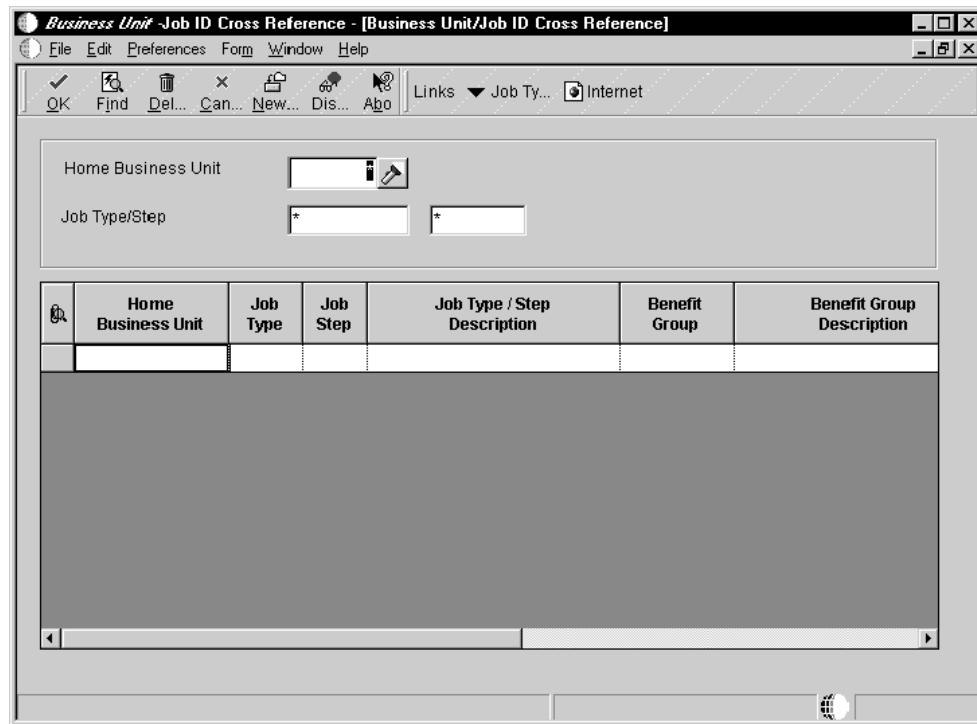
- Your organization has 5000 machinists.
- Of those machinists, 4,500 work in business unit 5, union 1000, and benefit group 100.
- The remaining 500 machinists work in business unit 6, union 1100, and benefit group 200.

To streamline the process of entering job information for employees, you can enter union 1000 and benefit group 100 when you define the job machinist, and then set up a cross-reference table for the machinists in business unit 6.

The system uses the information in the cross-reference table to automatically update the records for the employees in that business unit with the correct union, benefit group, and workers compensation information.

► To set up a cross-reference table by business unit

From the Job Specifications Setup menu (G05BJ4), choose Business Unit-Job ID Cross Reference.



1. On Business Unit/Job ID Cross Reference, complete the following field:
 - Home Business Unit
2. To define the information that applies to a job for only those employees who work in the business unit that you defined, complete any of the following fields and click OK:

- Job Type
- Job Step
- Benefit Group
- Union Code
- WCI Code
- S C

Setting Up Job Classification Constants

You set up job-classification constants to maintain various classifications of jobs, related to job type, job step, union, and business unit. For U.S. payroll, you can identify combinations of job types and job steps that you want to print on the Certified Payroll Register report to meet taxing authority regulations.

You can also specify alternate job types and job steps to print on the Certified Payroll Register report to meet U.S. taxing authority regulations. Alternate job-type and job-step codes replace the codes for job type and job step that exist in either the Employee Master table (F060116) or the Employee Transaction History table (F0618).

► To set up job-classification constants

From the Job Specifications Setup menu (G05BJ4), choose Job Classification Table Revisions.

1. On Work With Job Classification Constant, click Add.

Job Type/Step	Union Code	Business Unit	Alt.Job Type	Alt.Job Step	Hourly Rate Lower	Hourly Rate Upper	EEO Type	Rpt Cls.	Cert Flg.
61	5100						N	H	

2. On Job Classification Constant Revisions, complete the following fields and click OK:
 - Job Type/Step
 - Job Step
 - Union Code
 - Business Unit
 - Alt.Job Type
 - Alt.Job Step
 - Hourly Rate Lower
 - Hourly Rate Upper
 - EEO Job
 - Rpt. Cls.
 - Cert Flg.

Setting Up Pay Rate Table Information

You set up pay rate table information to simplify the process of associating the same information, such as pay rates, with a group of employees. You must set up pay rate tables if you have chosen pay rate table as your pay rate default source in System Options. The following information is associated with pay rate information:

Pay rate tables	You set up pay rate tables to associate pay rates with a specific group, such as a union.
Union local and job cross-references	You set up local and job cross-references to cross-reference parent unions with local unions.

Setting Up Pay Rate Tables

You set up pay rate tables to associate pay rates with a specific group of employees. You set up hourly rates by job type and job step. Any amounts that you enter in the pay rate tables can override rates set up in the Employee Master table (F060116). As you enter time for various job types and job steps, the system locates the appropriate hourly rate.

The system uses pay rate tables in conjunction with the time entry programs. You must define a processing option in the appropriate time entry program so that the system uses the pay rate tables.

Setting up pay rate tables allows you to do the following:

- Make rates specific to a job, business unit, or shift
- Define up to five different rates per job type and step
- Create workers compensation codes for each job type and step
- Define a flat burden factor for each job type and step
- Define a recharge billing rate

You can use Union Rates Master Revisions (P059121) to set up and revise pay rates tables. The program allows you to set up or revise a pay rate table one at a time or in groups. The following task allows you to set up pay rate tables in groups. To set up a single pay rate table, you need to find a record on the Work with Union Rates form, and then choose Single Revision from the Row menu.

Setting up pay rate tables updates the Employee Master table (F060116) and the Union Rates table (F069126).

► To set up pay rate tables

From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Add.

2. On Revise Multiple Rcds Union Rates, complete the following fields:

- Union Code
- From:

- Thru:
- Job Type
- Job Step
- Hourly Rate

When you complete only the Hourly Rate field, the system uses the pay type multiplier for the overtime rates.

3. Complete the following optional fields:

- Business Unit
- Shift Code
- Wage Decision No.

4. Select a group of rates to enter from the following options:

- Hourly Rates
- Billing Rates
- 1st Burden Rates
- 2nd Burden Rates

5. To enter hourly overtime rates, complete one or more of the following fields:

- Regular Overtime
- Double Overtime
- Triple Overtime
- Holiday Pay

When you complete only the overtime rate fields, the system does not use the pay type multiplier from Pay Type Revisions.

6. To enter billing rates, complete one or more of the following fields:

- Billing Rate
- Billing Regular
- Billing Double
- Billing Triple
- Billing Holiday

When you enter a value for billing rates, the system does not use the pay type multiplier.

7. To enter recharge burden rates, complete one or more of the following fields:
 - Rchg Burden Rate
 - Burden-1 Regular
 - Burden-1 Double
 - Burden-1 Triple
 - Burden-1 Holiday
 - Burden-2 Regular
 - Burden-2 Double
 - Burden-2 Triple
 - Burden-2 Holiday
8. Complete the following optional fields:
 - Piecework Rate
 - Wrk Comp Code
 - Wrk Comp SubClass
 - Labor Dist. Multiplier
 - Labor Dist. Method
9. Repeat steps 2-8 for each record that you want to add to the same union code.
10. When you finish entering records, click OK.

Revising Pay Rate Tables

You can use the Union Rates Master Revisions program (P059121) to revise pay rate tables. You can revise pay rate tables one at a time or in groups. To revise a single pay rate table, you need to locate a record on the Work with Union Rates form, and then choose Single Revision from the Row menu.

You can revise pay rate tables in groups either manually or by calculation.

Revising pay rate tables updates the Employee Master table (F060116) and the Union Rates table (F069126).

► **To revise pay rate tables manually**

From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Find. Then choose Revise Multiple from the Row menu.

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Job Type	Job Step	Job Type/Step Description	Hourly Rate	Regular Overtime	Double Overtime	Triple Overtime	Holiday Pay	Piece Rate
<input checked="" type="checkbox"/> 8R-1	J	Maintenance Mechanic Junior	20.500	30.750	21.000	31.500		
<input type="checkbox"/>	8R-3	Maintenance Instruc. Junior						
<input type="checkbox"/>								

2. On Revise Multiple Rcds Union Rates, review the following fields and change as necessary:
 - Thru:
 - Job Type
 - Job Step
3. Change the following optional field, if needed:
 - Wage Decision No.
4. Select a group of rates to revise by clicking one of the following options:
 - Hourly Rates
 - Billing Rates
 - 1st Burden Rates
 - 2nd Burden Rates
5. To revise hourly rates, change one or more of the following fields:
 - Hourly Rate
 - Regular Overtime

- Double Overtime
 - Triple Overtime
 - Holiday Pay
6. To revise billing rates, change one or more of the following fields:
- Billing Rate
 - Billing Regular
 - Billing Double
 - Billing Triple
 - Billing Holiday
7. To enter recharge burden rates, change one or more of the following fields:
- Rchg Burden Rate
 - Burden-1 Regular
 - Burden-1 Double
 - Burden-1 Triple
 - Burden-1 Holiday
 - Burden-2 Regular
 - Burden-2 Double
 - Burden-2 Triple
 - Burden-2 Holiday
8. Complete the following optional fields:
- Piecework Rate
 - Wrk Comp Code
 - Wrk Comp SubClass
 - Labor Dist. Multiplier
 - Labor Dist. Method
9. To save the revisions, click OK.
10. To revise records for the next union code, choose Next and repeat steps 2-9 for each record you want to revise.

► **To revise pay rate tables by calculation**

From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Find. Then choose Revise Multiple from the Row menu.

The screenshot shows the PeopleSoft interface with the title 'Revise Multiple Rcds. Union Rates'. The window includes fields for Union Code (1000), Machinists, Wage Decision No., Business Unit, Shift Code, Effective Dates (From: 01/01/00, Thru: 12/31/10), and options to apply increases to Hourly Rates, Billing Rates, or 1st/2nd Burden Rates. Below this is a section to calculate grid columns for Hourly, Regular, Double, Triple, and Holiday rates. A grid table displays data for job types 8R-1 and 8R-3, showing hourly rates and overtime calculations. The grid has columns for Job Type, Job Step, Job Type/Step Description, Hourly Rate, Regular Overtime, Double Overtime, Triple Overtime, Holiday Pay, and Piece Rate.

Job Type	Job Step	Job Type/Step Description	Hourly Rate	Regular Overtime	Double Overtime	Triple Overtime	Holiday Pay	Piece Rate
8R-1	J	Maintenance Mechanic Junior	20.500	30.750				
8R-3	J	Maintenance Instruc. Junior	21.000	31.500				

2. On Revise Multiple Rcds Union Rates, review the following fields and change as necessary:
 - Thru:
 - Job Type
 - Job Step
3. Revise the following optional field, if needed:
 - Wage Decision No.
4. Select a group of rates to which to apply the calculation by clicking one of the following options:
 - Hourly Rates
 - Billing Rates
 - 1st Burden Rates

- 2nd Burden Rates
5. Choose the grid columns to calculate.
 6. Complete one of the following fields and click Calculate:
 - Percent to Apply
 - - OR -> Amount to Apply
 7. Complete the following optional fields:
 - Piecework Rate
 - Wrk Comp Code
 - Wrk Comp SubClass
 - Labor Dist. Multiplier
 - Labor Dist. Method
 8. To save the revisions, click OK.
 9. To revise records for the next union code, choose Next and repeat steps 2-9 for each record you want to revise.

Setting Up Union Local and Job Cross-References

You set up union local and job cross-references to cross-reference parent unions with local unions. You use these tables when a parent union has members working for a local union and those members must be paid the local union's wage rate and receive the corresponding benefits. By cross-referencing one union's (local or parent) job to another union, you ensure that the system uses the correct rates and benefits to calculate payroll.

The cross-reference tables are specific to business units and jobs and provide for the retrieval of hourly rates and group DBAs. If you define these tables, you do not have to change an employee's union information during time entry. The system substitutes the employee's union and obtains the related local union.

You can also set up cross-references between local units of the union.

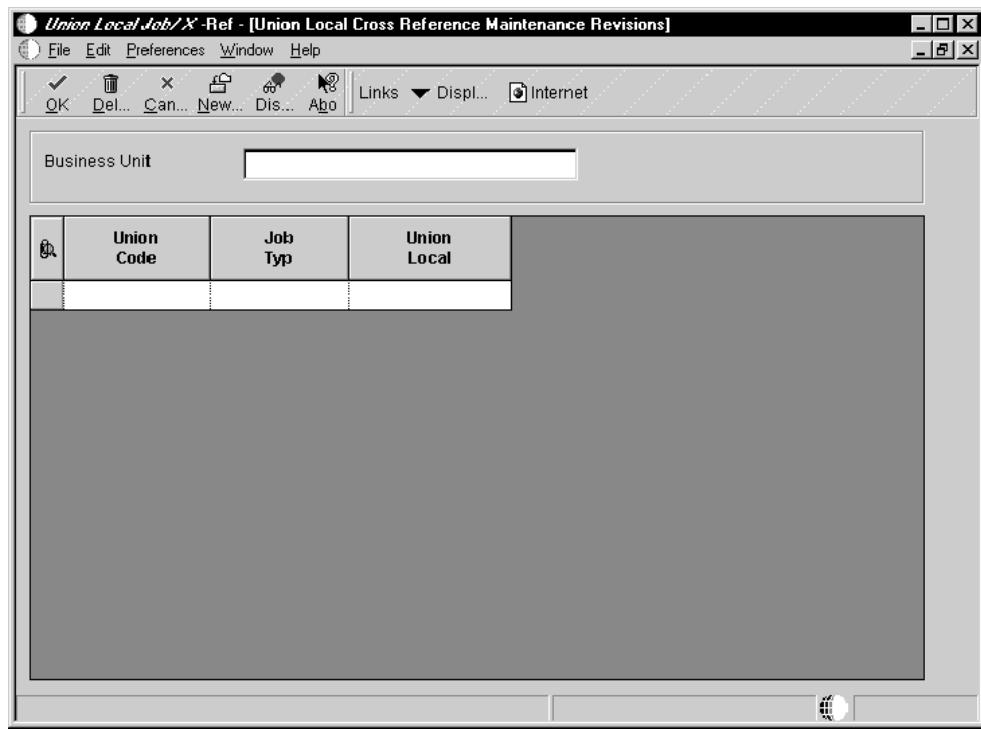
Before You Begin

- Define both the parent and local unions in the system. See *User Defined Codes for Workforce Management HR and Payroll Foundation*.
- Define the pay rates and group DBAs for the local union that has the job. See [Setting Up Pay Rate Table Information](#), [Setting Up Earnings Information](#), and [Setting Up Group Plan DBAs](#).

► To set up union local and job cross-references

From the Rate Derivation Setup menu (G05BRD4), choose Union Local Job/X-Ref.

1. On Work With Union Local Cross Reference Maintenance, click Add.



2. On Union Local Cross Reference Maintenance Revisions, complete the following fields:
 - Business Unit
 - Union Code
 - Union Local
3. Complete the following optional field and click OK:
 - Job Typ

Setting Up Earnings Information

You set up earnings information to define the types of pay that your employees receive. Earnings information consists of the following rates and tables:

Shift rate differentials	You set up shift rate differentials to add a flat dollar or percentage amount to an employee's hourly rate when the employee works a shift that receives an additional amount of pay per hour.
Occupational pay rates	You set up occupational pay rates for employees who perform various job types and have different hourly rates for each job type.
Pay type cross-reference tables	You set up pay type cross-reference tables to indicate valid pay types by job type and job step.

Setting Up Shift-Rate Differentials

A shift rate differential is a flat dollar or percentage amount added to an employee's hourly rate. You set up shift rate differential codes to assign them to employees who receive additional compensation for shift work.

You assign shift differentials to user defined shift codes (06/SH). You can also assign business units and union codes to shift differentials. When you define a shift differential, you must set effective dates for the table. The system compares the effective dates to the work dates you enter in time entry.

A shift rate differential can be either a flat dollar amount or a percentage of the employee's hourly rate. The system uses a flat dollar amount or a percentage shift differential with one of the following methods:

- The first method is hourly rate plus the shift differential, multiplied by the pay type multiplier and then multiplied by the hours worked.
- The second method is hourly rate multiplied by the pay type multiplier plus the shift differential and then multiplied by the hours worked.

The difference between the two methods is significant only when a multiplier other than 1 is entered.

These methods are associated with the shift code that you set up. You also associate these methods with pay types when you set up pay types. To have the system use the shift differential method associated with the pay type when you enter a timecard, you must set up shift codes and leave the shift differential method blank. When a shift code is entered on a time entry form, the system uses the shift differential method associated with the pay type from the Pay Type table (F069116) if it finds a blank shift differential method (in the Shift table F069246). The system also uses the shift differential method associated with the pay type when you don't enter a shift code.

Use shift code information to ensure that an employee is paid the correct amount for working on a shift with a rate differential. Use the following guidelines for using shift code information:

- If an employee always works a shift for which a shift rate differential is applicable, include the shift code in the employee's master record.
- If an employee occasionally works a different shift, you can override the information on the applicable time card.

See Also

- ❑ *Entering Timecards for Employees*
- ❑ *Entering Timecards for Employees Using Speed Time Entry*

► **To set up shift-rate differentials**

From the Rate Derivation Setup menu (G05BRD4), choose Shift Rate Differentials.

1. On Work With Shift Rate Differentials, click Add.

The screenshot shows the PeopleSoft Shift Rate Differentials Revision screen. The interface includes a header with a 'Select Workspace' dropdown set to 'Active Foundation', and navigation links for Portal, VWW, Intranet, and Training. Below the header is a toolbar with icons for Home, Search, Refresh, and Help. The main content area is titled 'Shift Rate Differentials Revision' and contains several input fields:

Shift Code	H
Business Unit (Opt)	[empty]
Union Code (Opt)	[empty]
Start Effective Date	01/01/2005
Ending Effective Date	12/31/2010
Percent or Amount	H
Shift Diff Calc Sequence	2
Shift Differential	2.500

Buttons for 'OK', 'Cancel', and 'Tools' are located at the top left of the form.

2. On Shift Rate Differentials Revision, complete the following fields:
 - Shift Code
 - Start Effective Date
 - Ending Effective Date
 - Percent or Amount
 - Shift Diff Calc Sequence
 - Shift Differential
3. Complete the following optional fields:
 - Business Unit (Opt)
 - Union Code (Opt)
4. Click OK to save the record.

Setting Up Occupational Pay Rates

You set up occupational pay rates for employees who perform various job types and have different hourly rates for each job type. Pay rates are specific to an employee. They can be specific to a business unit and union for that employee.

To revise multiple occupational pay rates, choose a record on Work with Occupational Pay Rates and choose Multiple Pay Rates from the Row menu.

Time Entry Considerations

Using occupational pay rates in time entry

To use the occupational pay rate in time entry, you must enter the associated job type from the Occupational Pay Rates table on the timecard.

See Also

- ❑ *Overriding an Hourly Rate for an Employee* to understand how the system derives an hourly rate

► To set up occupational pay rates

From the Rate Derivation Setup menu (G05BRD4), choose Occupational Pay Rates.

1. On Work with Occupational Pay Rates, click Add.

The screenshot shows the PeopleSoft Single Revisions Occupational Pay Rate dialog box. At the top, there are buttons for OK, Cancel, and Tools. Below that is a section for Employee Identification with fields for Employee No. (8015), Business Unit, Union Code, From Date (01/01/2005), and Thru Date (12/31/2005). The next section contains fields for Job Type/Step (1M-2), Hourly Rate (30.00), Distribution Rate, and Piecework Rate. The dialog box is titled "Single Revisions Occupational Pay Rate".

2. On Single Revisions Occupational Pay Rate, complete the following fields:

- Employee Identification
- From Date
- Thru Date

- Job Type
3. Complete the following optional fields:
- Business Unit
 - Union Code
 - Job Step
 - Hourly Rate
 - Distribution Rate
 - Piecework Rate
4. Click OK.

Setting Up Pay Type Cross-Reference Tables

You set up pay type cross-reference tables to indicate valid pay types by job type and job step. For example, use these tables to prevent a salaried person from receiving overtime pay or a temporary employee from receiving holiday pay.

To verify pay types against the pay type cross-reference tables, you must set the appropriate processing options in the time entry programs.

► **To set up pay type cross-reference tables**

From the Rate Derivation Setup menu (G05BRD4), choose Classification Pay/X-Ref.

1. On Work With Classification/Pay Cross Reference, click Add.

The screenshot shows the PeopleSoft Classification/Pay Cross Reference Revisions screen. At the top, there are tabs for Active Foundation, Personalize, Change Role, and Sign Out. Below the tabs, there is a toolbar with icons for OK, Delete, Cancel, Form, and Tools. The main area displays a grid titled "Records 1 - 3". The columns are labeled "From Trans", "Description", "Thru Trans", and "Thru Trans Description". The first row contains three checkboxes: the first is checked, the second is unchecked, and the third is checked. The descriptions are: "1 Regular", "99 *RANGE", "300 Sick Pay", and "999 Net Pay Adj.". The second row has three checkboxes: the first is unchecked, the second is checked, and the third is unchecked. The descriptions are: "2H-1 Human Resources Manager", "1 Regular", and "999 Net Pay Adj.". The third row has three checkboxes: the first is checked, the second is unchecked, and the third is checked. The descriptions are: "300 Sick Pay", "999 Net Pay Adj.", and "2H-1 Human Resources Manager".

2. On Classification/Pay Cross Reference Revisions, complete the following fields:
 - Job Type
 - From Trans
 - Thru Trans
3. Complete the following optional fields:
 - Job Step
 - Union Code
 - Business Unit
 - Shift Code
4. Click OK to save the record.

Setting Up Tax Information

Before you begin processing payroll for employees, you must set up tax information so that the employees' taxes are calculated properly. Tax amounts and some federal and state insurance amounts are calculated by a third-party software package called Quantum for Payroll Tax. Quantum for Payroll Tax is a product made by Vertex, Inc. that integrates with the J.D. Edwards Payroll system. You can also use the GeoCoder, another product made by Vertex, Inc. that can automatically assign tax information to employees and business units.

The Payroll system passes information such as the tax authority, taxable wages, exemptions, and supplemental wages to Quantum for Payroll Tax, which calculates each employee's tax. For unemployment insurance, you must set up tables that Quantum for Payroll Tax uses to calculate the appropriate taxes.

Setting Up Tax Area Information

Before using the J.D. Edwards Payroll system to process a payroll, you must set up tax area information.

If you are not using the J.D. Edwards Payroll system, setting up tax area information is not required for any system functions. However, you might want to set up tax areas so that you can transfer this information to your payroll service provider. You can set a processing option on the employee entry forms that controls whether tax area information is required when you enter employee records.

In the J.D. Edwards Payroll system, payroll tax amounts are calculated by a third-party software package called Quantum for Payroll Tax. Quantum for Payroll Tax is a product made by Vertex, Inc. J.D. Edwards Payroll system passes information such as the taxing authority, taxable wages, exemptions, and supplemental wages to Quantum for Payroll Tax.

You set up tax areas for the locations where employees live and work, and for the taxes that need to be withheld. Quantum for Payroll Tax performs the calculations based on the information that you set up. This system calculates the employee-paid amounts even if you do not set up the tax area information.

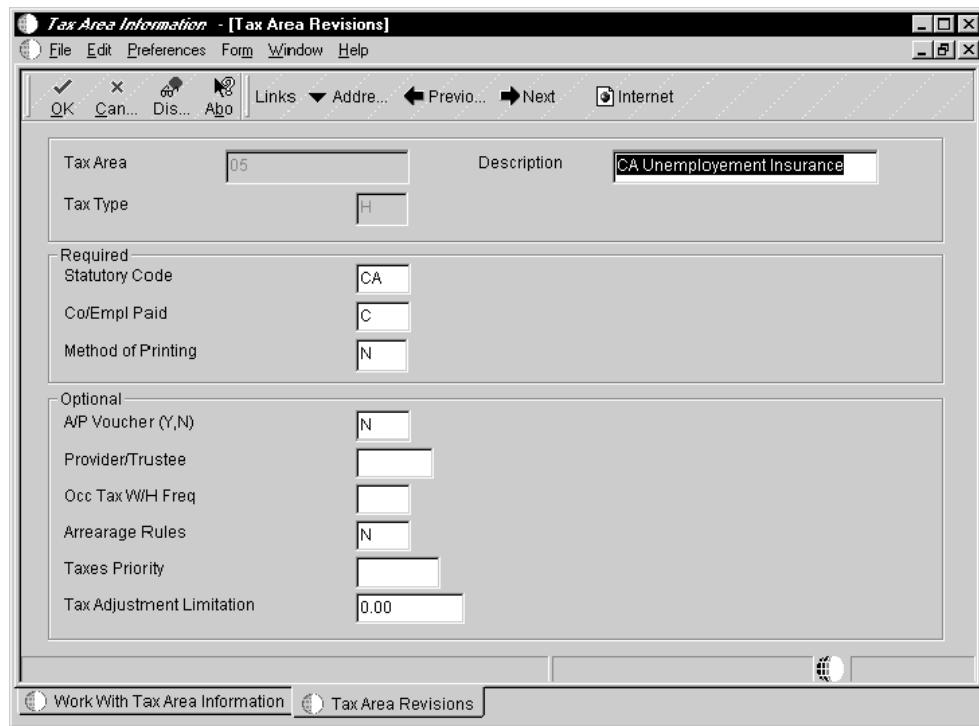
Before You Begin

- Install Quantum for Payroll Tax.
- Set up statutory codes in UDC 06/SC. See [Understanding User Defined Codes](#).
- Review the information about tax area codes in the global solutions guide for your country.

► To set up tax area information

From the Taxes and Insurance Setup menu (G07BPTI4), choose Tax Area Information.

1. On Work With Tax Area Information, click Add.



2. On Tax Area Revisions, complete the following fields:
 - Tax Area
 - Tax Type
 - Description 1
 - Co/Empl Paid
 - Method of Printing
3. If the tax area is a province, state, county, city, or a local area, complete the following field:
 - Statutory Code
4. If you are integrating Payroll with Accounts Payable and you need to activate vouchering for this tax type, complete the following field:
 - A/P Voucher (Y,N)
5. To specify a payee for the voucher, complete the following field:
 - Provider/Trustee
6. Complete any of the following optional fields and click OK:
 - Occ Tax W/H Freq

- Arrearage Rules
- Taxes Priority
- Tax Adjustment Limitation

See Also

- Accounts Payable Integration* for information about creating vouchers for payroll taxes and liabilities

Updating the Tax Area Table

Periodically, tax area information changes in the United States and Canada. In order for employee payroll taxes to calculate correctly, you must be sure that the correct tax area information for each state or province in which your organization conducts business is set up correctly in your system.

Vertex, Inc. periodically provides updates to ensure the accuracy of your organization's payroll calculations. You can automatically update the tax area information that is stored in the Payroll Tax Area Profile table (F069016) with the tax information that is included in the updates that you receive from Vertex, Inc.

To update tax information automatically, you must first select each state or province for which you want to update tax information. If your organization is large, you might want to select all states and provinces to ensure that your information is complete. After you select the states and provinces that you want to update, you process the Update Tax Area Table program (R07500). You should run this program each time you receive an update from Vertex, Inc. You can access this program from the Taxes and Insurance Setup Menu (G07BPTI4).

► To update the tax area table

From the Taxes and Insurance Setup menu (G07BPTI4), choose Tax Area Table Setup.

1. On GeoCoder Report Setup, choose one of the following options to determine which tax areas to display:
 - Show Selected
 - Show All
2. To select all tax areas, click the following option:
 - Select All
3. To select specific tax areas, double click on the row in the detail area of the form. A check mark will appear on each tax area record that is selected.
4. Click OK.
5. From the Taxes and Insurance Setup menu, choose Update Tax Area Table and process the program.

See Working with Batch Versions for instructions about processing a batch program.

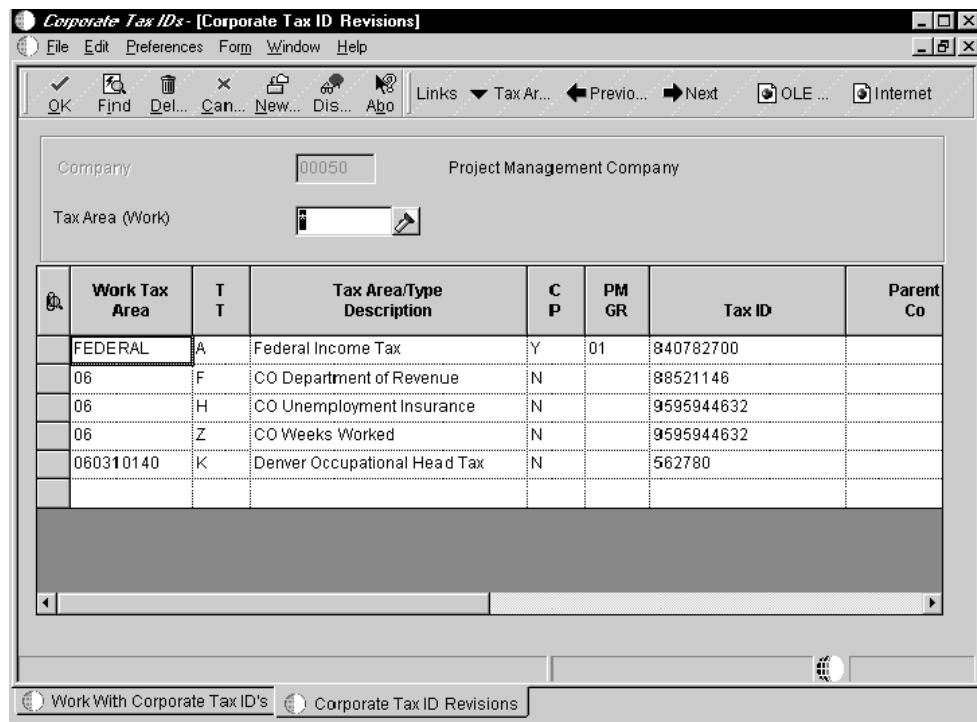
Setting Up Corporate Tax IDs

You must set up a corporate tax ID for each taxing authority to which you report. You set up corporate tax ID codes for each company so that the system can store employee tax history for reporting purposes.

► To set up corporate tax IDs

From the Taxes and Insurance Setup menu (G07BPTI4), choose Corporate Tax IDs.

1. On Work With Corporate Tax ID's, click Add.



2. On Corporate Tax ID Revisions, complete the following fields:
 - Company
 - Work Tax Area
 - TT
 - Tax IDIf you have a line for tax type H, you must have a line for tax type Z with the same tax ID.
3. For U.S. federal taxes, enter a single line for all federal taxes using tax type A.
4. If you have more than one company that you include under the same federal tax ID, complete the following fields:

- C P
 - PM GR
5. Complete the following optional field:
 - Parent Co
 6. Click OK.

Setting Up the GeoCoder

You use the Quantum GeoCoder to automatically assign GeoCodes, or tax areas, to employees and business units based on the address information entered in the employee record or the business unit record. If there is only one GeoCode that can be used for a specified address, the system automatically assigns the GeoCode to the record. If there are multiple GeoCodes that may be used for a specified address, the system displays a list of possible GeoCodes from which to select.

To use the GeoCoder, you must use Quantum for Payroll Taxes to calculate payroll tax information. Additionally, you must activate the Quantum system and set up the appropriate database connections. In addition, you must activate system control data item HRGEO, which will activate the GeoCoder in all Workforce Management applications. See *Setting Up System Controls* for instructions.

Activating Quantum

You must activate the Quantum interface prior to using the Quantum system with J.D. Edwards OneWorld software.

Note

Constants settings load during software initialization. Therefore, in order for the constants settings to take effect, you must exit and restart OneWorld.

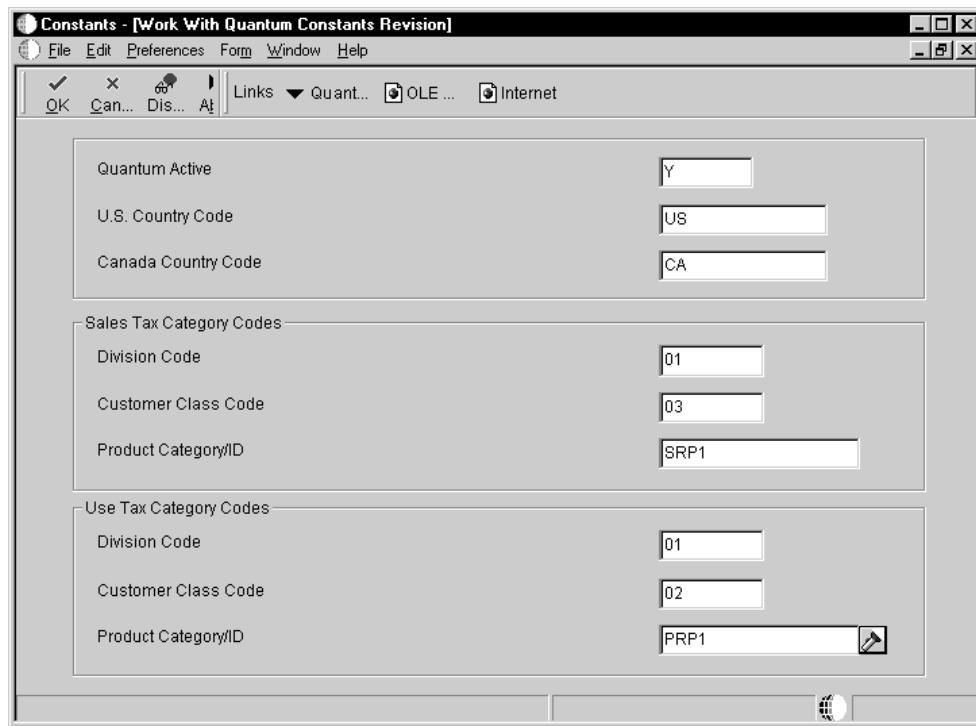
Before You Begin

- You must set up database connections to establish communication to the Quantum databases, both Quantum for Sales and Use Tax and Quantum for Payroll.

See *Configuring OneWorld for Use with Vertex Quantum Tax* for more information.

► To activate Quantum

From the Vertex Quantum Sales and Use Tax menu (G731), choose Constants.



1. On Work With Quantum Constants Revision, complete the following fields:
 - Quantum Active
 - U.S. Country Code
 - Canada Country Code
2. Complete the following fields for sales tax category codes:
 - Division Code
 - Customer Class Code
 - Product Category/ID
3. Complete the following fields for use tax category codes and click OK:
 - Division Code
 - Customer Class Code
 - Product Category/ID

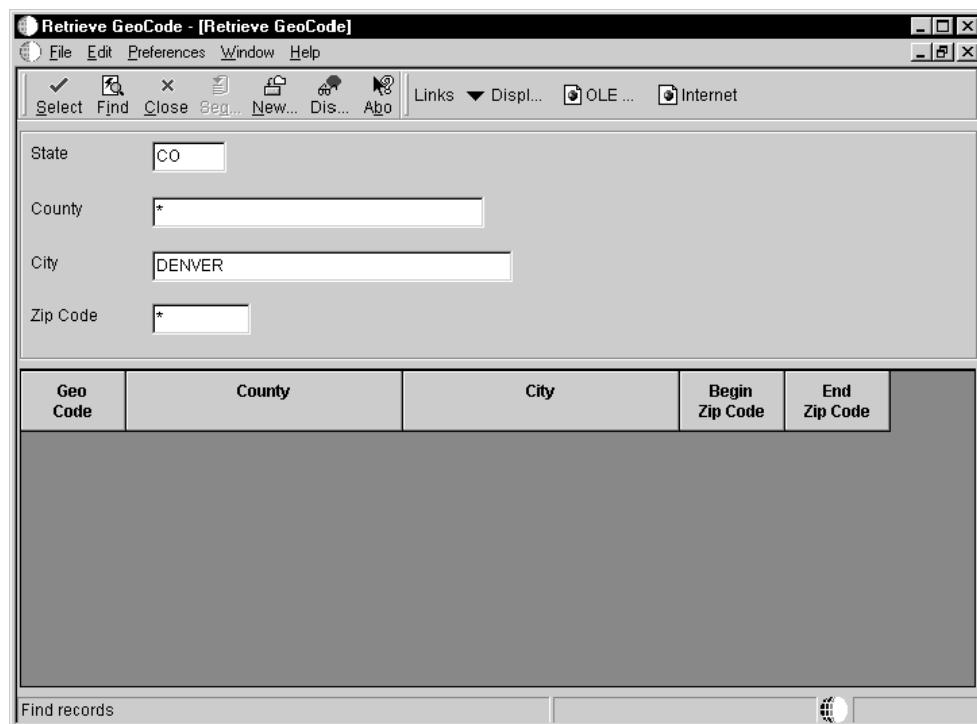
Testing the Quantum Connection

After you activate Quantum and set the country codes, J.D. Edwards recommends that you conduct a test to determine whether you have successfully connected to the Quantum

system. This test requires that you enter a city, state and ZIP Code in the Retrieve GeoCode form, and see if a GeoCode is returned. If you receive one, then the connection is working.

► To test the Quantum connection

Enter P73GEO in the fast path.



1. On Retrieve GeoCode, complete the following fields and click Find:
 - Type CO in the State field
 - Type DENVER in the City fieldIf you are properly connected to the Quantum system, 060310140 appears in the GeoCode column.
2. If nothing appears in the GeoCode column, a setup or configuration error might have occurred. Check the following:
 - On Work with Quantum Constants Revision, the Quantum Active field must be set to Y, and the Canada Country Code set to CA.
 - You have initialized the constants values by exiting and restarting OneWorld.
 - The Data Source, Server, User ID, and Password are set up properly in the Database Connections table. See *Setting Up Database Connections*.
 - All of the required business functions must be mapped to the server where the Quantum software is located. See *OCM Mapping*.

Master Business Functions

Several J.D. Edwards systems access centralized programs called master business functions. A master business function (MBF) is an interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables.

Master business functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. They contain logic that ensures the integrity of adding, updating, and deleting information from databases.

A master business function helps to standardize data entry information across related programs. For example, a large company might have employees enter their time from multiple sites and sources.

Master business functions are most commonly used for the following situations:

- You accept records from a third-party source
- Multiple programs are updating the same table

To maximize efficiency when creating timecards for all employees, you can set up processing options for master business functions to customize default fields and valid values for all time entry programs across the company. You can set up processing options to define the following functions for a set of programs that the master business function supports:

- Determining data dictionary default values
- Verifying valid values
- Updating tables with field information from multiple records

Processing options for master business functions are attached to version ZJDE001, which is provided by J.D. Edwards. J.D. Edwards recommends using this version as the default version for all your entry programs.

Note

If you need to create different versions for other data entry programs, contact your system administrator. For more information about how to set up versions, see *Creating a Batch Version*.

Setting Up MBF Processing Options for Time Entry

The HR and Payroll Foundation system has one master business function, Time Entry MBF (P050002A), which interacts with all time entry programs.

You need to set up processing options for the time-entry master business function to define default values, valid values, and functions for time entry programs.

Caution

J.D. Edwards recommends that you set up these processing options one time only. Changing these processing options might completely change necessary business functions for your time entry system.

The interactive version of the master business function, ZJDE0001, has security set to restrict access by certain users. An error message occurs if you try to access the version while security is turned on. Your system administrator must turn off version security before you can create a new version or access the processing options. After you have set up the appropriate values for the processing options, the system administrator needs to turn on security again for the version.

After setting up the processing options for P050002A, you need to choose either the default version (ZJDE0001) or a user defined version of the master business function in the processing options for the following OneWorld time entry menu options:

- By Individual (P051121)
- Speed Time Entry (P051121)
- Self-Service (P051191)
- Employee Assignment (P0716701)

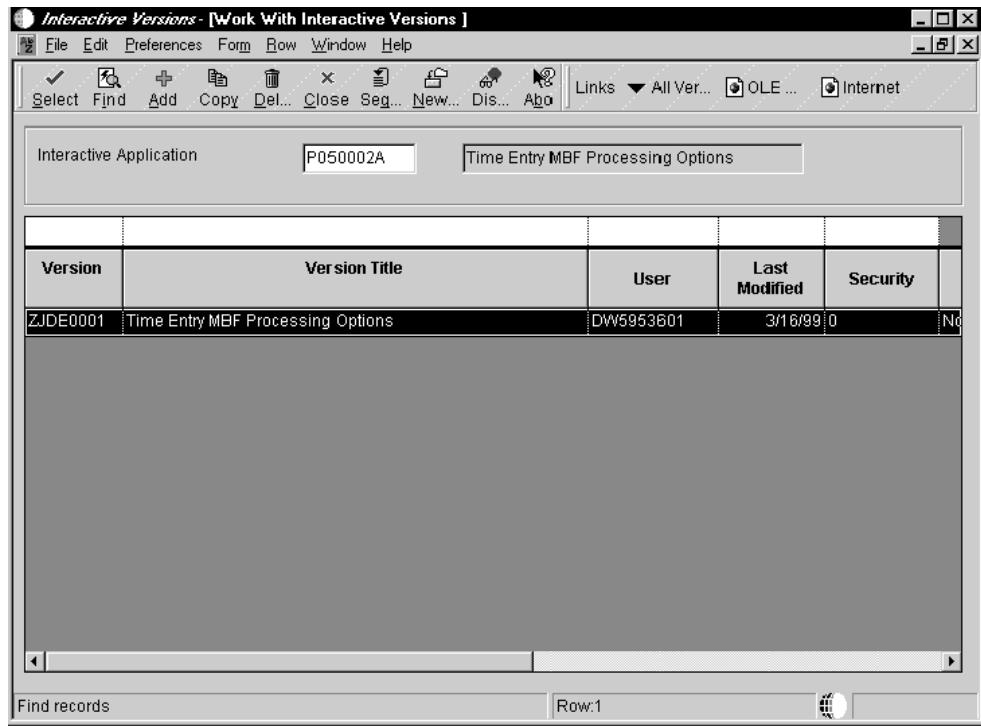
The processing options for the master business function are attached to the default version ZJDE0001, which is provided by J.D. Edwards. Contact your system administrator if you need to use a different version. For example, you might need to create and use a different version of the MBF for Time Entry for Employee Assignment.

See Also

- Understanding Master Business Functions*
- About Master Business Functions*

► To set up MBF processing options for Time Entry

From the System Administration Tools menu (GH9011), choose Interactive Versions.



1. On Work With Interactive Versions, type P050002A in the following field and click Find:
 - Interactive Application
2. Choose the Time Entry MBF Processing Options record, and then choose Processing Options from the Row menu.

Processing Options for Time Entry Master Business Function (P050002A)

Pay Rates Tab

These processing option specify how the system retrieves an employee's pay rates for time entry. You can specify the tables that you want the system to search to retrieve pay rates and whether you want the system to use the highest pay rate found or the standard pay rate.

1. Pay Rate

E = Use pay rates from the Employee Occupational Pay Rates table (F060146)

U = Use pay rates from the Union Rates table (F069126)

Blank = Use pay rates from the Employee Master table (F060116)

Use this processing option to specify the tables that you want the system to search to retrieve employee pay rates for time entry. If you are using job step progression, the system always retrieves employee rates for step progression employees from the Union Rates Table, regardless of how this option is set. Valid values are:

Blank

Use pay rates from the Employee Master table (F060116).

E

Include pay rates from the Employee Pay Rates table (F060146).

U

Include pay rates from the Union Rates table (F069126).

When you choose option (E), the system first searches the Employee Pay Rates table. If no rate exists for an employee in this table, the system uses the rate entered in the Employee Master table.

When you choose option (U), the system first searches the Union Rates table. If an employee has no rate entered in this table, the system searches for a rate in the Employee Pay Rates table. If no rate exists for the employee in the Employee Pay Rates table, the system uses the rate entered in the Employee Master table

2. Highest Rate

1 = Use the highest pay rate found

0 = Use the standard pay rate

Use this processing option to specify whether the system uses the standard pay rate or the highest pay rate when it performs the search that you specified in the Pay Rate processing option. If you are using job step progression, you must set this option to use the standard pay rate. Valid values are:

0

Use the standard pay rate.

1

Use the highest pay rate found

3. Piece Rate

E = Retrieve piece rate from the Employee Master table (F060116)

P = Retrieve piece rate from the Item Piece Rate table. (F06918)

Blank = Do not retrieve a piece rate. Piece rate functionality inactive

Use this processing option to specify whether you want the system to use the employee piece rate or the item piece rate when entering timecards for piece rate employees. Valid values are:

E

Retrieve piece rate from the Employee Master Information table (F060116)

P

Retrieve piece rate from the PF - Piece Rate Filetable (F06918)

4. Pay Type Multiplier Override to prevent multiplying a rate by the Pay Type multiplier when the rate is entered manually.

0 = Use Pay Rate Multiplier

1 = Do not use Pay Rate Multiplier

A code that specifies whether the system applies the Pay Type Multiplier when you manually enter pay rates on timecards. If you set this option to 1, any pay rate that you enter manually, except premium pay, will not be multiplied by the pay type multiplier. Premium pay always uses the pay type multiplier. Valid values are:

0

Use Pay Type Multiplier

1

Do not use Pay Type Multiplier

Pay Types Tab

These processing options are used to determine which pay types and pay tables are used to determine employee pay rates. If you are using job step progression processing, you must complete these processing options to ensure that overtime is calculated correctly.

1. Union Table - Pay Type Codes

Pay Type - Hourly

Use this processing option to specify the pay types to process.

If you are loading pay rates from the Union Rates File (F069126), enter only pay type codes associated with the entries you made in the Union Rates table. If you entered regular or premium amounts in the Union Rates table, enter their associated pay type codes here.

If you are loading pay rates from the Employee Pay Rates File (F060146), enter a pay type code for Regular only.

NOTE

If you have entered pay type codes in the Regular, Double, Triple, or Holiday fields, the Time Entry program retrieves the rates from the Union Rates table before applying overrides such as shift differential. If the Time Entry program does not find premium amounts in the Union Rates table, but you entered pay type codes in Regular, Double, Triple, or Holiday fields, the program applies the Pay Type Multiplier before applying Shift Differential Overrides

Pay Type - Regular Overtime

Use this processing option to specify the regular overtime pay type to process. If you are using pay rates from the Employee Pay Rates table (F060146), complete only this processing option. If you are using pay rates from the Union Rates table (F069126), enter only pay type codes that are linked to the entries that you made in the Union Rates table. If you entered regular or premium amounts in the Union Rates table, enter their matching pay type codes here.

Note: If you complete this processing option, the Time Entry program retrieves the rate from the Union Rates table before applying overrides such as shift differential. If the Time Entry program does not find premium amounts in the Union Rates table, but you completed the Regular Overtime processing option, the program applies the Pay Type Multiplier before applying Shift Differential Overrides.

Pay Type - Double Overtime

Use this processing option to specify the double overtime pay type to process. If you are using pay rates from the Union Rates table (F069126), enter only pay type codes that are linked to the entries that you made in the Union Rate table. If you entered regular or premium amounts in the Union Rates table, enter their matching pay type codes.

Note: If you complete this processing option, the Time Entry program retrieves the rate from the Union Rates table before applying overrides such as shift differential. If the Time Entry program does not find premium amounts in the Union Rates table, but you completed the Double Overtime processing option, the program applies the Pay Type Multiplier before applying Shift Differential Overrides.

Pay Type - Triple Overtime

Use this processing option to specify the triple overtime pay type to process. If you are using pay rates from the Union Rates Table (F069126), enter only pay types codes that are linked to the entries that you made in the Union Rates table. If you entered regular or premium amounts in the Union Rates table, enter their matching pay type codes here.

Note: If you complete this processing option, the Time Entry program retrieves the rate from the Union Rates table before applying overrides such as shift differential. If the Time Entry program does not find premium amounts in the Union Rates table, but you completed the Triple Overtime processing option, the program applies the Pay Type Multiplier before applying Shift Differential Overrides.

Pay Type - Holiday

Use this processing option to specify the holiday pay type to process. If you are loading pay rates from the Union Rates table (F069126), enter only pay type codes that are linked to the entries that you made in the Union Rates table. If you entered regular or premium amounts in the Union Rates table, enter their matching pay type codes here.

Note: If you complete this processing option, the Time Entry program retrieves the rate from the Union Rates table before applying overrides such as shift differential. If the Time Entry program does not find premium amounts in the Union Rates table, but you completed the Holiday processing option, the program applies the Pay Type Multiplier before applying Shift Differential

Overrides.

2. Job Type and Step Cross-Reference

1 = Validate the Pay Type

0 = Do not validate the Pay Type

Use this processing option to specify whether the system automatically enters job information into the Pay Type field. When set to 1, the system automatically enters the job type and step from the Classification and Pay Cross-Reference table (F06932) into the Pay Type field. Valid values are:

0

Do not load the Pay Type field automatically.

1

Load the Pay Type field automatically

3. Pay Type Description

1 = Load the Pay Type Description field automatically

0 = Do not load the Pay Type Description field automatically

Use this processing option to specify whether the system automatically enters explanation text into the Pay Type Description field. This automatic function can reduce data entry. The system enters the Pay Type Description from the Payroll Transaction Constants table (F069116) in the Explanation field (YTEXR) of the Employee Transaction Detail File table (F06116). Valid values are:

0

Do not load the Pay Type Description field automatically.

1

Load the Pay Type Description field automatically

4. Split Time

1 = Split time automatically

0 = Do not split time automatically

Use this processing option to specify whether the system splits time automatically. The system splits time according to the percentages specified in the Labor Distribution Instructions table (F06016) or the Position Account Distribution Instructions (F081012) table. The total percentages of hours must equal 100%. Valid values are:

0

Do not split time automatically.

1

Split time automatically

Equipment Tab

These processing options are used to determine how equipment charges are handled during time entry.

1. Equipment Worked On

1 = Load the Equipment Worked On field automatically

0 = Do not load the Equipment Worked On field automatically (default)

Use this processing option to specify whether the system automatically completes the Equipment Worked On value (EQWO) from the referenced work order. Valid values are:

0

Do not load the Equipment Worked On field automatically.

1

Load the Equipment Worked On field automatically

2. Zero Billing Rate

1 = Use the Zero Billing Rate

0 = Do not use the Zero Billing Rate

Use this processing option to specify whether the system uses the Zero Billing Rate when you charge employee time against specific equipment. Valid values are:

0

Do not use the Zero Billing Rate.

1

Use the Zero Billing Rate

Batches Tab

This processing option is used to determine how the system assigns time entry batches.

1. Batch Number

1 = Assign batch numbers automatically

0 = Do not assign batch numbers automatically

Use this processing option to specify whether the system assigns batch numbers automatically from next numbers. J.D.Edwards recommends that you allow the system to assign batch numbers automatically. You can override the batch number that the system assigns. Allowing the system to assign batch numbers disables the Get Batch Number form exit. When you do not assign batch numbers automatically, you must either enter a batch number or use the Get Batch Number form exit to retrieve a batch number. Valid values are:

0

Do not assign batch numbers automatically.

1

Assign batch numbers automatically

Employee Tab

This processing option is used to determine whether information from the timecard is automatically updated to the Employee Master table.

1. Check Route Code

0 = Update Employee Master only if Blank

1 = Always Update Employee Master

2 = Do Not Update Employee Master

Use this processing option to specify whether the system updates the check route code on the employee master record with the value entered on the timecard. Valid values are:

0

Update the employee master record only if the check route code is blank.

1

Always update the employee master record.

2

Do not update the employee master record

Recharge Tab

These processing options specify the default values that the system uses for multicurrency and recharge rate information.

1. Enable Multi-Currency Functionality

'0' = Do not enable Currency Functionality

'1' = Enable Currency Functionality

Use this processing option to enable multicurrency time accounting. Valid values are:

0

Do not enable multicurrency time accounting.

1

Enable multicurrency time accounting

3. Use Billing Markup Table for Rate Lookup

'0' = Do not use the Billing Markup Table

'1' = Use the Billing Markup Table (F48096) to retrieve rates

Use this processing option to determine whether recharge billing rates are obtained from the Billing Rate / Markup table (F48096). Valid values are:

0

Do not use Billing / Rate Markup table for recharge rates.

1

Use Billing / Rate Markup table for recharge rates

4. Generation Type for Rate Lookup

'1' = For Invoice Processing

'2' = For Revenue Processing

'3' = Component Amounts

'P' = Recharge Rate

A value that controls the type of entries for a batch and also the markup rules for the Billing Rate / Markup Table (F48096). When associated with types of entries, the system uses these codes to assign the generation type of a batch at the time the batch is created. When associated with billing rate/ markup processing, the system uses these codes to determine the markup rules for invoice, revenue, and component amounts. Depending on how you define the billing constants, different markup rules can

apply to different amounts, as follows:

Type 1: When the billing constants specify that invoice and revenue amounts are always the same, the markup rule applies to revenue, invoice, and component amounts. If the billing constants specify that the invoice and revenue amounts can be different , the markup rule still applies to revenue,

invoice, and component amounts if no Type 2 rule exists.

Type 2: When the billing constants specify that the invoice and revenue amounts can be different, the markup rule applies to revenue, and component amounts only.

Type 3: This type applies to component amounts. This rule is not dependent on the billing constants settings.

Type P: Payroll recharge processing is used for billing recharge rates using the J.D. Edwards time entry system.

Valid values are:

1

For Invoice Processing

2

For Revenue Processing

3

For Component Processing

P

For Recharge Processing

5. No Billing Markup Rate Found Action

Blank = Use Employee Distribution Rate

'1' = Use Employee Cost Rate

'2' = Return Error

Use this processing option to determine what the system identifies as the employee's rate when not using the Billing Rate / Markup table. Valid values are:

Blank

Use the Employee Distribution Rate

1

Use the Employee Cost Rate

2

Return Err

Leave Entry Tab

1. Leave Time Available

0 = Do not perform editing

1 = Perform editing. Display hard error if insufficient available balances exist.

2 = Perform editing. Display warning message if insufficient available balances exist.

3 = Perform editing. Use available plus accrued balances. Display hard error if insufficient balances exist.

4 = Perform editing. Use available plus accrued balances. Display warning message if insufficient balances exist.

Use this processing option to activate leave administration processing in time entry. You can specify whether to display an error or a warning, as well as specify whether the system should use available balances or available plus accrued balances for availability verification. Valid values are:

0

Do not perform editing.

1

Perform editing. Display hard error if insufficient available balance exists.

2

Perform editing. Display warning if insufficient available balance exists.

3

Perform editing. Display hard error if insufficient available plus accrued balance exists.

4

Perform editing. Display warning if insufficient available plus accrued balance exists

2. Leave History Source File

0 = Employee Transaction History Summary (F06146)

1 = Fiscal and Anniversary Year History (F06147)

Use this processing option to specify whether you want the system to calculate leave balances using the Employee Transaction History Summary table, or the Fiscal and Anniversary Year History table. Valid values are:

0

Employee Transaction History Summary (F06146)

1

Fiscal and Anniversary Year History (F06147)

Interims Tab

These processing options are used to enable the Time Entry Interim Generator and to determine which Interim ID is used during timecard entry.

1. Interim Header

1 = Create Interim Header

0 = Do not Create Interim Header

Use this processing options to automatically create interim payment header records during the time entry process. If you create interim header record for timecards, you must process the interim payments using the Interim Payment Workbench in order to populate all calculated values associated with the payment. Valid values are:

1

Create interim header records.

0

Do not create interim header records

2. Interim ID Pay Cycle Code:

Use this processing option to identify the Pay Cycle Code that the system uses to search for the default interim ID that is used to create interim payments during time entry. The system determines which interim ID to assign to interim payments that are created during time entry using the value in this processing option and the value in the Country Code processing option on this tab. The interim ID that is set up as the default interim ID for the Pay Cycle Code and Country Code combination that is entered in these processing options is assigned to the interim payments

3. Interim ID Country Code:

Use this processing option to identify the Country Code that the system uses to search for the default interim ID that is assigned to interim payments that are created during time entry. The system uses the value in this field along with the value in the Pay Cycle Code processing option on this tab to determine which interim ID to use. The system uses the default interim ID that is set up for this Pay Cycle Code and Country Code combination

Processing Tab

1. Time Entry Lockout: to prevent processing records that may require additional processing before running payroll.

1 = Keep Processed Records Locked to Time Entry

BLANK = Release Processed Records to Payroll

Use this processing option to specify whether you want the system to release processed records to payroll. Valid values are:

0

Release processed records to payroll (default)

1

Keep processed records locked out to Time Entry.

When you keep time entry records locked out, then the payroll system does not process them. You can set this option to 1 when you have multiple stages through which you need to process time entry records prior to running payroll. For example, in order to process your records through Time Card Automation/ Overtime Rule Evaluation, use a time entry version that releases the time entry records to payroll on the final step

Workflow Setup

Enterprise Workflow Management is an electronic messaging system that automates tasks by using an e-mail-based process flow across a network. For the Workforce Management Foundation system, the following tasks can be Workflow based:

- *Changing an employee's salary*
- *Terminating an employee*
- *Approving requisitions*

- Requesting a verification-of-employment letter
- Reviewing upcoming employee reviews by supervisor
- Setting up information for new employees
- Approving W-4 forms

This guide documents all processes that Workflow performs for the Workforce Management Foundation system. However, you can deactivate certain Workflow processes to meet your business needs. For example, if your company does not pay vacation accruals when an employee is terminated, and you are using Workflow to terminate an employee, you can deactivate the Workflow process that automatically pays the employee's vacation accruals.

Setting Up Recipients and Recipients Rules

Setting up recipients and recipient rules determines message routing for certain Workflow approvals and notifications. For example, you can set up Workflow to notify one person or a list of people when you terminate an employee. See [Working with Distribution Lists](#) and [Adding Recipient Rules](#) in the *Enterprise Workflow Management Guide*.

This task applies only to Workflow processes that might require more than one person for approvals. For certain Workflow tasks, you might only need to set a processing option to specify one recipient. For example, with the self-service W-4 program (P053030), you set a processing option to determine the person who is to receive and approve all completed W-4 forms.

Previewing MailMerge Documents

Some Workflow processes can produce a Microsoft Word, MailMerge document. The following MailMerge letters are preset. However, you can modify them to meet your business needs:

- Congratulatory letter
- Verification-of-employment letter
- COBRA and HIPAA letters

To review and revise the letters, use MailMerge Workbench (P980014). If you need to modify the letters, see [Mailmerge Workbench](#) in the *OneWorld Foundation Guide*.

The following MailMerge document is also available. However, you should not need to revise it:

- W-4 form

Verifying Processes in the Process Master

A Workflow process might include one or more subprocesses. For example, three subprocesses make up the Workflow process for setting up new employees. The three processes are listed in the Process Master program (P98800) as EESETUP01-Employee setup approval, EESUTSK03-Get task approval, and EESUTSK01-Employee task setup.

As part of Workflow setup, you should verify that each subprocess for a Workflow process is activated. See *Activating or Deactivating a Workflow Process* in the *Enterprise Workflow Management Guide*.

User Defined Information Setup

Before you can use any features of your Human Resources Management system, you need to define critical information that the system uses for processing. You set up some of this information to meet the specific needs of your organization. Such information is called user defined information.

User defined information consists of the following:

- | | |
|---------------------------|--|
| User defined codes | Set up user defined codes to customize your system to meet your specific business needs. |
| Supplemental data | Set up supplemental data to track detailed information about employees, applicants, requisitions, and jobs. You can track virtually any type of information that your organization needs. Supplemental data is not required by the system. |

Setting up supplemental data is optional.

Understanding User Defined Codes for Workforce Management Systems

Many fields throughout the Workforce Management systems accept only user defined codes. You can customize fields in your system by setting up user defined codes to meet the needs of your business environment.

User defined codes are stored in tables that relate to a specific system and code type. For example, 07/PY represents system 07 (Payroll) and user defined code type PY (Pay Cycle Codes). User defined code tables define which codes are valid for the individual fields in your system. If you enter a code that is not valid for a field, the system displays an error message. For example, in the Pay Cycle field, you can enter only those codes that are included in user defined code table 07/PY.

You can access all of the user defined code tables through a single user defined code form. After you choose a user defined code form from a menu, you can change the system code and user defined code type to access another user defined code table. The system stores user defined codes in the User Defined Codes table (F0005).

You can also print a list of all user defined code tables to review. To do this task, choose Print User Defined Codes from the Job Specifications Setup menu (G05BJ4).

Caution

User defined codes are central to J.D. Edwards systems. You must be thoroughly familiar with user defined codes before you change them.

You also might need to set up some additional user defined codes that are specific to the countries in which you do business.

See Also

- User Defined Codes* for detailed instructions on setting up user defined codes

- The global solutions guide for your country for information about country-specific user defined codes

User Defined Codes for Workforce Management Foundation

Accomplishment Type (05/AT)

You use accomplishment type codes to specify a type of accomplishment. Examples include industry certification, degree completed, or training completed.

Arrearage Method (05A/AR)

You use arrearage method codes to specify how the system collects payroll amounts that cannot be deducted from an employee's pay due to insufficient earnings.

Bank Transit (06/BC)

You use bank transit codes to identify an employee's financial institution. Banks might refer to this code as the ABA or payment routing number. This number can be obtained from the employee's check or deposit slip. It is located between the MICR colons (:) at the bottom of the check.

For U.S. banks, the bank transit number contains 9 digits. If this number does not contain nine digits, you must contact the employee's financial institution to obtain the correct number. For Canadian banks, this number contains 8 digits. Therefore, Canadian clients must enter the bank transit number with a leading zero.

If you change this number for an employee, the system creates a prenote for the employee's next auto deposit.

Based On Date (08/BO)

You use based on date codes to define the date that you want to use to calculate the completion date of employee setup tasks.

Benefit Enrollment Events (08/BE)

You use event codes to denote a benefits enrollment event such as marriage, divorce, or birth of a child.

Change Reason (06/T)

You use change reason codes to indicate the reason that an employee's record changed. For example, you can enter the reason that you are recommending a salary or rate change.

Note:

If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item.

Check Route (06/CR)

You use check route codes to specify the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.

Competency Change Reason (05/CH)

You use competency change reason codes to indicate the reason an employee competency goal was changed. For example, you might enter a new goal for an employee after he or she has reached the current goal. Therefore, you would enter a competency change reason of "Goal Obtained."

Competency Type (05/CY)

You use competency type codes to represent a competency table, or category, for which you can track employee competencies. Valid values for competency type codes are:

- 01 - Training
- 02 - Skill
- 03 - Accomplishment
- 04 - Certification
- 05 - Degree
- 06 - Language

The values in this user defined code table are hard coded and cannot be changed. Therefore, each of the competencies that you track must pertain to one of these competency types. Adding additional values to this list requires system customization.

Default Autopay Type (06/20)

You use default autopay type codes to designate the default pay type that the system uses to generate automatic payments in those instances in which the system does not use the employee labor distribution instructions. If you leave this field blank, the system uses pay type 001.

Delegate Authorization Type (08/AY)

You use delegate authorization type codes to specify the type of authorization given to a delegate. Valid values for delegate authorization type codes are:

- 01 - Approving
- 02 - Reporting
- 03 - Status Change
- 04 - Appraisal
- 05 - Managers Workbench

The values in this user defined code table are hard coded and cannot be changed.

EEO Job (06/J)

You use EEO job codes to specify classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by J.D. Edwards. You can add codes if needed.

Employee Benefit Status (06/EA)

You use benefit status codes to specify employee actions, such as new hire or rehire, for which the system searches as it tests for benefits eligibility. An * indicates that the guidelines refer to all employee actions not otherwise specified.

Do not change the codes that are hard coded, such as A (Active) and X (Terminated). These are required codes in the system.

Employee Setup Action (08/S3)

You use employee setup action codes to define the event that should occur during the new-employee setup workflow process. New hire, Rehire, and Transfer are hard coded. Rehire, Transfer, and Relocation codes cannot be used until a future release.

Employee Setup Status (08/S1)

You use employee-setup status codes to indicate the status of the entire employee-setup workflow process. Changing the setup status triggers the specific event associated with the status. For example, the system can display a W status if Workflow is waiting for a manager's approval. The system displays the status for the employee setup process on the Work With Employee Setup form (W08710C) and in the Employee tab area of the Employee Setup Entry form (W08710G).

These codes are hard coded in the system and should not be changed.

The following are explanations of the status codes and the sequence that the system might use to change them depending on how your processing options are set up:

- P - Pending. An assigned setup process begins with this status. You can make changes or delete the process if needed.
- W - Waiting for Approval. The system sets the process to this status when the process is initiated and if your processing options for Employee Setup are set to require a process approval.
- V - Approved. The system sets the process to this status when it obtains a process approval.
- 2 - Rejected. The system sets the process to this status when the process is rejected.
- A - Active. The system sets the process to this status when the process is initiated and no approval is required. You cannot cancel the process when it is changed to an Active status.

Employment Status (06/ES)

You use employment status codes to specify an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. Sample valid values include the following:

- Blank - Full-time regular.
- 1 - Full-time temporary
- 2 - Part-time temporary
- 3 - Part-time regular
- 4 - Seasonal
- 5 - Casual

Ethnic (06/M)

You use ethnic codes to designate minority classifications according to the U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity Occupational Group (EEOG) standards. The predefined codes that J.D. Edwards provides are hard coded. The system uses these codes to generate EEO reports and to compile

Canadian Employment Equity information. Do not change these predefined codes. You can add codes, if necessary.

French Language PDBA (06/LF)

You use French language PDBA codes to specify the French equivalent of the English text that prints on an employee's pay stub as the PDBA description. If the employee is set up as a French language employee, the system will use the PDBA description from this table on the pay stub.

Gap Reason (08/GN)

You use gap reason codes to indicate the reason that a gap snapshot was taken. For example, for gap snapshot taken at the end of each fiscal year, you could use a reason code of Fiscal Year. You might also take a gap snapshot if major organizational changes occur, in which case you could use a reason code of Organizational Changes.

Goal Type (05/GT)

You use goal type codes to define the type of goal that an employee is working towards. For example, you might define a goal type for receiving certification or for moving to the next pay grade.

Institution (05/IC)

You use institution codes to identify the educational institution from which an employee receives a degree or training.

Investment Group (06/AI)

You use investment group codes to indicate the grouping to be used when you balance accruals for investing in various funds. For "split" investments, the total deduction must total 100% of the amount specified. For example, an employee has a 401(k) deduction that he or she has elected to split three ways:

- 10%
- 20%
- 70%

These splits are three additional DBAs. To ensure that the three splits (or accruals) total 100%, you must:

- Use the same accrual investment group code for all three
- Ensure that the total of the individual percentages is 100
- Not use the accrual investment group code on the DBA upon which the splits are based
- Verify that the split DBAs have no effect on net or gross
- Verify that the split DBAs are not cash benefits

Job Evaluation Method (08/EM)

You use job evaluation method codes to specify the method or grouping that you use to evaluate the jobs within your organization. Suggested values are:

- Blank - Simple Subjective Point System
- D - Degree Method

- E - Evalucomp Method
- F - Factor Comparison Method
- P - Point Factor Method
- H - Hay Method

Job Group (08/JG)

You use job group codes to create groupings of similar jobs that are associated as a unit. Groupings can be based on functions within the organization, job duties, tasks and responsibilities, job evaluation methods to be used, or similarity in pay philosophy. Typical job units are clerical/administrative, technical, engineering, scientific and professional, factory jobs, middle-management, and executive.

Consider dividing up groups into separate populations based on the differences between exempt and nonexempt employees according to the rules and regulations of the Fair Labor Standards Act (FLSA). For example, consider assigning all your managers to the Managers job group.

Job Status Change Reason (08/JC)

You use job-status change reason codes to indicate why job information was changed. For example, you might want to indicate that job information was changed because the job is no longer active.

Job Status (08/JS)

You use job status codes to indicate whether a job is currently active or inactive.

Licensing Body (05/LB)

You use licensing body codes to represent the name of the organization that grants a professional license or certification.

Locality (06/SL)

You use locality codes to define the different salary localities within an organization. For example, an employee working in the East Coast locality might receive a higher salary than an employee doing the same job in the Midwest locality.

Marital Status (06/MS)

You use marital status codes to specify an employee's federal marital status as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.

Pay Frequency (06/PF)

You use pay frequency codes to indicate how often an employee is paid. Codes are:

- B - Biweekly
- W - Weekly
- S - Semimonthly
- M - Monthly
- A - Annually

The system uses the value in the Description-2 field on User Defined Codes to calculate the amount per pay period for a salaried employee.

Pay Status (06/PS)

You use pay status codes to indicate whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from payroll processing.

To process an employee's last check, the pay status must contain a numeric code. After the system processes the check through final update, you can change the pay status to an alphabetic code.

Pay Type/Print Method Category (06/PC)

You use pay type/print method codes to specify the pay type categories that you want to use. Examples of pay type categories that you might want to use are:

- Regular pay
- Overtime
- Certified pay types (for reporting on the Certified Payroll Register)

Record Type (05/RT)

You use record type codes to indicate the type of resource for which you are entering competency information. Values in this list are hard coded and should not be changed. Valid record type codes include:

- 01 - Employee
- 02 - Asset (such as equipment)

Report Category (08/RP)

You use report category codes to group reports that you run using the Manager's Self-Service Workbench. Examples of report category codes that you might set up include payroll reports, government reports, or requisition reports.

Renewal (05/RC)

You use renewal codes to indicate the requirements that an employee must complete to renew a license or certification.

Salutation (06/SA)

You use salutation codes to identify the proper title for a given employee. Examples of salutation codes are Mr., Ms., and Dr.

Shift (06/SH)

You use shift codes to identify daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard. If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time. If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.

Source (08/SS)

You use source codes to identify the source of salary information. Typically, this code refers to the source of salary information that you are using to make comparisons to salaries within your organization. Typical source codes might include trade publications or industry surveys.

Spending Account Type (06/FS)

You use spending account type codes to define which type of spending account, if any, is associated with a pay type. Examples of spending account type codes that you might use are:

- MED - Medical expenses spending account (where the annual amount is accrued on Jan 1 or the beginning of the year).
- DCR - Dependent care expenses (where accrual of available funds is on a pay period by pay period basis).

Status (05/CR)

You use status codes to identify the status of an employee with regard to a particular competency. For example, you can specify a status of fluent, read only, or speak only for a language competency.

Status Change Type (08/S4)

You use status change type codes to identify the type of status change being processed using the Manager's Self-Service Workbench.

Statutory (06/SC)

You use statutory codes to specify the two-character or three-character state or province code that prints on statutory reports such as W-2s and T4s. For example, on W-2s, instead of printing 06, the Geocode for the state of Colorado, the system prints the statutory code CO.

Suffix (06/SF)

You use suffix codes to identify the credentials for a given employee. Some examples of suffix codes are Phd, MD, and CPA.

Supplemental Data UDCs

You use supplemental data UDCs to track information about employees, applicants, requisitions, and jobs that is not already tracked in the system. Although supplemental data can be completely user defined, J.D. Edwards has created several UDCs to assist you in entering supplemental data information. If appropriate for your business needs, you might want to set up the following UDCs:

- Appraisal Type (08/TY)
- Authority Steps (08/AU)
- Company Property (08/CC)
- Drug Testing (08/TD)
- Education (08/ED)
- Educational Emphasis (08/EE)
- Employment Testing (08/TS)
- Grievance Type (08/GR)

- Interview Process (08/IP)
- Language Skills (08/LA)
- Licenses Held (08/LI)
- Miscellaneous Skills (08/SM)
- Performance Appraisal (08/AP)
- School Attending (08/SH)
- Skills (08/SK)
- Training (08/TG)

Team (05/TM)

You can use team codes to create groups of employees. Examples of codes that you might use include Team 1 or Team A, or you could name teams after the supervisor, for example, Team Smith or Team Allen.

Training Type (05/TY)

You use training type codes to categorize the types of training that employees take. Examples of training type codes include classroom training, computer-based training, and correspondence training.

Training Provider (05/PR)

You use training provider codes to identify a person or institution that provides training to employees.

Training Reason (05/TN)

You use training reason codes to define the reason that an employee takes training courses.

Tax Method (06/TM)

You use tax method codes to specify which method should be used to calculate payroll tax information for the employee. Examples include Contract Employee, Pension Employee, and Railroad Employee.

Type of Increase Next Review (06/RV)

You use type of increase next review codes to define the next type of salary or wage review due for an employee. Examples of type of increase next review codes that you might want to use are:

- Annual review
- Semiannual review
- Performance review
- Salary review

Type of Structure (00/TS)

You use structure type codes to identify different types of organizational structures. Each structure that you create can have a different hierarchy. Examples of codes that you might set up are financial and responsibility structures.

Union (06/UN)

You use union codes to identify the union or plan in which the employee or group of employees works or participates.

User Defined Competency Description (08/UD)

You use user-defined competency description codes to help an end user understand or work with job competencies. These codes are attached to individual job competencies. You can have several job competency descriptions for a single job competency. For example, you might have a description for employees, a description for managers, and a description for Workforce Management professionals.

Verification Method Codes (05/VM)

You use verification method codes to identify the method that you are using to verify employee competency levels.

Work Schedule Codes (05A/WS)

You use work schedule codes to identify a particular schedule that an employee might work. For example, if an employee works four ten-hour days each week, you might use code 410 to identify his or her schedule.

Worker's Compensation Insurance (00/W)

You use worker's compensation codes to represent different classifications for worker's compensation insurance. Worker's compensation codes are used to associate employees or groups of employees with their worker's compensation insurance rate. This code should correspond to the classifications on your periodic worker's compensation insurance reports.

Setting Up Supplemental Data

Supplemental data is any type of information that you want to track but for which the system provides no tracking. It can include information about employees, such as their educations or work experiences, or information that is unique to your business requirements, such as information about foreign languages spoken.

You can track supplemental data in the following J.D. Edwards systems:

- Address Book
- General Accounting
- Human Resources
- Payroll
- Asset Management (equipment)
- Fixed Assets
- Work Orders (engineering orders)
- Inventory

The way that you set up and maintain supplemental data is the same for all of these systems.

With each of these systems, J.D. Edwards provides one or more supplemental databases that can track related types of supplemental data. The Workforce Management Foundation system contains a supplemental database for each of the following:

- Employees (E)
- Jobs (J)
- Applicants (A)
- Requisitions (R)

You can set up any supplemental database so that the information that you enter appears in the language of your choice.

When setting up supplemental data, you define the types of supplemental information that you want to track in each of the supplemental databases. For example, in the job database, you can track job descriptions and requirements. In the employee and applicant databases, you can track job skills, education, and work experience.

To simplify working with supplemental information, you might choose to make some types of supplemental data consistent across multiple databases. For example, if you track job skills for employees, you can also track job skills for applicants. Making these supplemental data types consistent allows you to do the following:

- Simultaneously search for both applicants and employees who have specific job skills
- Transfer a hired applicant's supplemental data to the employee database

You can also transfer supplemental information from one data type to another within the same database. You might need to transfer supplemental data in cases where you change the name of a data type or when you decide to divide the information in one data type into multiple data types.

Setting Up Supplemental Databases

To designate an area of your system where you store related types of supplemental data, you set up a supplemental database. For a system in which you need to track only a few types of supplemental data, you might choose to store all of your supplemental data types in one database. For a system in which you need to track many types of supplemental data that you use for a variety of purposes, you can set up multiple supplemental databases and organize related data types within those databases.

The demonstration data that comes with your J.D. Edwards system includes the supplemental databases listed below. You cannot change these database codes or their setup parameters.

Employee (E) Database key field is Employee (address) Number.

Applicant (A) Database key field is Applicant (address) Number.

Job (J) Database key fields are:

- Job Type
- Job Step

Requisition (R) Database key field is Requisition number.

► To set up supplemental databases

From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database & Data Type Setup.

Supplemental Database Data Type Setup - [Work With Supplemental Database Setup]

This screenshot shows a Windows application window titled "Supplemental Database Data Type Setup - [Work With Supplemental Database Setup]". The menu bar includes File, Edit, Preferences, Form, Row, Window, and Help. The toolbar contains icons for Select, Find, Add, Del..., Close, Seg..., New..., Dis..., Abo..., Links, Work..., OLE..., and Internet. The main area is a grid table with the following columns: SDB Code, SDB Code, B.U. Key, Comp. Key, Alpha 1 Key, Alpha 2 Key, Num 1 Key, Num 2 Key, and Business Unit Row Description. The rows list various database types:

SDB Code	SDB Code	B.U. Key	Comp. Key	Alpha 1 Key	Alpha 2 Key	Num 1 Key	Num 2 Key	Business Unit Row Description
A	Applicant	0	0	0	0	1	0	
AB	Address Book	0	0	0	0	1	0	
AM	Asset Management	0	0	0	0	1	0	
BU	Business Units	1	0	0	0	0	0	
E	Employee	0	0	0	0	1	0	
ECO	Engineering Change Order	0	0	0	0	1	0	
I	Inventory by Item	0	0	0	0	1	0	
IB	Inventory by Item/Branch	1	0	0	0	1	0	Branch/Plant
J	Job	0	0	1	1	0	0	
JC	Job Cost	1	0	0	0	0	0	
R	Requisition	0	0	0	0	1	0	
WO	Work Order	0	0	0	0	1	0	

At the bottom left is a "Find records" button.

1. On Work With Supplemental Database Setup, click Add.

Supplemental Database Data Type Setup - [Supplemental Database Setup]

This screenshot shows a configuration dialog box for a supplemental database setup. It has tabs for OK, Cancel, Discard, and Abort. The main area contains fields for setting up a new database type:

Supplemental Database Code	A	Applicant
Select Key Fields	DD Alias	Row Description
<input type="checkbox"/> Business Unit		
<input type="checkbox"/> Company		
<input type="checkbox"/> Generic Alphanumeric Key 1		
<input type="checkbox"/> Generic Alphanumeric Key 2		
<input checked="" type="checkbox"/> Generic Numeric Key 1	AN8	Applicant Address Book Number
<input type="checkbox"/> Generic Numeric Key 2		
<input type="checkbox"/> Execute Data Selection	Function Name	
<input type="checkbox"/> Synchronize Database	File ID	

2. On Supplemental Database Setup, complete the following fields:

- Supplemental Database Code
 - Description
3. To specify that this database will be used in conjunction with a corresponding database in a J.D. Edwards WorldSoftware system, complete the following fields:
- Synchronize Database
 - File ID
4. To specify the key field for the employee, applicant, or requisition supplemental database, complete the following fields:
- Generic Numeric Key 1
 - Generic Numeric Key 2
5. To specify the key field for the job supplemental database, complete the following fields:
- Generic Alphanumeric Key 1
 - Generic Alphanumeric Key 2
6. To override the default label for any of the key fields that you specified, enter a row description for those fields.
7. Click OK.

Setting Up a Language Override

If your company is multinational, you can use the Supplemental Data Language Override feature to view descriptions for the key fields in the language that you specify. The key fields for which you designate the language override must be the same fields that you designated as key fields when you set up your database. See *Setting Up a Supplemental Database*. For example, if you designated a key field in the supplemental database setup, you can assign a Spanish language code and enter that key field description information in Spanish. If the Language field in your user profile is set to the same language, the key fields on the data entry form that is provided by the Supplemental Data program appear in the language that you specify. You can later view the supplemental database information in Spanish by selecting the Spanish language code.

► To set up language overrides for supplemental data

Depending on which system you are currently using, use one of the following navigations:

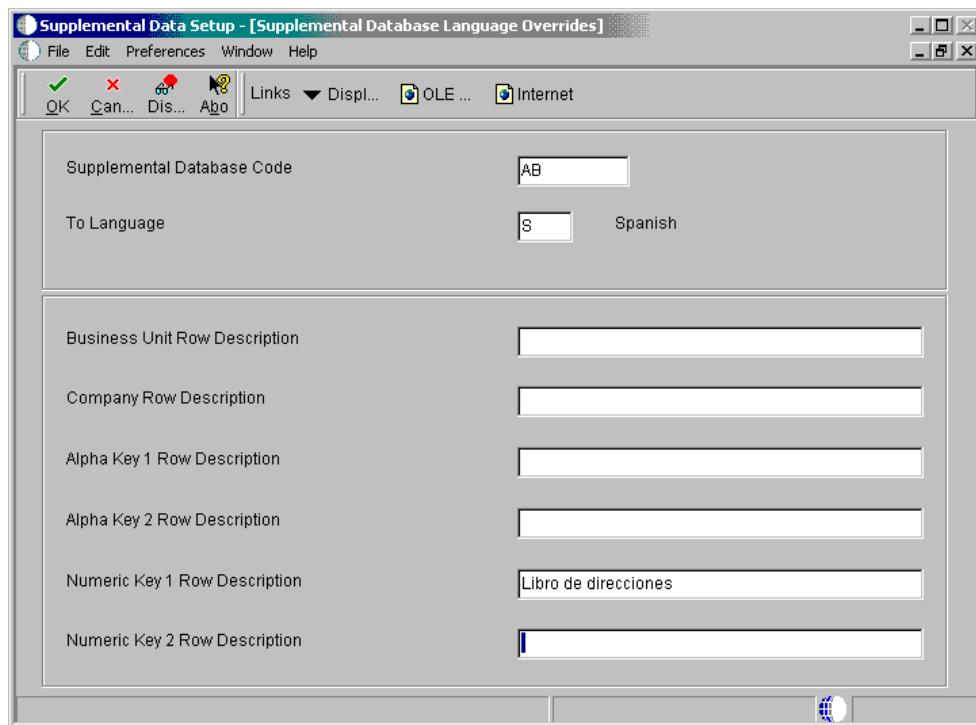
From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database & Data Type Setup.

From the CIF Supplemental Data menu (G01312), choose Supplemental Data Setup.

From the Supplemental Data Setup menu (G1344), choose Supplemental Data Setup.

1. On Work With Supplemental Database Setup, from the Form menu, choose Work With Lang Pre (Work with Language Preferences).

2. On Work With Language Overrides, click Add to set up language overrides.



3. On Supplemental Database Language Overrides, complete the following fields:
 - Supplemental Database Code
 - Language
4. Complete any of the following optional fields:
 - Business Unit Row Description
 - Company Row Description
 - Alpha Key 1 Row Description
 - Alpha Key 2 Row Description
 - Numeric Key 1 Row Description
 - Numeric Key 2 Row Description
5. Click OK.

Defining Types of Supplemental Data

You define types of supplemental data to specify categories of supplemental information and the specific information that you want to track for each category. Typical types of supplemental information include the following:

- Employee skills and education levels
- Job responsibilities
- Applicant qualifications
- Requisition requirements

Depending on your specific requirements, you can set up a supplemental data type in any of the following formats, or display modes:

Narrative format A form on which you enter free-form text

Code format A form that contains fields of data where you enter specific types of information

Program format An option that allows you to access a specific program and version number

Defining Supplemental Data Types in Narrative Format

Narrative format allows you to enter information in free-form text. Use the narrative format for entering the following types of information:

- Employee performance appraisals
- Applicant interview notes
- Job descriptions
- Legal descriptions
- General remarks

► To define supplemental data types in narrative format

Depending on which system you are currently using, use one of the following navigations:

From the CIF Supplemental Data menu (G01312), choose Supplemental Data Setup.

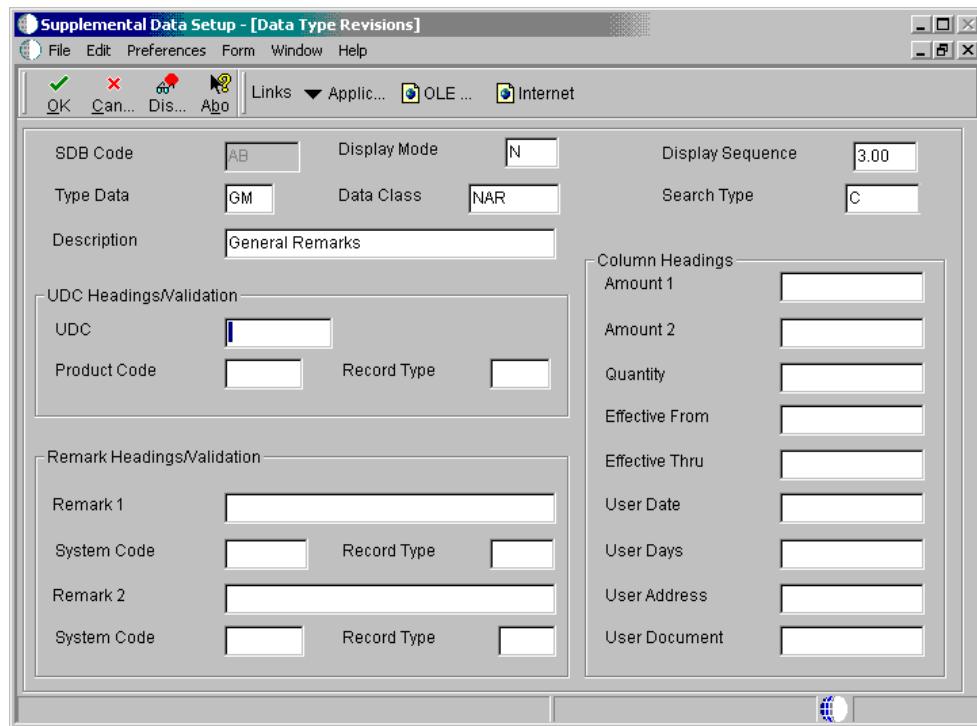
From the Business Unit Supplemental Data menu (G09312), choose Supplemental Data Setup.

From the Item Supplemental Data/CIF menu (G4124), choose Supplemental Data Setup.

From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database and Data Type Setup.

From the Supplemental Data Setup menu (G1344), choose Supplemental Data Setup.

1. On Work With Supplemental Database Setup, click Find to display existing database codes.
2. Choose the database code for which you want to define a narrative data type, and then choose Work With Data Typ (Types) from the Row menu.
3. On Work With Data Types, click Add. .



4. On Data Type Revisions, type N in the following field:
 - Display Mode
5. Complete the following fields:
 - Type Data
 - Description
6. Complete the following optional fields:
 - Display Sequence
 - Data Class
 - Search Type

Leave the remaining fields blank for narrative supplemental data types.
7. Click OK.
8. Click Cancel to return to Work With Data Types.
9. On Work With Data Types, click Find to view your newly created record.

Defining Supplemental Data Types in Code Format

Code format allows you to enter supplemental information in specific fields on the data entry form. For example, you could use code format for the following information:

- Language skills
- Training Completed
- Employee appraisal details
- Description of incident
- Cost of damage

You can associate a user defined code list with each supplemental data type that has a code format.

When you set up a data type in code format, you can customize the form on which you enter supplemental data. For each data type, you can customize validation and column heading fields that appear on the data entry form.

See *Customizing the data entry form for code format* for more information about customizing the data entry form.

Example: Setting Up a Code Format Data Type

When you define a code format data type, you specify a code title and, typically, a related date. You can also associate the code title with a user defined code table. The following describes how to set up a code format data type that you could use to track employee training. The data type is associated with a user defined code table that you have already set up.

Define the following information:

- Code title - Type (types of training that you track)
- Date from title - Trng Dte (date when training was completed)
- Amount 1 title - Costs (amount of training costs)
- System code - 55 (system code for the user defined code table that you set up for the training type)
- Record type - TG (record type for the user defined code table that you set up for the training type)

► To define supplemental data types in code format

Depending on which system you are currently using, use one of the following navigations:

From the CIF Supplemental Data menu (G01312), choose Supplemental Data Setup.

From the Business Unit Supplemental Data menu (G09312), choose Supplemental Data Setup.

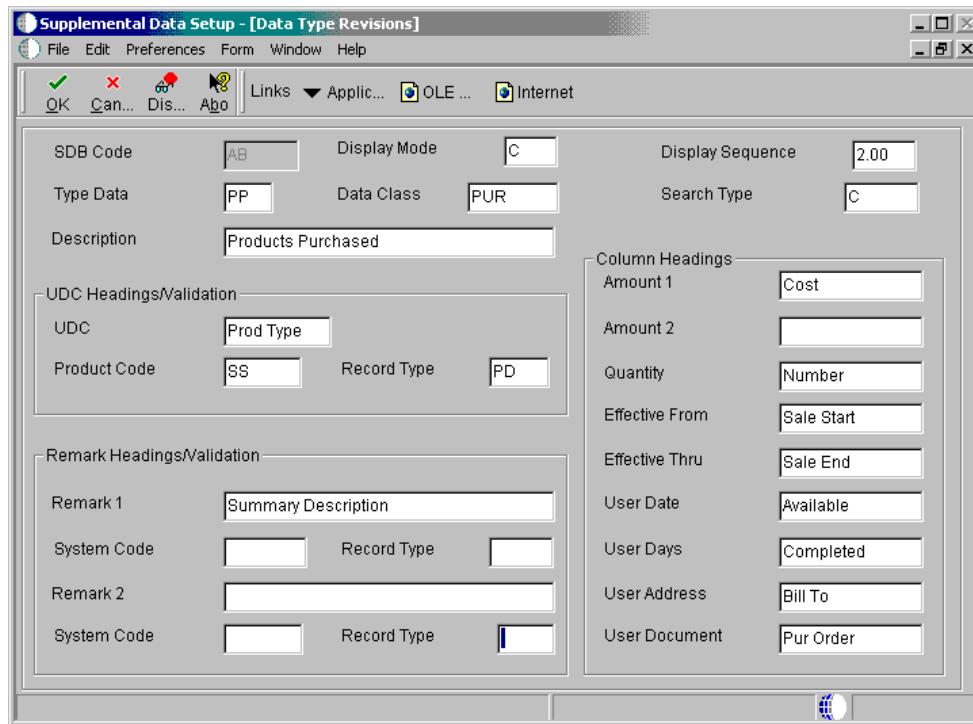
From the Item Supplemental Data/CIF menu (G4124), choose Supplemental Data Setup.

From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database and Data Type Setup.

From the Supplemental Data Setup menu (G1344), choose Supplemental Data Setup.

1. On Work With Supplemental Database Setup, click Find to display existing database codes.

2. Choose the database code for which you want to define a code data type, and then choose Work With Data Types from the Row menu.
3. On Work With Data Types, click Add.

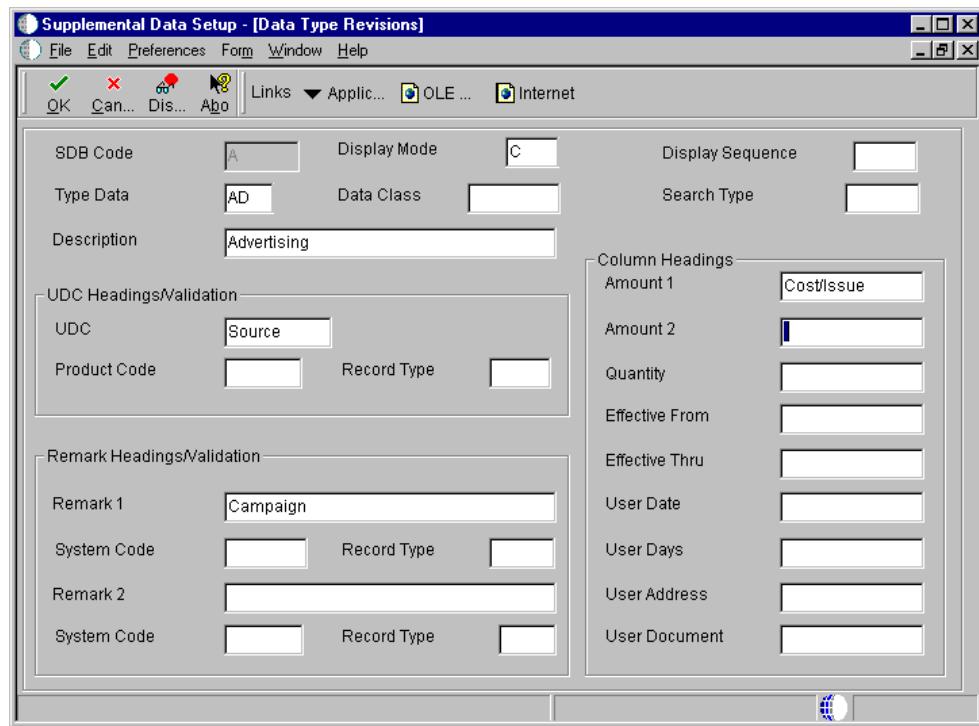


4. On Data Type Revisions, type C in the following field:
 - Display Mode
5. Complete the following fields:
 - Type Data
 - Description
6. Complete the following optional fields
 - Display Sequence
 - Data Class
 - Search Type
7. To customize the user defined codes column heading that appears on the General Description Entry form, complete the following field:
 - Display Mode
8. To associate a user defined codes table with the UDC field, complete the following fields in the UDC Headings/Validation group:
 - Product Code

- Record Type
9. To customize the Remarks column headings that appear on the General Description Entry form, complete the following fields:
- Remark 1
 - Remark 2
10. To associate either of the Remark fields with a record type in a J.D. Edwards system, complete the following corresponding fields in the Remark Headings/Validation group:
- System Code
 - Record Type
11. To customize the column headings that appear on the General Description Entry form, complete the following fields in the Column Headings group and then click OK:
- Amount 1
 - Amount 2
 - Quantity
 - Effective From
 - Effective Thru
 - User Date
 - User Days
 - User Address
 - User Document

Information that you type in any of the above fields appears on the data entry form as column headings.

The following form, which shows the Advertising (AD) data type, provides an example of the setup for code format:



12. Click Cancel to return to Work With Data Types.
13. On Work With Data Types, click Find to view your newly created record.

Defining Supplemental Data Types in Program Format

Program format allows you to access a specific program and version number from the Supplemental Data program. Instead of customizing menus, you can set up supplemental data types to access the forms that you use most often. Setting up supplemental data types in this way allows you to access these forms from a single menu selection, which saves you time and streamlines your data entry tasks.

► To set up supplemental data types in program format

Depending on which system you are currently using, use one of the following navigations:

From the CIF Supplemental Data menu (G01312), choose Supplemental Data Setup.

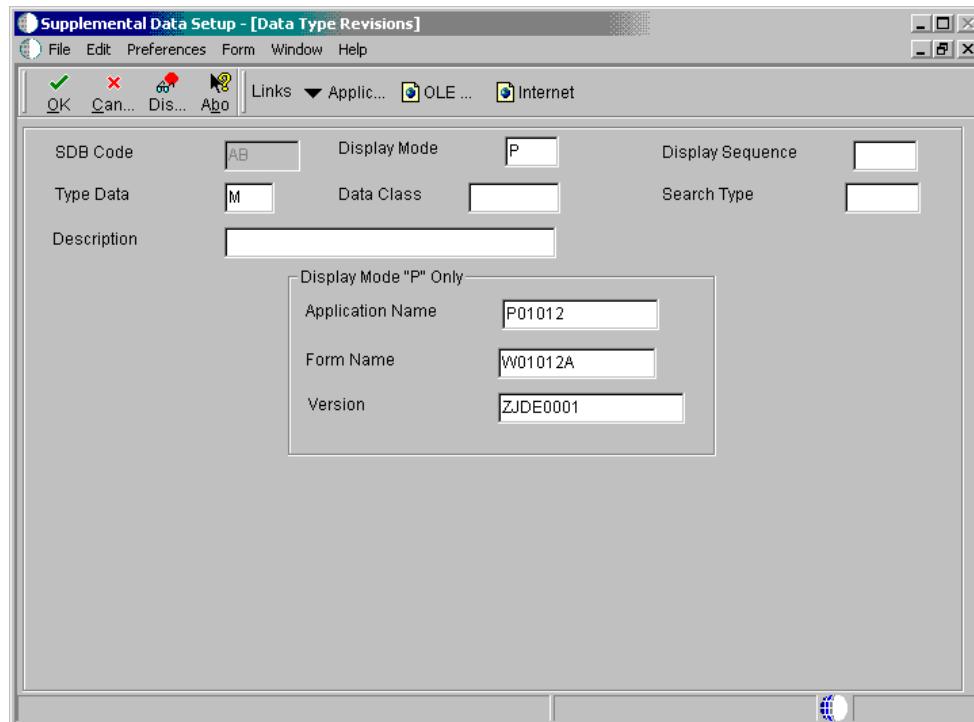
From the Business Unit Supplemental Data menu (G09312), choose Supplemental Data Setup.

From the Item Supplemental Data/CIF menu (G4124), choose Supplemental Data Setup.

From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database and Data Type Setup.

From the Supplemental Data Setup menu (G1344), choose Supplemental Data Setup.

1. On Work With Supplemental Database Setup, click Find to display existing database codes.
2. Choose the database code for which you want to define a program data type, and then choose Work With Data Types from the Row menu.
3. On Work With Data Types, click Add.
4. On Data Type Revisions, type P in the following field:
 - Display Mode
5. Complete the following field:
 - Type Data



6. Complete the following optional fields:
 - Display Sequence
 - Data Class
 - Search Type
 - Description
7. To specify the program that you want this data type to access, complete the following fields:
 - Application Name
 - Form Name

- Version
8. Click OK.
- The Data Type Revisions form displays additional fields.
9. On Data Type Revisions, click Cancel to return to the Work With Data Types form.

Setting Up Cross-Reference Tables for Supplemental Data

To save time and reduce typing errors, you can set up your system to automatically transfer a terminated employee's supplemental data to the applicant database. An example of a terminated employee whose supplemental database you might transfer is a seasonal employee that you terminate at the end of the season and intend to rehire next season.

Transferring supplemental data in this manner makes it easy to maintain consistent data throughout the processes of hiring applicants and terminating employees.

When you set up the cross-reference table, observe the following guidelines:

- The format (code or narrative) of each data type that you want to transfer must be the same in both databases.
- For code format data types, the source data type and target data type codes must be the same.
- The user defined code tables that are associated with code format data types must be the same in both databases.

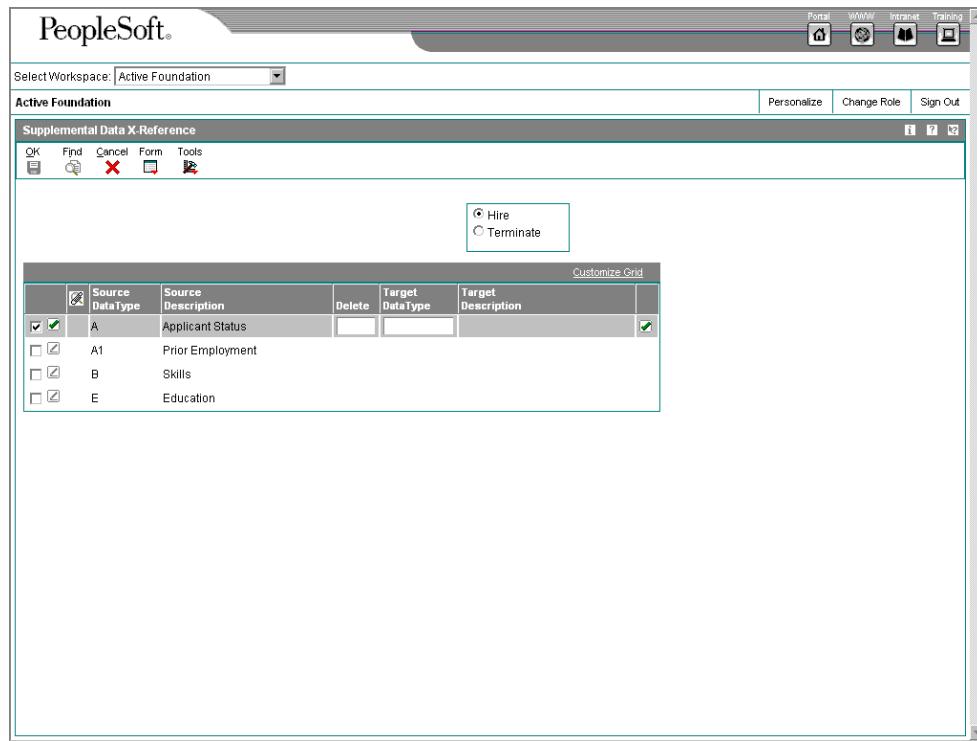
For example, if you have a data type, Prior Employment, in the applicant database that is associated with table 07/G, you can cross-reference it with the data type Prior Employment in the employee database, provided that the data type also uses table 07/G. When you transfer supplemental data for a terminated employee, you can choose to save a copy of the data in the employee database, or delete the information from the employee database and store it only in the applicant database.

Note

You must have the Recruitment Management module to transfer supplemental data for terminated employees.

► To set up cross-reference tables for supplemental data

From the Supplemental Data Setup menu (G05BSD4), choose Transfer Supplemental Data on Hire.



1. On Supplemental Data X-Reference, click either of the following options:
 - Hire
 - Terminate
2. Complete the following fields and click OK:
 - Source DataType
 - Delete
 - Target DataType

Processing Options for Transfer Supplemental Data on Hire/Termination (P08094)

Versions

1. Enter a '1' to transfer supplemental data on hire, enter a '2' to transfer data on terminate.

Transferring Supplemental Data

After defining types of supplemental data, you can transfer data from one data type within a database to another. If you change the data type code for a type of supplemental data, you can use this program to transfer data from the old data type to the new one. For example, if you have a data type S, for skills, that contains employee information, and you need to

change its data type code to SK, you can use this program to move employee information from data type S to data type SK.

Transferring supplemental data saves you time and reduces typing errors. You can transfer data by doing either of the following:

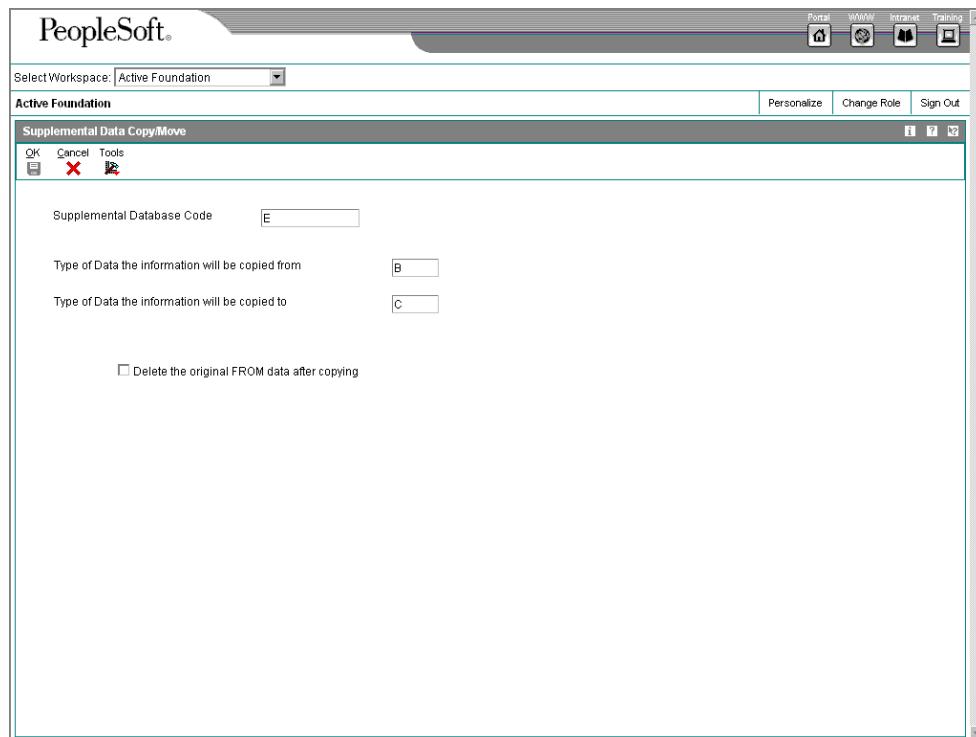
- Copying the information, which retains it in one data type and transfers it to another
- Moving the information, which deletes it from one data type and transfers it to another

Before You Begin

- Verify that the data type in the database you are copying from and the data type in the database you are copying to are the same.

► To transfer supplemental data

From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Data Copy and Move.



1. On Supplemental Data Copy/Move, complete the following fields:
 - Supplemental Database Code
 - Type of Data the information will be copied to
 - Type of Data the information will be copied from
2. To move the information without retaining it in the current data type, click the following option, and then click OK:

- Delete the original FROM data after copying

PDBA Setup

You set up pay types to categorize various employee earnings to direct labor to different accounts in the general ledger. You set up deductions, benefits, and accruals (DBAs) to automate the process of subtracting monies, calculating benefits, and tracking accruals when you run a payroll cycle. Pay types and DBAs are referred to as PDBAs.

Setting Up Pay Types

You set up pay types to categorize various employee earnings to direct labor to different accounts in the general ledger. You can define up to 999 different pay types, using the range of numbers 001 to 999. For example, most companies need to set up different pay types for holiday, sick, and vacation pay or for personal leave pay.

Setting up pay types also allows you to do the following:

- Define how different pay types are used when you compute employee pay
- Assign automatic pay methods for autopay employees
- Define a pay type to be tax exempt
- Define information to be printed on 1099 and W-2 forms for the associated pay type for U.S. payroll
- Define whether hours and dollar amounts should be passed to the general ledger

You can also attach a media object to a pay type for explanatory notes or other information. If you attach a text media object to the pay type, the first two lines of text that you enter appear on reports that include the pay type description.

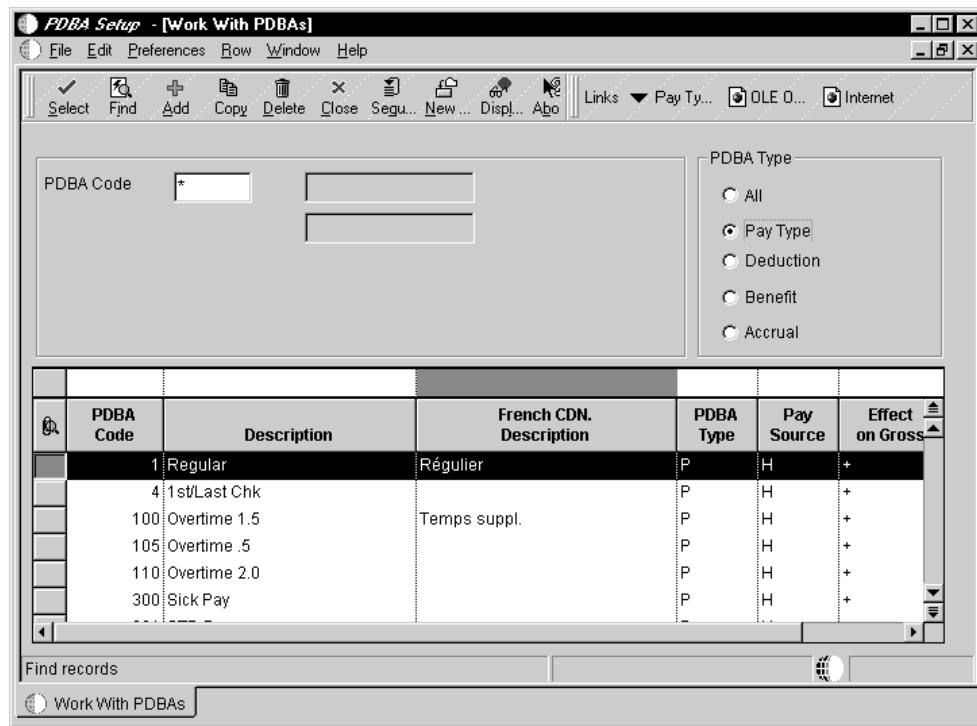
When you set up a basic pay type, you define the minimum amount of information that the system needs to perform the calculation.

Before You Begin

- Set up user defined codes (07/FS).
- Review how to add text to a pay type. See [Media Object Attachments](#).

► To set up a pay type

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

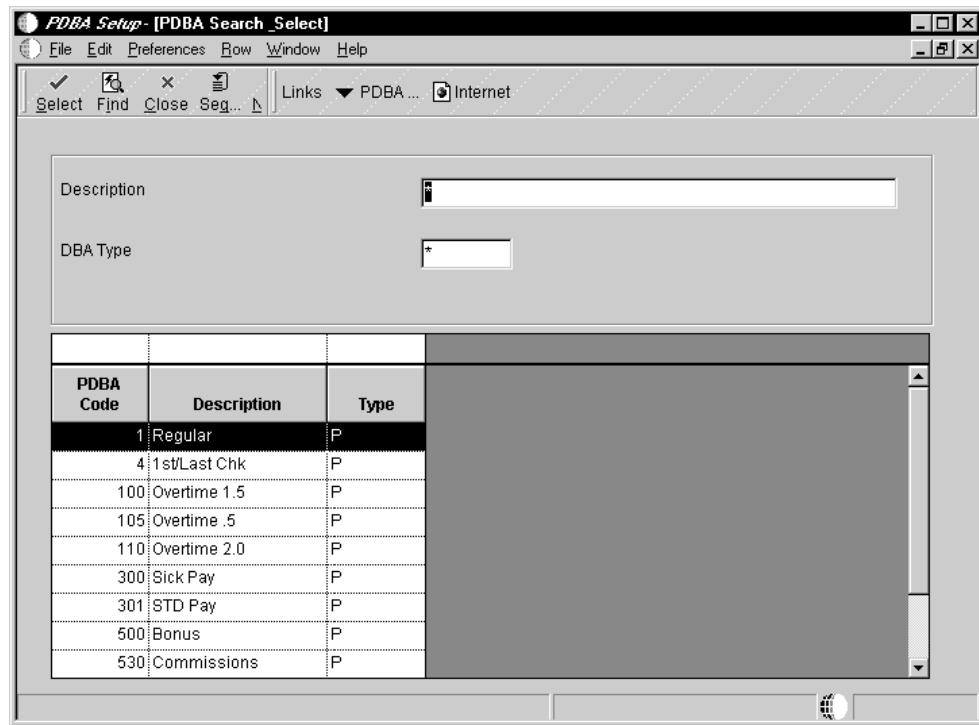


1. On Work With PDBAs, click the Pay Type option in the PDBA Type area and click Add.

Pay Type Revisions

Pay Type	825	Paystub Text	PTO
Print Method	Y	French CDN. Paystub Text	
Pay Type Category			
Pay Source	H	Pay Type Multiplier	1.00
Shift Differential Method	1	Shift Differential	
Auto Pay Methods	Y	Amount or Rate	
Effect on Gross Pay		Effect on Net Pay	
Effect on GL		Flex Spending Account Type	
History Retrieval Flag	1	Enable Leave Tracking	1

- On Pay Type Revisions, click the Search button in the following field to review a pay type before setting one up:
 - Pay Type



- On PDBA Search & Select, choose a pay type and then choose PDBA Recap from the Row menu.
- On Pay Type Recap, review the pay type information, and then click Cancel. The PDBA Search & Select form appears.
- Click Close. The system displays the Pay Type Revisions form again.
- On Pay Type Revisions, complete the following fields:
 - Pay Type
 - Paystub Text
 - Pay Type Category
 - Effect on GL
- To define how you want to calculate the pay type, complete the following fields:
 - Pay Source
 - Pay Type Multiplier

- Shift Differential
 - Shift Differential Method
 - Auto Pay Methods
-

Note

If you are setting up pay types for piece rate processing, you must enter B in the Pay Source field.

8. To override the hourly rate, complete the following field:
 - Amount or Rate
9. To define how the pay type affects an employee's pay, complete the following fields:
 - Effect on Gross Pay
 - Effect on Net Pay
10. For tax exempt pay types, choose Tax Exemptions from the Form menu, enter * in the following field, and click OK:
 - Tax Type 01
11. On Pay Type Revisions, to assign a category code to a pay type, choose Category Codes from the Form menu and assign as many category codes as needed.
12. Click OK.
13. On Pay Type Revisions, click OK.

Deductions, Benefits, and Accruals (DBAs)

You set up deductions, benefits, and accruals (DBAs) to automate the process of subtracting money from an employee's paycheck, calculating employee benefits, and tracking accruals when you run a payroll cycle.

Deductions	Deductions represent monetary amounts, excluding taxes, withheld from an employee's earnings. You set up deductions to automate the process of subtracting monies when you run a payroll cycle.
Benefits	Benefits represent amounts that the company funds for additional employee compensation. A benefit can be cash or non-cash, either taxable or nontaxable. Benefit information can be passed to the general ledger to track burden. You set up benefit DBAs to automate the process of calculating benefits when you run a payroll cycle.
Accruals	Accruals represent a number of paid hours that the company funds as additional employee compensation. Usually, an employee accrues a certain number of hours per pay period.

The system can carry over from year to year accrued remaining balances, such as available vacation and sick time.

A Comparison of Benefits and Accruals

To determine whether a DBA should be set up as a benefit or an accrual, consider the following:

- Benefits might or might not affect gross or net pay.
- Accruals have no effect on an employee's gross or net pay.

Determining How to Set Up DBAs

Before you set up deductions, benefits, and accruals for your company, consider the functions that you want the DBA to perform:

- Which method should the system use to calculate the DBA?
- When will the system calculate the DBA?
- What are the effective dates for the DBA?
- Should the system pass the information to the general ledger?
- Do you want to base the calculation for the DBA on another DBA or on a pay type?
- Should the deduction arrear in a negative pay situation?
- Should an accrual balance roll over into the next year?
- Should taxes be calculated for this DBA?
- Do you want to set up limits for the DBA?
- Is the DBA mandatory or voluntary?

Assigning DBA Codes

When you set up DBAs, you assign each DBA a numeric transaction code. Because the numeric transaction codes 001-999 are reserved for pay types, use the numeric transaction codes 1000-9999 to define up to 9000 DBAs.

J.D. Edwards recommends that you group similar DBAs by function. For example, you might group all long-term disability deductions and assign numbers within a range, leaving some numbers available for later additions, as follows:

- 1220 - Long-term disability insurance coverage at 66 2/3 percent
- 1222 - Long-term disability insurance coverage at 50 percent

DBAs are not specific to one company. You can use DBAs across different companies.

Assigning DBAs to Employees

To assign DBAs to employees, you can do any of the following:

- You can set up a DBA for all employees.
- You can enroll an employee in benefit plans, and the system automatically assigns the employee DBAs associated with those benefit plans.

- You can assign specific DBAs to a single employee.
- For one time only, you can enter a DBA in time entry for the current payroll.

The system does not limit the number of DBAs that you can assign to each employee.

You can define the amount of a DBA as follows:

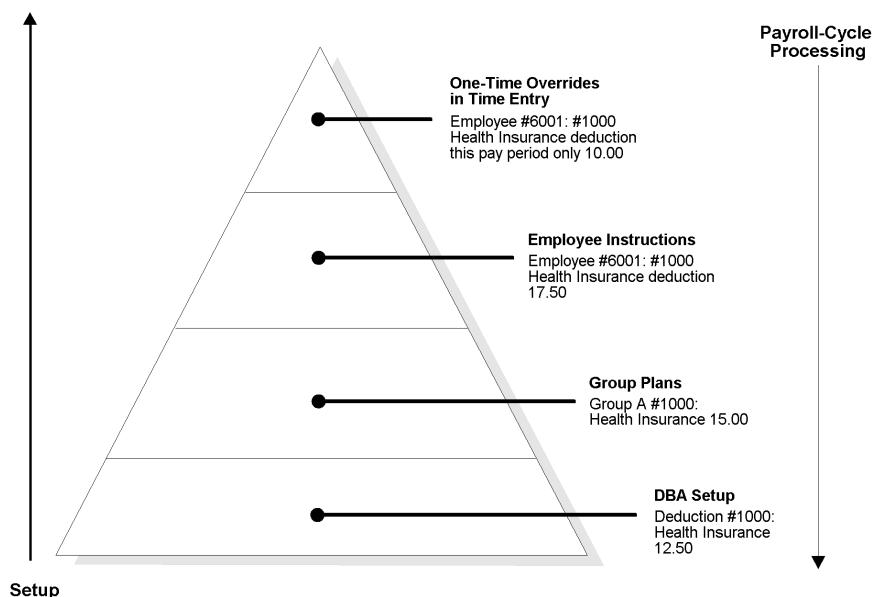
- When you set up the DBA
- At the group level
- At the employee level
- During time entry

You can override the amount at any level in time entry for any given payroll. The amount at the employee level overrides the DBA setup.

Example: DBA Amounts as a One-Time Override

An employee has a health insurance deduction included in the assigned benefit plan. If the employee is hired in the middle of the pay period, you can enter a prorated amount in time entry for the first pay period. The system deducts the regular amount for health insurance in subsequent pay periods.

The following graphic illustrates the order that you use to set up DBAs and the order that the system uses to process DBAs:



When processing payroll, the system first calculates DBAs that have been entered as one-time overrides in time entry. For example, if you entered a DBA in any employee's DBA instructions for three pay periods, the system would calculate the DBA in the DBA instructions and not the amount for the same DBA as entered in DBA setup.

See Also

- Entering Employee Instructions*
- Overriding DBA Amounts One Time*

Calculating DBAs

The system can use different methods to calculate DBAs. The methods used to calculate DBAs include the following:

- Flat monetary amounts
- Percentages of gross pay
- Calculation tables with criteria that vary from employee to employee

Unlike the DBAs that the system calculates by flat monetary amounts and percentages, you can override a DBA at the employee level that is based on a calculation table, but this is not recommended. A DBA based on a calculation table has a table-method code attached to the DBA that tells the system how to calculate the DBA. The system will not recognize another method to calculate a DBA when a table-method code is attached to the DBA.

Example: DBA Calculations

DBA calculations can be based on values, such as gross pay, hours, pieces, salary, month-to-date, or year-to-date earnings. You might set up the following:

- Flat monetary amount for health insurance with a deduction of 12.50 per pay period
- Percentage deduction of 4 percent per pay period to be used for a retirement savings plan
- Calculation table using the following variables to determine an employee's annual vacation accrual:
 - 40 hours if employed 1-2 years
 - 80 hours if employed 3-5 years
 - 120 hours if employed 6-99 years

See Also

- Setting Up Deductions, Benefits, and Accruals*
- Setting Up Group Plan DBAs*

Understanding Arrearage Methods

An arrearage occurs when the payroll system could not deduct an amount from the employee's pay because the employee did not earn enough to pay for the deduction.

The OneWorld system manages DBA arrearages in the following ways:

- The first time an employee is paid during the pay period the system attempts to collect DBA amounts. If there is still a remainder when the new pay period begins, that remaining amount is arreared into the new period for collection.
- Each time an employee is paid during the pay period the system attempts to collect any remaining DBA amounts. If there is still a remainder when the new pay period begins, that remaining amount is arreared into the pay cycle for collection.

- Each time an employee is paid during the pay cycle the system attempts to collect any remaining DBA amounts. If there is still a remainder when the new pay period begins, that remaining amount is *not* arreased into the new pay period for collection. This arrearage method is used for DBAs such as United Way contributions.

The system can also track DBA balances and limits across multiple companies (indicated by Tax ID). If you have an employee that works for multiple companies during the course of a single pay period, the system tries to collect all appropriate DBAs plus any arrearages or balances each time the employee is paid, regardless of the company the employee worked for when the arrearage or balance was created. See *Setting Up Company Options*.

The system adjusts negative pay in different ways depending on the arrearage method that you use. See *Setting Up a Deduction DBA to Adjust Negative Pay*.

Example 1

An employee is paid on the first day of a weekly pay period and has a \$30 deduction that is set to calculate once per pay period. Using arrearage method 'S', a partial or full deduction as needed, the remaining amount is placed in arrears for the current pay period only, and the arrearage balance is not written to history.

The employee's gross pay for the first paycheck of the pay period is \$35. After taxes, the amount calculated for the deduction is only \$17.50, leaving an arrearage balance of \$12.50.

On the third day of the pay period the employee receives gross pay of \$180. The remaining arrearage balance of \$12.50 is deducted from this paycheck. The arrearage balance is 0 and the record is not written to history.

Example 2

An employee is paid on the first day of a weekly pay period and has a \$30 deduction that is calculated once per pay period. Using arrearage method 'S', a partial or full deduction as needed, the remaining amount is placed in arrears for the current pay period only, and the arrearage balance is not written to history.

The employee's gross pay for the first paycheck of the pay period is \$35. After taxes, the amount calculated for the deduction is only \$17.50, leaving an arrearage balance of \$12.50.

On the third day of the pay period the employee receives gross pay of \$15. After taxes, the amount calculated for the deduction is only \$6, leaving an arrearage balance of \$6.50. The employee receives no additional paychecks during this pay period. The arrearage balance of \$6.50 is not carried forward into the following pay period and the record is not written into history.

Example 3

An employee is paid on the first day of a weekly pay period and has a \$30 deduction that is calculated once per pay period. Using arrearage method 'Q', a partial or full deduction as needed, the amount is placed in arrears and limits are not applied when collecting the arrearage.

The employee's gross pay for the first paycheck of the pay period is \$35. After taxes, the amount calculated for the deduction is only \$17.50, leaving an arrearage balance of \$12.50.

On the third day of the pay period the employee receives gross pay of \$15. After taxes, the amount calculated for the deduction is only \$6, leaving an arrearage balance of \$6.50. This

arrearage amount is written to history and the system will make the deduction in the next pay period.

Setting Up Calculation-Table Information

You can set up table-method DBAs to calculate DBAs based on various table calculations. A table-method DBA is a calculation table that has a table-method code attached to it to tell the system how to calculate the DBA.

You set up calculation tables to define the parameters that the system uses to calculate DBAs. After setting up your calculation tables, you attach tables to a DBA by defining the appropriate table method when you set up a DBA.

Setting Up Calculation Tables

You set up calculation tables to define the parameters for calculating DBAs that are based on variable values. You define valid ranges and amounts that are a function of certain table method codes.

Calculation tables contain user defined information to help define your standard DBA methods of calculation. Calculation tables provide calculations based on values that vary from employee to employee.

When you define a calculation table, you must first determine what the calculation is based on, such as any of the following factors:

- Age
- Annual salary
- Months of service
- Hours worked in a pay period

After you have defined the calculation table, you must determine the appropriate method of calculation. The method of calculation indicates what the ranges in the table represent, such as age ranges or salary ranges. The methods of calculation are attached to the following numeric codes defined in user defined code list 06/DM:

- 0 - Withholding periods
- 1 - Salary range
- 2 - Date range
- 3 - Age range (calculated by date of birth)
- 4 - Hours worked
- 5 - Pieces produced
- 6 - Variable months
- 7 - Workers Comp. Insurance
- 8 - Gross pay

9 - Age (calculated as of the date that you enter in the Employee Age field on the Personal form)

For example, to base a DBA on employee age, you can use code 3 or code 9 for the method of calculation.

Before You Begin

- ❑ Choose a table method from user defined code list 06/DM that is appropriate as a method of calculation. Read the descriptions to find a method that describes how you want the system to perform the calculation.

► To set up calculation tables

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose Calculation Tables.

1. On Work With Calculation Tables, click Add.

The screenshot shows the PeopleSoft Calculation Table setup screen. At the top, there are buttons for OK, Find, Delete, Cancel, Form, and Tools. Below these are fields for Table Code (03000) and Table Method (AS). The Table Type dropdown is set to D. The main area is a grid with columns: Lower Limit, Upper Limit, Amt.Rate, Excess Rate, S, M, Sec Table, Description, Limit Amt., Amt.Rate 2, and Additional Rate. The grid contains the following data:

Lower Limit	Upper Limit	Amt.Rate	Excess Rate	S	M	Sec Table	Description	Limit Amt.	Amt.Rate 2	Additional Rate
29.99		0.0900								
30.00	34.99	0.1000								
35.00	39.99	0.1300								
40.00	44.99	0.1700								
45.00	49.99	0.2700								
50.00	54.99	0.4400								
55.00	59.99	0.7000								
60.00	64.99	1.0000								
65.00	69.99	1.5000								

2. On Calculation Table, complete the following fields:
 - Table Code
 - Table Type
 - Table Method
3. To define the parameters of the calculation table, complete the following fields:
 - Lower Limit

- Upper Limit
 - Amt./Rate
4. Complete the following optional fields and click OK:
- Excess Rate
 - S M
 - Sec Table
 - Limit Amt.
 - Amt./Rate 2
 - Additional Rate
5. Repeat steps 2-4 to define all the parameters that are needed for the calculation table.

Note:

You do not need to include a line in the calculation table for zero amounts. For example, if vacation time is not earned in the first year of employment, you do not need to include that year on the first line of the calculation table. The first line could start with 2.00 as the lower limit.

See Also

- Setting Up Rollover Information for DBAs*
- DBA Table Methods Quick Reference*

Attaching Calculation Tables to DBAs

After you set up your calculation tables, attach a calculation table to the DBA by entering the table code on DBA Setup.

Although you can attach the same calculation table to more than one DBA, if you are attaching only one calculation table to one DBA, J.D. Edwards recommends that you make the table code the same as the DBA code for convenience.

► To attach calculation tables to DBAs

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, to designate whether this is a deduction, benefit, or accrual, click the corresponding DBA type and click Add.
2. On Basic DBA Information, complete the following fields:
 - Method of Calculation

- Table Code
3. Complete the remaining steps for setting up a DBA.
- See *Setting Up Essential DBA Information*.

Setting Up Deductions, Benefits, and Accruals

You typically set up deductions, benefits, and accruals (DBAs) only if you are using the J.D. Edwards Payroll system. You might set up DBAs without the Payroll system if you have a customized interface with a payroll service bureau.

You set up DBAs to automate the process of subtracting monies, calculating benefits, and tracking accruals when you run a payroll cycle. You must set up DBAs before you can assign them to employees.

If you are using the HR-Benefits module, you must also set up DBAs before you can enroll employees in benefit plans. You must also set up one or more DBAs for each benefit plan. When you enroll employees in benefit plans, the system automatically applies the appropriate DBAs to the DBA instructions for the employee, based on the DBA code.

Setting Up Essential DBA Information

When setting up essential DBA information, you define the minimum amount of information that the system needs to perform the calculation. Typically, you will want to calculate essential DBA information in one of three ways:

Monetary amount You set up a monetary amount to subtract a specific amount of money from the pay for the designated pay periods.

For example, an employee enrolls in the health care plan provided by the company, which requires a deduction of 5.00 USD each pay period. You might also set up a deduction for union dues.

Percentage rate You set up a percentage rate DBA to calculate a percentage of gross pay.

For example, the DBA might designate that 1 percent of gross pay should be deducted for United Way or another charitable fund.

Calculation tables You set up calculation tables for DBAs that are calculated by a formula. The calculation table defines the parameters that the system uses to calculate the DBAs.

When setting up essential DBA information, you can do one of the following:

- Define the actual amount or rate to calculate
- Omit the actual amount or rate to calculate

If you omit the actual monetary amount or the percentage rate information during setup, you can enter it when you assign the DBA at the employee or timecard level.

After setting up a DBA for which you have entered an amount or rate, you periodically might need to update that amount or rate. For example, when you set up a DBA for a medical deduction, you can enter the premium amount. A year later, when the medical plan carrier raises its premiums, you must update the premium amount for the DBA.

Determining the Basis of Calculation for a DBA

The system must have a value on which to base the calculation for each DBA. This is called the basis of calculation.

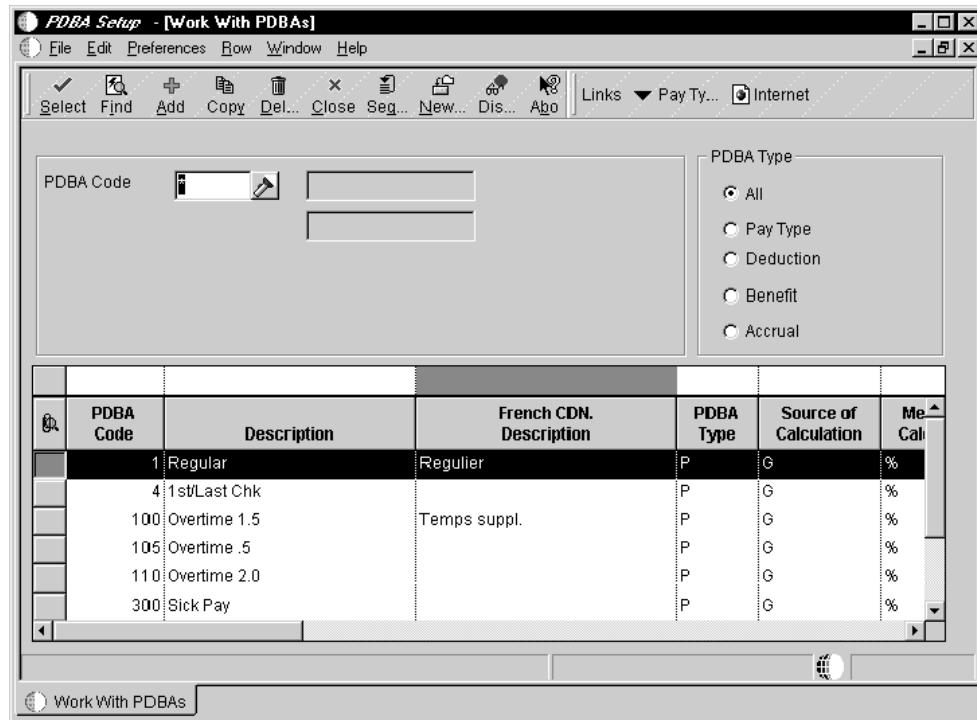
You set up a basis of calculation for a DBA to define the base value that the system uses to calculate the DBA during payroll processing. A DBA can be based on pay types, on another DBA, or on a combination of both pay types and DBAs (PDBAs). To define the base value, you must list one or more PDBA for each DBA that you create.

To determine which PDBA codes to assign to the DBAs that you set up, consider the following:

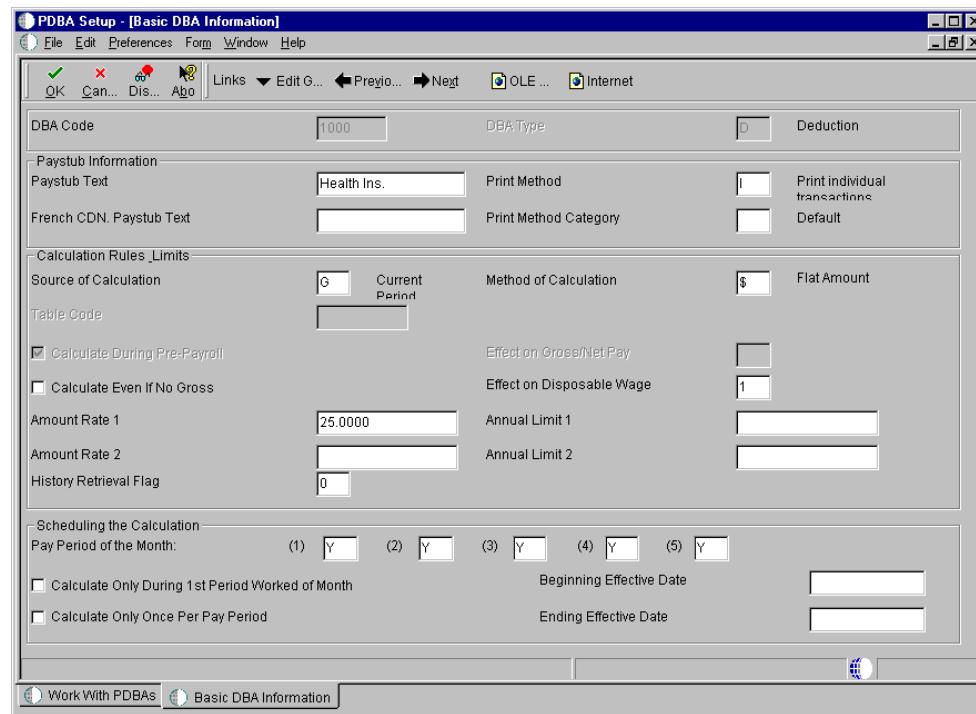
- If you base a DBA on another DBA, both the From PDBA Type field and the Thru PDBA Type field must contain the same code (the code for the basis DBA).
- If you base a DBA on all pay types, enter code 1 in the From PDBA Type and code 999 in the Thru PDBA Type field.
- If you base the DBA on a selected group of pay types, include only those pay types in the From PDBA Type and Thru PDBA Type fields. For example, if you base a DBA on all pay types except 801, enter 1 in the From PDBA Type field and 800 in the Thru PDBA Type field on the first line. On the second line, enter 802 in the From PDBA Type field and 999 in the Thru PDBA Type field.

► To set up basic DBA information

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.



1. On Work With PDBAs, click an option in the PDBA Type area to designate whether you are adding a deduction, benefit, or accrual and click Add.



- On Basic DBA Information, click the visual assist in the following field to review a deduction, benefit, or accrual before setting one up:
 - DBA Code

PDBA Setup - [PDBA Search_Select]

File Edit Preferences Row Window Help

Select Find Close Seg... Links PDBA ... Internet

PDBA Code	Description	Type
1	Regular	P
4	1st/Last Chk	P
100	Overtime 1.5	P
105	Overtime .5	P
110	Overtime 2.0	P
300	Sick Pay	P
301	STD Pay	P
500	Bonus	P
530	Commissions	P

3. On PDBA Search & Select, choose a DBA and then choose PDBA Recap from the Row menu.
4. On DBA Recap, review the DBA information, and then click Cancel.
The PDBA Search & Select form appears.
5. Click Close.
The system displays the Basic DBA Information form again.
6. To define paystub text and whether DBA information prints on paystubs, complete the following fields:
 - Paystub Text
 - French CDN. Paystub Text
 - Print Method
 - Print Method Category
7. To define calculation rules and limits, complete the following fields:
 - Source of Calculation
 - Method of Calculation
 - Calculate Even If No Gross
8. To designate the effect of a benefit on the employee's income, complete the following field:
 - Effect on Gross/Net Pay
9. To designate the effect of a deduction on the employee's disposable wages, complete the following field:
 - Effect on Disposable Wage
10. To apply the same amount or rate to all employees who are assigned the DBA, complete the following field:
 - Amount Rate 1
11. To assign a maximum amount to withhold or accrue in a year, complete the following field:
 - Annual Limit 1
12. To apply a secondary rate and limit after the first annual limit has been reached, complete the following fields:
 - Amount Rate 2
 - Annual Limit 2
13. To specify how the system retrieves PDBA history, complete the following field:

- History Retrieval Flag
14. To schedule the DBA calculation, complete one or more of the following fields and click OK:
- Pay Period of the Month:
 - Calculate Only During 1st Period Worked of Month
 - Calculate Only Once Per Pay Period
 - Beginning Effective Date
 - Ending Effective Date

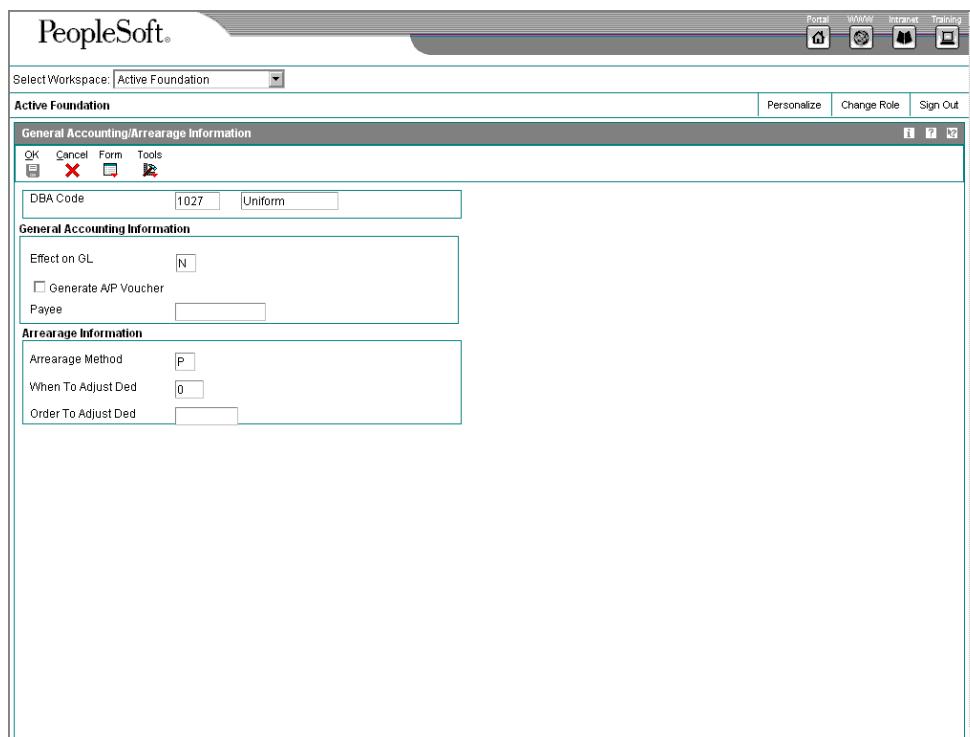
After you complete these steps, complete the steps to set up general accounting and arrearage information.

► **To set up general accounting and arrearage information**

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

After you complete the steps to set up basic DBA information, you must set up general accounting and arrearage information.

1. On Work With PDBAs, locate the record for which you want to set up general accounting and arrearage information and click Select.
2. On Basic DBA Information, choose GA/Arrearage Info. from the Form menu.



The screenshot shows the PeopleSoft PDBA Setup interface. At the top, there's a navigation bar with links for Portal, View/View, Intranet, Training, and a search bar. Below that is a toolbar with icons for OK, Cancel, Form, Tools, and a magnifying glass. The main area is titled "General Accounting/Arrearage Information". It contains two sections: "General Accounting Information" and "Arrearage Information".

General Accounting Information:

- DBA Code: 1027
- Uniform: (empty field)
- Effect on GL: N (checkbox checked)
- Generate A/P Voucher: (checkbox unchecked)
- Payee: (empty field)

Arrearage Information:

- Arrearage Method: P (radio button selected)
- When To Adjust Ded: 0 (radio button selected)
- Order To Adjust Ded: (empty field)

3. On General Accounting/Arrearage Information, complete the following field:
 - Effect on GL
4. To enter arrearage information for deductions, complete the following fields:
 - Arrearage Method
 - When To Adjust Ded
 - Order To Adjust Ded
5. If you are integrating the Payroll system with the Accounts Payable system and you need to activate vouchering for this DBA, complete the following field:
 - Generate A/P Voucher
6. To specify a payee for the voucher, complete the following field:
 - Payee

When you specify a payee, you should also select Generate A/P Voucher. If Generate A/P Voucher is not selected, the system might create an invalid journal entry.
7. Click OK.

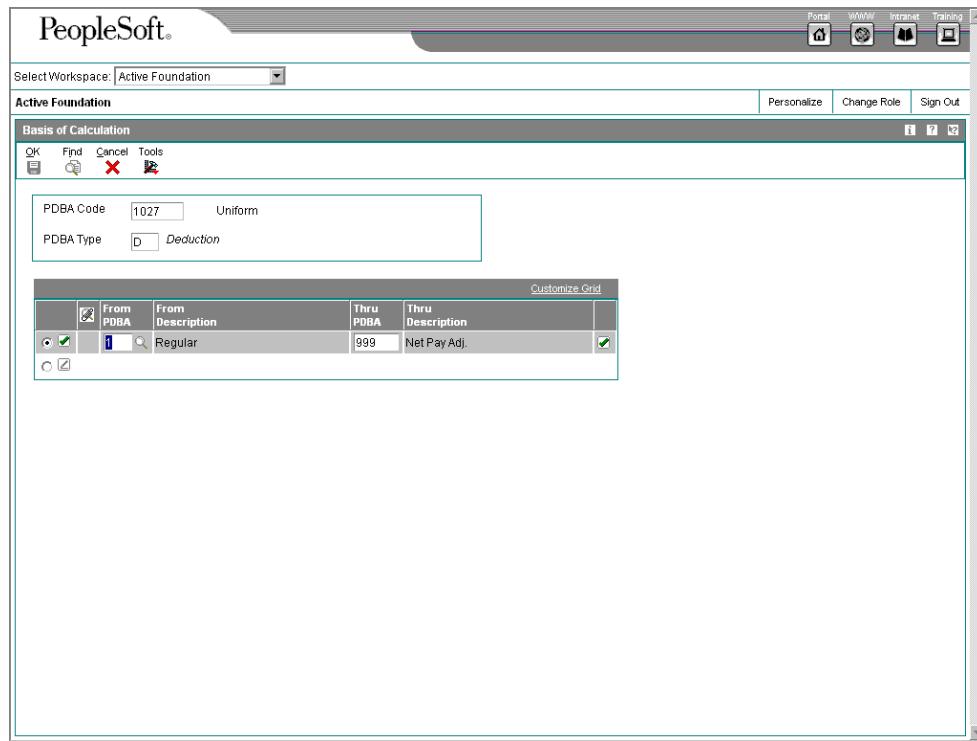
After you complete the steps to set up general accounting and arrearage information, you must set up the basis of calculation.

► **To set up the basis of calculation**

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

You set up a basis of calculation for a DBA to define the base value that the system uses to calculate the DBA during payroll processing. A DBA can be based on pay types, on another DBA, or on a combination of both pay types and DBAs (PDBAs). To define the base value, you must list one or more PDBAs for each DBA that you create.

1. On Work With PDBAs, locate the record for which you want to set up a basis of calculation and choose Basis of Calc. from the Row menu.



2. On Basis of Calculation, complete the following fields with the range of pay types that you want included in the calculation:
 - From PDBA
 - Thru PDBA

To include all pay types, enter 1 in the From PDBA field and 999 in the Thru PDBA field.
3. Click OK.

If the Basis of Calculation form contains only one row of values, you cannot delete that row. Every DBA must have a basis of calculation.

► To add text to a DBA

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, choose the DBA.
2. From the Row menu, choose Attachments.
3. On Media Objects, choose New, and then Text from the File menu.
4. Enter the text and choose Save & Exit from the File menu.

See Also

- *Media Object Attachments*

Setting Up Group Plan DBAs

You set up group plan DBAs to designate that deductions, benefits, or accruals apply to groups of employees. You identify each group plan by a user-defined DBA code, such as a union code. You can further define group plans with additional qualifying criteria, such as any of the following:

Business unit The plan applies only for work performed at a particular business unit or job location.

Job type The plan applies only to employees working in a certain job type.

Job step The plan applies only to employees in a certain job step within a job type.

Date range The plan applies if the pay period dates fall within the date range that you define. For example, you could use this criterion to establish plans with built-in rate increases that you base on effective dates.

Before You Begin

- Set your processing option to specify whether you are setting up single or multiple group plans. Depending on the value that you enter, the system displays either the Revision Multiple Group Plan DBA Setup form or the Revise Single Group Plan DBA Setup form.

► To set up group plan DBAs

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose Group Plan DBA Setup.

1. On Work With Group Plan DBA Setup, click Add.
2. On Revise Single Group Plan DBA Setup, complete the following fields:
 - PDBA Code
 - Union Code
 - Beginning Effective Date
 - Ending Effective Date
3. Complete the following optional fields:
 - Job Typ
 - Job Step
 - T T
 - Business Unit
 - M C
 - Explanation Alpha Name

4. If you are integrating the Payroll system with the Accounts Payable system and you need to activate vouchering for this group plan, complete the following field:
 - Gen Vch
5. To specify a payee for the voucher, complete the following field:
 - Provider Trustee
6. Click OK.

Processing Options for Group Plan DBA Setup (P059101)

Default Tab

Use this processing option to specify whether you want a Single Revisions form or a Multiple Revisions form. The default value (1) is the Multiple Revisions form.

1. Choose Revisions Form

Blank = Default to Single Revisions form

1 = Default to Multiple Revisions form

Use this processing option to specify whether the system should display the Single Revisions form or the Multiple Revisions form. Valid values are:

Blank Single Revisions form

1 Multiple Revisions form

Setting Up Tax Status for a Deduction

You set up tax information for a deduction so that the system properly calculates any taxes that must be withheld from an employee's pay as a result of the deduction. For example, you might need to specify that a deduction is exempt from federal withholding tax, but not from state withholding tax.

In some cases, you might need to indicate that a deduction is exempt from one or more types of taxes. For example, a deduction might be exempt from federal withholding tax, but not from state withholding tax.

Caution

Do not change taxable status for any DBA in the middle of the year. Previously calculated taxable amounts and taxes do not automatically change if the taxable status changes. You must enter an end date to the current DBA and create a new DBA with the new taxable status. If necessary, add the new DBA to your employee DBA instructions, using an appropriate start date.

See Also

- The *U.S. Payroll Year-End Processing Guide* for the current year to review important considerations for DBAs during year-end processing

► To set up tax status for a deduction

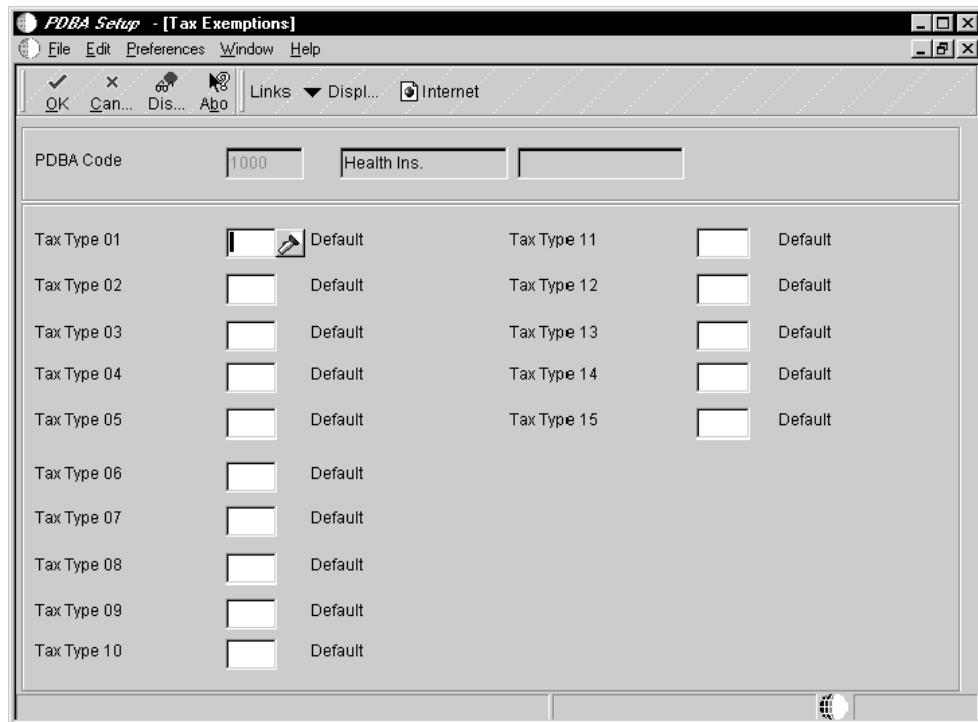
From the *Pay/Deductions/Benefits Setup* menu (G05BD4), choose *PDBA Setup*.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, complete the steps for setting up essential DBA information.

See [Setting Up Basic DBA Information](#).

3. To designate the deduction as exempt from one or more taxes, choose Tax Exemptions from the Form menu.

The Tax Exemptions form appears, on which you can enter up to 15 different tax types.



4. On Tax Exemptions, complete one or more of the following fields and click OK:
 - Tax Type 01 through
 - Tax Type 15

Setting Up Tax Status for a Benefit

You set up tax information for a benefit so that the system properly calculates any taxes that must be withheld from an employee's pay as a result of the benefit. In some cases, you might need to identify a benefit, such as a company-paid life insurance policy, as a taxable cash benefit.

When you set up a benefit, you must indicate its effect on employees' gross and net pay. You must identify the benefit as one of the following:

Nontaxable cash benefit	You set up a nontaxable cash benefit when the employer is providing a benefit to the employee that does not affect the employee's gross income. The cash benefit is added to the employee's net income as a net pay adjustment. An example of a nontaxable cash benefit is a moving allowance below the taxable minimum.
Nontaxable non-cash benefit	You set up nontaxable non-cash benefits when the employer is providing a benefit to the employee that is not taxed and is not transferrable to cash, such as company-paid health insurance. The employee is not taxed for this benefit.
Taxable cash benefit	You set up a taxable cash benefit when the employer is providing a benefit to the employee that is taxed and is in the form of cash. An example of a taxable cash benefit is a reimbursement for moving expenses.
Taxable non-cash benefit	You set up a taxable non-cash benefit when the employer is providing a benefit to the employee that is taxed and is not transferrable to cash. The benefit is added to an employee's gross pay, but it has no impact on the employee's net pay other than the tax withheld. An example of a taxable non-cash benefit is the use of a company car.

Caution

Do not change taxable status for any DBA in the middle of the year. Previously calculated taxable amounts and taxes do not automatically change as the taxable status changes. You must enter an end date to the current DBA and create a new DBA with the new taxable status. Add the new DBA to your group plan and employee level DBAs with an appropriate start date.

► To set up tax status for a benefit

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Benefit and then click Add.
2. On Basic DBA Information, complete the steps for setting up essential DBA information.

See [Setting Up Basic DBA Information](#).

3. To specify the tax status for the benefit, complete the following fields and click OK.
 - Effect on Gross/Net Pay

- Calculate Even If No Gross

Setting Up Rollover Information for DBAs

For most types of DBAs, such as retirement plan benefits and medical plan deductions, the system carries forward year-end balances when you run the standard year-end rollover programs.

For some DBAs, such as those that track vacation and sick time, employees can earn or hold balances that the system must calculate before it can roll over the balance from one year to the next. When you set up these DBAs, you must enter rollover information so that the system can calculate the balance to roll over.

The system rolls over DBAs that have any of the following:

- Remaining balances
- Remaining periods
- An inception-to-date limit
- An annual carryover limit
- Deduction amounts due
- Arrearages

You also enter rollover information to specify the table in which the system stores history for the DBA, either the Fiscal and Anniversary Year History table (F06147) or the Employee Transaction History Summary table (F06146).

You can set up vacation and sick DBAs in either of the following ways:

- When an employee accrues time that becomes available at a later date, you set up two DBAs. The first DBA accrues the time. The second DBA tracks the amount of that accrued time that is available to the employee.
- When an employee may take time as it is earned, you set up a single DBA to track accrued, or available, time.

Either of these scenarios might also involve a limit to the number of hours that an employee can carry forward into the following year.

Example: Limits on Vacation or Sick-Leave Rollover

Your vacation or sick-leave policy might state that employees can carry forward no more than 80 hours from one year to the next.

To administer this policy, you set up a rollover calculation table that allows only 80 hours to roll over into the following year.

The screenshot shows the PeopleSoft Calculation Table window. At the top, there are buttons for OK, Find, Delete, Cancel, Form, and Tools. Below this is a toolbar with icons for Home, View, Intranet, Training, and Help.

The main area displays a table with the following data:

Table Code	00002	Vacation Rollover 80 Hours Max		Table Type	R						
Table Method	VR	Vacation Roll Over Table									
		Lower Limit	Upper Limit	Amt./Rate	Excess Rate	S M	Sec Table	Description	Limit Amt.	Amt./Rate 2	Additional Rate
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		9999999.99	80.0000							
<input type="checkbox"/>	<input type="checkbox"/>										

The upper and lower limits in the rollover calculation table represent an employee's months of service. To include all employees in this table, use 0.00 as the lower limit and 999999.99 as the upper limit.

The table also specifies any limit to the amount of vacation time that the employee can carry over into the next year. This example allows 80 hours to be carried over to the next year. If your organization applies different limits based on the length of service of the employee, you can enter multiple rows in the rollover calculation table to administer this policy.

When you use two DBAs to track sick or vacation time, the rollover calculation table is associated with the DBA that tracks available time. The amount of available time might include a beginning balance from a prior year. The system compares the total amount to the limit that is entered in the table. Any amount that is over the limit is not rolled over into the new year.

Alternatively, your organization's vacation or sick-leave policy might state that employees cannot carry forward hours from one year to the next. To administer this policy, you use a processing option for the Leave Balance Rollover program to specify that the program rolls over only the current accrual. See *Processing Rollovers during the Payroll Cycle* in the *Payroll Guide* for more information.

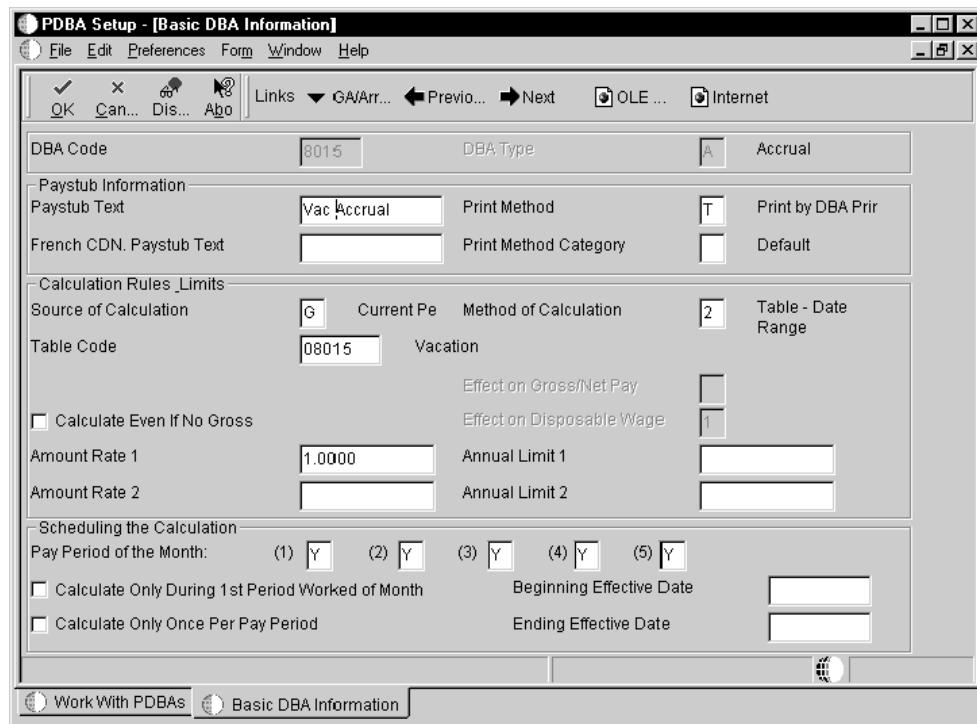
Example: Vacation Rollover for Time Not Immediately Available

Your vacation policy might state the following:

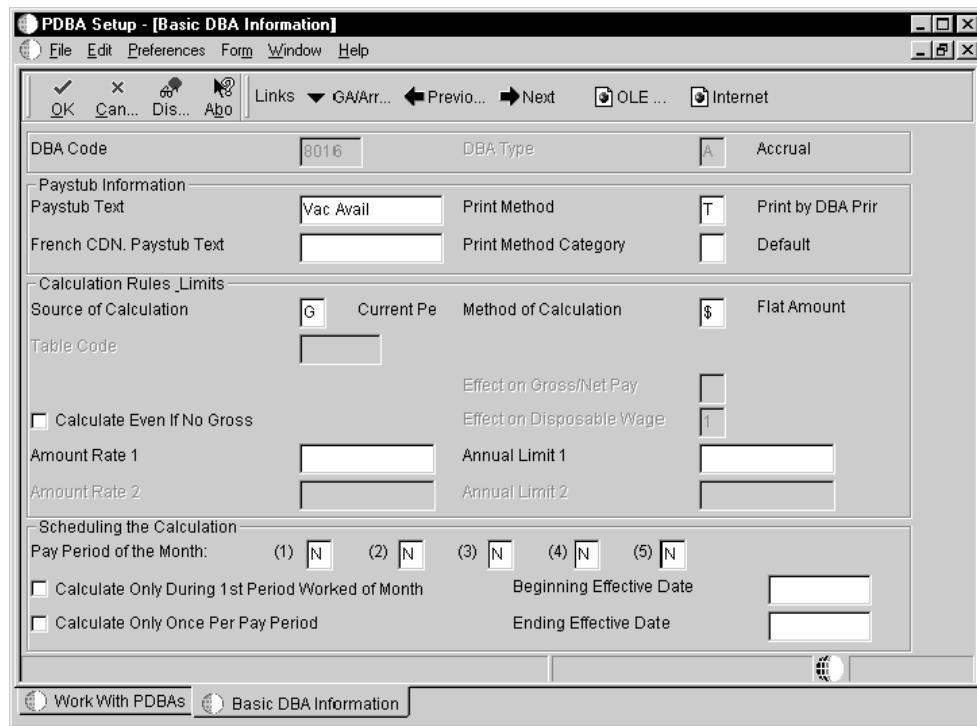
- Employees accrue vacation time at the rate of four to ten hours per month, based on years of employment.
- Employees may take vacation time in the calendar year following the year in which it was earned.

To administer this vacation policy, you would set up the following:

- A pay type (such as 815, Vacation Pay) that tracks the vacation time that an employee takes.
- An accrual (such as 8015, Vacation) that tracks the vacation time that an employee earns. The accrued time rolls over to a second DBA that tracks the available vacation time. Accrued time is not available until it rolls over.



- An accrual (such as 8016, Vacation Available) that tracks the vacation time that is available to the employee. You can use the accrual rollover table associated with this second accrual to establish the limit on the number of hours that can roll over into the following year.



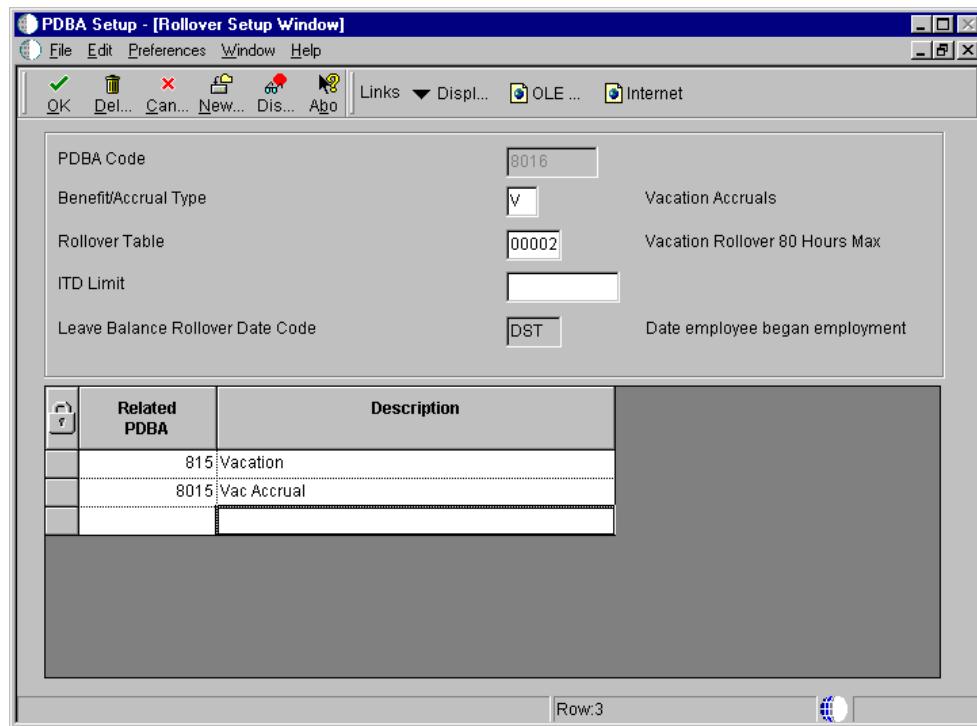
When you set up accrual 8016, Vacation Available, you would enter the following rollover information:

- In the Benefit/Accrual Type field, enter V (Vacation Pay).
- In the Rollover Table field, enter the table code of the rollover table that you just created so that only the specified amount rolls over.

Note

If you specify a limit in the ITD Limit field, the system ignores any table code that you might have entered in the Rollover Table field. When you specify a limit in the ITD Limit field, the system assumes that you roll over amounts only up to the maximum hours that you specified. For more information about using the ITD Limit field, see *Example: Vacation Rollover with an Inception-To-Date Limit*.

-
- In the Related PDBA field, enter the number of the pay type used for vacation pay.
 - In the next Related PDBA field, enter the DBA number of the accrual that represents accrued but not yet available hours.



When you run the rollover program, the system calculates the balance to roll over by adding the accumulated accrual amount and available balances, subtracting the vacation time that has been taken, and limiting the carryover amount, if you entered a rollover table, so that it does not exceed the amount entered in the rollover calculation table.

You cannot enter any information on the Rollover Setup Window for accrual 8015. The Rollover Setup Window is only maintained for the available accrual, 8016.

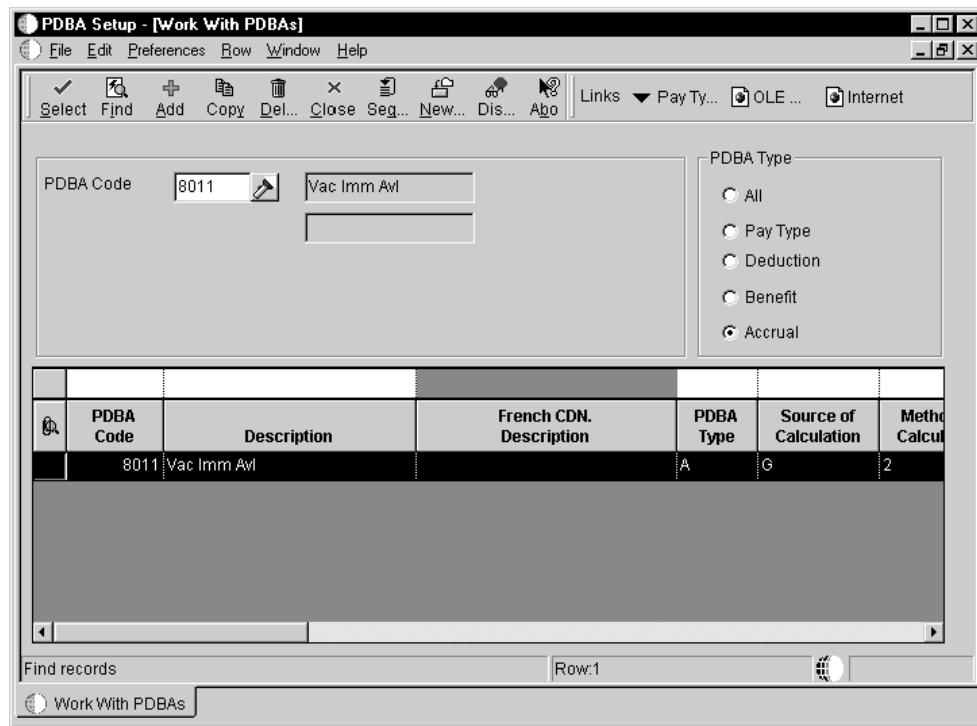
Example: Vacation Rollover for Time Immediately Available

Your vacation policy might state the following:

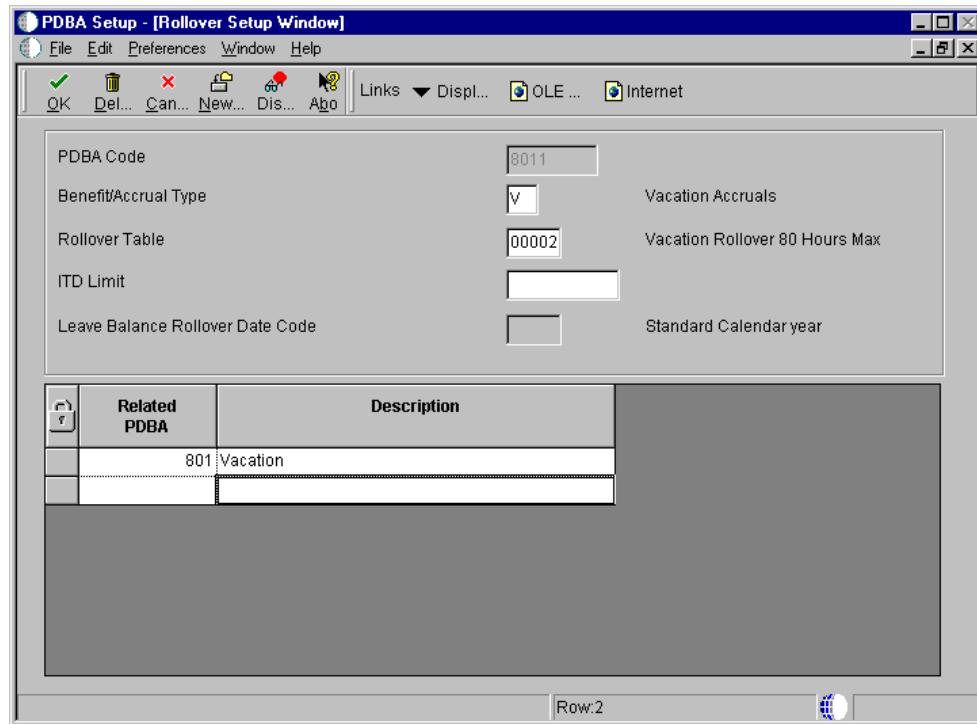
- Employees may take vacation time as it is earned.
- Employees accrue vacation time at the rate of four to ten hours per month, based on years of employment.
- Employees cannot roll over more than 80 hours to the next year.

To administer this vacation policy, you would set up the following:

- A pay type (such as 801, Vacation Pay) that tracks the vacation time that an employee takes
- An accrual (such as 8011, Vacation) that tracks the vacation time that an employee earns



When you set up accrual 8011, you would set up the following rollover information:



- In the Benefit/Accrual Type field, enter V (Vacation Pay).

- In the Rollover Table field, enter the table code of the rollover table that you just created so that only the specified amount rolls over.

Note

If you specify a limit in the ITD Limit field, the system ignores any table code that you might have entered in the Rollover Table field. When you specify a limit in the ITD Limit field, the system assumes that you roll over amounts only up to the maximum hours that you specified. For more information about using the ITD Limit field, see *Example: Vacation Rollover with an Inception-To-Date Limit*.

- In the Related PDBA field, enter the number of the pay type used for vacation pay (801).
- In the next Related PDBA field, enter pay type 801 as the pay type that the system uses to calculate the balance for accrual 8011.

When you run the rollover program, the system calculates the balance to roll over by subtracting the vacation time that has been taken from the vacation time earned, and limiting the carryover amount so that it does not exceed the amount entered in the rollover calculation table.

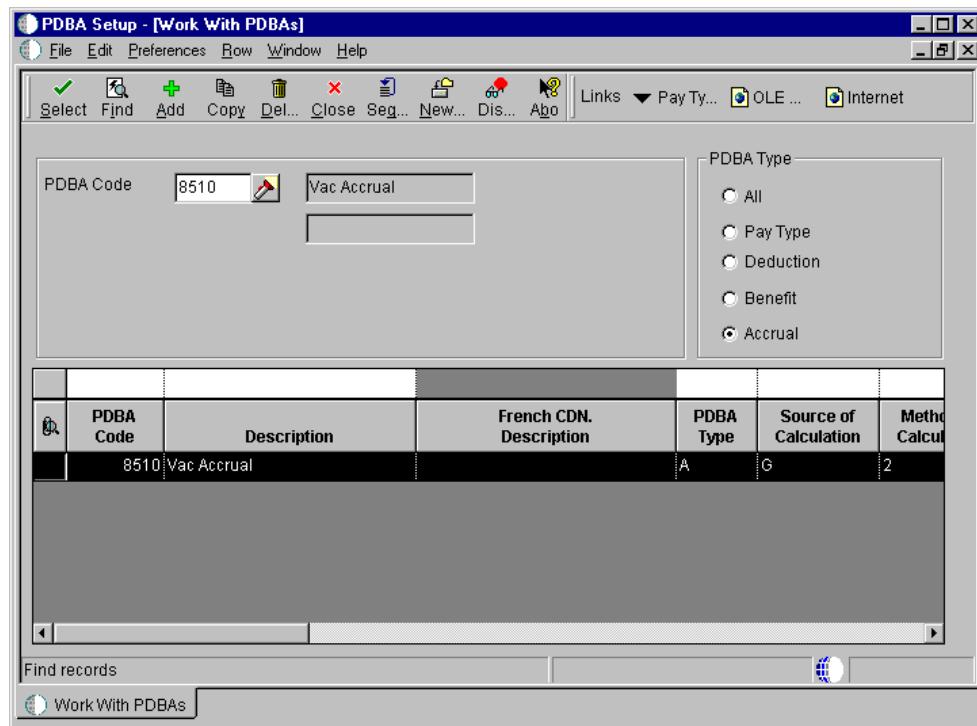
Example: Vacation Rollover with an Inception-To-Date Limit

Your vacation policy might state the following:

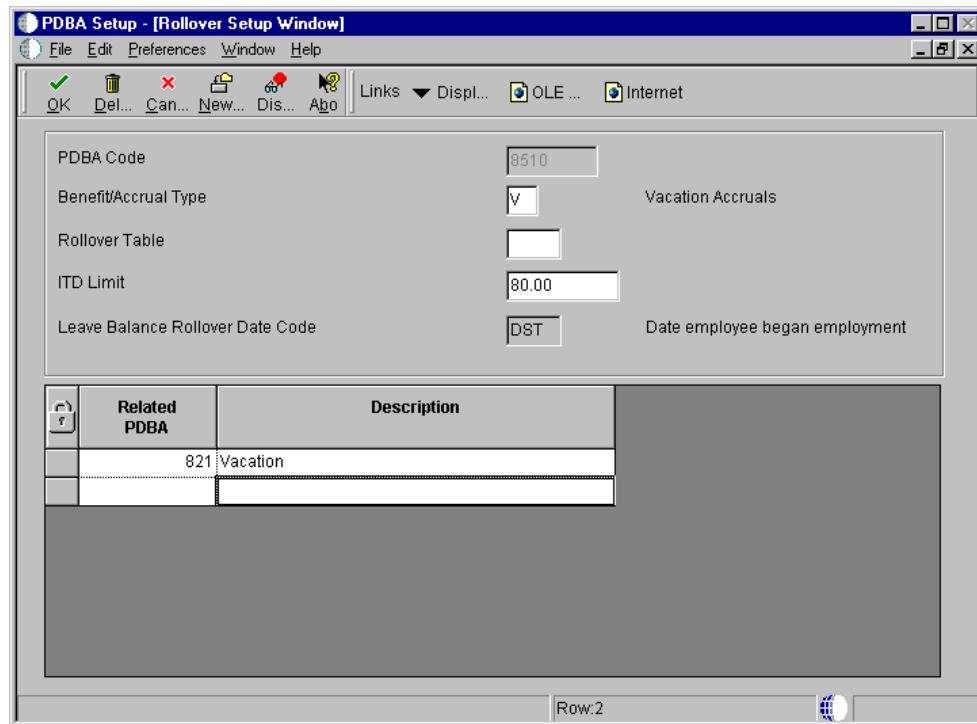
- Employees may take vacation time as it is earned.
- Employees accrue vacation time at the rate of six hours per pay period, and your organization processes semi-monthly payrolls.
- The Inception-To-Date (ITD) limit is 80 hours, that is, employees cannot have more than 80 hours available at any given time.

To administer this vacation policy, you would set up the following:

- A pay type (such as 821, Vacation) that tracks the vacation time that an employee takes
- An accrual (such as 8510, Vac Accrual) with an ITD limit of 80 that tracks both the vacation time that an employee earns and the vacation time that the employee has available



When you set up DBA 8510, you would set up the following rollover information:



- In the Benefit/Accrual Type field, enter V (Vacation Pay).

- In the ITD Limit field, enter 80.

Note

If you enter the table code of a rollover table in the Rollover Table field and specify a limit in the ITD Limit field, the system assumes that you roll over amounts only up to the maximum hours that you specified in the ITD Limit field and ignores the table code that you entered.

- In the Related PDBA field, enter the number of the pay type used for vacation pay (821).

When you process a payroll cycle, the DBA calculation program in pre-payroll uses the associated pay type code to calculate the net balance, that is, the employee's accrued hours for the year minus the taken amount. When the system calculates the employee's accrual for the pay period, it knows that the employee cannot have a balance greater than the ITD Limit (80 hours in this example), so it adds only enough hours to reach that limit. You do not need to run the rollover program, because the ITD limit ensures that the employee never has more available hours than the limit amount that you specified.

For example, suppose that, in the middle of the year, an employee has a balance of 78 hours of vacation. The next time you process payroll, the system calculates the employee's regular six-hour accrual. Because the employee has an ITD limit of 80 hours, the program adds only two hours to DBA 8500 ($80 - 78 = 2$). The remaining 4 hours are lost.

Suppose that this same employee took a vacation before you processed the payroll and charged 30 hours of vacation time to pay type 821. When you process the payroll, the system calculates the vacation time balance ($78 - 30 = 48$) and the employee's regular six-hour accrual, and then adds the accrual to the balance for a new balance of 54 hours. Every time that you process payroll, the system continues to calculate the full amount of the accrual and add it to the balance up to, but not exceeding the 80 hour ITD limit.

Note

You use the ITD limit in a single-DBA situation, that is, when you set up one DBA that tracks both time earned and time available. You typically do not use the ITD limit in a dual-DBA situation, that is, when you set up both an accrual DBA code and an available DBA code.

Before You Begin

- Set up the pay types that you will use to calculate balances for DBAs that require rollover information.

► To create rollover calculation tables for DBAs

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose Calculation Tables.

1. On Work With Calculation Tables, click Add.
2. On Calculation Table, enter R in the following field:
 - Table Type
3. Complete the following field:

- Table Code

4. Enter VR in the following field:
 - Table Method
 5. Enter the number of months of service from the original hire date in the following fields:
 - Lower Limit
 - Upper Limit
 6. Complete the following field to specify the carryover limit and click OK:
 - Amt./Rate

See Also

- #### *Setting Up Calculation-Table Information*

► To set up rollover information for DBAs

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA setup.

1. On Work With PDBAs, complete the steps for setting up basic DBA information for an accrual.

See [Setting Up Basic DBA Information](#).

Note

When you set up a lost DBA, on Basic PDBA Information, you should set up the DBA as a flat amount and set all of the Pay Period of the Month fields to N, so that the DBA does not calculate. Because lost DBAs should never be used for any calculations, J.D. Edwards recommends that you use the numeric transaction codes 9001-9999 to define your lost DBAs.

2. On Work With PDBAs, choose Advanced DBA Info from the Row menu.

3. On Advanced DBA Information, complete the following field:

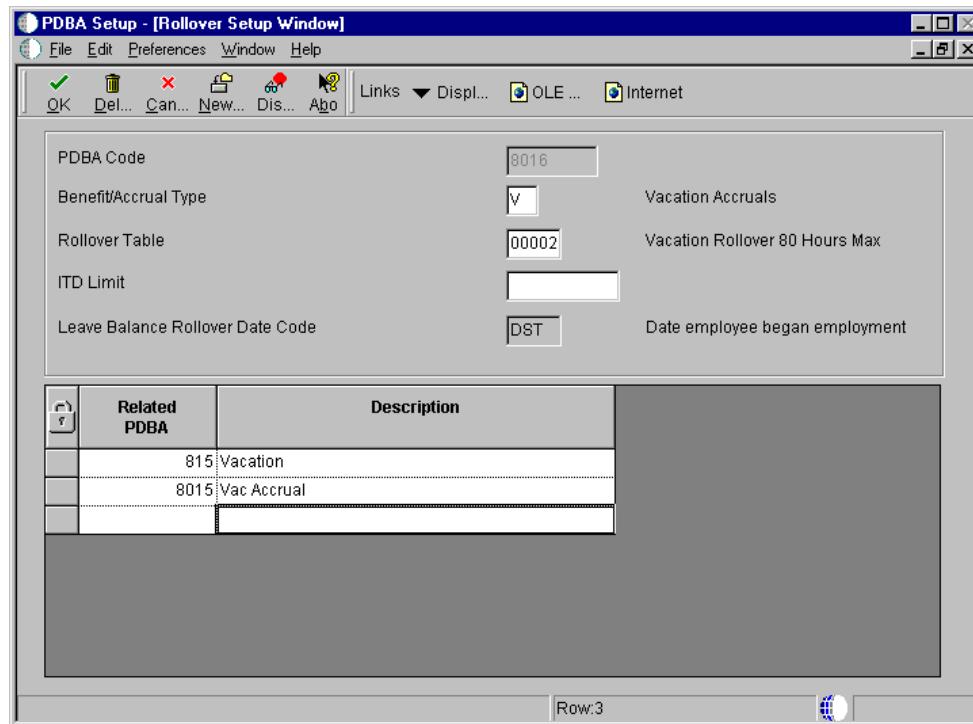
- Leave Balance Rollover Date Code

4. Complete the steps for setting up advanced DBA information.

For more information about advanced DBA information, see [Setting Up Advanced DBAs](#).

5. On Work With PDBAs, choose Rollover Setup from the Row menu.

6. On Rollover Setup Window, enter the table code for the rollover calculation table that you created to define carryover limits.



7. Complete the following fields and click OK:

- Benefit/Accrual Type
- Rollover Table

- ITD Limit
- Related PDBA

If you complete both the Rollover Table field and the ITD Limit field, the system can only apply one of those limits. A value in the ITD limit overrides any limit defined via the rollover table.

Note

On the Rollover Setup window, you cannot relate more than one accrual code to a single available DBA code. But you can relate more than one taken pay type to a single available DBA code.

You do not need to enter additional rollover information for a wage-attachment DBA. Wage-attachment balances are inception-to-date and do not need to be rolled over.

Setting Up Limits for Tax-Deferred Compensation Deductions

You set up a tax-deferred compensation deduction when you are deducting an amount from the employee's pay for a compensation program that defers taxes until the funds are distributed or until the funds are removed from the plan. In many cases, the government imposes limits on contributions to tax-deferred compensation plans. Your organization might also impose a limit on contributions to these plans. To simplify the process of administering a tax-deferred compensation plan, you can set up the deduction for the plan so that the system stops taking the deduction as soon as a limit is reached.

Before You Begin

- Set up a tax-deferred compensation deduction. See the global solutions guide for your country for instructions.

► To set up limits for a tax-deferred compensation deduction

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click the following option and then click Find:
 - Deduction
2. Choose a record in the detail area and then click Select.
3. On Basic DBA Information, choose Advanced DBA Info. from the Form menu.

The screenshot shows the 'Advanced DBA Information' window in the PeopleSoft interface. At the top, there are buttons for OK, Cancel, and Tools. The main area is divided into sections:

- Limit Rules:** Contains fields for Limit on Pay Period Dollars, Limit on Monthly Dollars, Limit on Quarterly Dollars, Annual Limit 1 (value: 11,000.00), Annual Limit 2, DBA For Prior Limit, Group Limit Code (value: A), Limit Method, Calendar Month Method, and Leave Balance Rollover Date Code.
- Minimum Maximum Rules:** Contains fields for Limit on Pay Period Percent - Minimum and Maximum Hours, and Limit on Pay Period Percent - Maximum and Maximum Hours.
- Additional DBA Rules:** Contains checkboxes for Calculate for all Emp, Declining Balance, Number of Periods, Include in Union Plan, and Investment Group Codes, along with fields for Pay Class(H/S/P), Home Company, Tax Area (Work), Amount Due, No. of Deductions, and Spending Account Type.

4. On Advanced DBA Information, complete any of the following fields to set up limit rules:
 - Limit on Pay Period Dollars
 - Limit on Monthly Dollars
 - Limit on Quarterly Dollars
 - DBA For Prior Limit
 - Group Limit Code
 - Limit Method
 - Calendar Month Method
5. To set up minimum and maximum rules, complete any of the following fields and click OK:
 - Limit on Pay Period Percent - Maximum
 - Limit on Pay Period Percent - Minimum
 - Minimum Hours
 - Maximum Hours

Setting Up Category Codes for DBAs

You set up category codes for DBAs as a way to group DBAs for reporting purposes that might be necessary for your organization. You use category codes to track and store information about DBAs that is not tracked and stored by other fields in the DBA setup. You can use category codes 1 through 10 for these purposes.

See Also

- UDCs, UDC Types, and Category Codes*

► **To set up category codes for DBAs**

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, to designate whether this is a deduction, benefit, or accrual, click the corresponding PDBA type and click Add.
2. On Basic DBA Information, complete the applicable steps for setting up essential DBA information.

See [Setting Up Basic DBA Information](#).

3. Choose Category Codes from the Form menu.
4. On Category Codes Revisions, you can enter up to ten different category codes. Complete one or more of the Category Code fields and click OK.

Setting Up a DBA Based on Another DBA

You set up a DBA based on another DBA to use a value that has already been calculated (from the based-on DBA) to calculate the DBA that you are setting up. For example, you set up an employer match benefit for a retirement plan that is based on a retirement plan deduction that has already been set up to deduct a certain amount from an employee's pay.

If DBAs are based on other DBAs, you must assign numbers to those transactions accordingly. The system calculates DBAs in numeric order, from low to high. For example, if your company matches an employee's contribution to a retirement plan based on payroll deductions, the DBA code for the employee's payroll deduction must be the lower number of the two so that the system calculates it before calculating the matching DBA.

► **To set up a DBA based on another DBA**

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, to designate whether this is a deduction, benefit, or accrual, click the corresponding PDBA type and click Add.
2. On Basic DBA Information, complete the steps for setting up essential DBA information.

See [Setting Up Basic DBA Information](#).

3. Choose Basis of Calc. from the Form menu.
4. On Basis of Calculation, complete the following fields with the DBA code that the DBA is based on:
 - From PDBA

- Thru PDBA
5. Click OK.

Setting Up Advanced DBAs

You can set up many different types of DBAs. The following tasks are examples of some advanced DBAs that you might set up for your company. These tasks do not include every possible scenario, but represent some typical situations in which you need a DBA to perform a specialized function.

Some organizations grant employees loans, or cash advances, from their future earnings. For example, on the 10th of the month, an employee might request a 100.00 advance. If you grant the employee the advance, you need to deduct 100.00 from the payment that the employee receives on the 15th of the month. You can set up an advance deduction to deduct the cash advance from the employee's payment.

You can set up several types of DBAs to manage situations in which an employee's net pay is less than zero. The Payroll system does not print payments for amounts that are less than zero. For example, some employees, such as commissioned sales people, might have a pay period in which they have no gross earnings, or they do not have enough gross earnings to pay for all of their deductions. To track employees' pay and deductions in these instances, you can set up a deduction that adjusts negative net pay, or you can set up an overpayment deduction that allows you to take the missed deductions in future pay periods, when the employee has enough earnings to pay for them. You can also set up a DBA to calculate even in pay periods when an employee has no gross earnings.

Setting Up an Advance Deduction

You set up an advance deduction for an employee to pay back a dollar amount advanced by the employer against an employee's earnings. An advance deduction DBA allows you to set up a declining balance that is active until the amount due equals zero.

► To set up an advance deduction

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, complete the steps for setting up essential DBA information.

See [Setting Up Basic DBA Information](#).

3. From the Form menu, choose Advanced DBA Info.
4. On Advanced DBA Information, complete the following field:
 - Amount Due
5. To continue this deduction until the value in the Amount Due field equals zero, click the following option:
 - Declining Balance
6. To define the number of pay periods for which the deduction will be taken, complete the following fields:

- Number of Periods
 - No. of Deductions
7. Review the value in the following field:
- Calculate for all Emp
8. Click OK.

Setting Up a Deduction DBA to Adjust Negative Pay

If an employee's gross pay does not cover the amounts to be deducted, the system adjusts deduction amounts to increase the net pay to zero. The system does not allow negative net pay situations. You can set up deductions to control this adjustment process. Depending on the deduction's arrearage rule, one of the following occurs:

- The system adjusts the deduction either partially or for the full amount.
- The system puts the adjusted amount in arrears and makes the adjustment the next time that the employee is paid.
- The system puts the adjusted amount in arrears and makes the adjustment each time the employee is paid within the same pay period but does not carry any remaining balance forward into the next pay period.

The system adjusts negative pay in different ways depending on the arrearage method that you use:

P, blank, F When all or part of the deduction cannot be taken and you have set up the DBA with one of these arrearage methods, the system:

- Reduces the deduction.
- Attempts to collect the amount each time the employee is paid during the current pay period.
- Attempts to collect the amounts in a future pay period. That is, the DBA is placed in arrears.

Amounts not taken appear on the Deductions Not Taken report, which the system generates during pre-payroll processing.

Q, R, G, H When all or some part of the deduction cannot be taken and you have set up the DBA with one of these arrearage methods, the system:

- Reduces the deduction.
- Attempts to collect the amount each time the employee is paid during the current pay period.
- Attempts to collect the amounts in a future pay period. That is, the DBA is placed in arrears.

Amounts not taken appear on the Deduction Arrearage report, which the system generates during pre-payroll processing.

S, T, I, J When all or some part of the deduction cannot be taken and you have set up the DBA with one of these arrearage methods, the system:

- Reduces the deduction.
- Attempts to collect the amount each time the employee is paid during the current pay period.
- Does *not* hold the amounts over to collect them in a future pay period. That is,

the DBA is placed in arrears for the current pay period only. Amounts not taken appear on the Deduction Arrearage report, which the system generates during pre-payroll processing.

Note

The system will not create journal entries for adjusted and arreared amounts until the deduction is actually withheld. The system posts only the actual amounts deducted as journal entries.

Example: Payroll Calculations to Adjust Negative Pay

The When to Adjust Deductions field and the Order to Adjust Deductions field allow you to determine the sequence that the system uses to deduct the DBAs:

Gross Deductions_DBA Code

Union	#3000
Health	#1000
Savings	#2000
401(k)	#7000
Advance	#9000

Taxes**Negative Net Pay****Gross Deductions_DBA Code**

Union	#3000
Health	#1000
Savings	#2000
RRSP	#7700
Advance	#9000

Taxes**Negative Net Pay**

The system adjusts the DBAs in the following order if the When to Adjust Deductions field is 0 (default) and the Order to Adjust Deductions field is blank:

1st -	#9000	Advance
2nd -	#7000	401(k)
3rd -	#3000	Union
4th -	#2000	Savings
5th -	#1000	Health
Last -		Taxes

1st -	#9000	Advance
2nd -	#7700	RRSP
3rd -	#3000	Union
4th -	#2000	Savings
5th -	#1000	Health
Last -		Taxes

When net pay goes below zero or minimum pay, the system adjusts deductions in a high to low order, from DBA code 9999 to DBA code 1000. For example, DBA #8611 would be

adjusted before #5322. You can override the order by using the When to Adjust Deductions and Order to Adjust Deductions fields.

These two fields allow you to control how the deductions are adjusted. You can group deductions into three groups so that one group is adjusted before the other two. You can also assign priority numbers within each group.

In this example, you want the Savings and 401(k) or RRSP adjusted (not deducted) before the Advance, Union dues, and Health. Therefore, assign Savings and 401(k) or RRSP a value of 0 in the When to Adjust Deductions field. Assign Advance, Union dues, and Health a value of 1.

The following example illustrates the sequence of adjustments that the system will use to bring the payment balance to zero:

Gross Deductions	DBA Code	When to Adjust Deductions
Union	#3000	1
Health	#1000	1
Savings	#2000	0
401 (k)	#7000	0
Advance	#9000	1

Taxes

Negative Net Pay

1st #7000 (0)	401 (k)
2nd #2000 (0)	Savings
3rd #9000 (1)	Advance
4th #3000 (1)	Union
5th #1000 (1)	Health
6th	Taxes

Gross Deductions	DBA Code	When to Adjust Deductions
Union	#3000	1
Health	#1000	1
Savings	#2000	0
RRSP	#7000	0
Advance	#9000	1

Taxes

Negative Net Pay

1st #7000 (0)	RRSP
2nd #2000 (0)	Savings
3rd #9000 (1)	Advance
4th #3000 (1)	Union
5th #1000 (1)	Health
6th	Taxes

Company policy might be to deduct the advance from the employee's pay before taxes are deducted. The government will make up any tax inequity with this employee at year end, but the company might not be able to retrieve the advance amount if the company no longer employs the individual. Enter 2 in the When to Adjust Deductions field for the Advance. The sequence of adjustments follows:

<u>1st -</u>	#7000 (0)	401(k)
<u>2nd -</u>	#2000 (0)	Savings
<u>3rd -</u>	#3000 (1)	Union
<u>4th -</u>	#1000 (1)	Health
<u>5th -</u>	Taxes	
<u>6th -</u>	#9000 (2)	Advance

<u>1st -</u>	#7700 (0)	RRSP
<u>2nd -</u>	#2000 (0)	Savings
<u>3rd -</u>	#3000 (1)	Union
<u>4th -</u>	#1000 (1)	Health
<u>5th -</u>	Taxes	
<u>6th -</u>	#9000 (2)	Advance

This example illustrates how the codes in the When To Adjust and Order to Adjust fields would work for one employee. When you set up your DBAs, you must consider how these codes impact all employees using these deductions.

► **To set up a deduction DBA to adjust negative pay**

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
 2. On Basic DBA Information, complete the steps for setting up essential DBA information.
- See [Setting Up Basic DBA Information](#).
3. From the Form menu, choose GA/Arrearage Info.
 4. On General Accounting/Arrearage Information, complete the following fields and click OK:
 - Arrearage Method
 - When To Adjust Ded
 - Order To Adjust Ded
 5. On Basic DBA Information, choose Basis of Calc. from the Form menu.
 6. On Basis of Calculation, complete the following fields and click OK:
 - From PDBA
 - Thru PDBA

Setting Up a Deduction DBA for Overpayment

The system cannot write a payment for a negative amount. Therefore, when an employee's net pay drops below zero and stays below zero, even after all adjustments have been made, the system creates an overpayment. The overpayment amount is the amount needed to bring net pay back to zero. The system treats this amount like an advance to the employee and subtracts the amount from the employee's future pay until the overpayment is repaid.

The system uses a DBA to collect the overpayment. Whenever the system creates an overpayment for an employee, it assigns the DBA to the employee's DBA instructions and

displays the amount on the payroll register. J.D. Edwards ships the Payroll system with DBA 9997 as the DBA for overpayments. You can set up a different DBA number for overpayments if you want to use 9997 for other purposes.

Before You Begin

- Verify that the overpayment processing option on the payroll workbench is set to DBA 9997.
- Assign an account number for DBA 9997 (or the DBA that you want to use for overpayments) in the credit liabilities table in your AAIs to avoid accounting errors. If you use a DBA code other than 9997, you need to set the overpayment processing option on the payroll workbench to the DBA code that you are using.

► To set up a deduction DBA for overpayment

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter 9997 in the following field:
 - DBA Code
3. Enter Overpayment in the following field:
 - Paystub Text
4. Complete the steps for setting up an advanced deduction.

See Setting Up Basic DBA Information.

Setting Up a DBA to Calculate If No Gross Pay

You can set up the system to calculate a DBA to calculate even if no gross pay exists. For example, you can set up a DBA to calculate a benefit when an employee is on a leave of absence.

You might also set up the system to calculate a deduction and place the amount in arrears to be withheld the next payroll cycle. The deduction is included on the Deduction Arrearage report during pre-payroll processing.

► To set up a DBA to calculate if no gross pay

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction or Benefit and then click Add.
2. To calculate the DBA even if the employee has no gross pay, click Calculate Even If No Gross on Basic DBA Information.
3. Enter \$ in the following field:
 - Method of Calculation
4. Complete the steps for setting up essential DBA information.

See Setting Up DBA Information.

5. For a deduction, enter one of the arrearage values in the following field on General Accounting/Arrearage Information (by choosing GA/Arrearage Info. from the Form menu) and click OK:

- Arrearage Method

Setting Up Deductions for Wage Attachments

Before you can enter wage attachment information for employees, you must set up a deduction for each type of wage attachment. Setting up a deduction for a wage attachment is similar to setting up any other kind of deduction. Therefore, only the unique considerations for each type of wage attachment deduction are discussed here.

Wage attachment payments are deducted from an employee's disposable wage (disposable earnings). An employee's disposable wage is the amount that remains after all payments that are required by law have been deducted from the employee's gross wages.

These required payments include:

- Federal income tax
- Social Security tax
- Medicare tax
- State income tax
- State unemployment insurance
- State disability insurance
- State employee retirement systems
- Local and county taxes
- Any other applicable state requirements

Special considerations for a wage attachment deduction include the following:

Effect on disposable wage For a wage attachment that is required by law, you should indicate that the attachment is a mandatory deduction when you specify its effect on disposable wage.

Calculation once per pay period Typically, you set up the system to calculate a wage attachment deduction only once per pay period. Therefore, if an employee receives a payment (such as a bonus) in addition to a regular payment, the wage attachment payment is deducted only from the regular payment.

Accounts payable integration If your Payroll system is integrated with the J.D. Edwards Accounts Payable system, you can set up a wage attachment DBA to generate vouchers.

See [Setting Up Voucher Information for DBAs](#).

Declining balances When you set up a wage attachment deduction, set the Declining Balance field to N (No). The system uses the method of calculation to calculate the declining balance.

Amount due Because wage attachment balances typically vary by employee, you should not enter an amount due for a wage attachment DBA. Instead, you enter the amount due when you assign wage attachments to individual employees.

See [Entering Wage Attachments for Employees](#).

Negative pay situations

You can set up wage attachment deductions to adjust or be placed in arrears in a negative-pay situation. When an employee does not earn enough in a pay period to pay the deduction, the system can place the deduction in arrears.

See [Setting Up a Deduction DBA to Adjust Negative Pay](#).

You set up a garnishment deduction to deduct court-ordered payments resulting from nonpayment of personal debts or overdue child support. The debts on which these imposed payments are based are already past due.

In some cases, you might need to associate fees with a wage attachment. For example, your organization might charge fees for administering garnishments.

You set up a tax levy deduction to deduct court-ordered payments for back taxes that the employee owes.

You set up a wage assignment deduction to deduct ongoing debts, including child support and maintenance, from an employee's earnings.

Setting Up a Garnishment Deduction

You set up a garnishment deduction to deduct court-ordered payments resulting from nonpayment of personal debts or overdue child support. The debts on which these imposed payments are based are already overdue. Because each deduction must match the court orders, you might need to set up separate deductions for different employees.

Before You Begin

- Set up the tables that the system uses to calculate garnishments. See [Setting Up Garnishment Tables](#).

► To set up a garnishment deduction

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter a numeric code from 1 to 7 in the following field:
 - Source of Calculation
3. Enter G in the following field:
 - Method of Calculation
4. Enter the attachment table number for your garnishment tables in the following field:
 - Table Code
5. Complete the steps for setting up essential DBA information.

See [Setting Up Essential DBA Information](#).

Setting Up a Fee Deduction

In some cases, you might need to associate fees with a wage attachment. For example, your organization might charge employees administrative fees for maintaining garnishments.

You set up deductions for fees, and you base those deductions on the deductions for which you are collecting the fees. Fees do not apply to tax levies.

A fee deduction must have a higher DBA number than the deduction on which it is based. For example, you can base fee deduction 1120 on garnishment deduction 1104. You can base a fee deduction on only one deduction. Therefore, even when you charge the same fee for garnishments as for wage assignments, you must set up two fee deductions. Base one fee deduction on the garnishment deduction, and base the other fee deduction on the wage assignment deduction. You specify the based-on deduction number in the basis of calculation for the fee deduction.

When you define a wage attachment for an employee, you assign the fee deduction number to the associated wage attachment.

► To set up a fee deduction

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter 0 (zero) or R in the following field:
 - Source of Calculation
3. Enter \$ or % in the following field:
 - Method of Calculation
4. Complete the steps for setting up essential DBA information.
See [Setting Up Essential DBA Information](#).
5. Choose Basis of Calc. from the Form menu.
6. On Basis of Calculation, complete the following fields for the wage attachment deduction for which you are collecting the fee and click OK:
 - From PDBA
 - Thru PDBA

Setting Up a Tax Levy Deduction

You set up a tax levy deduction to deduct court-ordered payments for back taxes that the employee owes. You set up a tax levy deduction in the same way that you set up any other type of deduction.

Before You Begin

- Set up exemption tables. See [Setting Up Exemption Tables for Tax Levies](#).

► To set up a tax levy deduction

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter a numeric code from 1 to 7 in the following field:
 - Source of Calculation
3. Enter L in the following field:
 - Method of Calculation
4. From the Form menu, choose Advanced DBA Info.
5. On Advanced DBA Information, verify that the following option is inactive:
 - Declining Balance

The wage attachment program calculates the remaining balance for the tax levy.

6. Complete the steps for setting up essential DBA information.

See [Setting Up Essential DBA Information](#).

Setting Up a Wage Assignment Deduction

You set up a wage assignment deduction to deduct ongoing debts, including child support and maintenance, from employees' earnings.

The courts typically rule that child support has priority over other types of wage attachments. This means that if an employee did not earn enough in a pay period to pay for all deductions, the child support deduction should be the last deduction to be adjusted.

To give the child support deduction first priority, assign it a lower DBA number than the numbers that you enter for other deductions. During payroll-cycle processing, the system adjusts (backs out) deductions in numerical order, beginning with the highest-numbered deduction. For example, deduction 1001 would be adjusted (backed out) before 1000.

You set up a wage assignment deduction in the same way that you set up any other type of deduction.

► To set up a wage assignment deduction

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter a numeric code from 1 to 8 in the following field:
 - Source of Calculation
3. Enter C in the following field:
 - Method of Calculation
4. Complete the steps for setting up essential DBA information.

See [Setting Up Essential DBA Information](#).

Reviewing the Basis of Calculation Hierarchy

You must enter a basis of calculation for any DBA that you set up. You can enter a pay type, another DBA, or a combination of PDBAs as the basis of calculation for a DBA. You can set up based-on relationships that are relatively complex, thus making it difficult to remember how specific DBAs are used.

To easily review the bases of calculation for multiple DBAs, review the basis of calculation hierarchy. This hierarchy graphically depicts the reporting relationships between PDBAs, even those DBAs that are based on multiple DBAs. For example, a typical hierarchy for 401(k) DBAs shows the following:

- The employer match DBA is based on the employee contribution DBA
- The employee contribution DBA is based on pay types 1 through 999

► To review the basis of calculation hierarchy

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose Basis of Calculations Hierarchy.

1. On Basis of Calculation Hierarchy, complete the following field and then click Find:
 - DBA Code
2. Review the information that appears and then click Close.

Automatic Accounting Instructions for Payroll and Time Accounting

You set up automatic accounting instructions (AAIs) to assign account numbers to journal entries. These account numbers allow the system to distribute labor and equipment billings, payroll disbursement, and actual burden journal entries to specified accounts in the general ledger.

During the payroll cycle, the system creates a journal entry of every calculation for every employee. These calculations include salary and wage expenses, burden, cash disbursements, and liabilities. You can create journal entries for labor and equipment billings and accruals for payrolls that cross accounting periods. After the journal entries are created and assigned account numbers, the system summarizes the entries and passes them to the general ledger.

You can set up rules to summarize journal entries. For example, because full detail exists in payroll, you might not need full detail in the general ledger. You can set up rules to summarize account ranges and business units.

When to Create Journal Entries

The system can create journal entries during any of the following processes:

- A regular payroll cycle.
- The processing of interim checks in a regular payroll cycle.

- The generation of journal entries for timecards using the Time Entry system. You can also generate journal entries for timecards when you need to post in-between payroll cycles.

If you are using J.D. Edwards Payroll, the system initially creates pro forma journal entries during the journal entry step of the payroll cycle. The pro forma journal entries are created in the Payroll Journal table (F063951), and at that time they become part of the Payroll system.

During the final update, the system posts actual journal entries to the Account Ledger table (F0911). At this time, the journal entries are part of the General Accounting system.

If you are using the Time Entry system, the system creates journal entries when you generate journal entries for timecards (R052901). You can then review, revise, and approve journal batches for posting to the general ledger.

See Also

- Processing Journal Entries* for information about generating journal entries for timecards
- Processing Pro Forma Journal Entries* for information about journal entries created during the payroll entry step of the payroll cycle

The General Ledger Account Structure

The system uses the standard business-unit object-subsidiary and subledger account structure. The general ledger account structure is composed of two parts:

- Where - business unit
- What - account number

Business unit is a 12-character, alphanumeric field that is the lowest level of organizational reporting. Each business unit is assigned to a company and can be associated with 20 category codes for higher level reporting. For example:

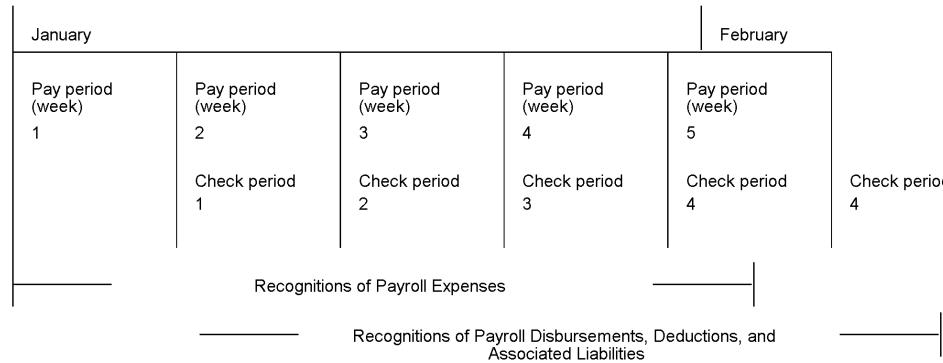
- Department
- Branch
- Asset (revenue and maintenance expense)

The account number identifies whether the account is an asset, liability, or expense. The account number contains two parts:

- Object account, a 6-character, alphanumeric field that is required on all journal entries.
- Subsidiary, an 8-character, alphanumeric field that is optional on journal entries. For example, use this field to identify an employee number, equipment number, or asset number.

Dates That You Associate with Journal Entries

The following chart shows the timing relationships that are important to payroll journal entries:



The following definitions are important in understanding payroll and time accounting journal entries:

General ledger date The date that the system can use for posting to the proper general ledger. The table that defines date ranges for each accounting period is in the Date Fiscal Patterns table (F0008) for the General Accounting system.

For payroll, the system always uses the G/L date.

For stand-alone time accounting, the system uses either the G/L date or the system date as setup in the processing options for Generate Timecard Journals (R052901).

Pay period ending date The last day of the pay period, as defined in your Master Pay Cycles.

Payment date The payment date of the pay period, as defined in your Master Pay Cycles.

Work date The actual date entered on a timecard.

Transition period Any pay period that has working days in two accounting periods.

Accounting period ending date The last day of the general accounting period.

Cost period The pay period that can be used with the creation of payroll journal entries for a transition period. Journal entries for those timecards with work dates that fall into the

preceding accounting period are assigned a general ledger date equal to the last day of the preceding accounting period. Journal entries for those timecards with work dates in the succeeding period are assigned a general ledger date equal to the pay period ending date in pre-payroll processing.

Override date	When defined in the journal entries step of the payroll cycle, the date that is used as the general ledger date for all payroll journals.
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Payroll Journal Entries

When journal entries are created in the payroll cycle, the system assigns a general ledger date using a date associated with the payroll, such as pay period ending date or payment date. You define the general ledger date to be used for labor distribution and burden journals (T2, T3, T4, and T5) in the payroll journal entries step of the payroll cycle. Cash disbursement and liability journals (T1 and T7) use the payment date as the general ledger date. The accrual factor, a method for allocating a percentage of the T1s, T2s, and T3s back to a prior month, creates an accrual entry (T6).

The Pay Cycle Review tracks your choice of general ledger date for labor distribution to reference when you submit the next payroll.

You can define an override date when you submit the journal entry creation job. The override date that you define becomes the general ledger date for all journal entries created for all document types.

You can also use an accrual factor to allocate a portion of your T1, T2, and T3 entries back to a prior month. For example, if 40% of the pay period occurs in one month, and 60% of the pay period occurs in the next month, you can enter an accrual factor of 40 to accrue 40% of the T1, T2, and T3 journal entries to the previous month and 60% to the current month. Journal entries that are generated for the previous month use the ending date of that month and entries generated for the current month use the pay period ending date. When you use an accrual factor to create journal entries, the system generates T6 journal entries.

Time Accounting Journal Entries

When you use the Time Entry system to create journal entries, you define in the processing options for Generate Timecard Journals (R052901) whether the system uses the general ledger date or the system date for posting journal entries.

You can also use this process to post timecards between payroll cycles.

Example: Payroll Journal Entry

The following example of a Payroll Cycle Journal is based on the following simple payroll:

1. Employee: Home Company = 1, Home Business Unit = 25, Union = 1000
2. Time Card: 01/28/98 (Pay Code 001) 1,000 USD
3. Payroll Taxes and Insurance (P.T.I.): FICA (Tax Type D & E) 70 USD
4. Payroll Taxes and Insurance (P.T.I.): UIC (Tax Type CC & CD) 70 USD
5. Deductions: Savings Bond (Ded Code 2000) 50 USD
6. Benefits: Union 1000 (Ben Code 6000) 30 USD
7. Payment Date: 02/05/98

Date	Account	Description	DR	CR
Labor Distribution Journals				
01/28/98	1.4205	Wages Payable		1000
01/28/98	25.8115	Labor Expenses	1000	
			1000	1000
Actual Burden Journals				
01/28/98	25.8146	Union Fringe	30	
01/28/98	25.8135	FICA Burden	70	
01/28/98	25.8135	UIC Burden	70	
01/28/98	1.4333.FR	Burden Clearing - Fringe		30
01/28/98	1.4333.TX	Burden Clearing - Tax		140
			170	170
Disbursement Journals				
02/05/98	1.4205	Wages Payable	1000	
02/05/98	1.1110.PAY	Cash in Bank		880
02/05/98	1.4316	Savings Bonds		50
02/05/98	1.4332	Union Fringe		30
02/05/98	1.4212.EE	FICA Employee		70
02/05/98	1.4212.ER	FICA Employer		70
02/05/98	1.4212.EE	UIC Employee		70
02/05/98	1.4212.ER	UIC Employer		70
02/05/98	1.4333.FR	Burden Clearing - Fringe	30	
02/05/98	1.4333.TX	Burden Clearing - Tax	70	
			1100	1100

Codes That Are Used to Identify Journal Entries

When the system creates a journal entry for the general ledger, it codes the journal entry with a document type and reference number. The document type is a two-character code that classifies journal entries into one of seven document types:

- *Type T1 - Payroll disbursement*
- *Type T2 - Labor distribution and flat burden*
- *Type T3 - Actual burden*
- *Type T4 - Labor billing distribution*
- *Type T5 - Equipment distribution*

- *Type T6 - Payroll accruals and deferrals*
- *Type T7 - Payroll vouchers*

For release B73.3.1, you can create journal entries for the following document types:

Document types for payroll	<ul style="list-style-type: none"> • T1 Payroll disbursement • T2 Payroll labor distribution • T3 Actual burden • T4 Labor billing distribution • T5 Equipment distribution • T6 Payroll accruals and deferrals • T7 Payroll vouchers
Document types for time accounting	<ul style="list-style-type: none"> • T2 Payroll labor distribution • T3 Actual burden (when you calculate monthly benefits) • T4 Labor billing distribution • T5 Equipment distribution

The reference number, composed of journal type and the general ledger date, or another date used on journal entries, further identifies the source of each journal entry within a document type.

The reference number of a journal entry becomes the Reference 2 value in the actual Account Ledger table (F0911).

Document Type T1 - Payroll Disbursement Journal Entries

Document type T1 contains all journal entries associated with the writing of payments. The journal entries include cash-in-bank, relief of accrued wages, deduction, tax and benefit liabilities, and burden clearing entries.

The system creates T1 journal entries in the payroll cycle only.

All T1 journal entries carry the same general ledger date, that is, the payment date or the override date.

The specific journal types used for these journal entries include the following:

AL	Accrued liabilities (deductions, benefits)
AT	Accrued liabilities (taxes)
AW	Accrued wages - debit entry
CF	Burden offset (clearing) - Fringe - debit entry
CT	Burden offset (clearing) - Taxes - debit entry
DA	Auto-deposit amount
DP	Printed computer payments
IC	Intercompany settlements

Document Type T2 - Labor Distribution Journal Entries

The system creates journal entries for document type T2 directly from timecards for labor expenses and associated offsets for accrued wages. You can also generate journal entries to allocate an estimated or flat burden expense.

The system creates T2 journal entries during the payroll cycle or when you generate timecard journal entries using the Time Entry system.

Four possible general ledger dates exist for journal entries created during the payroll cycle:

Work date	The general ledger date is the work date on the timecard.
Period ending	The general ledger date is the pay period ending date.
Cost period	The cost period can be used with the creation of payroll journal entries for a transition period. Journal entries for those timecards with work dates falling into the preceding accounting period are assigned a general ledger date equal to the last day of the preceding accounting period. Journal entries for those timecards with work dates in the succeeding period are assigned a general ledger date equal to the pay period ending date in pre-payroll processing.
Override date	You provide an override date when you submit the journal entry creation job. The date that you define becomes the general ledger date for all journal entries.

If you are using Payroll, define which general ledger date to use for T2s in the payroll journal entry step of the payroll cycle. When you generate timecard journal entries using the Time Entry system, you must specify whether the system uses the general ledger date or the system date in the processing options for the Generating Timecard Journal Entries program.

The specific journal types used for labor distribution journal entries are as follows:

AW	Accrued wages - credit entry
FB	Flat burden expense - debit entry
FC	Flat burden offset (Clearing) - credit entry
LD	Labor distribution straight time - debit entry
PR	Labor distribution premium time - debit entry
IC	Intercompany settlements

Document Type T3 - Actual Burden Journal Entries

The system calculates company-paid payroll taxes, insurance, and benefits on an employee-by-employee basis. These expenses are collectively referred to as burden. Actual burden journal entries are created when the employee burden expenses are allocated to expense accounts based on the individual timecards entered for each employee.

The system generates journal entries for document type T3 during either the payroll cycle or when you generate timecard journal entries using the Time Entry system.

Actual burden journal entries carry the same general ledger date as the associated labor expense.

The specific journal entry types used for actual burden journal entries are the following:

- BF** Fringe burden (benefits and accruals) - debit entry
- BT** Payroll tax and insurance burden (PTI) - debit entry
- CF** Burden offset (clearing) - Fringe - credit entry
- CT** Burden offset (clearing) - Taxes - credit entry
- IC** Intercompany settlements

Document Type T4 - Labor Billing Distribution Journal Entries

Document type T4 journal entries are for labor billings, also known as recharge, and associated revenue offsets.

You use T4 labor billings for the following:

- | | |
|---------------------------|---|
| Billing internally | For example: |
| | <ul style="list-style-type: none">• Charging other departments for maintenance people• Charging a supervisor's billing rate to a job |
| Billing externally | For example, service billing for consulting services |

The system creates these journal entries from the billing rate value. To create T4s for an associated timecard, you must set the Record Type field (originally set up in the Employee Master table) on the timecard to one of the following settings:

- 2 (Payroll and recharge processing)
- 3 (Recharge processing only)

The system creates journal entries for labor billing distribution from timecards during the payroll cycle or when you generate timecard journal entries using the Time Entry system.

Four possible general ledger dates exist for journal entries created during the payroll cycle:

- | | |
|-------------------------------|--|
| Work date | The general ledger date is the work date on the timecard. |
| Pay period ending date | The general ledger date is the pay period ending date. |
| Cost period | The cost period can be used with the creation of payroll journal entries for a transition period. Journal entries for those timecards with work dates falling into the preceding accounting period are assigned a general ledger date equal to the last day of the preceding accounting period. Journal entries for those timecards with work dates in the succeeding period are assigned a general ledger date equal to the pay period ending date in pre-payroll processing. |
| Override date | You can provide an override date when you submit the journal entry creation job. The date that you define becomes the general ledger date for all journal entries. |

If you are using the Payroll system, define which general ledger date to use for T4s in the payroll journal entry step of the payroll cycle. When you generate timecard journal entries using the Time Entry system, you must specify whether the system uses the general ledger date or the system date in the processing options for the Generating Timecard Journal Entries program.

The specific journal types used for labor billing distribution journal entries are as follows:

- RD** Labor billing (recharge) distribution - debit entry
- RO** Labor billing (revenue) offset - credit entry
- IC** Intercompany settlements

Document Type T5 - Equipment Distribution Journal Entries

Document type T5 journal entries designate billings associated with the use of equipment and the offsets for equipment revenue.

The system creates journal entries for equipment distribution from timecards. Equipment distribution journal entries can be generated during either the payroll cycle or when you generate timecard journal entries using the Time Entry system.

Four possible general ledger dates exist for journal entries created during the payroll cycle:

- Work date** The general ledger date is the work date on the timecard.
- Pay-period ending date** The general ledger date is the pay period ending date.
- Cost period** You can use the cost period with the creation of payroll journal entries for a transition period. The system assigns a general ledger date equal to the last date of the preceding accounting period for journal entries for those timecards with work dates that fall into the preceding accounting period. The system assigns a general ledger date equal to the pay period ending date in pre-payroll processing for journal entries for those timecards with work dates that fall in the succeeding accounting period.
- Override date** You can provide an override date when you submit the journal entry creation job. The date that you define becomes the general ledger date for all journal entries.

If you are using the Payroll system, define which general ledger date to use for T5s in the payroll journal entry step of the payroll cycle. When you generate timecard journal entries using the Time Entry system, you must specify whether the system uses the general ledger date or the system date in the processing options for Generating Timecard Journal Entries.

The specific journal entry types used for equipment distribution journal entries are the following:

- ED** Equipment billing distribution - debit entry
- EO** Equipment billing (revenue) offset - credit entry

Set up the credit entry in the equipment AAIs. See [Working with AAIs for Equipment Billing](#).

Document Type T6 - Payroll Accruals and Deferrals

The Payroll system allows you to specify an accrual factor for transition pay periods instead of using the cost-period option of creating payroll journal entries. Through the use of this feature, you can use the accrual factor to accrue a portion of payroll expenses in the previous month and defer the expense to the following month. Prior period entries are made to the last day of the prior accounting period.

The journal entry types for T6 are the same as those for T2, T3, T4, and T5.

The system creates journal entries for document-type T6 during the payroll cycle. Enter the accrual factor (percentage) in the journal entries step of the payroll cycle.

The accrual entries have a general ledger date that is equal to the last date of the prior accounting period. The reference number is equal to the journal entry type plus the original general ledger date.

The deferred entries have a general ledger date that is equal to the date of the original entries.

Document Type T7 - Payroll Vouchers

Document-type T7 journal entries designate accounts payable vouchers.

Document-type T7s are created during the payroll cycle. All T7 journal entries carry the same general ledger date, which is the payment date.

The specific journal-entry types used for payroll voucher journal entries are the following:

- AL** Accrued liabilities - Credit entry
- AT** Accrued taxes - Credit entry

No AAIs exist for T7s. The account numbers are assigned the same way that T1 account numbers are assigned.

Example: Journal Entry with Document and Journal-Entry Types

The following example of a payroll-cycle journal entry is based on the following simple payroll conditions:

- Employee: Home Company = 1, Home Business Unit = 25, Union = 1000
- Timecard: 01/28/98 (Pay Code 001) \$1,000
- Payroll Taxes and Insurance (P.T.I.): FICA (Tax Type D & E) \$70
- Deductions: Savings Bond (Ded Code 2000) \$50
- Benefits: Union 1000 (Ben Code 6000) \$30
- Payment Date: 02/05/98

Type	Journal-Entry Type	Date	Account	Description	DR	CR	Menu Sel.
Type T2 - Labor Distribution Journal Entries							
Type T2 - Labour Distribution Journal Entries							
T2	AW	01/28/98	1.4205	Wages Payable		1000	7
T2	LD	01/28/98	25.8115	Labor Expenses Labor Expenses	1000		2
					1000	1000	
Type T3 - Actual Burden Journal Entries							
T3	BF	01/28/98	25.8146	Union Fringe	30		3
T3	BT	01/28/98	25.8135	FICA Burden	70		3
T3	CF	01/28/98	1.4333.FR	Burden Clearing - Fringe		30	7
T3	CT	01/28/98	1.4333.TX	Burden Clearing - Tax		70	7
					100	100	
Type T1 - Disbursement Journal Entries							
T1	AW	02/05/98	1.4205	Wages Payable	1000		7
T1	DA	02/05/98	1.1110.PA.Y	Cash in Bank		880	4
T1	AL	02/05/98	1.4316	Savings Bonds		50	5
T1	AL	02/05/98	1.4332	Union Fringe		30	5
T1	AT	02/05/98	1.4212.EE	FICA Employee		70	5
T1	AT	02/05/98	1.4212.ER	FICA Employer		70	5
T1	CF	02/05/98	1.4333.FR	Burden Clearing - Fringe	30		7
T1	CT	02/05/98	1.4333.TX	Burden Clearing Tax	70		7

		8		- Tax			
					1100	1100	

The Search Criteria That the System Uses

Company 00000 is the default company in all of the AAI tables. Always start by setting up generic entries in Company 00000. Such entries provide a source for default accounts for all of the various types of journal entries. After you complete table entries for Company 00000, you can set up other companies. Entries for other companies should only be exceptions to the generic rules set up under Company 00000.

Every AAI table includes the Journal Type field, which contains one or more codes identifying the type of journal entry. Each table has a hard-coded set of journal types. Rules for some journal types must be set up. Other rules are optional.

Each time the system creates a journal entry, it follows a hierarchy of search criteria to determine which distribution account to debit or credit. The system begins the search with basic data related to the type of accounting entry, referred to as the search argument. The system creates a search argument from the system data, such as the timecard, and searches the accounting rules tables for the table entry that best matches the search argument information.

On the first search, the system uses data appropriate for that table and looks for a match on all fields in the search criteria section of the form (the entire search argument). Then, one by one, the system drops elements from the search argument until it finds a matching table entry. At the lowest level, the system tries to match only the journal type. In addition, you can have a line in an accounting instruction table that has no search criteria other than the journal type. This is the default line.

The system first searches the rules for a specific company. If it finds no applicable rules (matches) for that company, it continues with the rules for Company 00000.

Setting Up AAIs for Payroll and Time Accounting

You set up automatic accounting instructions (AAIs) for Payroll and Time Accounting to automatically assign account numbers to the journal entries created in the system. You are setting up a series of rules for the system to use to charge time, labor, and equipment billing to certain accounts.

You can set up AAIs for each company and for the default company (Company 00000). It is important to set up AAIs for Company 00000 first so that the system can use these AAIs if it cannot find AAIs for a specific company. However, you cannot set up a business unit for Company 0000 because each business unit can be attached to a different company.

The rules are flexible and changeable within the payroll cycle. For example, labor distribution account numbers can be assigned by company, business unit, group (union), job type, job step, and pay type. You can also define instructions for labor distribution at the employee level for certain employees that need separate instructions.

In addition to defining instructions in the separate AAI tables, you can also set up rules for how the system summarizes journal entries.

Every AAI table includes the Journal Type field, which contains one or more codes identifying the type of journal entry. Each table has a hard-coded set of journal types. Rules for some journal types must be set up. Other rules are optional.

Depending on how you set your processing options, you can either set up and edit multiple AAIs using the multiple edit format or set up and edit a single AAI using the single edit format.

Setting Up AAIs for Labor, Billings, and Equipment Distribution

You set up AAIs for direct labor, billings, and equipment distribution to define accounts for transactions related to labor, labor billing (recharge), and the use of equipment. You do this by defining search criteria for employee or timecard information and the account number information for the system to use in making the labor, billings, and equipment journal entries. All of these transactions are related directly to timecard entries.

You can set up AAIs separately for each company. Always set up generic instructions in Company 00000 first. When searching for AAIs, the system searches for a specific company. If it finds no AAIs for the specific company, it uses the AAIs defined for Company 00000.

The minimum information needed to set up an AAI is the Journal Type field. When you set up direct labor, billings, and equipment distribution AAIs, the following are the minimum setup requirements for Journal Type:

Payroll labor distribution (LD)	Required if you are using employee hourly and salary rates.
Labor billing distribution (RD)	Required if you are using billing (recharge) rates.
Equipment distribution (ED)	Required if you are using equipment rates.

The system accesses this AAI table during time entry as well as during pre-payroll when it creates timecards for autopay employees. The system uses the values from the timecard, which obtains the values from the Employee Master table, other sources, or the overrides that you supply. You use these search criteria fields to assign account numbers based on the specific timecard information.

Note

If you enter an account number in an AAI table, you must first set up that account number in your chart of accounts. When you enter timecards for employees, the system allows you to enter any account number that is set up in your chart of accounts, regardless of whether the account is set up in your AAI tables. When you run the journal entries step of the payroll-cycle process, you will receive errors on your Journal Batch Proof Report for any timecards that contain account numbers that were not set up in the AAI tables. You must either change the account number on the timecard to reflect an account number that is set up in the AAI table, or you must add the account number to the AAI table. After you make the account number corrections, you must reprocess the timecards through pre-payroll.

Search Criteria for Labor Distribution

The system uses certain fields as search criteria to determine a valid account for distribution of labor, billings, and equipment entries. The system searches the following AAIs for a specific company:

8. On the first pass, the system compares the time entry record's business unit, union, job type, job step, and pay type to the search criteria defined in the AAI for labor distribution and attempts to match the AAI search criteria to the appropriate journal type.
9. On each successive pass the system drops a value and uses a different combination of data fields for the search criteria.
10. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example identifies the search criteria that the system uses to match information from the timecard for a specific company:

Business Unit	Union	Job Type	Job Step	Pay Type	Journal Type
100	3000	CARP	APPR	1	LD
100	3000	CARP	APPR		LD
100	3000	CARP		1	LD
100	3000	CARP			LD
100	3000			1	LD
100	3000				LD
100		CARP	APPR	1	LD
100		CARP	APPR		LD
100		CARP		1	LD
100		CARP			LD
100				1	LD

Business Unit	Union	Job Type	Job Step	Pay Type	Journal Type
100					LD
	3000	CARP	APPR	1	LD
	3000	CARP	APPR		LD
	3000	CARP		1	LD
	3000	CARP			LD
	3000			1	LD
	3000				LD
		CARP	APPR	1	LD
		CARP	APPR		LD
		CARP		1	LD
		CARP			LD
				1	LD
					LD

The following example identifies additional search criteria that the system can use to match information from the timecard for Company 00000:

- On the first pass, the system compares the time entry record's business unit, union, job type, job step, and pay type to the rule's search criteria and attempts to match these search criteria fields to the appropriate journal type.
- On each successive pass, the system drops a value and uses a different combination of data fields as search criteria.
- Finally, if no matches exist in the rules for the specific company, the system searches the rules for the default journal type, LD.

Business Unit	Union	Job Type	Job Step	Payment Type	Journal Type
	3000	CARP	APPR	1	LD
	3000	CARP	APPR		LD
	3000	CARP		1	LD
	3000	CARP			LD
	3000			1	LD
	3000				LD
		CARP	APPR	1	LD
		CARP	APPR		LD

Business Unit	Union	Job Type	Job Step	Payment Type	Journal Type
		CARP		1	LD
		CARP			LD
				1	LD
					LD

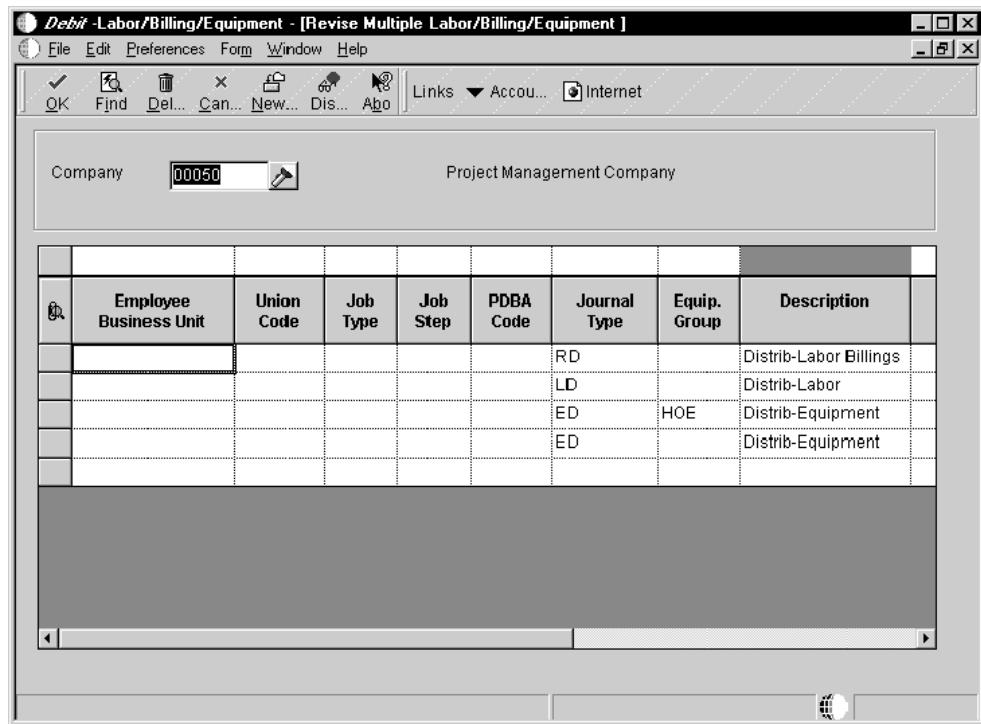
Before You Begin

- ❑ Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts.

► To set up AAIs for labor, billings, and equipment distribution

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit - Labor/Billing/Equipment.

1. On Work With Accounting JE Rules - Labor/Billing/Equipment, click Add.



2. On Revise Multiple Labor/Billing/Equipment, complete the following fields:
 - Company
 - Journal Type
 - Obj Acct

3. Complete the following optional fields:

- Employee Business Unit
- Union Code
- Job Type
- Job Step
- PDBA Code
- Business Unit
- Sub

4. Click OK to save the record.

See Also

- Entering Default Journal Types*
- About Automatic Accounting Instructions for Payroll and Time Accounting*

Processing Options for Debit-Labor/Billing/Equipment (P069043)

Default

1. Enter a '1' for the program to use the Multiple Entry form when selecting a record or when the ADD button has been pressed. When left blank, the program will use the Single Entry form when a selection has been made or when the ADD button has been pressed.

Setting Up AAIs for Burden and Premium Labor Distribution

You set up AAIs to define accounts for actual burden, flat burden, and premium time transactions for labor distribution. You can choose a hierarchy method that controls the search criteria that the system uses to search for accounts .

You can set up AAIs separately for each company. Always set up generic instructions in Company 00000. The system searches for a specific company first. If it finds no instructions for the specific company, it searches for Company 00000.

Burden is defined as the direct expenses that a company incurs for an employee in addition to wages. These expenses include the following:

- Payroll taxes and insurance (PTI) - Company-paid taxes and insurance, such as workers compensation insurance
- Fringe benefits - Company-paid benefits, such as health insurance and company contributions to a 401(k) or RRSP plan

Flat burden considerations

Flat burden:

- Is an estimate that is a predetermined percentage of an employee's gross wages. This estimate is approximate to actual burden costs.
- Distributes the expense in the same amount throughout the entire year.
- Can be calculated per employee, union, or business unit for each timecard

during time entry.

- Is not calculated for lump sum amounts.
- Is a median calculation of actual burden for the year.

Actual burden considerations

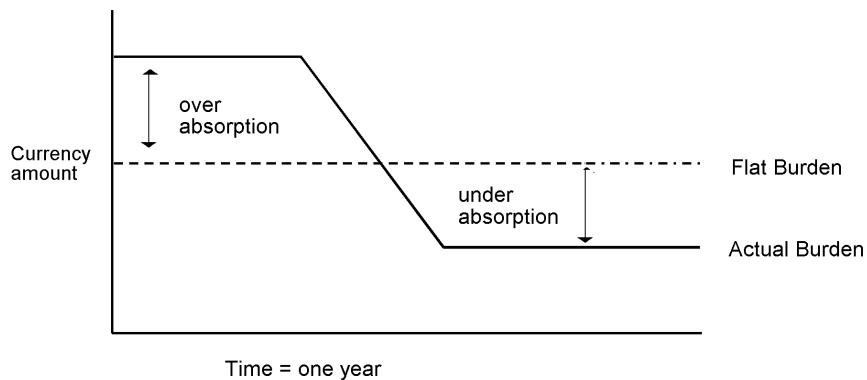
Actual burden:

- Is heavier at the beginning of the year until limits are reached. Examples are FICA, FUI, SUI, and SDI in the U.S.
- Can be turned on and off by company to complete the calculation.

Burden considerations for the Time Accounting system

The Time Accounting system calculates flat burden instead of actual burden.

The following graphic illustrates how expenses are distributed throughout an entire year according to flat burden and actual burden:



When you set up flat burden distribution debit instructions, you must, at a minimum, include the following Journal Type code:

- FB - Flat burden

When you set up premium labor debit instructions, you must, at a minimum, include the following Journal Type code:

- PR - Payroll premium labor distribution

You can have the system split the premium portion of overtime and create separate journal entries for straight time versus premium time. See *Setting Up Company Burden Rules*.

When you set up actual burden distribution debit instructions, you must, at a minimum, include the following default Journal Type codes:

- BF - Burden fringe benefits for actual burden

Use this Journal Type for the burden fringe benefits that you do not want to distribute separately. The system uses the account number associated with this Journal Type when it does not find an entry for a specific fringe benefit.

- BT - Burden taxes for actual burden

Use this Journal Type for the burden taxes that you do not want to distribute separately. The system uses the account number associated with this Journal Type when it does not find an entry for a specific tax.

Search Criteria for Burden Fringe

The system uses certain fields as search criteria to determine a valid account for the distribution of burden fringe entries. The system searches the following AAIs for a specific company:

11. On the first pass, the system compares the time entry record's business unit, object, subsidiary, PDBA code, and journal type to the search criteria defined in the AAI for burden fringe, and attempts to match the AAI search criteria to the appropriate journal type.
12. On the second pass, the system searches for business unit, object, subsidiary, and journal type.
13. On each successive pass, the system drops a value and uses a different combination of data fields for the search criteria. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example illustrates the ways that the system can match information from a timecard for a specific company for burden fringe:

Timecard Business Unit	Timecard Object	Timecard Subsidiary	PDBA Code	Journal Type
1	1340	02200	1000	
1	1340	02200		BF
1	1340		1000	
1	1340			BF
	1340		1000	
	1340			BF

The following list illustrates the ways that the system can match information from a timecard for Company 00000.

Timecard Business Unit	Timecard Object	Timecard Subsidiary	PDBA Code	Journal Type
	1340	02200	1000	
	1340	02200		BF
	1340		1000	
	1340			BF

	00000		1000	
	00000			BF

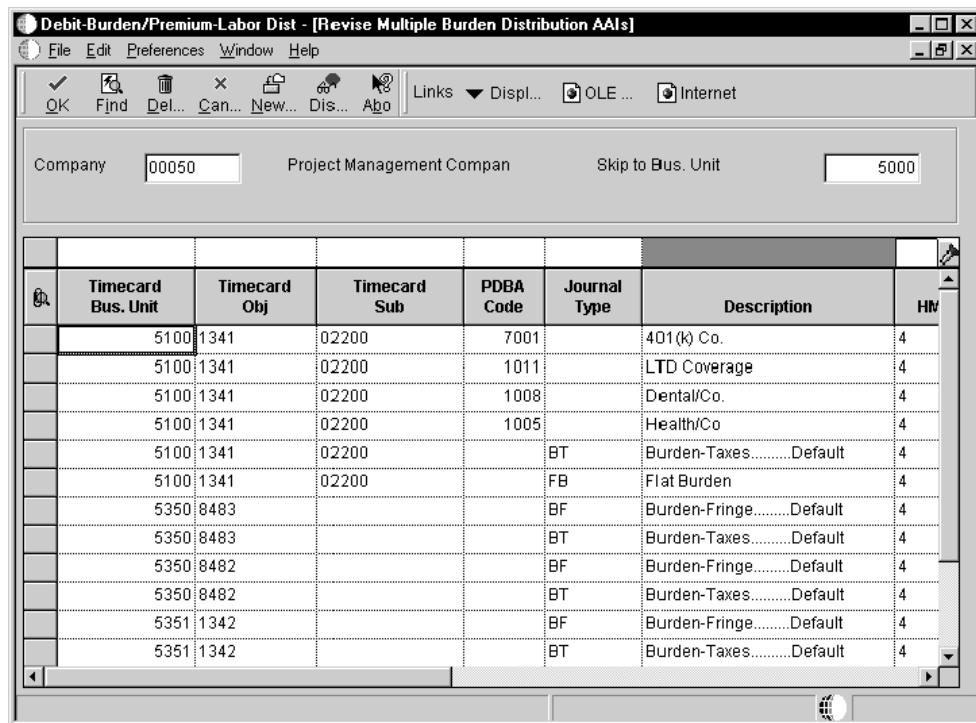
Before You Begin

- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts.

► To set up AAIs for burden and premium labor distribution

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit - Burden/Premium-Labor Dist.

1. On Work With Burden Distribution AAIs, click Add.



2. On Revise Multiple Burden Distribution AAIs, complete the following fields:

- Company
- PDBA Code
- HM

The Hierarchy Method entered controls the Business Unit and the Subsidiary values.

- Obj
3. To set up Company 00000, enter 00000 or a valid object in the following field:
 - Timecard Obj
 4. To set up a specific company, enter a valid object in the following field:
 - Timecard Obj
 5. For tax types and journal types FB and PR, complete the following field:
 - Journal Type
 6. For a specific company, complete the following optional field:
 - Timecard Bus. Unit
 7. Complete the following optional fields:
 - Timecard Sub
 - Bus. Unit
 - Sub
 8. Click OK to save the record.

See Also

- *Entering Default Journal Types*
- *About Automatic Accounting Instructions for Payroll and Time Accounting*

Processing Options for Debit-Burden/Premium-Labor Dist (P069042)

Defaults

1. Enter a '1' for the program to use the Multiple Entry form when selecting a record or when the ADD button has been pressed. When left blank, the program will use the Single Entry form when a selection has been made or when the ADD button has been pressed.
-

Setting Up Company Burden Rules

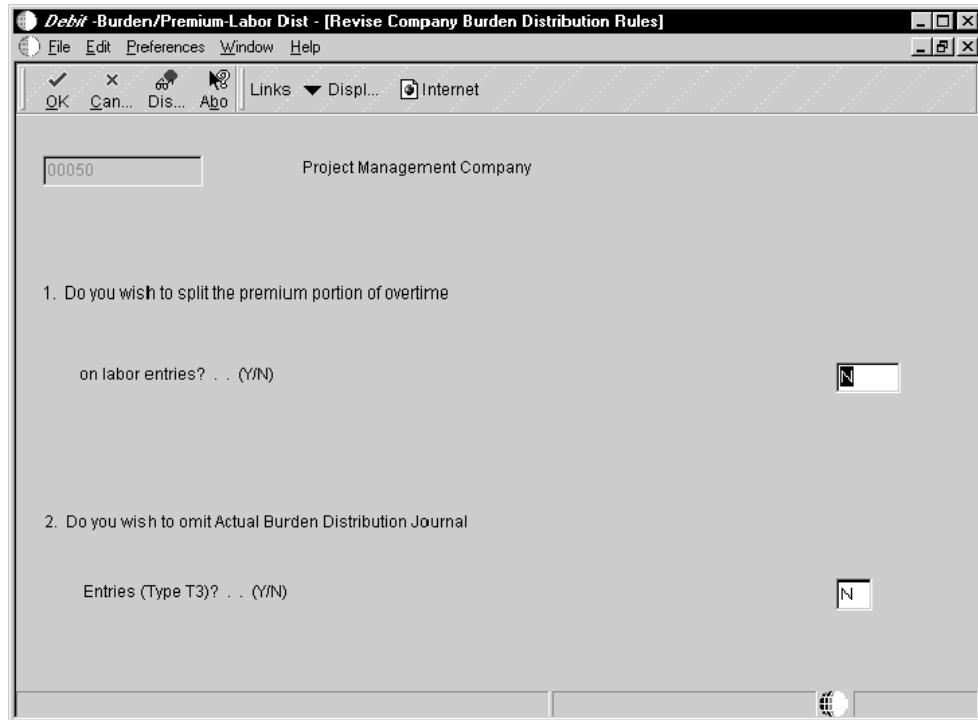
You can set up company burden rules to split the premium portion of overtime into a separate journal entry.

You must set up company burden rules for a specific company. You cannot use Company 00000.

► To set up company burden rules

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit - Burden/Premium-Labor Dist.

1. On Work With Burden Distribution AAIs, complete the following field and click Find:
 - Co
2. From the Row menu, choose CO Burden Rules (Company Burden Rules).



3. On Revise Company Burden Distribution Rules, answer Y or N to the following options and then click OK:
 - 1. Do you wish to split the premium portion of overtime on labor entries?
 - 2. Do you wish to omit Actual Burden Distribution Journal Entries (Type T3)?

Setting Up Business Unit Burden Rules

You can create and store actual burden detail for every timecard. Typically, you need this information for government jobs or for auditing by an outside agency. When you set up business unit burden rules, you define a burden rule that applies to a single business unit. This AAI is useful for tracking detailed cost-plus burden expenses by job and business unit.

If you do not set up burden rules, the system creates T3s but does not write records to the Burden Distribution worktable (F07241) during the payroll process. If you set up burden rules, the Burden Distribution worktable (F07241) is populated, and the Burden Distribution table (F0724) is updated during the final update step of the payroll process.

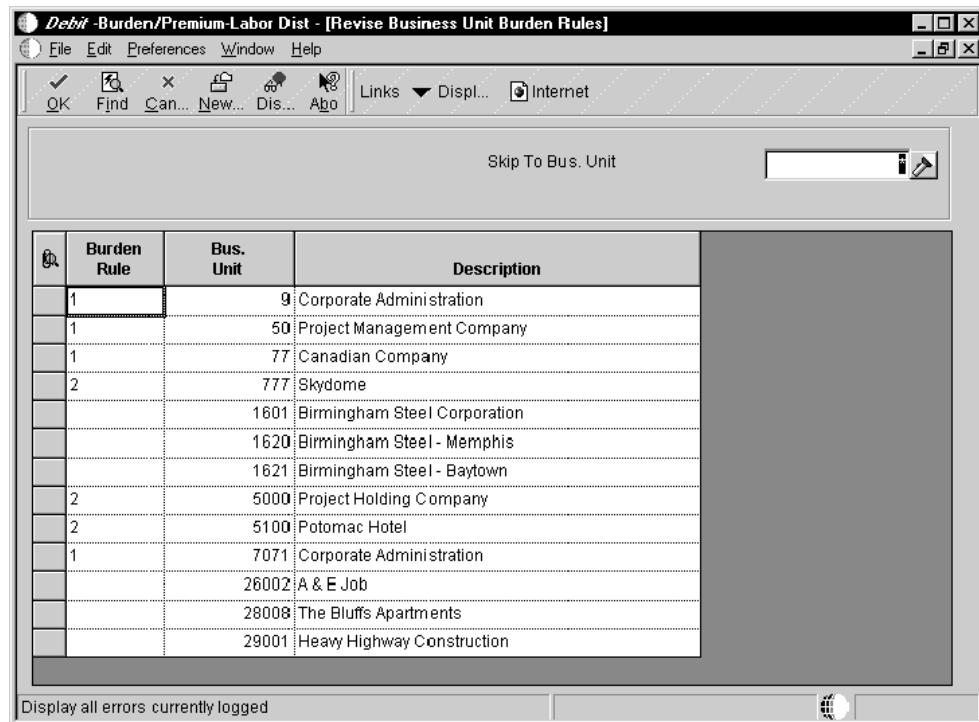
Before You Begin

- ❑ You must set up each business unit for which you want to track burden information in the Business Unit Constants (P059051A). See *Setting Up Business-Unit Constants*.

► To set up business unit burden rules

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit - Burden/Premium-Labor Dist.

1. On Work With Burden Distribution AAIs, from the Form menu, choose BU Burden Rules (Business Unit Burden Rules).



2. On Revise Business Unit Burden Rules, complete the following field and click OK:

- Burden Rule

Setting Up AAIs for Cash-in-Bank Account Distribution

You set up AAIs for cash-in-bank account distribution to define accounts for payroll disbursements. You can define different accounts for the following:

- Cash disbursements
- Computer checks
- Automatic deposits
- Interim manual checks
- Interim computer checks

When you set up cash-in-bank account distribution instructions, you must, at a minimum, set up the default Journal Type DP. You can use other journal types when other types of payments are drawn on different bank accounts.

If you create automatic deposits for interim payments, you must set up Journal Type DD. The Journal Batch Proof report lists payments processed with Journal Type DD as Journal Type DI. These payments are also created in the Account Ledger table (F0911) under Journal Type DI.

The system derives cash-in-bank account numbers during pre-payroll processing. If your cash account is incorrect, after correcting the cash account, you must rerun pre-payroll.

Journal Types	DA - Automatic deposits
	DC - Currency disbursement (cash)
	DD - Interim automatic deposits
	DI - Interim computer checks
	DM - Interim manual checks
	DP - Printed computer checks from payroll cycle
	DF - Create separate payments by business unit

The Journal Type represents the type of payment.

Note

You only set up DF entries if you want the system to create separate payments for each business unit in which an employee works. To generate separate payments for each business unit, you must create an AAI entry using the DF journal type for each business unit in your organization. Each of these entries must also have a unique account number. Journal type DF is not used to derive the account number for payroll payments. Journal type DF is used to derive temporary account numbers that are unique for each business unit.

For example, if an employee works in two different business units during a pay period, you would set up an entry in the Cash-in-Bank Account AAI table for each business unit using journal type DF. You would also assign a unique account number to each of these entries. Then, by referencing the business unit on each of the employee's timecards, the system would create two separate payments for the employee.

Temporary account numbers from the DF entries are used to create separate payments in one of the following ways:

- Using the Time Entry Interim Generator, the DF account number is assigned to the GL Bank Account field (GLBA) on the payment record in the Payment File table (F07350) when the timecard is added to the Employee Transaction Detail table (F06116). Separate payments are generated for payment records with different DF account numbers.
- When processing regular timecards, the DF account number is assigned to the GL Bank Account field (GLBA) on the payment record in the Payment File table (F07350) during pre-payroll. Separate payments are generated for payment records with different DF account numbers.

These account numbers are only used during pre-payroll to determine whether separate payments are necessary. The actual cash-in-bank account for the payments is created using the DA, DC, DD, DI, DM, and DP entries in the AAI table.

Search Criteria for Cash-in-Bank Account Distribution

The system uses certain fields as search criteria to determine a valid account for distribution of Cash-in-Bank during pre-payroll processing. The system searches the following AAIs for a specific company:

14. On the first pass, the system compares the time entry record's business unit and journal type to the search criteria defined in the AAI for Cash-in-Bank accounts, and attempts to match the AAI search criteria to the appropriate journal type.
15. On each successive pass, the system locates either the business unit or the journal type.
16. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example illustrates the ways that the system matches the type of payment and the home business unit for a specific company:

Business Unit	Journal Type
1	DA
1	DP
	DA
	DP

- Business unit = 1, journal type = DA
- Business unit = 1, journal type = DP
- Business unit = none, journal type = DA
- Business unit = none, journal type = DP

The following example illustrates the ways that the system can match the type of payment for Company 00000:

Business Unit	Journal Type
	DA
	DP

- When the Business unit = none, the journal type can be DA or DP.

Before You Begin

- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts.

► To set up AAIs for cash-in-bank account distribution

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Credit-Cash Bank Account.

1. On Work With Accounting JE Rules - Cash/Bank Account, click Add.

Employee Business Unit	Journal Type	Description	Business Unit	Obj Acct	Sub
	DP	Printed Computer Chk	50	1110	PAYROLL
	DM	Manual Checks	50	1110	PAYROLL
	DI	Interim Checks	50	1110	PAYROLL
	DD	Interim Auto Deposit	50	1110	PAYROLL
	DC	Currency Disbursement	50	1110	PAYROLL
	DA	Auto Dep. Check	50	1110	PAYROLL

2. On Revise Multiple Cash/Bank Account, complete the following fields:
 - Company
 - Journal Type
 - Obj Acct
3. Complete the following optional fields:
 - Business Unit
 - Sub
 - Employee Business Unit
4. Click OK.

See Also

- Entering Default Journal Types*

Setting Up AAIs for Liabilities

You set up AAIs for liabilities to define accounts for the payroll disbursements journal.

The minimum setup requirements for journal types when you set up liabilities instructions include the following default journal type codes:

AL Accrued liabilities for deductions and benefits

AT Accrued liabilities for payroll taxes

Search Criteria for Liabilities

The system uses certain fields as search criteria to determine a valid account for the distribution of liabilities. The system searches the following AAIs for a specific company:

17. On the first pass, the system compares the time entry record's home business unit PDBA code and journal type to the search criteria defined in the AAI for Liabilities and attempts to match the AAI search criteria to the appropriate journal type.
18. On each successive pass, the system uses the business unit or the journal type.
19. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example illustrates the fields that the system uses as search criteria for a specific company. For tax liabilities, the system matches the journal type and, optionally, the employee's business unit. For PDBA liabilities, the system matches the PDBA code and, optionally, the employee's business unit.

Business Unit	PDBA Code	Journal Type
1		H
1		AT
		H
		AT
1	5000	
1		AL
	5000	
		AL

The following example illustrates the fields that the system uses as search criteria for Company 00000. The system matches the PDBA code, or it uses the default journal type if no match is found.

Business Unit	PDBA Code	Journal Type
		H
		AT
	5000	
		AL

Understanding Distribution Account Fields for Liabilities

You can override the value, or use one of the following constants in the Subsidiary field so that the system can designate distribution account information. You must have valid general ledger account numbers set up. See *Account Setup* in the *General Accounting Guide*.

- *STAT To move the statutory code to the Subsidiary field for a tax. Use *STAT to charge taxes to specific accounts without having to define each account in the table. For example, the system will use CA for California.
- *EMP To move the employee number to the Subsidiary field for a DBA.
- *PAY To move the pay or DBA code to the Subsidiary field.
- *UNION To move the union code to the Subsidiary field for a DBA.

You can use the following constants in the Subledger field:

- *SBLE To move the employee number to the Subledger field.
- *SBLP To move the DBA code to the Subledger field.

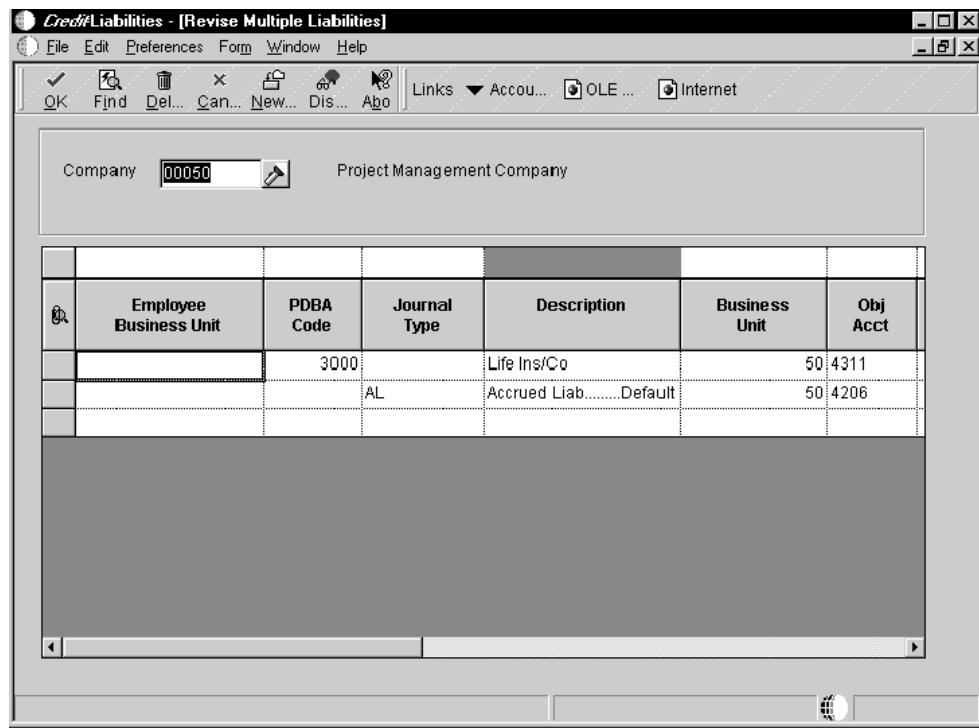
Before You Begin

- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts.

► To set up AAIs for liabilities

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Credit-Liabilities.

1. On Work With Accounting JE Rules - Liabilities, click Add.



2. On Revise Multiple Liabilities, complete the following fields:
 - Company
 - Obj Acct
3. For deductions and benefits, complete the following field:
 - DBA Code
4. For taxes and for AL and AT journal types, complete the following field:
 - Journal Type
5. Complete the following optional fields:
 - Employee Business Unit
 - Business Unit
 - Sub
 - Subledger
 - Sub Type
6. Click OK.

Setting Up AAIs for Labor Billings

You set up AAIs for labor billings to define accounts for labor billing offsets. These offsets are natural credit or revenue entries that offset labor billing charges or debits. Entries for labor billings are generally credit entries.

If your company does not use labor billings, you do not need to set up these AAIs.

For your most common account distribution, you can define a default labor billing rule using the journal type RO with the appropriate account information. The system uses the default rule when it does not find a rule for the specific business unit in a specific company.

Search Criteria for Labor Billings

The system uses certain fields as search criteria to determine a valid account for the distribution of labor billings. The system searches the following AAIs for a specific company:

20. On the first pass, the system compares the time entry record's home business unit, charge to unit, PDBA code, and journal type to the search criteria defined in the AAI for Labor Billings and attempts to match the AAI search criteria to the appropriate Journal Type.
21. On each successive pass, the system drops a value and uses a different combination of data fields for the search criteria.
22. Finally, if no matches exist in the rules for the specific company, the system searches the rules for the default company (Company 00000).

Home Business Unit	Charge to Unit	PDBA Code	Journal Type
9	501	1	RO
9	501		RO
9		1	RO
9			RO
	501	1	RO
	501		RO
		1	RO
			RO

The following example identifies the fields that the system uses as search criteria to match information from the timecard to the default company (Company 00000):

Home Business Unit	Charge to Unit	PDBA Code	Journal Type
	501	1	RO
	501		RO
		1	RO
			RO

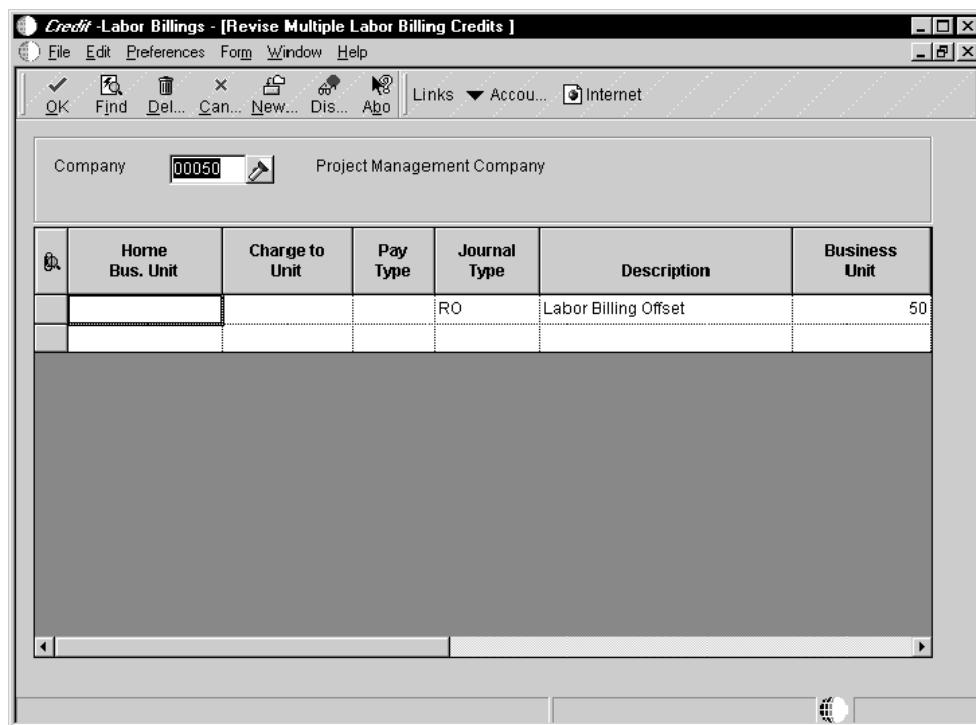
Before You Begin

- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts.

► To set up AAIs for labor billings

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Credit-Labor Billings.

1. On Work With Accounting JE Rules - Labor Billing Credits, click Add.



2. On Revise Multiple Labor Billing Credits, complete the following fields:

- Company
- Journal Type
- Obj Acct

3. Complete the following optional fields:

- Home Bus. Unit
- Charge to Unit
- Pay Type
- Business Unit

- Sub

The Charge to Unit and Home Business Unit fields allow you to account for billing revenue.

4. Click OK.

See Also

- Entering Default Journal Types*
- Automatic Accounting Instructions for Payroll and Time Accounting*

Processing Options for Credit-Labor Billings (P069044)

Default

1. Enter a '1' for the program to use the Multiple Entry form when selecting a record or when the ADD button has been pressed. When left blank, the program will use the Single Entry form when a selection has been made or when the ADD button has been pressed.
-

Setting Up AIs for Accruals and Clearing

For the Payroll system, you set up AIs for accruals and clearing to define accounts for the following:

- Accrued wages (T1, T2)
- Flat burden clearing (T2)
- Recharge flat burden clearing
- Intercompany settlements (T1-T6)
- Actual burden clearing (T1-T3)

For the time accounting process, you set up AIs for accruals and clearing to define accounts for the following:

- Accrued wages (T2)
- Flat burden clearing (T2)

When you set up the accrued wages account, you must, at a minimum, include the following journal type code:

- AW - Accrued wages for the labor distribution and payroll disbursements journals

When you set up the flat burden clearing account, you must, at a minimum, include the following journal type code:

- FC - Flat burden clearing for the labor distribution journal

When you set up intercompany settlement accounts, you must, at a minimum, include the following journal type code:

- IC - Intercompany settlements for the actual burden expense, labor distribution, and payroll disbursements journals

When you set up the recharge flat burden clearing account, you must, at a minimum, include the following journal type code:

- RC - Recharge burden relief for the actual burden expense and payroll disbursements journals

When you set up actual burden clearing accounts, you must, at a minimum, include the following journal type code:

- CF - Burden clearing fringe for the actual burden expense and payroll disbursements journals
- CT - Burden clearing tax for the actual burden expense and payroll disbursements journals

Search Criteria for Accruals and Clearing

The system uses certain fields as search criteria to determine a valid account for distribution of accrued wages, flat burden clearing, intercompany settlements, and recharge flat burden clearing. The system searches the following AAIs for a specific company:

23. On the first pass, the system compares the time entry record's business unit and journal type to the search criteria defined in the AAI for Accruals and Clearing and attempts to match the AAI search criteria to the appropriate journal type.
24. On the next pass, the system looks only at journal type.
25. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example identifies the search criteria that the system uses to match information from the timecard for a specific company for clearing tax burden:

Business Unit	PDBA Code	Journal Type
1		H
		H
1		CT
		CT

The following example identifies the search criteria that the system can use to match information from the timecard for Company 00000 for clearing tax burden:

Business Unit	PDBA Code	Journal Type
		H
		CT

The following example identifies the search criteria that the system can use to match information from the timecard for a specific company for clearing fringe burden:

Business Unit	PDBA Code	Journal Type
1	1000	
	1000	
1		CF

Business Unit	PDBA Code	Journal Type
		CF

The following example identifies the search criteria that the system can use to match information from the timecard for Company 00000 for clearing fringe burden:

Business Unit	PDBA Code	Journal Type
	1000	
		CF

The following example identifies the search criteria that the system can use to match information from the timecard for a specific company for accrued wages, flat burden clearing, intercompany settlements, or recharge flat burden clearing:

Business Unit	PDBA Code	Journal Type
1		AW, FC, IC, or RC
		AW, FC, IC, or RC

The following example identifies the search criteria that the system can use to match information from the timecard for Company 00000 for accrued wages, flat burden clearing, intercompany settlements, or recharge flat burden clearing:

Business Unit	PDBA Code	Journal Type
		AW, FC, IC, or RC

Understanding Distribution Account Fields for Accruals and Clearing

The following information tells you what values to enter in certain fields to help the system designate detailed account information. See *Account Setup* in the *General Accounting Guide*.

- Business Unit - *LABOR for FC (flat burden offset) provides the same business unit as labor, not Home Business Unit
- Subsidiary - Override the value or enter *PAY for DBAs, or *CO for intercompany settlements
- Subledger - A required field

Before You Begin

- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts at a time.

► **To set up AAIs for accruals and clearing**

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Dr/Cr-Accruals/Clearing.

1. On Work With Accounting JE Rules - Accruals/Clearing, click Add.

The screenshot shows a software application window titled "Dr/Cr - Accruals/Clearing - [Revise Multiple Accruals/Clearing]". The window has a menu bar with File, Edit, Preferences, Form, Window, and Help. Below the menu is a toolbar with icons for OK, Find, Del..., Can..., New..., Dis..., and Abo. To the right of the toolbar are links for Accou... and Internet. The main area contains a table with the following data:

	Employee Business Unit	PDBA Code	Journal Type	Description	Business Unit	Obj Acct
			FC	Flat Brdn Clearing (Relief)	50	4334
			CT	Burden Clearing-Taxes (Defl)	50	4333
			CF	Burden Clearing-Fringe (Defl)	50	4333
			AW	Accrued Wages	50	4205

2. On Revise Multiple Accruals/Clearing, complete the following fields:
 - Company
 - Obj Acct
3. Complete one of the following fields, as appropriate:
 - PDBA Code
 - Journal Type
4. Complete the following optional fields and click OK:
 - Employee Business Unit
 - Business Unit
 - Sub
 - Subledger

- Sub Type

See Also

- ❑ *Entering Default Journal Types*
- ❑ *Automatic Accounting Instructions for Payroll and Time Accounting*

Setting Up Journal Summarization Rules

You set up journal summarization rules to define how the Payroll system summarizes pro forma journal entries before creating actual journal entries in the general ledger. Summarizing journal entries reduces the number of transactions in the general ledger.

Note

If you use the Time Accounting System to generate journal entries, you can define a processing option in the Generate Timecard Journals program (R052901) to override the journal summarization rules you set up in this task.

Defining journal summarization rules allows you to do the following:

- Summarize journal entries for specific companies and for Company 00000
- Create both summarized and detail journals
- Define up to six different summarization rules for a specific range of object accounts and for a specific business unit

If the system does not find summarization rules for a specific company, it uses those that are set up for Company 00000. If it finds no summarization rules for an account, it assumes full summarization.

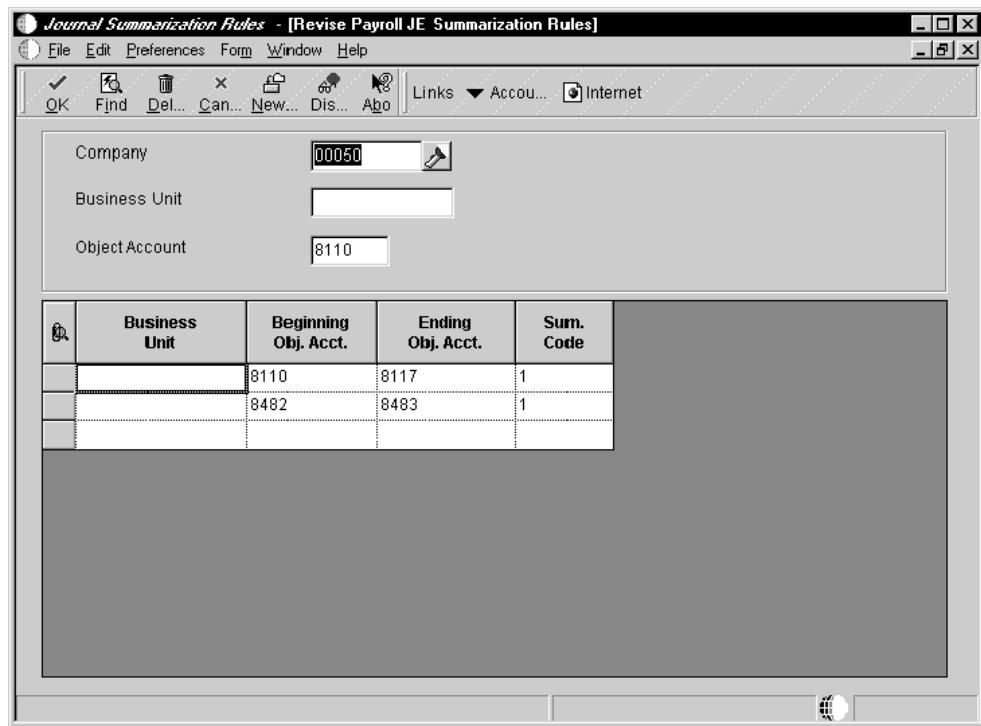
Each additional variable (company, business unit, or summarization code) that you define requires additional computer resources, which increases processing time. Therefore, J.D. Edwards recommends that you do the following:

- Set up summarization rules for Company 00000
- Avoid setting up summarization rules at the business unit level
- Define the same summarization code for each object account range when possible

► To set up journal summarization rules

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Journal Summarization Rules.

1. On Work With Payroll JE Summarization Rules, click Add.



2. On Revise Payroll JE Summarization Rules, complete the following fields:
 - Company
 - Object Account
3. Complete one or more of the following fields and click OK:
 - Business Unit
 - Beginning Obj. Acct.
 - Ending Obj. Acct.
 - Sum. Code

Entering Default Journal Types

Each AAI table can have a default journal type. For example, LD is the default journal type for the labor distribution table. When the timecard or employee criteria do not match up to any instructions, the system uses the instructions assigned to the default journal type. You can use a default journal type for a specific company and for Company 00000.

The following table lists the default journal types:

LD and RD	Use in labor, billings, and equipment distribution tables
------------------	---

PR	Use in premium labor tables
RO	Use in labor billings tables
AW	Use in accrued wages in accruals and clearing tables
IC	Use in intercompany settlements in accruals and clearing tables
BF and BT	Use in actual burden tables
AL and AT	Use in liabilities tables

You can also use a default journal type to indicate that you are missing instructions from a table.

If you set up a default with an invalid account number, the system prints a warning on the Journal Proof report.

► To enter default journal types

From the Automatic Accounting Instruction Setup menu (G05BT4), choose any AAIs form.

1. On any AAIs form, complete the following fields for the default journal type:
 - Journal Type
 - Obj Acct
2. Complete the following optional distribution account fields:
 - Business Unit
 - Sub
3. Click OK.

Intercompany Settlements

If your organization consists of multiple companies and your employees sometimes work in companies other than their home companies, intercompany settlements make it possible for you to expense labor to one company and the associated liabilities to the home company.

Intercompany settlements keep the payroll journal entries for each company in balance by document type. These journal entries ensure that each company's net balance equals zero, or that the debits equal the credits.

Example: Intercompany Settlements Using Document Type T2

An employee whose home company is Company 1 works in Company 50, business unit 501. The employee's gross wages are 1,000.00. All liabilities are posted to the home company.

When you have not set up intercompany settlements in the Payroll system, the journal entries for the employee are:

- In balance by document type across all companies
- Out of balance by company
- Out of balance by document type within a company

The document type T2 (labor distribution) journal entries for the employee are the following:

TY	JT	Account	Description	DR	CR
T2	AW	1.4205	Wages Payable		1000
Company 1 Total	00	1000			
T2	LD	501.8115	Labor Expense	1000	
Company 50 Total	1000	00			
Grand Total	1000	1000			

When you have set up intercompany settlements in the Payroll system, the entries for the employee are:

- In balance by company
- In balance by document type within a company

The document type T2 (labor distribution) journal entries for the employee are the following:

TY	JT	Account	Description	DR	CR
T2	AW	1.4205	Wages Payable		1000
T2	IC	1.1291.000050	Intercompany	1000	
Company 1 Total	1000	1000			
T2	LD	501.8115	Labor Expense	1000	
T2	IC	50.1291.00001	Intercompany		1000
Company 50 Total	1000	1000			
Grand Total	2000	2000			

How Do You Generate Intercompany Settlements?

To generate intercompany settlements for payroll transactions, your Payroll system must be integrated with the J.D. Edwards General Accounting system. You can set up either of these systems to generate intercompany settlements for payroll transactions. You can choose the method that works best for your environment.

When you use the General Accounting system to generate intercompany settlements, the system processes all of the balancing journal entries through a single hub (main) company. The hub company is the same for all employees. You can designate the hub company in the intercompany constants for the General Accounting system. If you do not designate a hub company, the post program uses the first company that it encounters as the hub company. Therefore, the hub company might not be the employee's home company.

When you use the Payroll system to generate intercompany settlements for payroll transactions, the system creates the balancing entries before journal entries are posted to the general ledger. The Payroll system ignores the intercompany constants for the General Accounting system and designates the employee's home company as the hub (main) company for processing balancing entries.

Intercompany settlements in the Payroll system apply to document types T1, T2, T3, T4, and T6. They do not apply to document types T5 and T7.

Setting Up Intercompany Settlements in Workforce Management Foundation

You use intercompany settlements if your organization consists of multiple companies and your employees sometimes work in companies other than their home companies. When an employee works in a company other than the home company, the home company typically charges the other company for the employee's labor expenses.

Before you can set up AAs for intercompany settlements, you should verify that your organization's chart of accounts contains intercompany settlement accounts.

After verifying your chart of accounts, you set up AAs for intercompany settlements. After you set up AAs for intercompany settlements, you should create a payroll ID that generates intercompany settlements in the Payroll system rather than in the General Accounting system.

Before You Begin

- Set up intercompany accounts in your chart of accounts. See [Creating and Updating Your Chart of Accounts](#).

See Also

- [Setting Up Intercompany Settlements](#)

Verifying Your Chart of Accounts

Before you can set up AAs for intercompany settlements, you should verify that your organization's chart of accounts contains intercompany accounts.

All intercompany accounts must use the same object number. The subsidiary (the third part of the account number) can represent either the company from or the company to which intercompany amounts are due.

For example, the following table shows intercompany accounts for companies 1, 7, and 50, where 1291 is the object account for intercompany settlements:

Company 1	Company 7	Company 50
1.1291.00007	7.1291.00001	50.1291.00001
1.1291.00050	7.1291.00050	50.1291.00007

You (or someone in your accounting department) must use the General Accounting system to set up the accounts. Typically, you verify your chart of accounts from the General Accounting system. If you do not have access to the General Accounting system, you can verify your chart of accounts from the AAI tables in the Payroll system. To verify your chart of accounts

from the AAI tables, choose the Help function for the business unit, object, or subsidiary fields.

Setting Up AAIs for Intercompany Settlements

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Dr/Cr-Accruals/Clearing.

You use this AAI table to set up the AAIs for generating intercompany settlements. You define journal types for intercompany settlements so that the system tracks intercompany transactions for each company in your organization. You should set up intercompany settlements for Company 00000 only.

When you set up AAIs for intercompany settlements, you do not enter a business unit. When the system creates journal entries for intercompany accounts, it enters Company 00000, in which the journal entry is created as the business unit.

Proceed to the task *Setting Up AAIs for Accruals and Clearing* to set up AAIs for intercompany settlements.

Setting Up a Payroll ID for Intercompany Settlements

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Dr/Cr-Accruals/Clearing.

After you set up AAIs for intercompany settlements, you should set up a payroll ID for intercompany settlements. When you use this payroll ID to process a payroll cycle, the Payroll system, rather than the General Accounting system, generates intercompany settlements before posting them to the general ledger.

Use this payroll ID to process payroll for employees who worked in companies other than their home companies. When you process this payroll ID, the system automatically creates balancing journal entries for intercompany settlements.

To set up a payroll ID for intercompany settlements, proceed to the task [Creating a New Payroll ID](#).

Appendices

DBA Table Methods Quick Reference

Five general, arbitrary categories of DBA table methods are available. The methods are distinguishable by what the DBA method is based on.

Category	Available Calculations
Salary Amounts:	For the salary figure, you can perform one of the following calculations:
Pay Period	• Table amount x Employee rate
Monthly	• Salary x Employee rate x Table amount
Annual	• Table amount = actual DBA amount
Life Insurance	• Hours worked x Table amount
2nd Life Insurance	• Gross earnings x Table amount • Salary x Employee rate Result rounded down x Table amount • Salary x Employee rate Result rounded up x Table amount • Salary x Table amount x Excess rate
Employee's Age:	Based on the employee's age, you can perform one of the following calculations:
	• Salary x Employee rate x Table amount • Salary x Employee rate Result rounded down x Table amount • Salary x Employee rate Result rounded up x Table amount • Salary x Employee rate Result rounded down / 1000 • Salary x Employee rate Result rounded up / 1000 • Salary x Table amount x Excess rate
Dates:	For each date, you can perform one of the following calculations:
Leave of Absence	• Table amount x Employee rate
Original Hire	• Table amount x Employee rate (calculates hours only)
Participation	• Table amount x Hours worked (can optionally calculate Rate x Hours)
Start	• Table amount x Hours worked (calculates hours only) • Table amount x Hours worked • Table amount = actual DBA amount • Table amount x Gross earnings • Annual salary x Table amount x Excess rate • Pay-period salary x Table amount x Excess rate • Monthly salary x Table amount x Excess rate • Life insurance salary x Table amount x Excess rate • 2nd life insurance salary x Table amount x Excess rate
Amounts:	You can perform various calculations against an employee's pay rate, hours, and gross wages. These calculations include the following:

Category	Available Calculations
Hours	gross wages. These calculations include the following:
Gross Amount	
Flat Dollar	<ul style="list-style-type: none"> • Average hourly rate • Range from the detail area of the table
Miscellaneous:	You can use various tables, depending on the following:
Pay-Period Number	<ul style="list-style-type: none"> • Pay-period number for the month
Variable Months	<ul style="list-style-type: none"> • Number of months of history to use as a basis
Excess Life Insurance	<ul style="list-style-type: none"> • Group term life insurance premiums

Based on Pay-Period Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
EA	Pay-Period Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
EB	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee x Table amount.	3
ED	Pay-Period Salary	Table amount equals the actual amount of the DBA.	1
EH	Pay-Period Salary	The number of hours worked by the employee x Table amount or rate.	1
EP	Pay-Period Salary	Employee's gross earnings for the current period x Table amount or rate.	1
EQ	Pay-Period Salary	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
ER	Pay-Period Salary	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
ES	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
ET	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
EY	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table	3 or 9

Table Method	Lower/Upper Ranges Represent	Calculation	Method
		amount or rate. The system does not calculate a DBA amount.	
EZ	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
E%	Employee's Age or Pay-Period Salary	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Monthly Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
NA	Monthly Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
NB	Employee's Age in Years	Employee's monthly salary x amount or rate associated with the employee x Table amount.	3
ND	Monthly Salary	Table amount equals the actual amount of the DBA.	1
NH	Monthly Salary	Number of hours worked by the employee x Table amount or rate.	1
NP	Monthly Salary	Employee's gross earnings for the current period x Table amount or rate.	1
NQ	Monthly Salary	Employee's monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
NR	Monthly Salary	Employee's monthly salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
NS	Employee's Age in Years	Employee's monthly salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
NT	Employee's Age in Years	Employee's monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
NY	Employee's Age in Years	Employee's monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000.	3 or 9

Table Method	Lower/Upper Ranges Represent	Calculation	Method
		The system does not calculate a DBA amount.	
NZ	Employee's Age in Years	Employee's monthly salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
N%	Employee's Age or Monthly Salary	Employee's monthly salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Annual Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
AA	Annual Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
AB	Employee's Age in Years	Employee's annual salary x amount or rate associated with the employee x Table amount.	3
AD	Annual Salary	Table amount equals the actual amount of the DBA.	1
AH	Annual Salary	Number of hours worked by the employee x Table amount or rate.	1
AP	Annual Salary	Employee's gross earnings for the current period x Table amount or rate.	1
AQ	Annual Salary	Employee's annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
AR	Annual Salary	Employee's annual salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
AS	Employee's Age in Years	Employee's annual salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
AT	Employee's Age in Years	Employee's annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
AY	Employee's Age in Years	Employee's annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9

Table Method	Lower/Upper Ranges Represent	Calculation	Method
AZ	Employee's Age in Years	Employee's annual salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
A%	Employee's Age or Annual Salary	Employee's annual salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Life Insurance Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
IA	Life Insurance Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
IB	Employee's Age in Years	Employee's life insurance salary x amount or rate associated with the employee x Table amount.	3
ID	Life Insurance Salary	Table amount equals the actual amount of the DBA.	1
IH	Life Insurance Salary	Number of hours worked by the employee x Table amount or rate.	1
IP	Life Insurance Salary	Employee's gross earnings for the current period x Table amount or rate.	1
IQ	Life Insurance Salary	Employee's life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
IR	Life Insurance Salary	Employee's life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
IS	Employee's Age in Years	Employee's life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
IT	Employee's Age in Years	Employee's life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
IY	Employee's Age in Years	Employee's life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
IZ	Employee's Age in Years	Employee's life insurance salary x the amount or rate associated with the employee.	3 or 9

Table Method	Lower/Upper Ranges Represent	Calculation	Method
		rate associated with the employee. Result rounded up to the next 1000 / 1000.	
I%	Employee's Age or Life Insurance Salary	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Second Life Insurance Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
FA	2nd Life Insurance Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
FB	Employee's Age in Years	Employee's 2nd life insurance salary x amount or rate associated with the employee x Table amount.	3
FD	2nd Life Insurance Salary	Table amount equals the actual amount of the DBA.	1
FH	2nd Life Insurance Salary	Number of hours worked by the employee x Table amount or rate.	1
FP	2nd Life Insurance Salary	Employee's gross earnings for the current period x Table amount or rate.	1
FQ	2nd Life Insurance Salary	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
FR	2nd Life Insurance Salary	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
FS	Employee's Age in Years	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
FT	Employee's Age in Years	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
FY	Employee's Age in Years	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
FZ	Employee's Age in Years	Employee's 2nd life insurance salary x the amount	3 or 9

Table Method	Lower/Upper Ranges Represent	Calculation	Method
		or rate associated with the employee. Result rounded up to the next 1000 / 1000.	
F%	Employee's Age or 2nd Life Insurance Salary	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Leave-of-Absence Date

Table Method	Lower/Upper Ranges Represent	Calculation	Method
LA	Months of Service from Leave of Absence	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
LB	Months of Service from Leave of Absence	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
LH	Months of Service from Leave of Absence	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
LI	Months of Service from Leave of Absence	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
LR	Months of Service from Leave of Absence	Table amount x Number of hours worked equalling the DBA amount.	2
L\$	Months of Service from Leave of Absence	Table amount equals the actual amount of the DBA.	2
L%	Months of Service from Leave of Absence	Employee's gross earnings x Table rate percentage.	2
L1	Months of Service from Leave of Absence	Employee's annual salary x Table amount or rate x Excess rate.	2
L2	Months of Service from Leave of Absence	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	2
L3	Months of Service from Leave of Absence	Employee's monthly salary x Table amount or rate x Excess rate in the table.	2
L4	Months of Service from Leave of Absence	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	2
L5	Months of Service from Leave of Absence	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

Based on Original Hire Date

Table Method	Lower/Upper Ranges Represent	Calculation	Method
OA	Months of Service from Original Hire Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
OB	Months of Service from Original Hire Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
OH	Months of Service from Original Hire Date	Table amount x Number of hours worked equaling hours to accrue x Employee's hourly rate for the DBA amount.	2
OI	Months of Service from Original Hire Date	Table amount x Number of hours worked equaling hours to accrue x Employee's hourly rate for the DBA amount.	2
OR	Months of Service from Original Hire Date	Table amount x Number of hours worked equaling the DBA amount.	2
O\$	Months of Service from Original Hire Date	Table amount equals the actual amount of the DBA.	2
O%	Months of Service from Original Hire Date	Employee's gross earnings x Table rate percentage.	2
O1	Months of Service from Original Hire Date	Employee's annual salary x Table amount or rate x Excess rate.	2
O2	Months of Service from Original Hire Date	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	2
O3	Months of Service from Original Hire Date	Employee's monthly salary x Table amount or rate x Excess rate in the table.	2
O4	Months of Service from Original Hire Date	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	2
O5	Months of Service from Original Hire Date	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

Based on Participation Date

Table Method	Lower/Upper Ranges Represent	Calculation	Method
PA	Months of Service from Participation Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
PB	Months of Service from Participation Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2

Table Method	Lower/Upper Ranges Represent	Calculation	Method
PH	Months of Service from Participation Date	Table amount x Number of hours worked equaling hours to accrue x Employee's hourly rate for the DBA amount.	2
PI	Months of Service from Participation Date	Table amount x Number of hours worked equaling hours to accrue x Employee's hourly rate for the DBA amount.	2
PR	Months of Service from Participation Date	Table amount x Number of hours worked equaling the DBA amount.	2
P\$	Months of Service from Participation Date	Table amount equals the actual amount of the DBA.	2
P%	Months of Service from Participation Date	Employee's gross earnings x Table rate percentage.	2
P1	Months of Service from Participation Date	Employee's annual salary x Table amount or rate x Excess rate.	2
P2	Months of Service from Participation Date	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	2
P3	Months of Service from Participation Date	Employee's monthly salary x Table amount or rate x Excess rate in the table.	2
P4	Months of Service from Participation Date	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	2
P5	Months of Service from Participation Date	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

Based on Start Date

Table Method	Lower/Upper Ranges Represent	Calculation	Method
SA	Months of Service from Start Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
SB	Months of Service from Start Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
SH	Months of Service from Start Date	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
SI	Months of Service from Start Date	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
SR	Months of Service from Start Date	Table amount x Number of hours worked equalling the DBA amount.	2

Table Method	Lower/Upper Ranges Represent	Calculation	Method
S\$	Months of Service from Start Date	Table amount equals the actual amount of the DBA.	2
S%	Months of Service from Start Date	Employee's gross earnings x Table rate percentage.	2
S1	Months of Service from Start Date	Employee's annual salary x Table amount or rate x Excess rate.	2
S2	Months of Service from Start Date	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	2
S3	Months of Service from Start Date	Employee's monthly salary x Table amount or rate x Excess rate in the table.	2
S4	Months of Service from Start Date	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	2
S5	Months of Service from Start Date	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

Based on Hours Worked

Table Method	Lower/Upper Ranges Represent	Calculation	Method
HA	Hours Worked	Employee's total wages / Employee's total hours x Table amount or rate.	4
HD	Inception to Date Hours Worked	Table amount equals the actual amount of the DBA.	4
HP	Inception to Date Hours Worked	Employee's hours worked during the current period x Table rate.	4
H1	Hours Worked	Table amount equals the number of hours that the DBA is based on.	4

Based on Gross Amount

Table Method	Lower/Upper Ranges Represent	Calculation	Method
GA	Gross Amount	Amount or rate associated with the employee x Table amount.	8
GD	Gross Amount	Table amount equals the actual amount of the DBA.	8
GH	Gross Amount	Hours worked x Table amount.	8
GP	Gross Amount	Amount of employee's gross earnings x Table rate.	8

Table Method	Lower/Upper Ranges Represent	Calculation	Method
G%	Gross Amount	Amount of employee's gross earnings x Table rate.	3
G@	Gross Amount	Amount of employee's gross earnings x Table rate.	8

Based on Flat Dollar Amount

Table Method	Lower/Upper Ranges Represent	Calculation	Method
DD	Hours Worked	If possible, use the amount in the table. If employee worked fewer hours, do one of the following: Calculate days worked Days worked x Rate in the detail area	4
DH	Hours Worked	If possible, use the amount in the table. If employee worked fewer hours, use Actual hours worked x Rate in the detail area.	4
DL	Employee's Age in Years	Table amount equals the actual amount of the DBA.	3 or 9
DP	Pieces Produced	If possible, use amount in table. If employee produced fewer pieces, use Actual pieces produced x Rate in the detail area.	5

Based on Pay-Period Number

Table Method	Lower/Upper Ranges Represent	Calculation	Method
WD	Pay-Period Number (1-5)	Days worked (based on number of timecard records) x Table amount or rate.	0
WH	Pay-Period Number (1-5)	Hours worked x Table amount or rate.	0
WP	Pay-Period Number (1-5)	Pieces produced x Table amount or rate.	0
W\$	Pay-Period Number (1-5)	Table amount equals the actual amount of the DBA.	0
W%	Pay-Period Number (1-5)	Gross earnings x Table amount or rate.	0

Based on Variable Months

Table Method	Lower/Upper Ranges Represent	Calculation	Method
MH	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated hours worked for the number of months specified in the table x Table rate.	6

Table Method	Lower/Upper Ranges Represent	Calculation	Method
MI	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated hours worked for the number of months specified in the table rounded up to the next whole hour x Table rate.	6
MJ	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated hours worked for the number of months specified in the table rounded down to the next whole hour x Table rate.	6
MP	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated gross earnings for the number of months specified x Table rate.	6
MR	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated pieces produced for the number of months specified x Table rate.	6

Based on Excess Life Insurance

Table Method	Lower/Upper Ranges Represent	Calculation	Method
XL	Employee's Age in Years	The maximum amount for data dictionary item #XL1-Hours basis. Remainder x Table amount.	3 or 9
XC	Employee's Age in Years	The maximum amount for data dictionary item #XLC-Hours basis. Remainder x Table amount.	3 or 9

Example: Calculation Table Based on Months of Service

When you set up a calculation table based on months of service, the system uses only whole numbers for the lower and upper limits.

	Lower Limit	Upper Limit	Amt./Rate	Excess Rate	S	M	Sec Table	Description	Limit Amt.	Amt./Rate 2	Additional Rate
<input checked="" type="checkbox"/>	5.99	4.0000									
<input type="checkbox"/>	6.00	11.99	6.0000								
<input type="checkbox"/>	12.00	35.99	6.6666								
<input type="checkbox"/>	36.00	99999999.0	10.0000								
<input type="checkbox"/>											

For example, the system reads the limits above as the following:

- 0 to 5
- 6 to 11
- 12 to 35
- 354 to 9,999,999

The system considers the months between the specified date and the payroll date, not the number of days. The system does not convert number of days to months. For example, the system would calculate months of service as follows:

- Start Date = 1/15 and Pay Date = 1/31

The system calculates one month of service. The employee started in January and was paid in January.

- Start Date = 1/15 and Pay Date = 2/15

The system calculates two months of service. The employee started in January and was paid in February.

Example: Calculation Table Based on Periods Worked

You might want to set up a calculation table based on different amounts based on pay periods worked. For example, you might want to split a 75.00 per month health insurance premium between two pay periods.

The following list shows the information to enter on each line of the calculation table:

Line one for the first pay period	Lower Limit = 1 Upper Limit = 1 Amount/Rate = 40
Line two for the second pay period	Lower Limit = 2 Upper Limit = 2 Amount/Rate = 35

Based on this calculation, the system deducts 40.00 in the first pay period and 35.00 in the second pay period.

DBA Troubleshooting

You should research the following questions when the system does not calculate a DBA as you expect:

1. For whom is the DBA not being calculated? One employee? A group of employees? Everyone?
2. At what level is the DBA assigned? Employee? Union? Required? One-Time Override?
3. Does the DBA have start or stop dates?
4. What is the value of the Calculate if No Gross field?
5. Does the employee have gross wages?
6. What is the DBA method? Flat dollar amount? Percentage? Wage attachment?
7. Does the DBA use a calculation-table code for its calculation?
8. Does the DBA have limits? If it has a limit, has the limit been met?
9. Are the PDBAs in the Basis of Calculations table correct?
10. Is the DBA based on another DBA? If so, does the based-on DBA calculate first?
11. Does the DBA have a declining balance? If so, is an amount due?
12. What is the value of the Calculate in Pre-Payroll field?
13. Has the DBA already been calculated for this period?
14. What is the employee's pay frequency? Biweekly? Semimonthly? Monthly? Weekly?
15. Which period of the month are you processing?
16. What is the value of the DBA Specification Withholding field?
17. What payroll processes are you using? Pre-payroll? Interims?
18. Does the value in the Period Number field in the pre-payroll parameters correspond to the value in the DBA Specifications Withholding field?
19. Does the DBA calculate in a test interim?
20. What is the value of the Z column on the employee's DBA Instructions form?

Timecard Derivation Sequence

This appendix lists the sequence that the system uses to derive values for fields on the timecard entry forms.

Item	1	2	3	4	5
Timecard Record Type	Keyed on timecard	Employee Master (F060116)		Default - 1	
1. Payroll 2. Combined 3. Billing					
Pay Type	Keyed on timecard	Option - U Union Rate table (F069126)	Option - E Occupational Rate table for Regular Pay Only (F060146)	Labor Distribution table	
Date Worked	Keyed on header of timecard	Defaults to Pay Period Ending for autopay			
Home Company	Keyed on timecard	Employee Master (F060116)			
Home Business Unit	Local Union Override (F0693006)	Keyed on timecard	Employee Master (F060116)		
Union Code for Wages and Reporting	Keyed on timecard	Local Union Override (F0693006)	Employee Master (F060116)		
Job Type	Keyed on timecard	Employee Master (F060116)			
Job Step	Keyed on timecard	Employee Master (F060116)			
Item	1	2	3	4	5
Labor Distribution	Keyed on timecard	Employee Labor Distribution	Position Account Instructions	AAl's (F06904)	

Item	1	2	3	4	5
Account	timecard		Instructions (for autopay employees)	(F081012)	
Billing Distribution (Recharges)	Keyed on timecard		AAs for any Missing Element RD	(F06904)	
Equipment Distribution	Keyed on timecard		AAs for Object Account ED	(F06904)	
Job Location	Keyed on timecard		Business Unit associated with Primary Distribution		
Shift Code	Keyed on timecard		Employee Master	(F060116)	
Shift Differential and Method	Keyed on timecard	Shift Differential table \$/HR or % (F069246)	If Shift Code is blank, retrieve from Pay Type table \$/HR (F0690116)		
Hours Worked	Keyed on timecard	Autopay Instructions	Labor Distribution table		
Rate	Keyed on timecard	Option - U Union Rate table (F0609126)	Option - U Occupational Rate table (F060146)	Option - E Occupational Rate table (F060146)	Employee Master (F060116 or F060118)
Base Rate		The derivation of the base rate depends on the derivation of the hourly rate as follows:			
		<ul style="list-style-type: none"> • If the Union Rates table is used, then the base rate is found by dividing the rate derived from the Union Rates table by the pay-type multiplier. • If the Occupation Rates table is used, then the rate from the Occupation Rates table is assumed to be the base rate. • If the hourly rate is manually entered, then the base rate is found by dividing the entered hourly rate by the pay-type multiplier. 			
		If the employee master rate is used, the base rate is the rate from the Employee Master table.			

Item	1	2	3	4	5
Gross Pay	Entered Lump Sum Amount	Calculated			
Flat Burden %	Employee Master (F060116)	Option - U Use Union Rate table (F069126)	Labor Distribution Business Unit (F0006)		
W/C Insurance	Keyed on timecard	Labor Distribution Account, update in Cost Code Master (F0901)	Employee Labor Distribution Instructions	Option - U Union Rate table (F069126)	Employee Master (F060116)
Work Tax Area	Keyed on timecard	Labor Distribution Payroll Business Unit (F0006)	Employee Master (F060116)		
Check Route Code	Keyed on timecard	Employee Master (F060116)			
Equipment Rate Code	Keyed on timecard (F1301)	Distribution Account, update in Cost Code Master (F0901)	Labor Distribution Business Unit, update in Payroll Business Unit or Job Master (F0006)	Rental Rules table (F1302)	
Equipment Rate	Keyed on timecard	Equipment Rate table			
Bank Account	Defined in Pre-payroll processing option	Interim check entry	AAIs		

Optional Fields for the Employee Transactions Batch table (F06116Z1)

The following fields are not required in order to upload timecard information. However, the values uploaded into these fields are passed from system to system. Complete the following optional fields in a custom program:

VLANI (Account Number)	A number that identifies an account in the general ledger. You can use one of the following formats for account numbers: <ul style="list-style-type: none">• Structured account (business unit, object, subsidiary)• 25-digit unstructured number• 8-digit short account ID number• Speed code The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program (P000909). The value is supplied from the master business function based on labor distribution fields. Use either this field, or the VLMCU, VLOBJ, and VLSUB fields.
VLMCU (Business Unit)	A value that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse, location, or job.
VLOBJ (Object Account)	The object account portion of the general ledger account.
VLSUB (Subsidiary)	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account. If you complete this field, you must also complete the VLSBLT field.
VLGMCU (Recharge Business Unit)	For Payroll purposes, a business unit that represents the distribution account where the recharge (billing) amounts are to be posted. The only time that this field is generated is when you are entering a 2 or 3 in the Record Type field for an employee. In this case, the derived distribution account, or entered account, equals this business unit.
VLGOBJ (Recharge Object Account)	For Payroll purposes, the number of the account to which the recharge (billing) amounts are to be posted.
VLGSUB (Recharge Subsidiary)	For Payroll purposes, the number of the account where the recharge (billing) amounts are to be posted.
VLSBL (Subledger)	A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so forth. If you enter a subledger, you must also specify the subledger type. If you complete this field, you must also complete the VLSBLT (Subledger Type) field.
VLSBLT (Subledger Type)	A UDC (00/ST) that is used with the Subledger field to identify the subledger type.
VLWR01 (Phase)	A UDC (00/W1) that indicates the current stage or development for a work order. You can assign a work order to only one phase code at a time. This UDC is automatically supplied from the work order field if the speed coding work order entry method is used. See the master business function

documentation for more information.

VLMCUO (Chargeout Business Unit)	A business unit that represents the location where the employee worked. It can be used to indicate that an employee worked at this location, but charged the time to another business unit. This field is used for deriving rates from the Union Pay Rate table and it is used exclusively by the Certified Payroll Register.
VLMAIL (Check Route Code)	A UDC (06/CR) that specifies the check routing or mail stop code. This code can be used to sequence the printing of payroll checks to facilitate their handling and delivery.
VLUN (Union Code)	A UDC (06/UN) that represents the union or plan in which the employee or group of employees work or participate.
VLJBCD (Job Type)	A UDC (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
VLJBST (Job Step)	A UDC (06/GS) that designates a specific step, grade, or salary level within a particular job type. The system uses this field in conjunction with job type to determine pay rates by job.
VLSHFT (Shift Code)	A UDC (06/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percent or amount to the hourly rate on a timecard.
VLSHD (Shift Differential)	An additional rate, expressed in dollars or percent, added to an employee's hourly rate, depending on the shift worked. This rate can be applied in one of two ways as defined by the Shift Differential Calculation Sequence (data item CMTH).
VLDTBT (Date Time Clock Start)	The date and time that the timecard transaction was created.
VLTCDE (Date Time Clock End)	The date and time that the timecard transaction was ended.
VLEQWO (Equipment Worked On)	The ID number for the equipment that an employee maintained or repaired, but did not use. For example, an employee might change the oil in the company dump truck. Use this field to direct labor expenses to this piece of equipment.
VLEQCG (Equipment Worked)	The ID number of the equipment that an employee used to perform a job. For example, an employee might drive a company dump truck or operate a printing press. Use this field to distribute the cost of using the equipment to the proper account in the general ledger.
VLQOBJ (Equipment Object Account)	The object account to which you want the system to distribute equipment utilization charges.
VLERC (Equipment Rate Code)	A UDC (00/RC) that indicates a billing rate, such as DY for daily, MO for monthly, and WK for weekly. You can set up multiple billing rates for a piece of equipment.
VLEQRT (Billing Rate)	The monetary amount for the equipment billing rate. Each equipment item can have numerous billing rates based on the rate code (see Equipment Billing Rate-ERC).
VLEQHR (Equipment Hours)	The number of hours that the equipment was operated. If you leave this field blank, the system uses the hours from employee time entry when you enter an equipment number. If you do not enter employee hours, you must complete this field.

VLEXR (Explanation)	A name or remark that describes a timecard record.
VLP001-VLP004 (Category codes 1-4)	A Payroll system category code for which you can define the use and description to fit the needs of your organization.
VLEPA (Entered Gross Pay)	A lump sum amount, an adjustment amount, or an amount that represents an employee's gross pay. This amount temporarily overrides any pay calculation that the system normally performs.

