PeopleSoft®

EnterpriseOne JDE5
Human Resources for the United States PeopleBook

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Overview

Overviews

Human resources departments play an integral role in all levels and aspects of business. The J.D. Edwards Human Resources system provides an effective way to manage your human resources functions.

This section provides overview information about the industry environment and how the J.D. Edwards Human Resources system operates.

Industry Overview

To understand how human resources affects your organization and why tasks are performed the way that they are, you need to be aware of the critical role that human resources management plays in the business environment.

This section introduces the industry concepts that are associated with human resources. In addition, it describes J.D. Edwards solutions to problems that are inherent in a human resources department.

Industry Environment and Concepts for Human Resources

J.D. Edwards provides a comprehensive solution to assist human resources departments in automating and streamlining virtually every aspect of human resources management from recruitment through retirement.

System Integration

Through seamless integration and a central, shared database within the J.D. Edwards Human Resources, Benefits, Payroll, and Financials systems, redundant data entry is eliminated. This integration makes business practices more efficient and enables the staff to focus its attention and efforts on other activities.

Workflow

The workflow feature provides the ability to automate virtually every business process. With workflow, companies are no longer forced to rely on paper routing through interoffice mail and voice-mail messaging.

For instance, to change an employee's salary in the past, a Compensation Specialist had to route a change request form to the appropriate manager by way of interoffice mail, wait for the manager to approve the change, and reroute the form back to Human Resources, meanwhile leaving several voice mail messages to check on the status. After the Human Resources department received the approved form, the Compensation Specialist then updated the salary change in the HR database. Often, the Compensation Specialist needed to make retroactive adjustments to compensate the employee for time that was lost during the approval process.

Using workflow, a salary change can be immediately requested and approved by e-mail. Once approved, the salary change can be automatically updated in the database.

Using workflow, companies can eliminate many unnecessary steps in their business processes, saving time and money. Workflow processes can easily be created and customized to streamline nearly every business practice.

Self-Service

Self-service applications transfer many responsibilities from Human Resources staff directly to employees. For example, when employees get married, they might need to change their name, address, tax withholding, and benefit elections. Using self-service, employees can make these changes to the system through their company's intranet site, rather than filling out paperwork in the Human Resources department and having an HR clerk enter the changes into the system.

Self-service applications can be set up to initiate workflow processes. For example, when an employee address change reflects a move to a different taxing locality, a workflow message can be automatically generated to notify the payroll department.

Flexibility

One of the most important features of the J.D. Edwards solution is the flexibility of the system. Instead of relying on programmers and system analysts, end-users can easily customize forms on their desktop to meet their individual needs.

You can set processing options to customize operations. When an organization's needs or business processes change, you can change the system to reflect those needs and processes within minutes. This flexibility enables the J.D. Edwards system to remain the comprehensive solution in the growing and changing world of Human Resources.

Idea to Action: The Competitive Advantage

The following table presents typical problems with tracking human resources information, as well as the J.D. Edwards business activator that resolves each problem, and the return on investment from using the J.D. Edwards Human Resources system.

Keeping up with the data that is needed to maintain Affirmative Action plans is an immense project.	To ensure compliance with Affirmative Action plans, you can track data that is updated annually for current employees, former employees, and applicants. You can track ethnicity, gender, veteran status, and disability status. You can use this information as well as reasons for changes, turnover statistics, date changes, and other country-specific data changes within the Employee Master to compile statistics needed for Affirmative Action plan reports. Affirmative Action plan reports include Workforce Analysis, Affirmative Action Exception, and Hired Applicants by EEO Job Category. The system saves time and the research effort that is usually spent compiling data.
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.	Using Create Next Year's Budget, your managers can establish a new budget that is based on the existing position structure and can even build in an automatic base salary increase. Using Cross Year Budget Comparison, you can determine whether trends exist within the budget from one year to the next, which helps to evaluate the forecast for next year. Using Work with Position Activity, your managers can review the activity that has occurred

within a position for the previous year. Using 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 save time with the automated budgeting measures, and you increase the accuracy of the budget information.

Human Resources Overview

J.D. Edwards understands that no such thing as a standard Human Resources department exists. Management depends on you to respond to workforce and industry changes, government regulations, and your organization's policies and procedures. The information that you need is unique and often complex.

The J.D. Edwards Human Resources system facilitates tracking the information that you need to meet both your immediate and long-range goals, as well as the demands of change and growth within your company and industry. You can access and compile the information quickly and provide quick answers to questions. Because the Human Resources system manages many mundane and repetitive tasks, you have more time to play a strategic role on your organization's management team.

System Integration

To facilitate data entry for both Payroll and Human Resources users, you enter a great deal of human resources-related information into the Workforce Management Foundation system. This system contains the central database for all of the 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

The Human Resources system contains additional functions, such as recruitment management and position control, that are specific to human resources users.

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

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

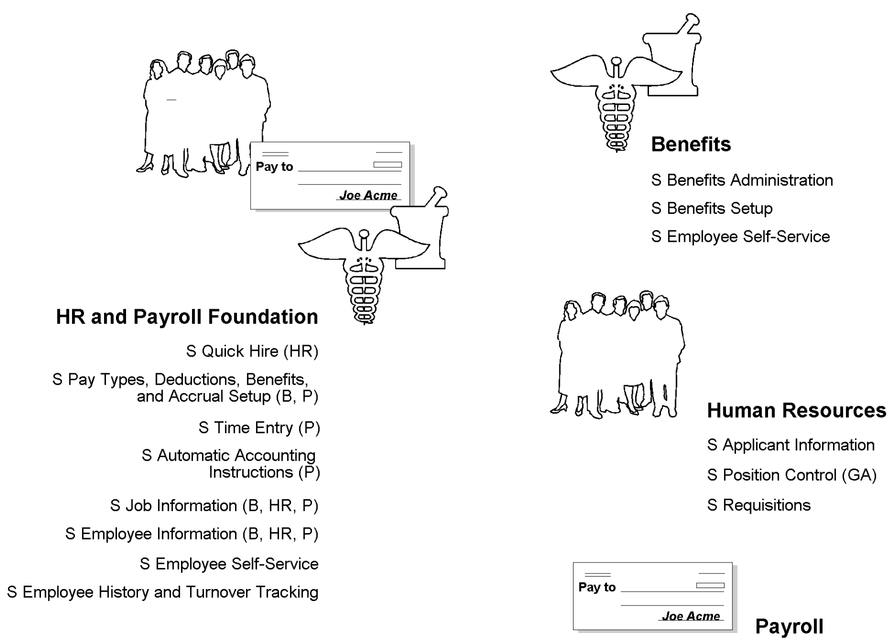
Both human resources and payroll users can enter information into the foundation system. However, to prevent unauthorized access to confidential information, you can set up system security that allows users to access only the information that they need to perform their jobs. Typically, your system administrator 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.

To simplify your processes and facilitate communication within your organization, the Human Resources system also integrates with other J.D. Edwards systems, including the following systems:

Address Book	The Address Book system contains employees' names, addresses, and tax IDs.
General Accounting	You can use the Human Resources system to create salary budgets by business unit and update them in the general ledger.
Accounts Payable	You can set up the Payroll system, which is closely integrated with the Human Resources system, to create A/P vouchers for deductions and benefits that occur during payroll.

The following graphic shows how the HR and Payroll Foundation system supports Human Resources, Benefits, 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

Human Resources Features

In addition to the features that are included in the Workforce Management Foundation system, the Human Resources system provides the following features:

- *Recruitment process*
- *Requisition management*
- *Applicant tracking*
- *Position budget management*
- *Compensation management*
- *Benefits administration*

See Also

- *System Features* in the *Workforce Management Foundation Guide* for more information about features that are common to human resources, payroll, and time accounting.

Recruitment Process

While many organizations are accustomed to a paper-heavy process to organize their recruiting efforts, OneWorld offers an automated solution.

The requisition, application, and hiring processes are automated and paperless in OneWorld. Using OneWorld's features, such as Enterprise Workflow Management, the field manager no longer needs to notify human resources about vacancies. The field manager can access OneWorld directly, create an electronic requisition, and forward it by e-mail to HR and approving managers. With electronic approvals, HR knows immediately when the approval has been granted. When this approval occurs, HR begins to search for candidates and can electronically attach an applicant record to the requisition as people submit resumes.

With each step of the applicant evaluation process, HR can update the requisition with new information, such as "Applicant has completed second interview." Using the Applicant Supplemental Database, HR can include additional company-specific information in the applicant's record, such as scores on skills evaluation tests and previous job experience. Using the Supplemental Data Multiskill Search function, HR can quickly assess those applicants whose experience and education most closely match the requirements of the job. Reporting on applicant demographics is easy using OneWorld's various standard reports, which are based on the applicant records that HR has entered throughout the recruiting process.

Converting a candidate to an employee within OneWorld is an easy process. The user transfers the data that has already been entered on the applicant side to the employee database. The user is then prompted for other key employee information that is required. Throughout this process, field managers and approving authorities can access OneWorld to review the status of the search and review the qualification of the applicants.

The recruitment process includes requisitions and applicant information.

Requisition Management

To begin filling a vacancy within your organization, you can create online requisitions that include detailed information about the open position and its associated job.

By identifying open requisitions, you can create internal job postings, which you can make available to your entire organization. The flexibility of the system lets you associate multiple requisitions with a single applicant or multiple applicants with a single requisition. Using the requisition features, you can analyze data to evaluate your recruiting process.

You can use Enterprise Workflow Management to facilitate the process of getting approval for a requisition. For example, you can automate formerly paper-based tasks, such as notifying a manager that a requisition is waiting for approval, by using an e-mail-based process flow across a network. The Human Resources system includes a workflow process for requisition approvals.

Because recruiting is expensive, you need to know where your efforts have been most effective. You can track how long a requisition is open before it is filled. You can also track the costs associated with filling the requisition, such as advertising, travel, and recruiter fees.

Applicant Tracking

In today's job market, one opening in your company can result in hundreds of resumes. You need to be able to quickly identify the applicants who meet the requirements of an open requisition. With the J.D. Edwards Human Resources system, you can manage extensive information about each applicant, such as desired salary, available date, education, prior experience, and foreign language proficiency.

You can then search for applicants who meet specific criteria. The system's extensive search capabilities make it easy to reduce a list of applicants to those whom you want to seriously consider. You can then provide your managers with a list of qualified applicants.

When you hire an applicant, the system automatically updates the person's employee master record to indicate that he or she is an employee. You can also set up your system to require someone to enter payroll information before the hiring process is complete.

Position Budget Management

The Human Resources system provides comprehensive tools for position budget management so that you can improve how you manage employee salary costs. By managing your position budgets within the Human Resources system, your department can become more proactive when managing salary budgets.

As part of managing your budget, you can perform the following tasks:

- Review the approved head count for a position before you create a requisition.
- Track position effective dates and the resulting budget calculations.
- Automatically update position activity when you change an employee record.
- Compare projected salaries through year end with the approved budget for each position.
- Determine year-end costs by developing projections based on hours, salary amounts, head count, or full-time equivalents.
- Track positions and head count by company and department.
- Post position budgets and accounts to the general ledger.

Compensation Management

The J.D. Edwards Compensation Management system provides a salary-planning tool that empowers supervisors to make salary decisions that are based on real-time information. Basic Compensation provides a flexible Web tool that allows supervisors to recommend adjustments to their employees' salaries using the budgets, rules, and approval requirements that are defined by Human Resources. At the same time, the system gives HR personnel more control over the salary-planning process while freeing them from administrative tasks that are historically associated with salary planning.

Benefits to HR include the following:

- Rules engines allow HR to define the parameters under which supervisors can operate and remove HR from the process of manually looking for any activities that are outside the guidelines.
- Real-time information automatically updates supervisor rosters and budgets.
- Online forms prevent lost spreadsheets, therefore saving time and preventing security risks that are associated with mailing employee information.

Benefits to supervisors include the following:

- Web interface allows supervisors to plan salaries or approve recommendations from any location.
- Real-time information gives supervisors the most current data on which to base decisions.
- Online guidelines with visual indicators help supervisors make informed decisions and give them instant feedback on their recommendations.
- Summary information tells the supervisors immediately how they and their subordinate supervisors are doing against their budgets.
- Upper management can view the progress of the staff from a budget and salary review perspective.

The Compensation Management system can improve the salary review process for both Human Resources and management.

Benefits Administration

The Benefits Administration module provides you with tools to manage your organization's benefit plans with online integration to other human resources information and payroll processing. With the Benefits Administration module, you can respond to employees' requests for information about their benefits.

See Also

- The *Benefits Administration Overview* in the *Human Resources - Benefits Guide* for information about benefits administration

Tables and Descriptions

The Human Resources system uses the following tables:

Address Book Master (F0101) and Address by Date (F0116)	Contains name and address information for all employees and applicants. Employee records have a search type of E, and applicant records have a search type of A.
Employee Master (F060116)	Contains employee information for the Payroll and Human Resources systems.
Job Information (F08001)	Contains information for job ID and for the job evaluation. The job ID is a combination of the job type and job step (job steps are levels of advancement within a job type).

Supplemental Database Types of Data (F00090)	Contains data types and their respective column headings. Use these data types to define 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.
Requisition Information (F08102)	Contains the definition of the requisition, including requisition status and fiscal year.
Applicant Master (F08401)	Contains applicant information, including applicant status and Equal Employment Opportunity Commission (EEOC) information.
Position Master (F08101)	Contains the position definition, along with budget information at the position level.
Position Accounts (F081012)	Contains accounting information, split by account, for a position.
Position Budget Detail (F08111)	Contains position detail at the employee activity level.

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 area 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* in the *OneWorld Foundation Guide* for complete instructions on setting up user defined codes
- The global solutions guide for your country for country specific information about user defined codes
- *Understanding User Defined Codes for Workforce Management Systems* in the *Workforce Management Foundation Guide* for a list of additional user defined codes

User Defined Codes for Human Resources

The user defined codes described below apply specifically to the J.D. Edwards Human Resources system.

Applicant Status (08/AS)

You use applicant status codes to define steps in the hiring process (such as initial contact and first interview) that the applicant has completed. When you enter or change the status of an applicant on the Applicant Entry form, the system adds a record to the supplemental data type for applicant status. You can use supplemental data to review the history of changes made to the applicant status field.

Approval Type (05/AP)

You use approval type codes to specify the type of change that needs approval. For example, you might use COM as the approval type code for a compensation change.

Based Date from Length of Service (08/RW)

You use based on date from length of service codes to identify the date to use when calculating an employee's length of service. For example, for some calculations, you might consider length of service to be the time that the employee has spent in his or her current job. Therefore, you might use a code to specify the data item Date in Current Job to calculate length of service. You might also use hire date or start date if you are calculating length of service that is based on the time that the employee has spent with the company.

Branch/Location (01/01)

You use branch/location codes to define the branch or geographic location for which an applicant is being considered. This code can be helpful for tracking and reporting applicant information. For example, by using this information, you can track which branch or location has the best applicant response.

Budget Status (08/PC)

You use budget status codes to indicate the status of position budgets. The system uses the first character in the second description in the user defined code table 08/PC to process approved and closed positions. The position's budget must have an approved status before you can assign it to an employee or an approved requisition. Positions with a closed budget status are not included when you run Create Next Year's Budgets (R081820).

Candidate Status (08/CN)

You use candidate status codes to track the current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from UDC 08/CN. You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are:

CAN	Any candidate code
DET	Any code indicating that the position is detached or no longer filled
FIL	Any code indicating that the position has been filled
REJ	Rejected
TMP	Temporarily filled

Candidate requisition status codes that have a special handling code of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to "Filled and Closed."

Compensation Model Types (08/PM)

You use compensation model type codes to designate the type of compensation model that you create. You can create the following three types of compensation models:

- PUBLIC - Can be viewed by the owner of the model as well as other employees
- MASTER - Used for final submission
- PRIVATE – Can be viewed only by the owner of the model

Data Item for Column or Row Factor (08/RH)

You use data item column and row factor codes to designate which data items that you are using in the Define Increase Type Guidelines tables. Codes entered in this user defined code table should match the data item names of the fields that you want to use to define compensation review guidelines. For example, if an employee's performance appraisal level is used to determine increase guidelines, you would enter data item PAPL in UDC 08/RH.

Establishment Search Types (08H/ES)

You use establishment search type codes to define what search types can be used as establishments for health safety management reporting purposes. For example, if companies are the only organizational unit within your organization that can be considered an establishment for health safety management reporting, you would enter the search type code that defines company, as set up in UDC 01/ST, in UDC 08H/ES. Similarly, if both business units and companies can be considered establishments, you would enter the codes for business unit and company, as set up in UDC 01/ST, in UDC 08H/ES. All codes entered in this UDC must first be set up in UDC 01/ST.

Hazardous Material Codes (08/HM)

You use hazardous material codes to specify the type of hazardous chemical or material, if any, that is involved in a work-related accident.

Input Method Codes (08/RB)

You use input method codes to determine the type of entry that you use for basic compensation calculations. Examples of codes that you might enter are fixed amount or percentage.

Method of Application (08/MA)

You use method of application codes to define how an applicant applied for a job within your organization. Examples of codes that you might use for methods of application are Phone, Fax, Mail, and In Person.

Occupational Illness (08/H5)

You use occupational illness codes to define the exact nature of an occupational illness for health safety management reporting purposes. The sequence of the illness codes that J.D. Edwards provides corresponds exactly to the sequence on the OSHA 200 Summary report. If you plan to print the OSHA 200 Summary report that J.D. Edwards provides and send it to the US Department of Labor, you should not change the sequence of the codes. For example, you can change user defined code A, Skin Disease or Disorder, to code R, Rash, if that better meets your needs. However, the corresponding column on the OSHA 200 Summary report always refers to Occupational Skin Diseases or Disorder. If you are not sending the report to OSHA, you can change the codes, descriptions, and sequence to suit your organizational needs.

Occurrence Location (08/H2)

You use occurrence location codes to define the exact physical location where an event (injury or illness) occurred. Examples of occurrence locations are the computer room, loading dock, and cafeteria. Occurrence location codes are used in health safety management reporting. See *Opening an Injury or Illness Case.*

Part of Body (08/H4)

You use part of body codes to indicate the part of the body that is affected by a work-related injury or illness. Examples of part of body codes include right hand, left foot, and lower back. This information is used in health safety management reporting.

Pay Type Categories (05/V1)

You use pay type category codes to group pay types into predefined categories that are used in the standard Verification of Employment Letter. Pay type category codes include base, overtime, commission, bonus, and other pay.

Position Status (08/PL)

You use position status codes to define the current activity level of a position. When you attach an employee record to a vacant position, the system updates the position status with the position status code that has DEFA in its special handling code. The system updates the position status code on the beginning date of the employee's assignment. When the position again becomes vacant, you must manually change the value in the Position Status field to reflect that the position is vacant.

Requisition Status (08/RS)

You use requisition status codes to describe the status of the position htat is associated with a requisition. J.D. Edwards provides several codes that you can use for requisition status purposes. Two of these codes are hard-coded and should not be changed:

- Approved (AA)
- Filled and Closed (99)

Statuses that indicate that a requisition is approved should begin with the letter A. If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the requisition status when the appropriate person approves the requisition. This update overwrites any existing value in the field.

Rounding Rule Code (08/RR)

You use rounding rule codes to specify the rounding rule for an increase amount or a pro-rated amount. If you use pro-rating in the compensation review, the pro-rate amount is rounded. Otherwise, the increase amount is rounded.

Setup Subclass (08/T2)

You use setup subclass codes, along with employee setup task codes, to define tasks that must be performed in the Manager's Employee Setup Workflow process. For example, to further define the employee setup task "setup computer," you might use a setup subclass code to identify the type of computer that should be set up.

Setup Task Status (08/S2)

You use setup task status codes to identify the status of a task in the Manager's Employee Setup Workflow process. Examples of setup task status codes are pending and complete.

Setup Task Types (08/T1)

You use setup task type codes to identify primary categories or classifications of employee setup tasks. For example, you might use setup task type code IT to categorize a task as something that needs to be completed by an IT employee, such as setting up a computer.

Requisitions

Requisitions

You enter a requisition to begin the process of filling a vacancy within your organization. A requisition is a record or document that contains information about the open position (an employee's assignment for a fiscal year) and job (the duties that an employee performs for your organization). A vacancy is a job opening or unfilled head count (number of people) in a position.

After you enter a requisition, you typically need to wait for the appropriate person to approve it before you can begin the process of filling the requisition. Enterprise Workflow Management automates tasks that were formerly paper-based. For example, you can notify a manager that a requisition is waiting for approval by using an e-mail-based process flow across a network.

You can track the status of a requisition from its initial creation to its approval or rejection to its close.

You can associate a candidate with one or more requisitions. When you hire an applicant or transfer an employee to a new position, the system automatically indicates that the requisition is closed.

Entering Requisition Information

You enter requisition information to begin the process of filling one or more vacancies within your organization. The requisition contains job and position information that you can use to match a candidate to a vacancy.

You can also track additional information that is unique to your organization or your industry. For example, if you need a senior consultant who speaks fluent Spanish, you can track Spanish fluency on the requisition.

To help you manage your workflow, you can enter requisition information before the appropriate manager has approved it and indicate that it is waiting for approval. Then, after the manager approves or rejects the requisition, you can update its status.

You can use Enterprise Workflow Management to facilitate the process of getting approval for a requisition. For example, you can notify a manager that a requisition is waiting for approval by using an e-mail-based process flow across a network.

After you enter requisition information, you can review the information to verify that it is correct. You can review detailed information about individual requisitions or about all of the requisitions for a specific business unit or job type. For example, you can review all of the requisitions in business unit 701 to determine which of them have been approved and the name of the person who approved them.

Entering Initial Requisition Information

You enter initial requisition information to identify a new vacancy within your organization. For example, you might enter the following types of initial requisition information:

- Fiscal year
- Home business unit

- Job type
- Job step

You can also attach the following types of objects to a requisition:

- Text documents
- Scanned images
- Links to other OneWorld applications and other software packages

For example, you can attach a Microsoft Word document that lists approval or rejection information for the requisition.

Basic requisition information is the minimum amount of information that you should track. It includes information such as the status of the requisition and the job to which it applies. Additional information includes optional items, such as pay information and information that is unique to your organization.

► To enter initial requisition information

From the Requisitions menu (G08BR1), choose Requisition Information.

1. On Work With Requisitions, click Add.
2. On Requisition Information, complete the following field to assign a specific requisition number:
    - Requisition Number

   If you leave this field blank, the system assigns the next available number.
3. Click the Primary Information tab and complete the following fields:
    - Requisition Status
    - Home Business Unit
    - Security Business Unit
    - Requested By
4. Complete any of the following fields, as necessary:
    - Requisition Date
    - Effective From Date
    - Effective Thru Date
    - Fiscal Year
    - Position ID
    - Job Type/Step
    - Approved By

- Approval Date
- Headcount

5. Click the Secondary Information tab and complete any of the following fields, as necessary:

    - Pay Grade/Step
    - Pay Class(H/S/P)
    - Overtime Exempt
    - Expected Salary
    - FTE
    - Hours
    - Last Filled By
    - Filled Date

    If you completed the Headcount field on the Primary Information tab and do not complete the FTE and Hours fields on the Secondary Information tab, the system automatically completes the FTE and Hours fields based on the headcount.

6. To attach objects to the requisition, click the Additional Information tab.

    See *Working with Media Objects* in the *OneWorld Foundation Guide* for information about entering text and attachments.

7. Click the Category Codes tab and complete any applicable fields.
8. To complete the requisition, click OK.

    If you have enabled Enterprise Workflow Management for requisition approvals and you entered a "waiting for approval" requisition status, a dialog box appears when you save the requisition.

    See Updating the Status of a Requisition for information about using the workflow process to approve a requisition.

9. On Requisition Workflow Pending Review Notification, click OK.

Processing Options for Requisition Information (P08102)

Defaults
1. Enter a '1' to default Pay Grade, Pay Grade Step, Pay Class and Overtime Exempt from the Job Information Table
  0 = Do not use default data. (Default if blank)
  1 = Use default data.
2. Address Number of Default Approver
3. Address Number or Default Recruiter

Entering Supplemental Data for Requisitions

From the Requisition Supplemental Data menu (G08BSDR1), choose the appropriate option.

Supplemental data is any type of information in addition to the requisition record that you want to track about the following items or individuals:

- Requisitions
- Jobs
- Employees
- Applicants
- Dependents/Beneficiaries

When you set up your Human Resources system, you specify the types of supplemental data (data types) that you want to track. Supplemental data is not required by the system.

Requisitions might include the following types of supplemental data:

- Requirements
- Approval steps
- Requisition notes
- Requisition activity
- Requisition review

The method that you use to enter supplemental data is the same for any other type of supplemental information that you track.

See Also

- ❑ *Working with the Supplemental Database* in the *Workforce Management Foundation Guide* for information about entering, copying, and reviewing supplemental data
- ❑ *Reviewing Requisition Reports*

Working with Requisitions

After you enter basic requisition information, you typically need to wait for approval from the appropriate person before you can begin recruiting candidates. If you have enabled the workflow process for requisition approvals, the system automatically updates the status of a requisition. If you are not using the workflow process, you must update the status manually.

You can attach candidates' records to a requisition to track the candidates' progress as you interview them and evaluate their qualifications. When you hire a candidate to fill a requisition, the system automatically updates the filled head count for the requisition. (The filled head count is the number of people who have been hired to fill the requisition.)

When you hire enough candidates to meet the head count for the requisition, the system automatically indicates that the requisition is filled and closed. You cannot hire candidates for a requisition that is filled and closed. If necessary, however, you can reopen a closed requisition by increasing its head count and changing the requisition status.

Updating the Status of a Requisition

Your organization might require that a new requisition be approved by a higher level of management before it can be filled. In this case, when you (the requestor) enter a requisition, you can indicate that it is waiting for approval. When the approving manager approves or rejects the requisition, the requisition status must be updated accordingly.

Typically, you wait until a requisition is approved before you begin searching for candidates to fill the requisition. The system does not allow you to hire a candidate to fill a requisition unless the requisition status is "approved."

The demonstration data for your system includes a workflow process for requisition approvals. You can enable this workflow process when you set up your system. If the workflow process is enabled, the following events happen after you enter a requisition:

- The system automatically notifies the person who is authorized to approve requisitions (the approving manager) that a requisition is waiting for approval.
- When the approving manager approves or rejects a requisition, the system automatically updates the requisition status. If the manager approves the requisition, the system also updates the Approved By field.

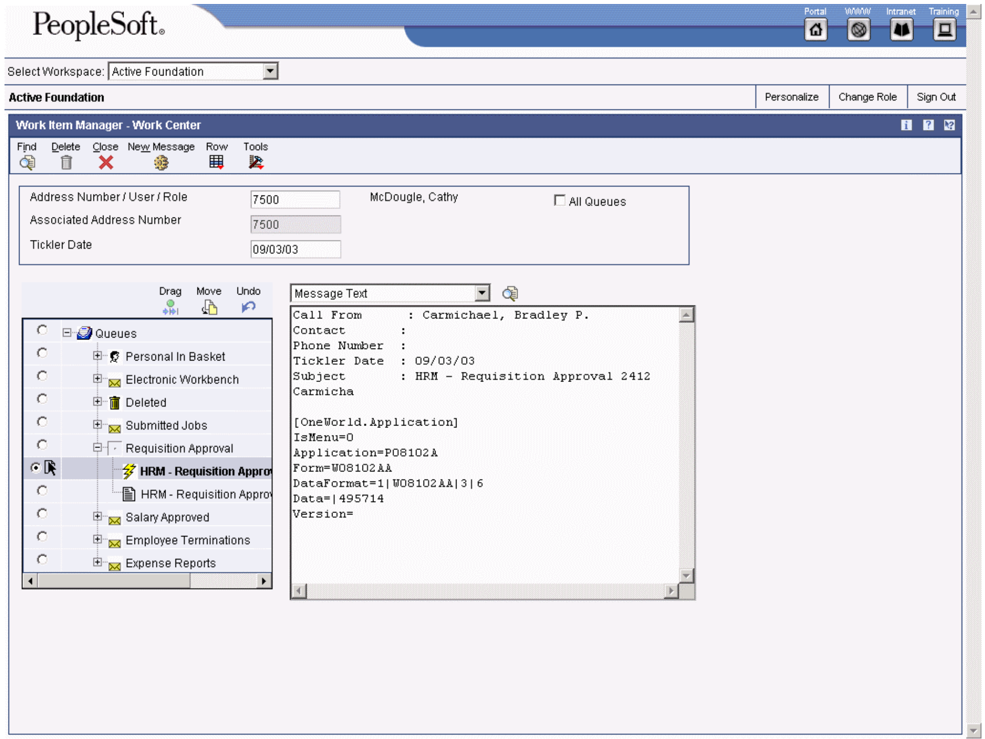
If you have activated this workflow process, you do not need to manually update the requisition status when the requisition is approved or rejected. Instead, the system automatically updates the requisition status for you. If you are not using the workflow process, you or the approving manager must manually update the status of the requisition.

► To update the status of a requisition using workflow

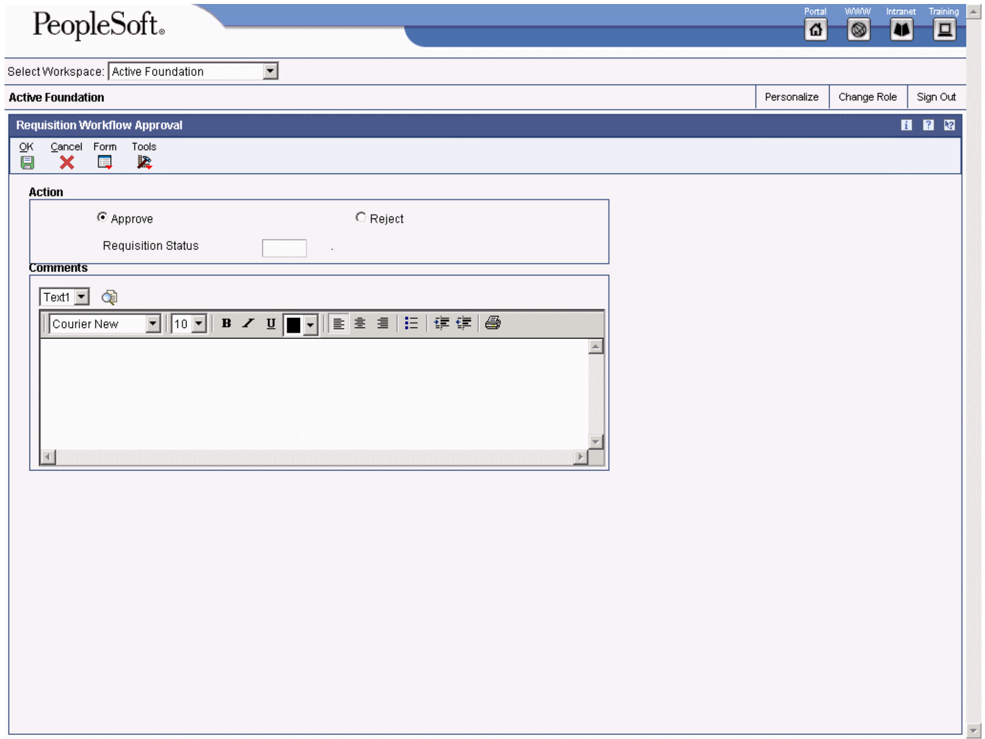
The following steps describe how the approving manager completes the workflow process after the requestor completes the steps for entering requisition information.

The approving manager receives a workflow message saying that a requisition is waiting for approval. The message containing the requisition appears in the Requisition Approval mailbox in the Work Center.

From the Workflow Management menu (G02), choose Employee Work Center.



1. On Work Center, to approve or reject the requisition, choose the message containing the requisition, and then click the Requisition Workflow Approval icon.
2. Click Requisition Workflow Approval on the right side of the form.



3. On Requisition Workflow Approval, click the following option:

    - Approve

4. Complete the following field:

    - Requisition Status

5. Enter an optional text message.

    The system stores the message text in an audit table so that you can refer to it later, if necessary.

6. Click OK.

    The system updates the requisition with the new status code, adds the name of the person who approved the requisition, and notifies the requestor that the requisition has been evaluated. If the manager approves the requisition, the system also sends a message to the appropriate recruiter.

▶ To update the status of a requisition manually

From the Requisitions menu (G08BR1), choose Requisition Information.

1. On Work With Requisitions, to locate the requisition that you need to approve, complete one or more of the following fields and click Find:

    - Home Business Unit

- Position ID
- Requisition Number
- Requisition Status
- Job Type/Step
- Fiscal Year

2. Choose the requisition and click Select.
3. On Requisition Information, complete the following fields, and then click OK:

    - Requisition Status
    - Approved By
    - Approval Date

Attaching a Candidate Record to a Requisition

When you determine that a candidate might be suitable to fill a vacancy, you can attach the candidate's record to the requisition. Attaching candidate records to a requisition simplifies the process of tracking each candidate's status as you interview and evaluate candidates for the vacancy.

After you attach candidate records to a requisition, you can easily review the status of all of the candidates who are being considered for a requisition. You can limit your review to include only applicants, only employees, or both applicants and employees. For applicants, you can further limit the search to include only those with a specific applicant status, such as applicants who have passed the tests that are required for employment with your organization.

You can also update the candidate's requisition status as necessary. For example, when you decide that a candidate is not suitable for the vacancy, you can reject the candidate.

When you are ready to fill a requisition, you hire an applicant or assign an employee to the requisition. The system automatically changes the candidate's status to indicate that the candidate has filled the requisition.

► To attach a candidate record to a requisition

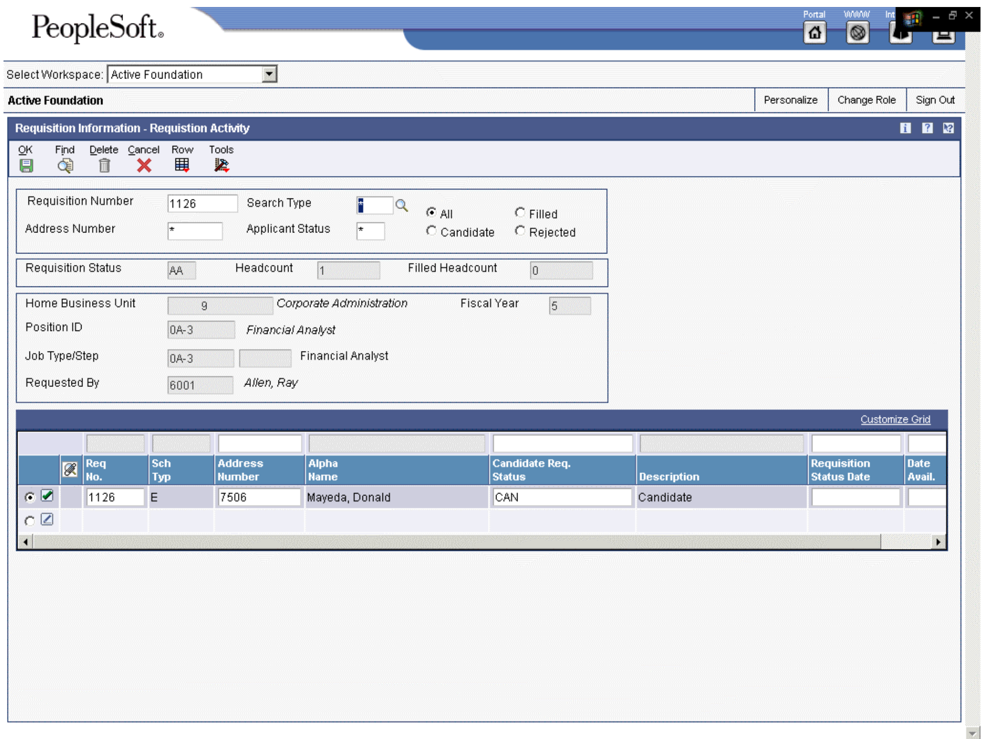
From the Requisitions menu (G08BR1), choose Requisition Information.

1. On Work With Requisitions, to locate the requisition to which you need to attach a candidate record, complete one or more of the following fields and click Find:

    - Home Business Unit
    - Position ID
    - Requisition Number
    - Req Status

- Job Type
- Job Step
- Fiscal Year

2. Highlight the requisition and click Select.
3. On Requisition Information, choose Requisition Activity from the Form menu.



4. On Requisition Activity, complete the following field:
   - Address Number
5. Complete the following fields in the detail area of the form, and click OK:
   - Candidate Req. Status
   - Requisition Status Date
   - Date Avail.

Reopening a Requisition

In some cases, you might need to reopen a requisition that has been filled and closed. For example, assume that you receive the necessary funding to increase the head count for a position that had previously reached its maximum-filled head count. If you have a filled and closed requisition that references the position, you can save time by reopening the existing requisition instead of creating a new one.

► To reopen a requisition

From the Requisitions menu (G08BR1), choose Requisition Information.

1. On Work With Requisitions, to locate the requisition that you need to reopen, complete one or more of the following fields and click Find:
    - Home Business Unit
    - Position ID
    - Requisition Number
    - Requisition Status
    - Job Type
    - Job Step
    - Fiscal Year
2. Choose the requisition and click Select.
3. On Requisition Information, change the information in the following field:
    - Requisition Status
4. Complete the following field and click OK:
    - Headcount

Reviewing Requisition Reports

After you enter requisition information, you can print reports to review the information and verify that it is correct. You can also review information about groups of requisitions, such as their approval status, their filled status, and the candidate records that are attached to them.

Reviewing the Requisition Supplemental Data Report

From the Requisition Supplemental Data menu (G08BSDR1), choose Requisition Supplemental Data Report.

To review complete information for one or more requisitions, print the Requisition Supplemental Data report. You can review this information online for a single requisition using Requisition Supplemental Data Inquiry. However, this report allows you to print information for multiple requisitions at one time.

You can list requisitions either by requisition number or alphabetically by requisition description. You also choose whether the report includes text information.

See Also

- R080416, *Requisition Supplemental Data* in the *Reports Guide* for a report sample

Processing Options for Requisition Supplemental Data Report (R080416)

Printing Text
1) Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Reviewing the Requisition Data by Data Type Report

From the Requisition Supplemental Data menu (G08BSDR1), choose Requisition Data by Data Type Report.

To review a list of all of the requisitions with information in a particular supplemental data type, print the Requisitions by Data Type report. You can review this same information online using Requisition Data by Data Type.

See Also

- R080406, *Requisition Data by Data Type* in the *Reports Guide* for a report sample

Processing Options for Requisition Data by Data Type Report (R080406)

Options
Enter a '1' to bypass printing text information on the report.
Default of blank will print the text.

Reviewing the Requisition Review - Position Report

From the Requisitions menu (G08BR1), choose Requisition Review - Position.

To determine the approval status of a group of requisitions, print the Requisition Review - Position report. You can print two versions of this report. One version lists the requisitions by job description, and the other version lists them by position description.

See Also

- R081490, *Requisition Review - Position* in the *Reports Guide* for a report sample

Processing Options for Requisition Review – Position (R081490)

Detail Type
1. Which field would you like to see on the report. Blank (default) = Position Description, 1 = Job Description.

Applicant Information

Applicant Information

An applicant is a person who applies for a vacancy in your organization. You can track detailed information about applicants and use this information to do the following things:

- Link applicants to requisitions.
- Evaluate the qualifications of each applicant.
- Meet government reporting requirements.

You might track the following standard types of applicant information:

- Personal information, such as name, address, and tax identification number
- The job and position for which each applicant applies
- Governmental reporting information, such as that required to meet Equal Employment Opportunity (EEO) and Canadian Employment Equity requirements

The system also gives you the flexibility to track any other type of information that your organization needs. You can use the supplemental data feature to track entire categories of auxiliary information for applicants, such as job skills or professional licenses.

Entering Applicant Information

Before you can begin evaluating applicant information, you must add a record that contains personal information about the applicant to the database.

You can track detailed information about applicants so that you can evaluate applicants' qualifications and match applicants to open requisitions. You can also track the applicant information that you need to meet government reporting requirements.

After you enter initial information for an applicant, you can enter supplemental data, which is any additional information that you want to use to link the applicant to a job.

When you are finished adding new applicant records, the system can update one of the following tables:

- Unedited Quick Hire Transaction table (F060116Z)
- Employee Master table (F060116)

If you click the Initiate Hire option after you add an applicant record, the system updates the Unedited Quick Hire Transaction table (F060116Z). This table is part of the Employee Quick Hire program (P060116Q). The applicant record does not become an employee record in the Employee Master table until you run the Process Pending Employees report (R060116P). This report copies the applicant record from the Unedited Quick Hire Transaction table to the Employee Master table (F060116) and changes the search type from applicant to employee.

The Unedited Quick Hire Transaction table (F060116Z) does not automatically update the Employee Master table, so you can review and revise the applicant records before they are copied to the Employee Master table (F060116). You can review and revise applicant records with the Employee Work File Revisions program (P060116P), and then run the Process Pending Employees report (R060116P) to update the Employee Master table (F060116).

If you click the Hire option after you add an applicant record, the system updates the Employee Master table (F060116) and changes the search type on the record from applicant to employee.

See Also

- *Attaching a Candidate Record to a Requisition* for information about associating applicants with requisitions
- *Working with New Employee Information* in the *Workforce Management Foundation Guide* for information about updating the Employee Master table

Adding New Applicant Records

Before you can track applicant information or search for an applicant who has a specific skill, you must add a record for the applicant. This record includes the following personal information about the applicant:

- Job applied for
- Country code
- Date available to work

Basic information includes information about the applicant, such as the job for which the applicant is applying.

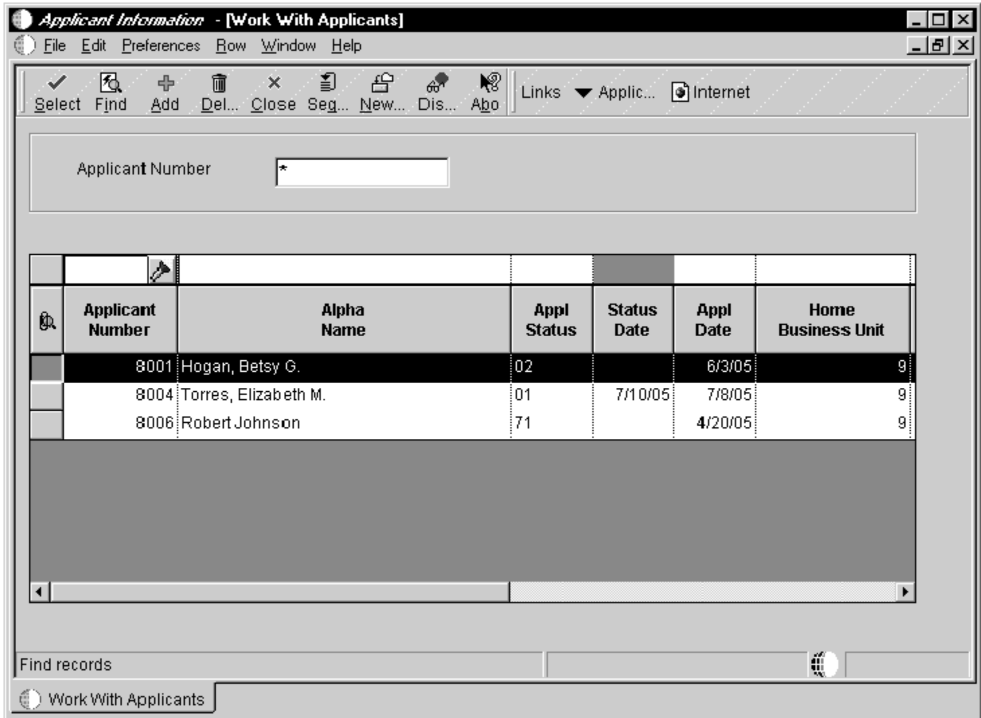
Address book information includes information such as the applicant's name, address, and phone number. Entering address book information automatically adds the applicant to the Address Book system. After you enter address book information for an applicant, you can locate the applicant's record in the database by name. You do not need to know the applicant number.

Country-specific information is information that is required only in the country where the applicant works. For example, in the United States, country-specific information includes information that is required for government reporting, such as veteran and disability status.

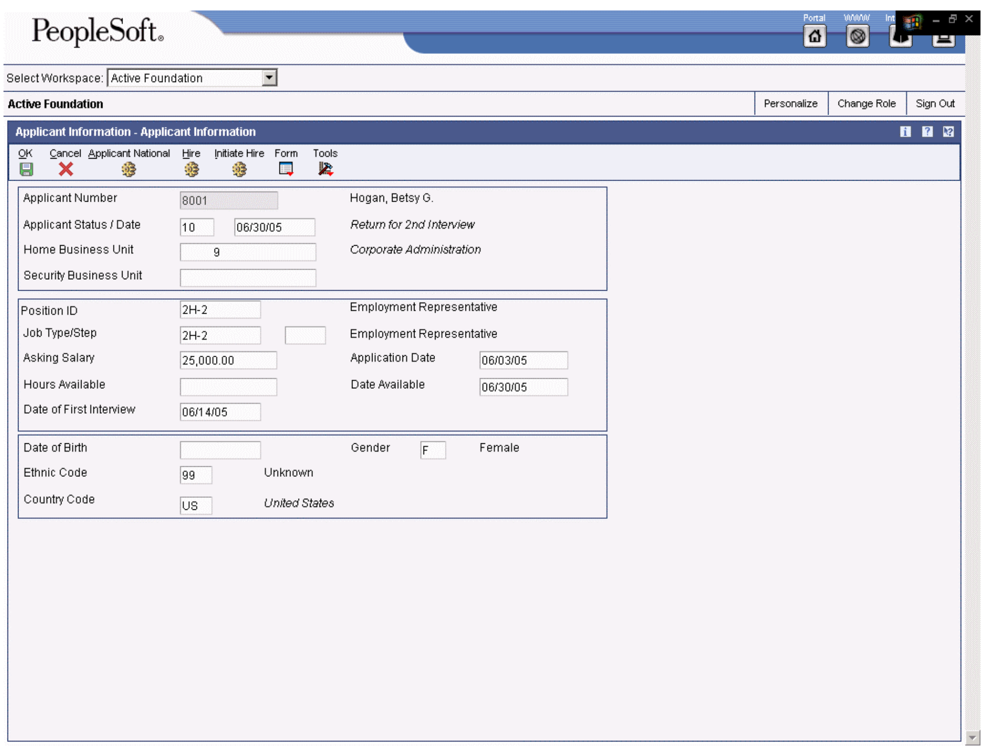
Adding new applicant records includes entering basic applicant information, plus address book and country-specific information.

► To enter basic applicant information

From the Applicants menu (G08BA1), choose Applicant Information.



1. On Work With Applicants, click Add.



2. On Applicant Information, complete the following fields:

    - Applicant Number
    - Applicant Status / Date
    - Application Date
    - Gender
    - Ethnic Code
    - Country Code

3. To associate the applicant's record with a specific job, complete the following fields:

    - Home Business Unit
    - Job Type/Step

4. Complete any of the following optional fields:

    - Security Business Unit
    - Position ID
    - Date Available
    - Date of First Interview
    - Asking Salary
    - Hours Available
    - Date of Birth

5. If you want to assign competencies to the applicant, choose Resource Competency from the Form menu.

    See *Assigning Competencies to Employees* in the *Workforce Management Foundation Guide* for additional information.

6. If you want to compare the applicant’s competencies with the competencies that are required for a particular job, on Applicant Information, choose Gap Analysis from the Form menu.

    See *Reviewing Gap Analysis Online* in the *Workforce Management Foundation Guide* for additional information.

7. To add text or objects to applicant information, on Applicant Information, choose Attachments from the Form menu.

    When you enter applicant information, you can use the attachment feature to attach additional text or objects, such as a scanned copy of the applicant's resume, to the applicant record. See Working with Media Objects in the *OneWorld Foundation Guide* for information about entering text and attachments.

8. On Applicant Information, click OK.

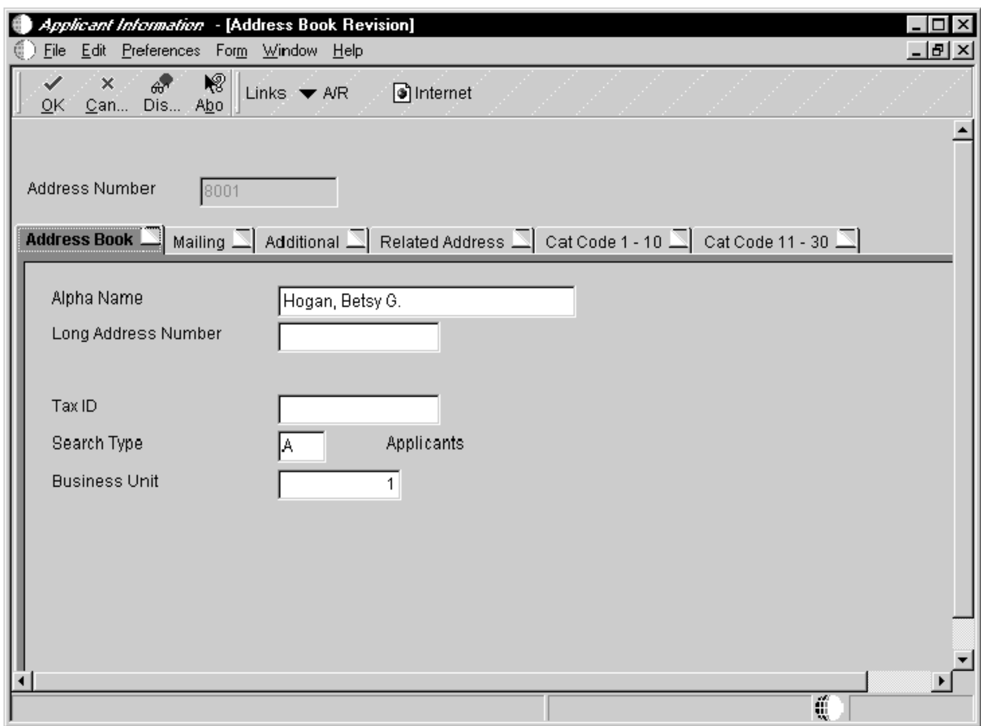
After you have completed these steps, the Address Book Revision form appears. Follow the steps to enter address book information for an applicant.

Note

If you are using the J.D. Edwards Payroll system to report applicant information to the Equal Employment Opportunity Commission (EEOC), you must enter all applicants into the database, regardless of the applicant's qualifications.

► To enter address book information for an applicant

After you complete the steps to enter basic applicant information, the Address Book Revision form appears. You must complete the following steps to enter address book information.



1. On Address Book Revision, click the Address Book tab.
2. Complete the following fields:
   - Alpha Name
   - Search Type
3. Complete the following optional fields:

- Long Address Number
- Tax ID
- Business Unit

4. Click the Mailing tab.
5. Complete the following fields:
   - Mailing Name
   - Address Line 1
   - City
   - State
   - Postal Code
   - Country
   - County
6. Complete the following fields, if necessary:
   - Address Line 2
   - Address Line 3
   - Address Line 4
7. Click OK.

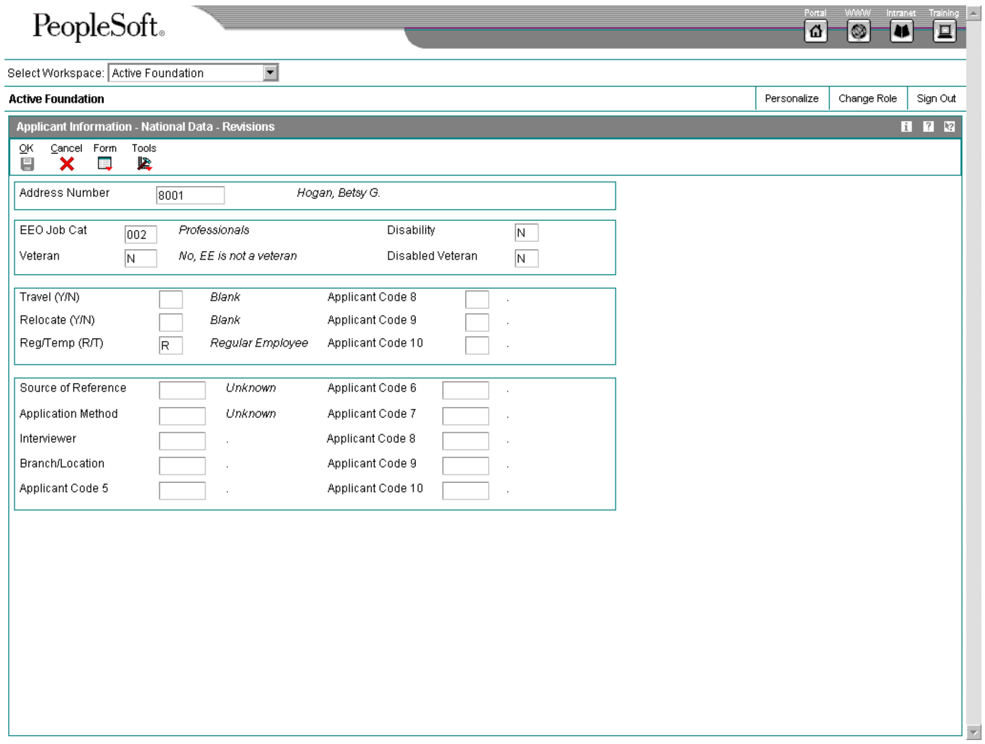
   After you have completed these steps, the Work With Applicants form appears. Follow the steps to enter country-specific information for an applicant.

► To enter country-specific information for an applicant

After you complete the steps to enter address book information for an applicant, you must enter country-specific information. When you enter country-specific information, the system displays fields only for the information that applies to the country code that you entered for the applicant. Many of the fields that appear on the Applicant Information - National Data - Revisions form are user defined fields that you can customize to meet the specific needs of your organization. The following steps apply to an applicant in the United States.

From the Applicants menu (G08BA1), choose Applicant Information.

1. On Work With Applicants, locate and choose the applicant's record, and then click Select.
2. On Applicant Information, choose Applicant National from the Form menu.



3. On Applicant Information - National Data - Revisions, complete the following fields to enter government reporting information:
    - EEO Job Cat
    - Veteran
    - Disability
    - Disabled Veteran
4. Complete any of the following optional fields:
    - Travel (Y/N)
    - Relocate (Y/N)
    - Reg/Temp (R/T)
    - Source of Reference
    - Application Method
    - Interviewer
    - Branch/Location
5. Complete any of the other user defined fields as necessary.

6. Click OK.

Processing Options for Applicant Information (P08401)

Hire
1. Status Code
2. Requisition Information

   Default = No
   1 = Yes
3. Job Information

   Default = No
   1 = Yes
4. Transfer Supplemental Data

   Default = No
   1= Yes
5. Notification Message

   Address Book Number = Yes
   0 = No

Delete
1. Delete Supplemental Data and
   Address Book Record

   Default = No
   1 = Yes

Add
6. Date of Birth, Gender, and Ethnic Code Required

   Default = No
   1 = Yes

Updating an Applicant's Address

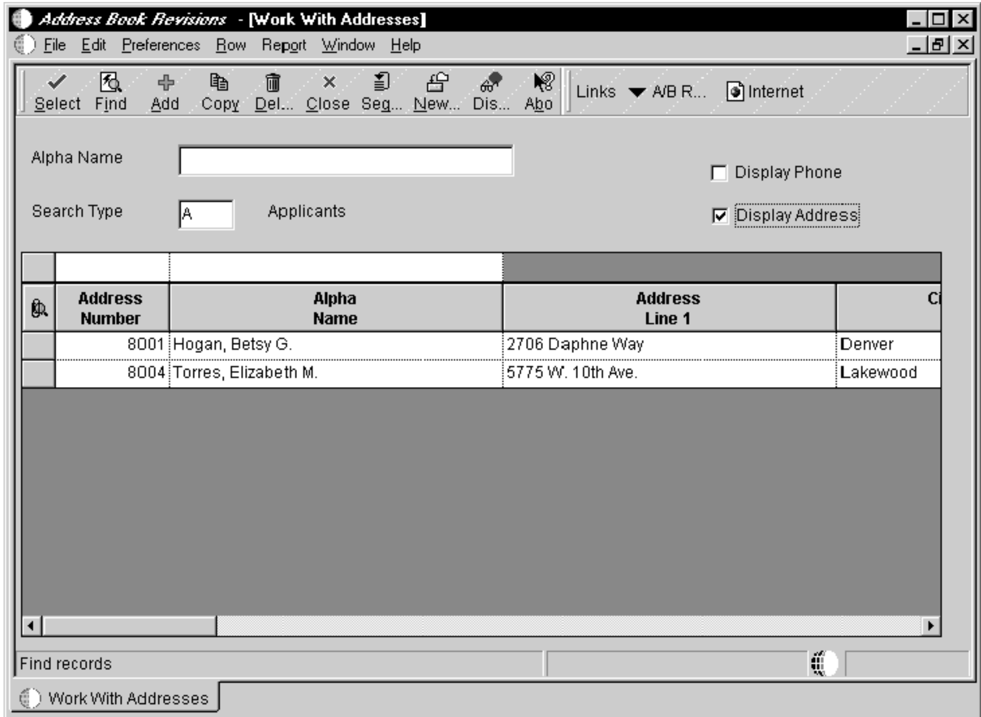
After you have entered applicant information, you can use Address Book Revisions to change an applicant's address.

See Also

- *Entering Address Book and Mailing Information* in the *Address Book Guide*
- *Processing Options for Address Book Revision* in the *Address Book Guide*

► To update an applicant's address

From the Applicants menu (G08BA1), choose Address Book Revisions.



1. On Work With Addresses, complete either of the following fields to locate the address that you need to change:

    - Alpha Name
    - Search Type

2. To display the applicant's phone or address, click the Display Phone or Display Address option.
3. Click Find.
4. Choose the employee address that you want to change and click Select.
5. On Address Book Revision, complete any of the necessary fields and click OK.

Entering Supplemental Data for Applicants

From the Applicant Supplemental Data menu (G08BSDA1), choose the appropriate option.

Supplemental data is any type of information in addition to an applicant record that you want to track about the following items or individuals:

- Requisitions
- Applicants
- Employees
- Jobs

- Dependents
- Beneficiaries

When you set up your Human Resources system, you specify the types of supplemental data (data types) that you want to track. Supplemental data is not required by the system.

You might include the following types of supplemental data for applicants:

- Applicant status history
- Work experience
- Education
- Job skills
- References

The method that you use to enter supplemental data is the same for any other type of supplemental information that you track.

See Also

- *Working with the Supplemental Database* in the *Workforce Management Foundation Guide* for information about entering, copying, and reviewing supplemental data
- *Reviewing Applicant Reports*

Hiring an Applicant

When you offer an applicant a job and the applicant accepts, you need to indicate that the applicant is hired. When you hire an applicant, you can either complete the employee record yourself or send a message to the person in your organization who is responsible for creating new employee records in the database.

When the person who hires applicants is (typically) the same person who creates new employee records, you can save time and eliminate redundant data entry by setting up your system to automatically copy applicant information to the employee database when you hire an applicant. You can copy both initial applicant information-- such as name, address, and position information-- and applicant supplemental data.

Because you typically need to retain applicant records for government reporting requirements, copying applicant information to the employee database does not delete the information from the applicant database.

When you hire an applicant, you can enter additional employee information. To ensure that you enter the information that is required to process the employee through a payroll cycle, you can use a processing option to require someone to enter that information before the hiring process is complete.

After you hire an applicant, the system automatically updates the person's Address Book record to indicate that he or she is an employee.

You can hire a high volume of new employees efficiently using Quick Hire. See *Adding Employee Records for Applicants, Rehires, and New Hires* in the *Workforce Management Foundation Guide*.

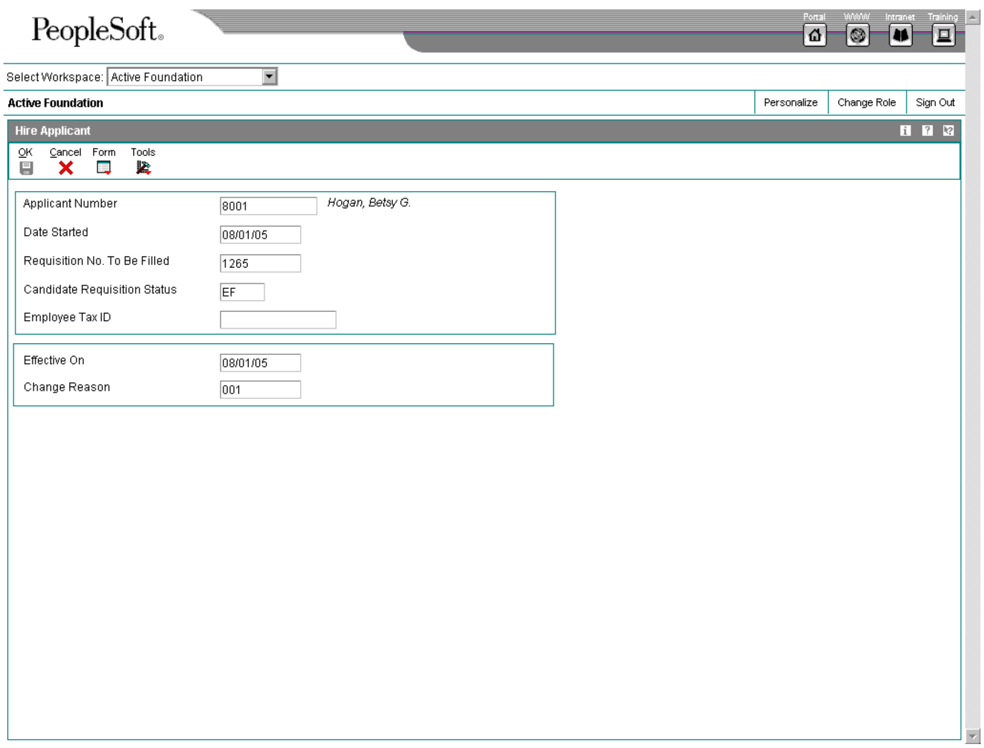
Before You Begin

- ❑ Set up your system to transfer selected types of supplemental data when you hire an applicant. See *Setting Up Cross-Reference Tables for Supplemental Data* in the *Workforce Management Foundation Guide.*
- ❑ Review the processing options for this program and for Employee Information. To transfer supplemental data for applicants to the employee supplemental database, you must set up the appropriate processing options.
- ❑ Verify that the applicant status is set up on Define Types of Data. See *Defining Types of Supplemental Data* in the *Workforce Management Foundation Guide*.

► To hire an applicant

From the Applicants menu (G08BA1), choose Applicant Information.

1. On Work With Applicants, locate the applicant.
2. Choose the applicant's record, and then click Select.
3. On Applicant Information, do one of the following:
   - Click the Hire button to hire the applicant and enter complete employee information for the applicant.
   - Click the Initiate Hire button to hire the applicant and send an e-mail message to the person who needs to enter complete employee information for the applicant.



4. On Hire Applicant, complete the following fields and click OK:
   - Date Started

- Requisition No. To Be Filled
- Candidate Requisition Status
- Effective On
- Change Reason

5. Click OK to either hire the applicant or send notification to the person who will complete the hiring process.
6. On History Effective Date Confirmation, click OK.
7. On Hire Applicant, click OK.

   If you clicked the Hire button to hire the applicant, the Employee form appears.

8. On Employee, complete the remaining steps to add a new employee record.

   See *Adding Employee Records One at a Time* in the *Workforce Management Foundation Guide*.

Creating Applicant Letters

To send written information to applicants, you can use the mailmerge features of your J.D. Edwards OneWorld software to efficiently produce letters for small, infrequent mailings. Using Print Applicant Letters (P08450), you can select one or more applicants, specify a form letter, and print customized copies for each recipient. You can also select a specific group of applicants for whom you want to print letters, such as all applicants who have been called for an interview.

You can use either of two approaches to customize the content of letters that you 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.

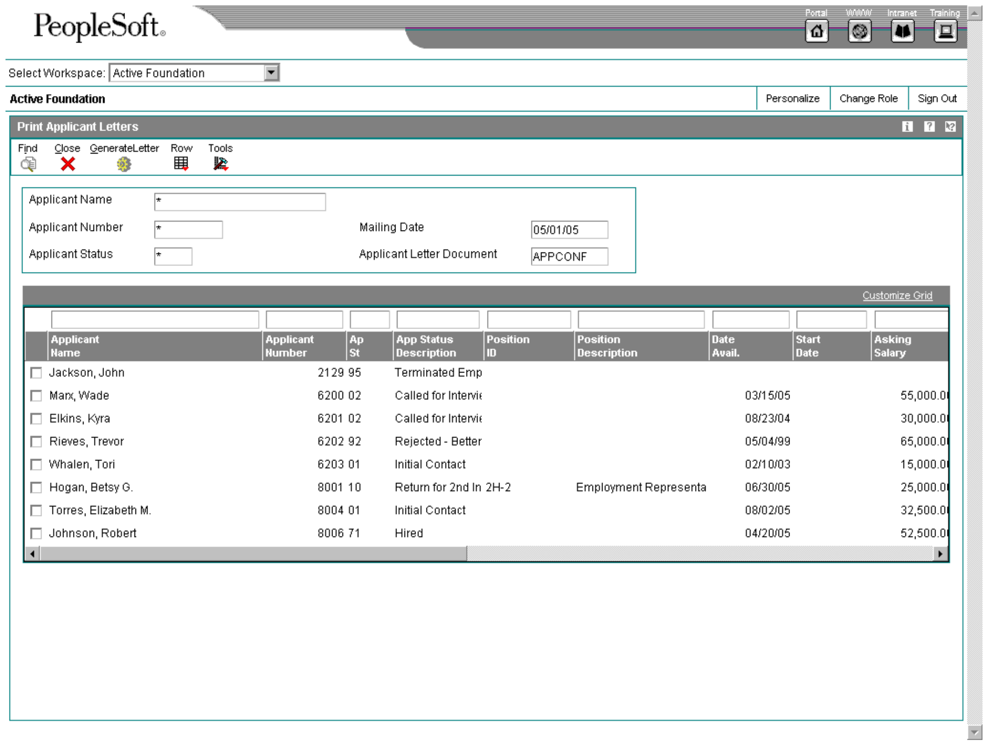
Before You Begin

- ❑ Create or customize letters that you can use with the merge process. See *MailMerge Workbench* in the *OneWorld Foundation Guide*.

► To create an applicant letter

From the Applicants menu (G08BA1), choose Print Applicant Letters.

1. On Print Applicant Letters, to create multiple letters, click Find to display all applicants, and then choose multiple applicant records from the detail area.



2. To create a single letter, complete one or more of the following fields, click Find, and then choose the applicant record:

   - Applicant Name
   - Applicant Number
   - Applicant Status

3. If you want to print a date other than the current system date on your letter, complete the following field:

   - Mailing Date

   If the letter has been set up to use this value, this date prints on your letter.

4. Complete the following field to choose the desired letter template:

   - Applicant Letter Document

5. Choose Generate Letter from the Row menu.

   The system displays a copy of your letter, including the merged information. You can modify the letter if necessary.

6. On MailMerge, choose Print from the Form menu.

Processing Options for Print Applicant Letters (P08450)

Process Tab

This processing option specifies the letter template to use for the applicant letters.

Applicant Letter Document

Use this processing option to specify which letter template will be used when generating applicant letters.

Reviewing Applicant Reports

To review detailed information about applicants, you can print applicant reports. The following tasks are easy to do with these reports:

- Search for applicants who have specific skills.
- Satisfy government reporting requirements.
- Evaluate the hiring practices of your organization.

To review a summary of applicant information, as well as detailed supplemental information for each applicant, you can print applicant listing and applicant supplemental data reports. You can review applicant supplemental information by individual employee or by data type.

To satisfy the requirements of the EEOC, you can print the Applicant Listing - EEO Listing report. You use this report to show that your organization provides equal opportunities for all of the applicants who apply to your organization. Managers within your organization can also use these reports to analyze hiring and promotion practices within your organization.

See Also

- *Working with the Supplemental Database* in the *Workforce Management Foundation Guide* for information about reviewing supplemental data online
- *Working with Multiskill Search* in the *Workforce Management Foundation Guide* for information about locating applicants who meet multiple criteria

Reviewing the Applicant List Report

From the Applicants menu (G08BA1), choose Applicant List.

To review detailed applicant information, print the Applicant List report. You can use this report to list all of the applicants or just specific applicants, such as those who have reached a certain point in the hiring process. This report lists detailed information, such as the applicant's available date and asking salary.

See Also

- R084480, *Applicant Listing* in the *Reports Guide* for a report sample

Reviewing the Applicant Listing by Position Report

From the Applicants menu (G08BA1), choose Applicant Listing by Position.

To review a list of all applicants who have applied for a specific position, print the Applicant Listing by Position report.

See Also

- R084481, *Applicant Listing by Position* in the *Reports Guide* for a report sample

Reviewing the Applicant List - Job Type/Step Report

From the Applicants menu (G08BA1), choose Applicant List-Job Type/Step.

To review a list of all of the applicants, arranged according to their job type and step, print the Applicant List-Job Type/Step report. This report includes the number of applicants in each job type and step, along with the status of each applicant.

See Also

- R084482, *Applicant List - Job Type/Step* in the *Reports Guide* for a report sample

Reviewing the Applicant List - EEO Listing Report

From the Applicants menu (G08BA1), choose Applicant List-EEO Listing.

To analyze the number of female, minority, veteran, or disabled applicants who have applied to your organization, print the Applicant List-EEO Listing report. You can also use this report for Affirmative Action reporting purposes.

You can review applicants by job categories and ethnic codes. The report shows which applicants were hired, as well as the total number who applied from each of the EEO categories.

See Also

- R084483, *Applicant Listing - EEO Listing* in the *Reports Guide* for a report sample

Processing Options for Applicant List–EEO Listing (R084483)

Date of Birth
Enter '1' to hide Date of Birth, default of blank will show Date of Birth.

Reviewing the Applicant Supplemental Data Report

From the Applicant Supplemental Data menu (G08BSDA1), choose Applicant Supplemental Data Report.

To review complete supplemental information for one or more applicants, print the Applicant Supplemental Data report. This report compiles all of an applicant's supplemental information into an easy-to-read, resume-style format.

The information that prints on this report is the same information that you can review online by using Applicant Supplemental Data Inquiry. However, the report allows you to print information for multiple applicants at the same time.

See Also

- R080411, *Applicant Supplemental Data* in the *Reports Guide* for a report sample

Processing Options for Applicant Supplemental Data Report (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.

Reviewing the Applicant Data by Data Type Report

From the Applicant Supplemental Data menu (G08BSDA1), choose Applicant Data by Data Type Report.

To review a list of all of the applicants who have information entered in a particular supplemental data type, you can print the Applicant Data by Data Type report. For example, you can review applicants whose supplemental data includes job skills information. The information that prints on this report is the same information that you can review online using Applicant Data by Data Type.

You can review information either by data type or by applicant. For each applicant, the system lists data types in alphabetical order.

See Also

- R080401, *Applicant Data by Data Type* in the *Reports Guide* for a report sample

Processing Options for Applicant Data by Data Type Report (R080401)

Narrative
1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Position Control

Position Control

A position is an employee's assignment for a fiscal year. You use positions to budget for employee salaries. Positions and their budgets are also called position budgets.

Position control is the process of creating, maintaining, and monitoring position budgets. You do not need to create positions to use your Human Resources and Payroll systems. However, to use positions, you must have a position budget.

You define a position budget to establish, monitor, and control budgets for employee assignments. To enable your accounting department to track the salary amounts that are budgeted for positions, you must define position accounts. You define position accounts either in the Human Resources system or the General Accounting system, depending on which department within your organization is responsible for determining salary amounts for position budgets.

You can attach employee records to a position budget and then review position budget information to ensure that the salary, hours, and full-time equivalent (FTE) for your employees compare favorably to those that you budgeted for the position.

You can revise position budget information when a position budget changes or when you need to correct a data entry error.

To illustrate the reporting relationships among the positions in your organization, you can create parent/child relationships by position. Documenting parent/child relationships can help you determine whether you need to create additional positions or reduce the number of positions in your organization.

Defining Position Budgets

You define position budgets to establish, monitor, and control budgets for employee assignments. In the same way that a project manager allocates time and material resources for a special project, your organization can create position budgets for its employee resources. For each position, your organization plans for and manages the following types of components:

- Salary expenditures
- Hours worked
- FTEs
- Head count (number of employees)

When you define a position budget, the system updates the Position Master Information table (F08101).

You can define your position budgets manually; or you can let the system automatically define them for you, based on the job and employee information that you have already entered into the system.

When defining a position budget, complete the following steps:

1. Identify the need for one or more employees.
2. Approve the need for the employees.
3. Set up a budget for the employee salary and hours worked.
4. Assign the appropriate FTEs and head count to the position.
5. Monitor hiring to ensure that you do not exceed the position budget.

For each fiscal year, you can define only one position budget for each position ID within a particular business unit. However, you can use the budgeted FTE to budget for more than one employee to be assigned to a particular position ID.

After you activate the appropriate system options and create your position budgets, the system automatically creates a position activity record whenever you enter a position ID for an employee. The system uses the values in the activity record to generate the projected through year-end values. The activity record includes the following information:

- Employee
- Assigned position
- Date when the employee was assigned to the position
- Employee's salary
- Standard hours per year
- Full-time equivalent
- Projected year-end amounts for salary, FTE, hours, and headcount, based on assignment date

Example: Budget Processing

You need a stock clerk position in your warehouse. To fill this position, you need enough employees to equal 10 FTEs. The plant manager approves the need for this position, specifying that, to expedite training, you should hire no more than 14 people to fill the position (some of the employees can work part-time). When you define the position budget, you enter the following data:

Salary	200000.00 (annual)
FTEs	10
Head count	14

The person with the appropriate authority approves the position. When you hire employees to fill the position, the system immediately alerts you if you exceed the budgeted amounts for salary, hours, FTE, or head count.

Before You Begin

- ❑ Set up position control information in the system options. See *Setting Up System Options* in the *Workforce Management Foundation Guide.*
- ❑ Set up your business units and fiscal periods. See *Working with Business Units* and *Setting Up Fiscal Date Patterns* in the *General Accounting Guide*.
- ❑ If you want to associate job type codes with each position, define those job type codes. See *Defining Jobs* in the *Workforce Management Foundation Guide*.

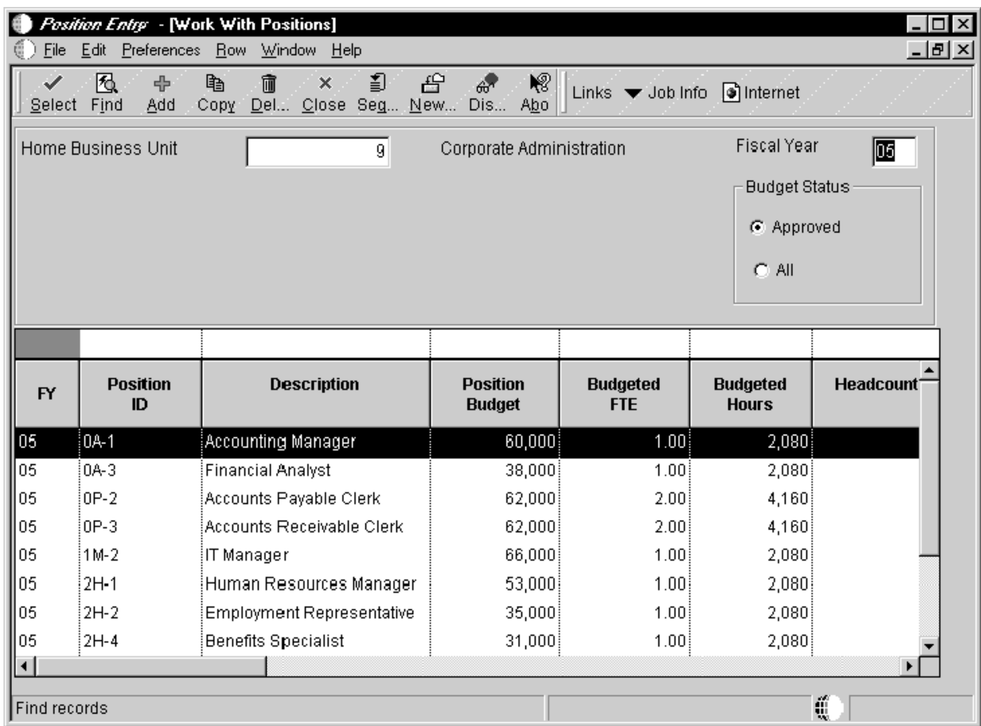
Defining Position Budgets Manually

You typically define position budgets manually when one or both of the following situations occur:

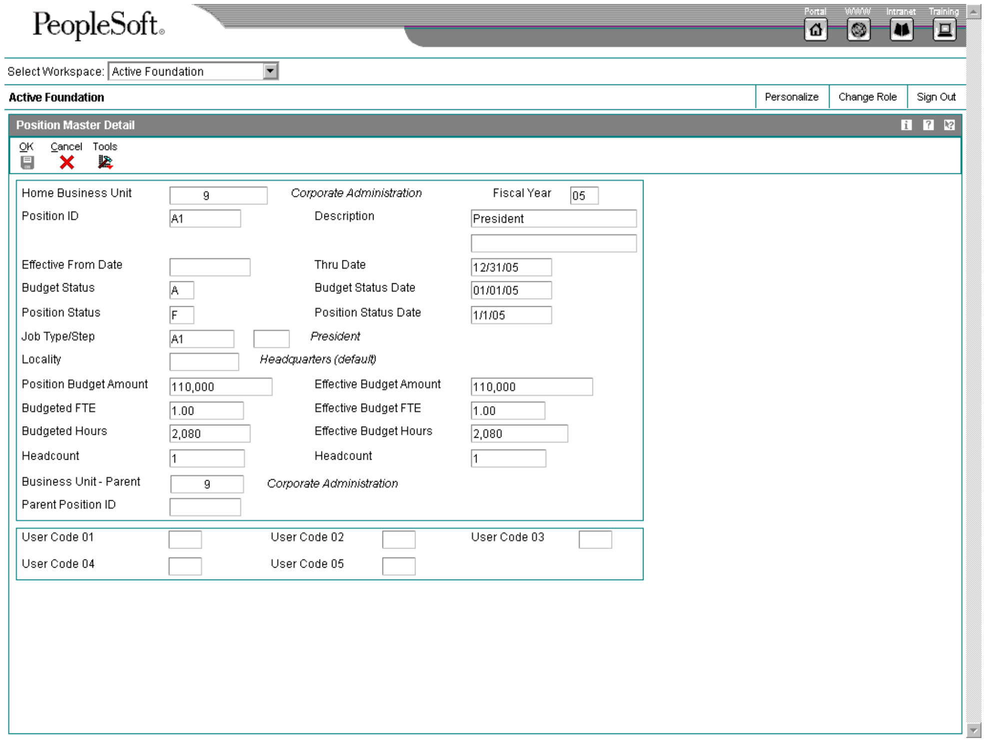
- The initial position budget (the position budget for the first fiscal year for which you are using position control) does not equal the salary, standard hours per year, and FTEs for the employee whom you intend to assign to the position. In this case, if you create position budgets automatically, you need to manually revise the budget values.
- You want the identifier for the position (the position ID) to be different from the corresponding job type. When you create position budgets automatically, the program uses the corresponding job type for the position ID.

► To define a position budget manually

From the Daily Processing menu (G08BP1), choose Position Entry.



1. On Work With Positions, click Add.



2. On Position Master Detail, complete the following fields:

   - Home Business Unit
   - Fiscal Year
   - Position ID
   - Description
   - Security Business Unit
   - Position Budget Amount
   - Budgeted FTE
   - Budgeted Hours
   - Headcount

3. To associate a job with the position budget, complete the following fields:

   - Job Type/Step
   - Locality

4. To enter status information, complete the following fields:

- Effective From Date
- Thru Date
- Budget Status
- Budget Status Date
- Position Status
- Position Status Date

5. Complete any of the following additional fields:
   - Business Unit - Parent
   - Parent Position ID
6. Complete any of the other user defined fields as necessary, and then click OK.

Processing Options for Position Entry (P08101)

Defaults Tab

This processing option allows you to determine whether the job type/step fields are required on the Position Master Detail form.

1. Job Type/Step Entry

Blank = Issue a warning if Job Type/Step is left blank.

1 = Require entry of Job Type/Step.

Use this processing option to indicate whether the Job Type and Job Step fields are required on the Position Master Detail form. If these fields are required, you cannot close and save the Position Master Detail form without complete the Job Type and Job Step fields. If these fields are not required, the system displays a warning message when you leave these field blank; however you can save your work and close the form. Valid values are:

Blank Issue a warning if the Job Type and Job Step fields are left blank.

1 Require entry of Job Type and Job Step.

If you enter 1 in this processing option, you must also use the Position ID Required field on the HRM Foundation Position Control Options form to indicate that position ID is required. The system ignores this processing option if you have set this option so that the position ID is not required.

Defining Position Budgets Automatically

From the Position Control Setup menu (G08BP4), choose Start Position Control.

When you begin to use the position control feature, you must decide whether to enter position budgets manually or run a program that creates them automatically.

You can define position budgets automatically when both of the following situations are true:

- Your initial position budgets equal the salary, hours, FTEs, and headcount that already exist in your current employee records.
- You plan to use your employees' job type codes as the position IDs.

When you define position budgets automatically, the program uses the employee's job type, job type description, home business unit, and salary as the respective position ID, position description, home business unit, and salary for the position budget. The program creates and populates the following tables:

- Position Master Information (F08101)

- Position Budget Detail (F08111)

When you define position budgets automatically, the system enters the budget status with an approved status code. Only positions with approved budget status codes can be assigned to employee records. Furthermore, an approved requisition can reference only an approved position budget.

You might need to enter other information manually, such as effective dates or user defined information.

To modify position budget information after you have defined position budgets automatically, use Position Master Detail.

The program does not include an employee's job record when it creates position budgets if any of the following circumstances exist:

- The employee is terminated prior to the beginning of the current fiscal year.
- No job type exists in the employee's record.
- The employee has a hire date that occurs after the system date of the day that you started position control. For example, if you run Start Position Control on August 16th and the employee's hire date is September 1st, the employee is not included.

If more than one employee is associated with a job type within a home business unit, the system totals the values for all of the employees to generate values for the position budget.

Note

You can assign an approved position budget to an approved requisition, and then assign both of them to an employee. You can assign an unapproved position budget to an unapproved requisition, and then assign both of them to an applicant.

See Also

- R081800, *Start Position Control* in the *Reports Guide* for a report sample

Processing Option for Start Position Control (R081800)

Process Tab

This processing option indicates whether to clear the Position Master table (F08101) and the Position Detail table (F08111)

1. Clear Tables:

Blank - Do not clear tables

1 - Clear tables

Use the processing option to clear the Position Master table (F08101) and the Position Detail table (F08111).

If you do not clear these tables, the records from the Employee Master table (F060116) will be added to the records that already exist in these tables.

Valid values are:

Blank Do not clear tables.

1 Clear tables.

CAUTION:<F0> Clearing these tables erases their contents. Clear the tables only if you are certain you no longer need the information contained within them.

Entering Account Information for Positions

You enter account information for positions so that your accounting department can track the salary amounts that you have budgeted for each position. When you enter account information, you specify the accounts in the general ledger that are affected by the position budget. If you receive funding for a position from more than one source, you can divide the position budget among multiple accounts.

If your human resources department has the authority to determine salary amounts for position budgets, you can set up the system to summarize all position budgets and transfer that information to the general ledger accounts that you specify.

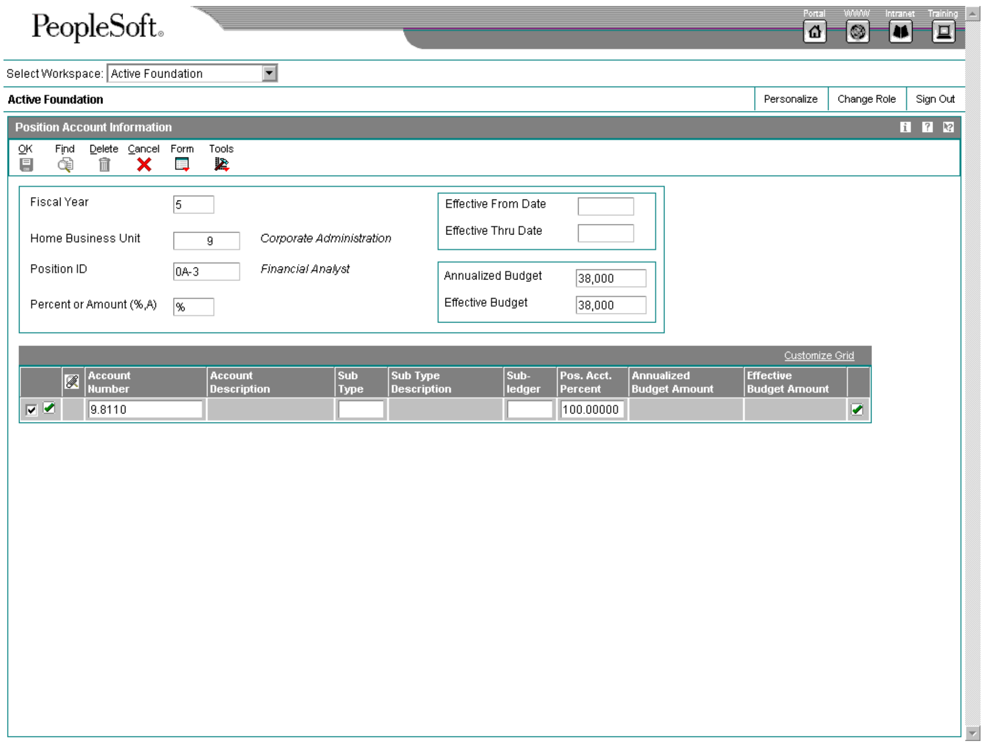
► To enter account information for positions

From the Daily Processing menu (G08BP1), choose Position Entry.

1. On Work With Positions, to locate the position for which you need to enter account information, complete one or more of the following fields and click Find:
    - Fiscal Year
    - Home Business Unit

Note
You can further refine your search for positions by entering a position ID in the Position ID column of the Query By Example (QBE) line.

2. Choose a record in the detail area, and then choose Position Acct Info (Position Account Information) from the Row menu.



3. On Position Account Information, to specify the method of calculation, complete the following field: :

   - Percent or Amount (%,A)

4. Complete the following field in the detail area:

   - Account Number

5. If the method of calculation (Percent or Amount field) is percent, complete the following field:

   - Pos. Acct. Percent

6. If the method of calculation is amount, complete the following field:

   - Annualized Budget Amount

7. Complete the following optional fields:

- Subledger
- Sub Type

8. Click OK.
9. Click OK, again to update the account information and return to the Work With Positions form.

See Also

- *Transferring Position Budgets to the General Ledger*

Setting Up AAIs for Position Budgets

You set up AAIs to specify the accounts in the general ledger that contain position budget information. You, or someone in your accounting department, must set up AAIs in the General Accounting system. You cannot set up these AAIs from the Human Resources system.

These AAIs determine which accounts in the general ledger are used to calculate the financials budget that appears on the Business Unit by Organization form (P081200). You can review the financials budget for a position to determine whether it corresponds to the amount that you entered for the position in the Human Resources system.

The following table lists AAIs for position budgeting. The system adds the amounts in all the accounts between and including the first and last accounts to calculate the financials budget.

HRLT	The ledger type where budget information is stored
HRSB	The first account in the range of object accounts for a business unit
HRSE	The last account in the range of object accounts for a business unit

You should create these three AAIs for each company in your organization that has position budgets. The system stores AAIs in the Automatic Accounting Instructions Master table (F0012).

See Also

- *Working with AAIs* in the *General Accounting Guide* for instructions for setting up AAIs

Transferring Position Budgets to the General Ledger

After you define your position budgets and position accounts, you can post detailed information for position budgets to the Account Ledger table so that your accounting department can access it.

Depending on the requirements of your accounting and human resources departments, you can transfer either summary information for position budgets or detailed information.

Summary information includes monthly totals of salary amounts and hours for all of the position budgets that you specify. Detailed information includes a record of the salary amount and hours for each individual position budget.

To transfer summary information to the general ledger, you must transfer position budgets to the Account Balances table (F0902). To transfer detailed position budget information, you must post position budgets to the Account Ledger table.

You can use Position Account Information to identify the general ledger accounts to which you want to transfer the information.

Caution

You transfer position budget information to the general ledger only if your human resources department is responsible for creating salary budgets. To avoid overwriting information, you should not transfer position budget information to the general ledger if your accounting department determines the salary budgets for your organization.

Before You Begin

- ❑ Define your position budgets. See *Defining Position Budgets*.

See Also

- ❑ *Entering Annual Budget Amounts* in the *General Accounting Guide*
- ❑ *Entering Detailed Budget Amounts* in the *General Accounting Guide*

Transferring Position Budgets to the Account Balances Table

From the Position Control Adv/Tech Operations menu (G08BP3), choose Update Position Budgets to Acct Bal (Account Balances).

To create or refresh your position budget accounts, you transfer summary position budget information to the general ledger Account Balances table. You typically perform this task to establish an initial budget for a new year.

As you work through the budgeting process, you can transfer three types of position budgets to the Account Balances table:

- Requested budgets
- Approved budgets
- Final (also known as original) budgets

You use a different version of Update Position Budgets to Account Balances to transfer each of these types of position budgets. This program updates the Account Balances table (F0902). You or someone in your accounting department can review this information as you work through the budgeting process.

When you run Update Position Budgets to Account Balances for the requested position budgets, the system updates the approved and final budget fields for the same account in the Account Balances table with the same values. When you run this program for the approved budget, the system also updates the final budget for the same account in the Account Balances table with the same value. When you run the program for the final budget, the system updates only that value. In this case, the values for requested and approved budgets remain the same.

The system transfers only effective hour values (BU) and effective budget amounts (BA) for positions to the general ledger.

Caution

Because this program overwrites all of the existing information in the Account Balances table, you transfer position budgets to the Account Balances table only when you are setting up budgets for a new year. If you need to revise position budgets in the middle of the year, do not rerun this program. Instead, post position budgets to the Account Ledger table. See *Posting Position Budgets to the Account Ledger Table*.

Processing Options for Update Position Budgets to Account Balances (R08902)

Update Options
1. Enter a "1" to update account balances file (F0902)
Ledger Type
1. When entering budgets to the actual and units ledgers, the ledger type "BA" and "BU" is assumed. If you wish to enter to a different ledger (such as a temporary budget or a revised budget), you must designate the alternate budget ledger types.
Salaries Budget Ledger:
Hours Budget Ledger:
Note: The ledger codes on this screen must be valid in User Defined Codes 09/LT. If not, the program will not function. Also the following ledger types can not be updated by this program: AA, CA, XA, YA, ZA, AC.
Fiscal Year
1. Enter the last two digits of the fiscal year.
Budget Cycle
1. Enter a "1" next to each item you wish to update in the Account Balances file (F0902). If all items are left blank, the default will only update the Final Budget.
Requested Budget:
Approved Budget:
Final Budget:
Report Type
1. Enter "0" for an Exception Report. Enter a "1" to have a Summary or a Detail Report. (See option below)
2. Enter "0" for a Summary Report. Enter a "1" for a Detail Report. This option is ignored if only an Exception Report is requested. (See option above)

Posting Position Budgets to the Account Ledger Table

> *From the Position Control Adv/Tech Operations menu (G08BP3), choose Update Position Budgets to Acct. Ledger.*

To track detailed information for your position budgets, you can update the position budget information to a temporary account ledger table(Journal Entry Transactions, F0911Z1). The Accounting department posts the temporary Account Ledger table to the live Account Ledger (F0911) table. Position budgets must have an approved status before you can post them. When you post position budgets to the Account Ledger table, you can distribute them among as many as 12 periods in the Account Balances table (F0902).

See Also

- *Posting Journal Entries* in the *General Accounting Guide* for more information about posting information to the Account Ledger table

Processing Options for Update Position Budgets to Account Ledger (R08911)

Select Tab

This processing option allows you to enter the fiscal year of the transactions that are being updated.

---

1. Fiscal Year

Use this processing option to select the records from the Position Master table that will be updated to the Journal Entry Transaction - Batch table (F0911Z1). Only the records from the fiscal year you enter will be updated. You need to enter only the last two digits of the year. A leading zero is stripped from the view (05 becomes 5), so you could enter a single digit for years 2000 to 2009.

Process Tab

These processing options allow you to determine the way records will be written in the Journal Entry Transaction - Batch table (F0911Z1) including the ledger to which they are written.

1. Transaction Description

Use this processing option to enter a brief description of the transaction. This description will be included on every record that is updated to the Journal Entry Transaction - Batch table (F0901101). This description can be up to 30 characters in length.

2. Transaction Date

Use this processing option to specify the date to be posted for this transaction. If left blank, the system date will be used.

3. Budget Ledger Type

Use this processing option to specify the ledger to be updated. Valid values are stored in User Defined Code table 09/LT. If left blank, the BA ledger will be updated. If a value is entered, that ledger is updated.
This program cannot update the following ledger types: AA, AC, CA, XA, YA, ZA. An invalid record type error will occur if one of these ledger types is entered.

4. Proof/Update Mode

0 = Proof mode
1 = Update mode

Use this processing option to specify whether you run this report in proof or update mode.
In proof mode, a report will be generated showing what will be written to the Journal Entry Transaction - Batch table (F0911Z1). Use proof mode to examine data and fix any errors. Then rerun the process in update mode. Valid values

are:

0 or blank Proof Mode 1 Update Mode

Reports Tab

This processing option allows you to determine which reports this program generates. An exception report is always created. In addition, you can create either a summary report or detail report of the transactions that will be updated to the Journal Entry Transaction - Batch table (F0911Z1).

1. Exception Report

0 = Exception report only

1 = Exception report and Summary or Detailed report

Use this processing option to determine whether to create a summary or detail report in addition to an exception report. The exception report will always be generated. The exception report lists the errors that have occurred. The value in the summary report option determines whether a summary or detailed report is generated. Valid values are:

0 or blank Exception report only 1 Exception report and Summary or Detailed report

The following are the error messages that can appear on the exception report:

No parent record in F08101 found

Invalid Budget Status Code

Invalid Account

Invalid Sub-Ledger

Invalid Sub-Ledger Type

Invalid Fiscal Year

Invalid Salary Ledger Type

Invalid Hours Ledger Type

Invalid Home Business Unit

Budget Not Approved

Non-Posting Account

Inactive Account

2. Summary Report

0 = Summary report

1 = Detailed report

Use this processing option to create either a summary report or detail report.

If the exception report option value is 0 or blank, the summary report option

is ignored. A summary report includes subtotals by account number, subledger,

and subledger type. A detail report may be very long. Valid values are:

0 or blank   Summary report 1   Detailed report

Revising Position Budgets by Business Unit

After you define position budgets, you can easily review and update a group of position budgets for the same business unit and fiscal year. You can use this revision method when you need to update several position budgets that are in the same business unit.

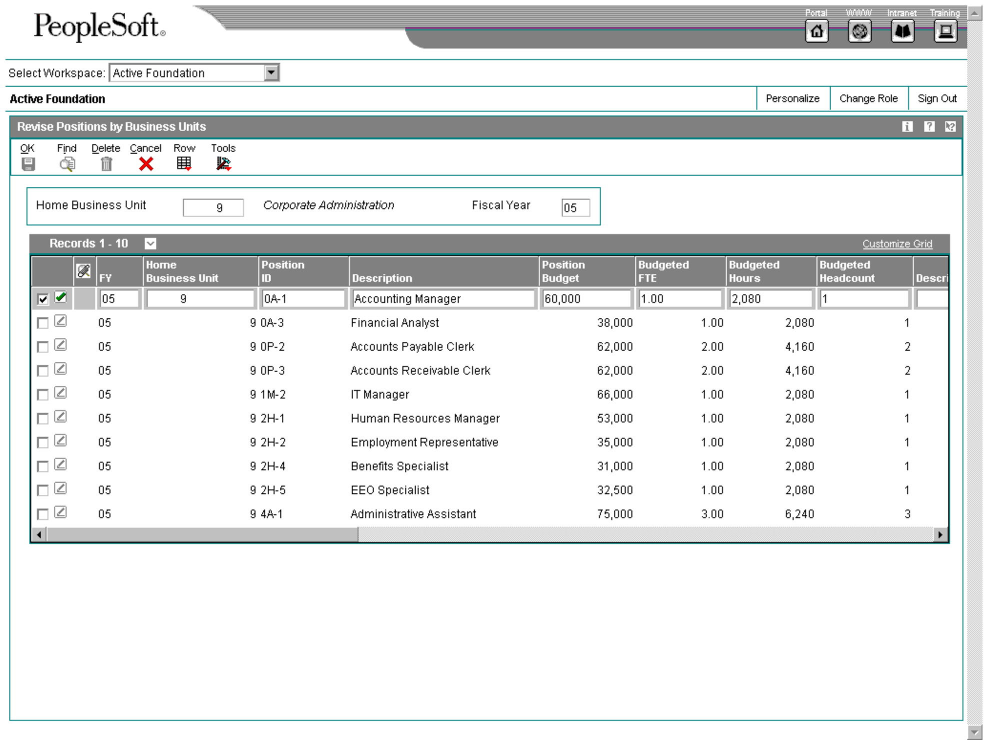
When you review the positions by business unit, you can compare the budgeted amounts for each position with the projected amounts, and use this information to determine whether a position budget will be met by the end of a fiscal year.

The system calculates the budgeted and projected amounts by using the fiscal year that you enter on the form. If you do not enter a fiscal year, the system uses the default fiscal year for the home business unit.

► **To revise position budgets by business unit**

From the Daily Processing menu (G08BP1), choose Position Entry.

1. On Work With Positions, complete the following fields:
    - Home Business Unit
    - Fiscal Year
2. From the Form menu, choose Pos by Business Un (Positions by Business Units).



3. On Revise Positions by Business Units, revise the information in any of the following fields and click OK:

   - Position ID
   - Description
   - Position Budget
   - Budgeted FTE
   - Budgeted Hours
   - Budgeted Headcount
   - Eff From
   - Eff Thru
   - Job Type
   - Job Step
   - Budget Status
   - Position Status
   - Position Status Date

- Reports to BU
- Reports to Position

Working with Position Activity Information

After you define and approve your position budgets, you can attach employee records to them. You attach employee records to ensure that the actual salaries, hours, and FTEs for your employees are within those that you established for your position budgets. Position activity illustrates employee movement into and out of positions. To determine appropriate position budgets, you can set up your system to store historical records of position activity.

When an employee changes positions or leaves your organization, you must update the employee's record to reflect the change. You can set up your system to create position activity records when you update position-sensitive information in employee records.

You can also review position activity information to verify that it is correct. You can review position activity online, or you can print a report. You can correct position activity records if you entered incorrect position information for an employee.

Attaching an Employee Record to a Position Budget

After you define and approve your position budgets, you can attach employee records to them. You attach an employee record to a position budget to control budget expenditures and to ensure data integrity. To attach an employee record to a position budget, you enter a position ID in the employee's record.

To stay within your position budgets when you are entering employee information, the system sends you either an error or a warning message when you exceed the approved salary, hours, FTE, or head count for the position. When you set up your system options, you define the type of message that appears when a position's effective budget is exceeded.

When you attach an employee record to a position budget, the system performs the following functions:

- Adds the salary, hours, FTEs, and head count amounts for the employee to the projected position budget amounts through the fiscal year end.
- Adds any job information that is associated with the position to the employee's record.
- Updates the Position Budget Detail table (F08111) with the effective date of the employee's assignment, the employee's salary, FTE, and hours. The system then uses this information to project the effect of these values on the budget through the end of the fiscal year.

Before You Begin

- ❑ Verify that you have set up position control options. See *Setting Up System Options* in the *Workforce Management Foundation Guide*.
- ❑ For each position to which you need to attach employee records, verify that the budget status is approved. See *Defining Position Budgets*.

► To attach an employee record to a position budget

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

1. On Work With Organizational Assignments, to locate the employee record, complete the following field and click Find:
   - Employee Identification
2. Choose the employee record and click Select.
3. On Organizational Assignment, complete the following field and click OK:
   - Position ID
4. On Change Reason, complete the following fields and click OK:
   - Effective On
   - Change Reason

See Also

- *Processing Options for Organizational Assignment* in the *Workforce Management Foundation Guide*
- *Adding Employee Records One at a Time* in the *Workforce Management Foundation Guide* for information about how processing options affect position assignments

Reviewing Position Activity

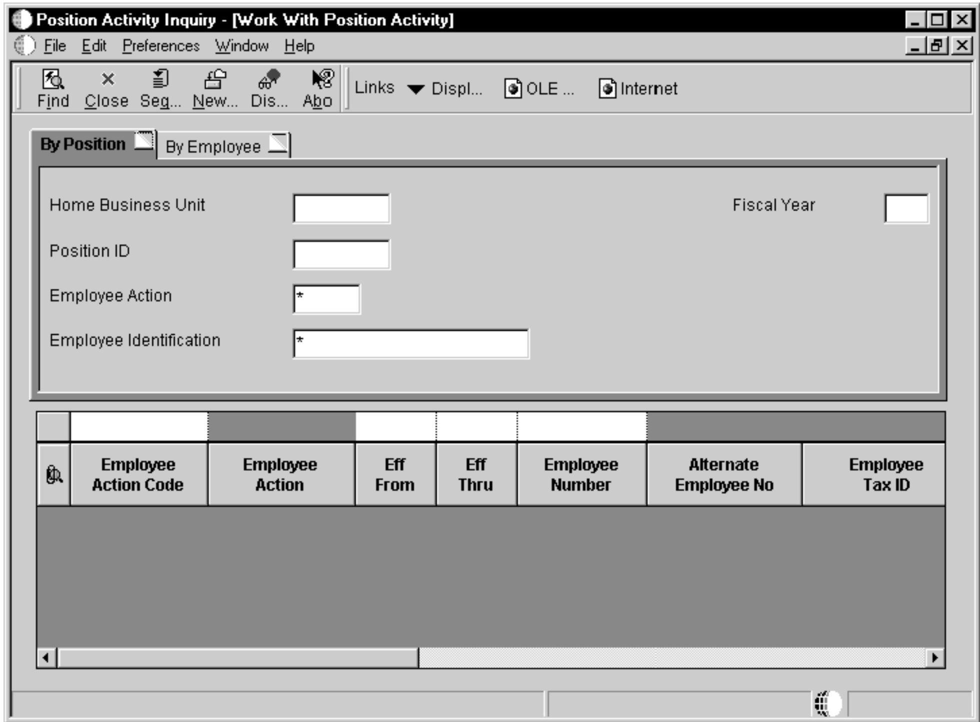
To determine whether you can stay within budgeted amounts for salary and head count through the end of the fiscal year, you can review position activity information either by position or by employee. The type of information that appears on the form varies, depending on whether you review position activity by employee or by position.

When you review information by employee, you can see all of the positions in which an employee has worked. You can also review position information for an employee who works in more than one position during a fiscal year.

When you review activity by position, you can see all of the employees who are associated with a particular position budget. You can also review projected totals for salary, headcount, FTE, and hours worked. The system calculates these totals by using all active and inactive records for the specified year, based on the home business unit that you enter.

► To review position activity

From the Daily Processing menu (G08BP1), choose Position Activity Inquiry.



1. On Work With Position Activity, to define whether you want to review information by position or by employee, click one of the following tabs:
   - By Position
   - By Employee
2. If you clicked the By Position tab, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
   - Position ID
3. If you clicked the By Employee tab, complete the following field and click Find:
   - Employee Identification
4. To limit either type of search to a particular employee activity, complete the following field and click Find:
   - Employee Action
5. Review the information.

Correcting Employee Position Activity

When an employee changes positions or leaves your organization, you must update the employee's record to reflect the change. You can set up your system to create historical records of the information that you have changed. In addition to these employee history records, you can set up your system to create position activity records when an employee does any of the following things:

- Enters a position
- Leaves a position
- Changes positions within your organization

When you are also tracking position information for employees, the system creates position activity records when an employee does any of the following things:

- Moves from one home business unit to another within your organization
- Changes jobs or job steps
- Receives a salary change
- Changes FTE values
- Changes the number of hours worked

Tracking position activity records makes reviewing all of the employees who have worked in a specific position easy.

You can correct position activity records if you make a mistake when entering position information for an employee. For the current activity record, you can correct all of the position activity information. For historical activity records, you can correct only the requisition number and remarks.

In addition to correcting employee position activity, you can also use Employee Activity to enter historical position activity information that you previously stored in another system.

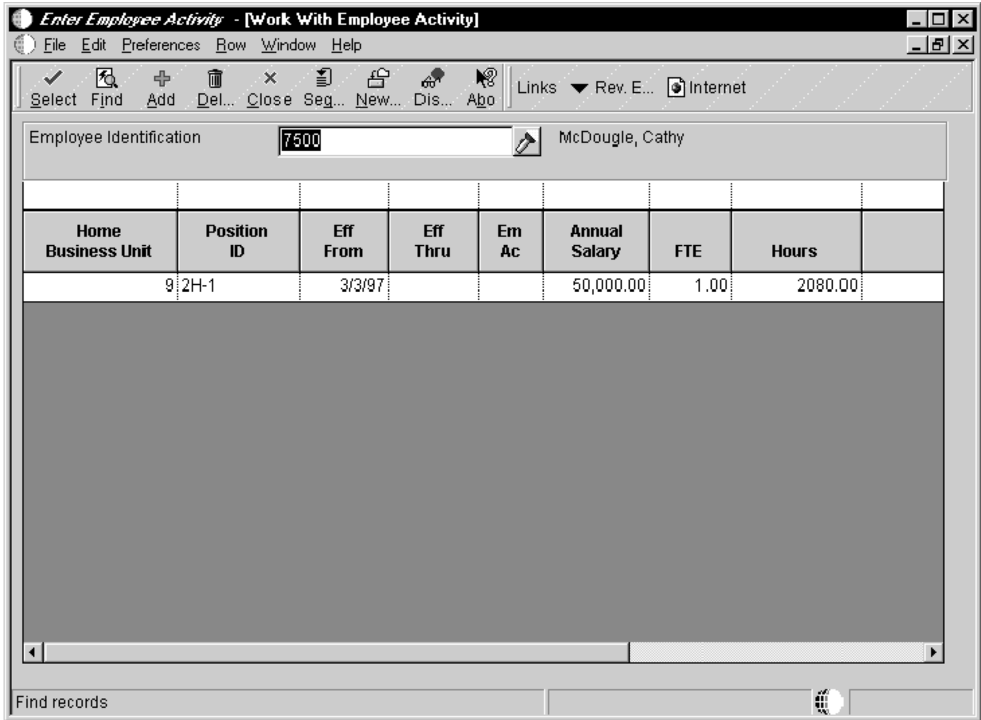
Caution

Because the system does not create an audit trail of the changes that you make when you correct position activity records, J.D. Edwards recommends that you assign high security to this program.

This program updates the Position Budget Detail table (F08111). It does not update the employee history tables or the Employee Master table (F060116).

► To correct employee position activity

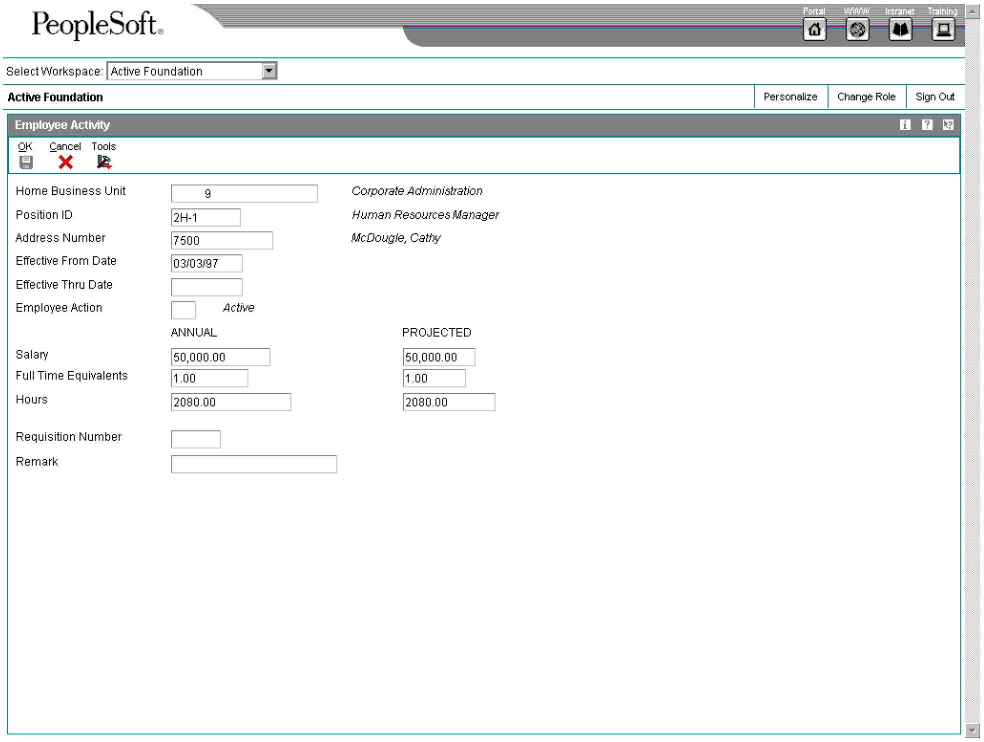
From the Daily Processing menu (G08BP1), choose Enter Employee Activity.



1. On Work With Employee Activity, to locate the employee record, complete the following field and click Find:

    - Employee Identification

2. Choose the current activity record and click Select.



3. On Employee Activity, change the incorrect information in any of the following fields and click OK:

   - Effective Thru Date
   - Employee Action
   - Salary
   - Full Time Equivalents
   - Hours
   - Requisition Number
   - Remark

Note

As an alternate entry method, you can use Revise Employee Activity to correct multiple position activity records at the same time. To access this form, choose Rev. Emp Activity from the Row menu on Work With Employee Activity.

See Also

- *Setting Up System Options* in the *Workforce Management Foundation Guide* for information about setting up your system to create position activity records
- *Reviewing the Employee Position Activity Report* for information about reviewing all of the position activity for each employee within your organization

Reviewing Position Budget Information

To ensure that the salary amounts that you defined in your position budgets compare favorably with the actual salaries of the employees in those positions, you should periodically review position budget information. You can review this information for a specific business unit or position, or by the activity involving the position.

When you review position budget information, the system displays projected year-end salary amounts that you can compare with budgeted amounts. The system calculates these amounts based on employees' annual salaries and their associated effective dates. The system calculates projected year-end amounts by adding together the prorated annual salaries for all of the employees who served in the position during the year. If an employee does not work an entire year in the same position, the system prorates the employee's annual salary for the amount of time that the employee worked in the position during the fiscal year.

For example, assume that the following conditions exist:

- Position A1 (accountant) pays an annual salary of 42,000.
- Cathy worked in position A1 from January 1 through April 30 (85 days multiplied by 8 hours = 680 hours), so her projected annual salary for that position is 13,729.20 (42,000 divided by 2080 = 20.19; 20.19 multiplied by 680 hours = 13,729.20).
- The position was vacant from May 1 to May 31.
- George worked in position A1 from June 1 through December 31 (153 days multiplied by 8 hours = 1224 hours), so his projected annual salary was 24,712.56 (42,000 divided by 2080 = 20.19; 20.19 multiplied by 1224 hours = 24,712.56).

The system calculates the projected year-end amount for position A1 as 38,441.76 (13,729.20 plus 24,712.56).

Reviewing Position Budget Information by Business Unit

To compare budgeted amounts for salaries, FTEs, hours, and head count with the corresponding actual amounts that are projected through year end, you can review position budget information by business unit. To determine whether you are likely to remain within position budget amounts through the end of the fiscal year, you can also review projected year-end salary amounts for each business unit.

A positive open amount for salary, hours, head count, or FTE indicates that you are under budget for the fiscal year. A negative open amount indicates that you are over budget for the fiscal year.

► To review position budget information by business unit

From the Daily Processing menu (G08BP1), choose Business Unit by Organization.

1. On Work With Business Unit by Organization, complete any of the following fields and click Find:

- Company
- Fiscal Year
- Level of Detail
- Division
- Home Business Unit

2. Review the information in the following fields:

    - Financials Budget
    - Position Budget
    - Effective Budget
    - Projected At Year End

Reviewing Position Budget Information by Position

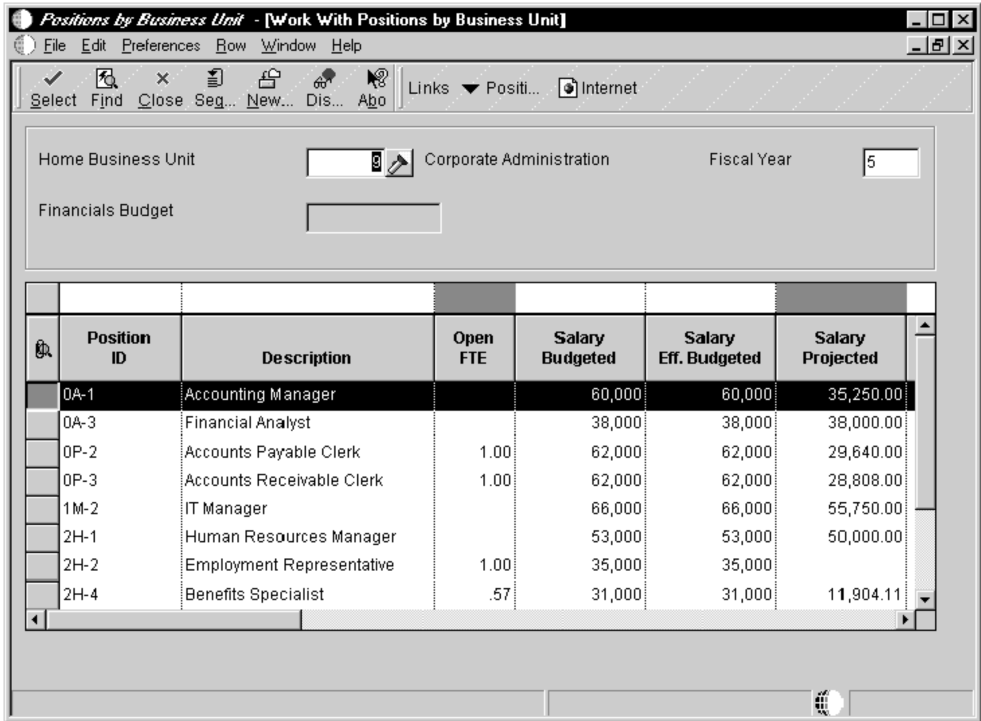
To compare budgeted amounts for salaries, FTEs, hours, and head count with the corresponding actual amounts that are projected through year end, you can review position budget information by position. You use this information to determine whether you expect to meet or exceed your position budgets through the end of the year.

A positive open amount for salary, hours, head count, or FTE indicates that you are under budget for the fiscal year. A negative open amount indicates that you are over budget for the fiscal year.

The system calculates the budgeted and projected amounts by using the fiscal year that you enter on the form. If you do not enter a fiscal year, the system uses the default fiscal year for the company, associated with the home business unit that you entered.

► To review position budget information by position

From the Daily Processing menu (G08BP1), choose Positions by Business Unit.



1. On Work With Positions by Business Unit, complete the following fields and click Find:

    - Home Business Unit
    - Fiscal Year

2. Review the information in the following fields in the detail area:

    - Position ID
    - Description
    - Open FTE
    - Salary Budgeted
    - Salary Eff. Budgeted
    - Salary Projected
    - FTE Budgeted
    - FTE Projected
    - Headcount

Defining Next Year's Position Budget

From the Position Control Adv/Tech Operations menu (G08BP3), choose Create Next Year's Positions.

Although a position budget is valid for only one fiscal year, you do not need to enter position budget information each year. You can choose from several options to automatically generate the next fiscal year's budget amounts. For example, when the position budget information for next year will be the same as the corresponding information for the current year, you can save time by running a program that automatically creates position budgets for the next fiscal year. These position budgets can be based on the position budgets for the current year in the Position Master table (F08101) or on the position activity records in the Position Detail table (F08111). If your position budget is increasing or decreasing by a consistent amount, you can set processing options to increase or decrease the new budget amount and the new budget full-time equivalents, hours, and headcounts by flat percentages.

When you run this program, the system performs the following operations:

- Creates the position, fiscal year, home business unit, and position ID and description
- Prints an exception report that lists any existing positions that have effective-through dates that are prior to the end of the current fiscal year.
- Creates a position accounts table for the next fiscal year (optional)

Depending on how you set the processing options, the system does not create budgets for the following positions:

- Closed positions
- Vacant positions that had no activity during the year

The system generates an exception report that lists the positions for which no budgets were created.

Data Selection

The data selection for this program must include the fiscal year from which you want the system to calculate position budget information.

Before You Begin

- ❑ Set up the fiscal date patterns for the next fiscal year. See *Setting Up Fiscal Date Patterns* in the *General Accounting Guide*.
- ❑ Set up a salary default source in your system options. See *Setting Up System Options* in the *Workforce Management Foundation Guide*.

Processing Options for Create Next Year's Positions (R081820)

Dates Tab

These processing options allow you to specify the year on which you are basing new position budgets and the year for which you are calculating them, as well as the effective date for pay rates or pay grade steps.

1. Current Fiscal Year

Use this processing option to specify the year on which you are basing new position budgets. Typically, this is the current year. Enter the last two digits of the year.

2. Fiscal Year

Use this processing option to specify the year for which you are creating position budgets. Typically, this is the next fiscal year. Enter the last two digits of the year.

3. Effective Dates for Pay Rates or Pay Grade Step

Use this processing option to specify the effective date of the pay rates or pay grade steps that you are using to create next year's position budget. Enter a date in this field only if you use the pay rate or pay grade step methods of salary calculation.

Process Tab

These processing options allow you to specify the positions for which you are going to create budgets, and the table from which you create the budgets.

1. Select Position Budgets

Use this processing option to specify the positions for which you want to budget and whether you want the budgets created from the Position Master table (F08101) or the Position Detail table (F08111). The Position Master table contains budgeted amounts, while the Position Detail table contains the actual amounts. Valid values are:

1 All position budgets (default)

2 Position budgets with current activity

Options 1 and 2 generate budgets from the Position Master table. If you choose option 1, the system will calculate budgets for all positions in the Position Master table. If you choose option 2, the system will calculate budgets for positions that have at least one active employee in the Position Detail table.

3 Position budgets with activity during the year

4 Position budgets with current activity

Options 3 and 4 generate budgets from the Position Detail table. If you choose option 3, the system will calculate budgets for positions that have had activity during the year, even if the positions are currently vacant. If you choose option 4, the system will calculate budgets only for positions that have current activity for the year.

2. Create Budgets for Prior Positions

Use this processing option to specify whether to create budgets for positions that ended prior to the beginning of the new fiscal year. A position ended prior to the beginning of the new fiscal year when the Thru Date for that position is prior to the beginning of the new fiscal year. An exception report will list all positions that are created in this manner. Valid values are:

Blank Do not create budgets for prior positions.

1 Create budgets for prior positions.

3. Create Position Accounts

Use this processing option to specify whether to create position accounts, in addition to position budgets, for the new fiscal year. Position accounts let you allocate your position budgets by percentage to various accounts in the General Accounting system. Valid values are:

Blank Do not create position accounts.

1 Create position accounts.

Options Tab

These processing options allow you to specify the percentages by which to change previous budget amounts.

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1. Percent Change in New Budget Amount

Use this processing option to enter the percent of increase or decrease from the old to the new budget amounts. Enter percentages as whole numbers. Use a negative number to indicate a decrease. For example, enter 5 for a 5% increase or enter -5 for a 5% decrease.

2 . Percent Change in Full-Time Equivalents (FTE's), Hours, Headcount

Use this processing option to enter the percent of increase or decrease from the old to the new values for full-time equivalents, hours, and headcount. Enter percentages as whole numbers. Use a negative number to indicate a decrease. For example, enter 5 for a 5% increase or enter -5 for a 5% decrease.

Working with Parent/Child Relationships by Position

To provide executives and managers with a summary of the reporting relationships within your organization, you can define an organizational structure that shows the flow of information within your organization. You can create an organization structure that shows reporting relationships among the positions within your organization. These relationships are called parent/child relationships.

Before You Begin

- Set up parent/child structure types in user defined code list 01/TS. See Understanding User Defined Codes in the *Workforce Management Foundation Guide.*

See Also

- *Creating Parent/Child Relationships by Employee* in the *Workforce Management Foundation Guide* for information about defining organizational structures by employee

Creating Parent/Child Relationships by Position

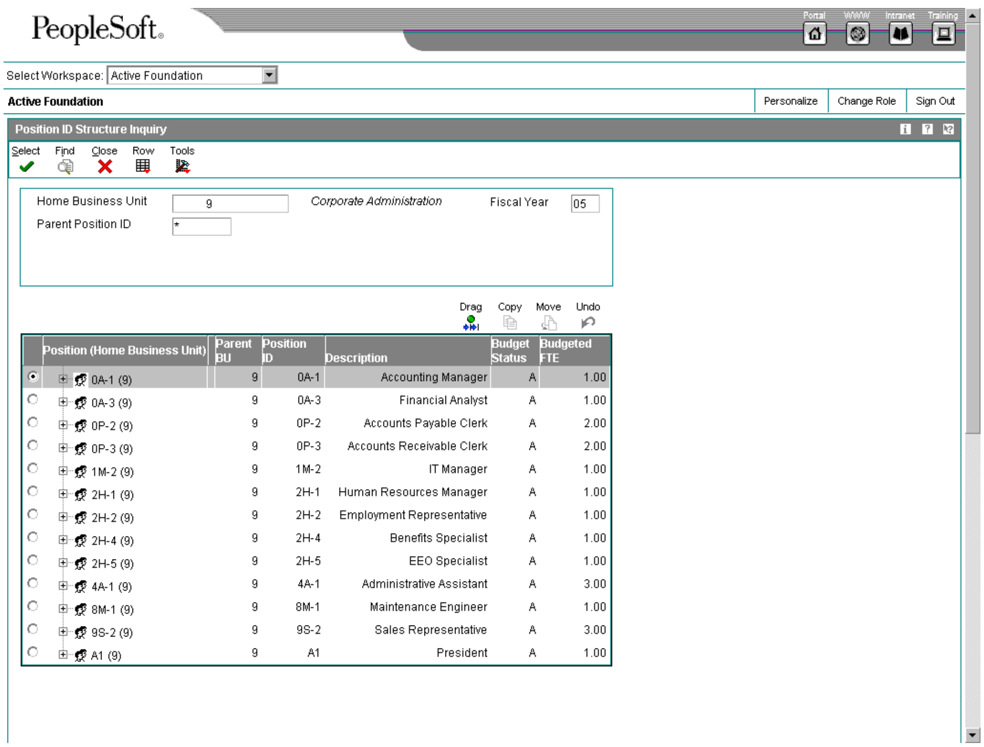
To show the reporting relationships among different positions within your organization, you can create parent/child relationships by position. For example, you can organize a reporting structure in which you define group leaders as parent positions to programmer analysts. The group leaders are, in turn, child positions to a department manager.

Defining parent/child relationships by position eliminates the need to continually revise an organizational structure when individual employees change jobs.

You can create parent/child relationships at any time that your management requires. For example, if your organization is resizing, you might need to create a parent/child relationship that shows the number of positions reporting to the first-level managers and distribute that structure to all of the managers.

► To create parent/child relationships by position

From the Daily Processing menu (G08BP1), choose Position ID Structure Inquiry.



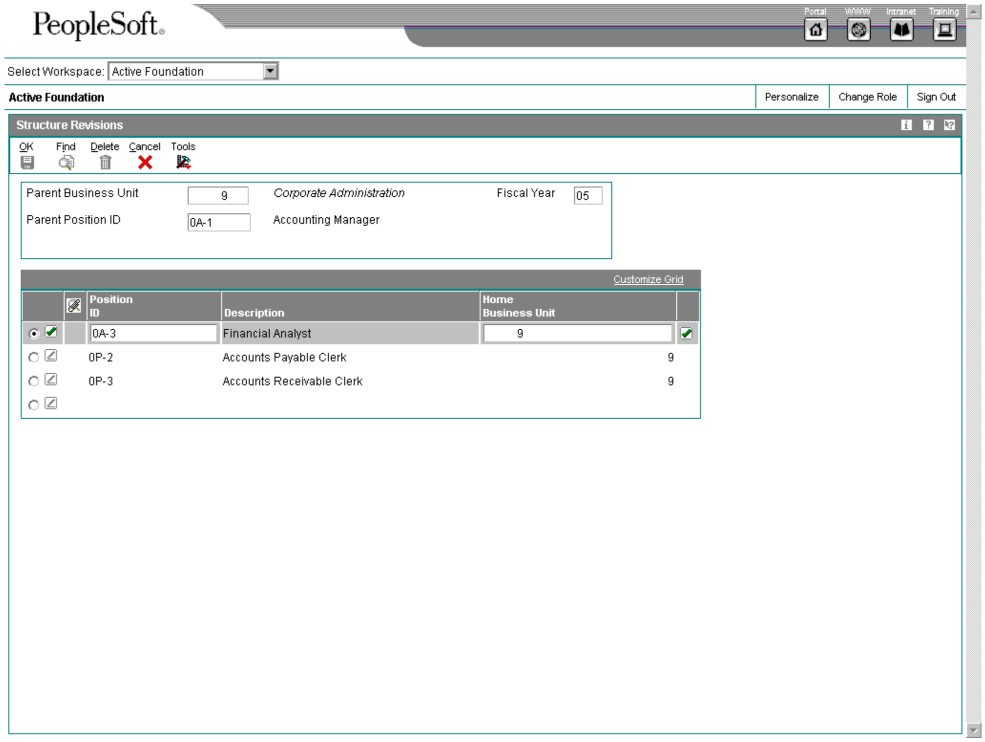
1. On Position ID Structure Inquiry, to locate the positions for which you are creating parent/child relationships, complete the following fields and click Find:

    - Home Business Unit
    - Fiscal Year

2. To limit the positions that appear, complete the following field and click Find:

    - Parent Position ID

3. In the detail area, choose a parent or child position, and click Select.



4. On Structure Revisions, verify the information in the following field and click Find:

    - Parent Position ID

    You can change the information in this field if you need to work with a different parent position.

5. Complete the following fields in the detail area for each child relationship and click OK:

    - Position ID

    - Home Business Unit

6. On Position ID Structure Inquiry, click Find to refresh the information that is displayed.

7. Review the structure that you created.

Reviewing Parent/Child Relationships by Position

After you define parent/child relationships by position, you can analyze the reporting relationships among the positions in your organization by reviewing the following structures:

- A single-level hierarchy that shows only the subordinate positions directly under a parent position

- A multiple-level hierarchy that shows all of the subordinate positions directly under a parent position and also all of the positions that report to each subordinate

► **To review parent/child relationships by position**

From the Daily Processing menu (G08BP1), choose Position ID Structure Inquiry.

1. On Position ID Structure Inquiry, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
2. To limit the positions that appear, complete the following field and click Find:
   - Position ID
3. To review the employee number of the employee who is currently in a position, choose the position in the detail area, and then choose Current Incumbents from the Row menu.
4. On Current Incumbents, review the information in the detail area.

Purging Position Information

If your system contains out-of-date position records, you can purge these records, or you can archive them by moving them to tape or to an alternate backup system to clear space on your system. You can also create a report of the records that this program will purge before you actually purge them.

Purging Positions

From the Position Control Adv/Tech Operations menu (G08BP3), choose Purge Positions.

To purge outdated positions from the Position Master table, run Purge Positions. For example, you can purge records from past years that are no longer relevant. You can also purge all of the position records from a certain fiscal year or select which records to purge using data selection.

Processing Options for Purge Positions (R0808151)

Purge Positions
1) To create a report and delete the Position Master records enter '1'. To create a report, delete the Position Master records and save it to a purge table enter '2'. Default of blank will only create the report.
* Important Note * When choosing '2', the purge table is named F08101P. This table is created every time the user chooses '2'. However, it is important to remember that the purge table is over written every time the program is executed.

Purging Position Activity

From the Position Control Adv/Tech Operations menu (G08BP3), choose Purge Position Activity.

To purge employee position-activity records that are no longer needed, run Purge Position Activity. For example, you might remove records of former employees.

Processing Options for Purge Position Activity (R0808161)

Purge Activity
1. Enter a <blank> to only create a report (default); Enter "1" to delete records from the Position Budget Detail table (F08111); Enter "2" to delete records from the Position Budget Detail table and save the deleted records in a purge table. A report is always created.
Important Note: The purge table is F08111P. It is purged and over-written every time this program is run with Purge Activity = "2".

Reviewing Position Control Reports

To ensure that the salary amounts that you defined in your position budgets compare favorably with the actual salaries, FTEs, hours worked, and headcount of the employees in those positions, you should periodically review position budget information. To do this review, you can print position reports. You can review this information for current, previous, or future fiscal years.

You can also use position reports to review the most recent changes that have been made to position budgets.

Reviewing the Open Amounts by Position Report

From the Daily Processing menu (G08BP1), choose Open Amounts by Position.

To review position information for salaries, FTEs, and hours worked, print the Open Amounts by Position report. Use this information to compare budgeted amounts with projected amounts through the fiscal year end. The report displays open amounts, which are the differences between budgeted and projected amounts.

The system calculates the projected amounts depending on the fiscal year for which you defined the position. When it calculates these amounts, the system uses the fiscal pattern for the company with which the position is associated. The system uses the beginning of the fiscal year date and the end of the period-14 date for the fiscal pattern as the start and end date ranges for the position's fiscal year. All position activity records that overlap the ranges are included in the projection calculations.

See Also

- R081420, *Open Amounts by Position* in the *Reports Guide* for a report sample

Processing Options for Open Amounts by Position (R081420)

Options
1. A value of '1' will show Effective Budgeted Amounts. A default of blank will show Budgeted Amounts.

Reviewing the Cross-Year Budget Comparison Report

From the Daily Processing menu (G08BP1), choose Cross Year Budget Comparison.

To simultaneously review the position budgets for two fiscal years, print the Cross-Year Budget Comparison report. You can compare the budget information for two years in a side-by-side format. The report also displays the percentage change in each budget from one fiscal year to the next.

The system calculates the percentage change amounts by dividing the difference between the budget amounts for each year by the first year's budget amount, as it appears in the left column of the report.

See Also

- R081430, *Cross-Year Budget Comparison* in the *Reports Guide* for a report sample

Processing Options for Cross Year Budget Comparison (R081430)

Options
1. Enter the first fiscal year (two digits) to be displayed.
2. Enter the second fiscal year (two digits) to be displayed.

Amounts
1. Effective/Budgeted Amounts

Blank = Budgeted Amounts
1 = Effective Amounts

Reviewing the Position Control Comparison Reports (R081440)

From the Daily Processing menu (G08BP1), choose Position Control Comparison.

You can run three comparison reports:

- Position Control Headcount Report
- Position Control Budgeted FTE Report
- Position Control Effective FTE Report

Position Control Headcount Report

To compare the current headcount for your positions with the budgeted headcount for the next fiscal year, print the Position Control Headcount report. Use this information to determine whether you need to do either of the following:

- Hire additional employees to fill a position.
- Request approval for additional headcount for a position.

See Also

- R081440, *Position Control Headcount* in the *Reports Guide* for a report sample

Position Control Budgeted FTE Report

To review current position activity and compare it with the FTEs budgeted for the upcoming fiscal year, print the Position Control Budgeted FTE report. Use the information to determine whether you need to do either of the following:

- Hire additional employees to fill a position.
- Request approval for additional FTEs for a position.

Current headcount is a total of all FTEs in a position. Changes are calculated as the difference between current headcount and the next year's budgeted FTE. This report displays the new position amount as the number of FTEs that would have to be hired for current headcount to match the budgeted headcount. This report also displays the ratio of new positions to current headcount.

See Also

- ❑ R081440, *Position Control Budgeted FTE* in the *Reports Guide* for a report sample

Position Control Effective FTE Report

To review current position activity and compare it with the effective FTEs for a specific fiscal year, print the Position Control Effective FTE report. This report is the same as the Position Control Budgeted FTE report, except that it uses effective FTEs instead of budgeted FTEs.

See Also

- ❑ R081440, *Position Control Effective FTE* in the *Reports Guide* for a report sample

Processing Options for Position Control Comparison (R081440)

FTE/Headcount
1. Enter the fiscal year(two digits) whose budgeted FTE or Headcount will be compared to the current FTE or Headcount.
2. Enter the Type of report you would like to see. Blank (default) = FTE, 1 = Headcount
3. For the FTE report which would you like to see Effective or Budgeted amounts. Blank (default) = Effective, 1 = Budgeted

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Reviewing the Position Budgets Report

From the Daily Processing menu (G08BP1), choose Position Budgets.

To review by fiscal year the position budgets that are established for all business units and positions, print the Position Budgets report. Use this information to verify that your position budgets are correct. You might also use this information for reference when you are preparing your position budgets for next year. You can print one version of this report to review annual position budgets and another to review effective position budgets.

See Also

- ❑ R081460, *Position Budgets Effective Budget* in the *Reports Guide* for a report sample
- ❑ R08146, *Position Budgets Annual Budget* in the *Reports Guide* for a report sample

Processing Options for Position Budgets (R081460)

Pos Control
1. Budgeted/Effective Amounts

Blank = Effective Amounts
1 = Budgeted Amounts

Reviewing the Employee Position Activity Report

From the Daily Processing menu (G08BP1), choose Employee Position Activity.

To review all of the position activity for each employee within your organization, print the Employee Position Activity report. You can analyze employee movement among positions, and determine whether you need to hire additional employees or reduce the headcount for a position.

You can choose to sort this report either by employee last name or by employee number.

See Also

- R081480, *Employee Position Activity* in the *Reports Guide* for a report sample

Data Selection

You should specify only one fiscal year for this report. Do not specify a range. If you specify a range of fiscal years, the report does not indicate which records are associated with each fiscal year.

Reviewing the Position Budgets by Job Type and Step Report

From the Daily Processing menu (G08BP1), choose Position Budgets by Job Type & Step.

To review the position budgets for all business units and positions for each job type and job step within your organization by fiscal year, print the Position Budgets by Job Type & Step report. Use this information to verify that your position budgets are correct. You might also use this information for reference when you are preparing your position budgets for next year.

Caution

Because the system does not create an audit trail of the changes that you make when you correct position activity records, J.D. Edwards recommends that you assign high security to this program.

See Also

- R081470, *Position Budgets by Job Type and Step* in the *Reports Guide* for a report sample

Processing Options for Position Budgets by Job Type & Step (R081470)

Budget
1. Enter "0" or leave blank to show Effective Amounts, or "1" to show Budgeted Amounts

Compensation Management

Compensation Management

To adequately budget for employee salaries, you must plan for employee pay changes and assess the financial impact of those changes on your salary budget.

Compensation Management is a flexible salary-planning tool that improves the salary review process for both the human resources department and management. The human resources department begins the salary review process by setting up all the rules and constants that define eligibility, and the guidelines for using the system. Before processing a compensation review, human resources must first build work tables. After building these work tables, human resources can grant access to them to managers.

Each time that a manager accesses the system, a visual indicator identifies any data changes that have been made to the Employee Master so that the manager is certain to have the most current employee information for making salary recommendations.

In Compensation Management, managers can create compensation review models with different "what if" scenarios and save their work to the Master Model, or to a private or public model. The Master Model is used to approve and update the salary recommendations to live tables. Private models are visible only to the person who created them. Public models are predefined by the human resources department. The public models allow private models from multiple managers to be consolidated without committing the salary review to the Master Model. Upper level managers can look at public models to see the combined salary review recommendations from multiple supervisors without having to open the individual models of each of the lower-level managers.

See Also

- *Compensation Management Self-Service Considerations* in Manager’s Workbench in the *Workforce Management Foundation Guide*

Setting Up Compensation Management

Before you use the features of your Compensation Management system, you must define critical information that the system uses for processing. You set up this information to meet specific needs of your organization.

Before You Begin

- Set up the common settings for compensation management. See *Setting Up Common Settings for Human Resources* in the *Workforce Management Foundation Guide*
- Define the system options for Pay Rate Edit and Position Control. See *Setting Up System Options* in the *Workforce Management Foundation Guide.*
- Define increase type eligibility. See *Setting Up Eligibility Tables* in the *Human Resources – Benefits Guide.*

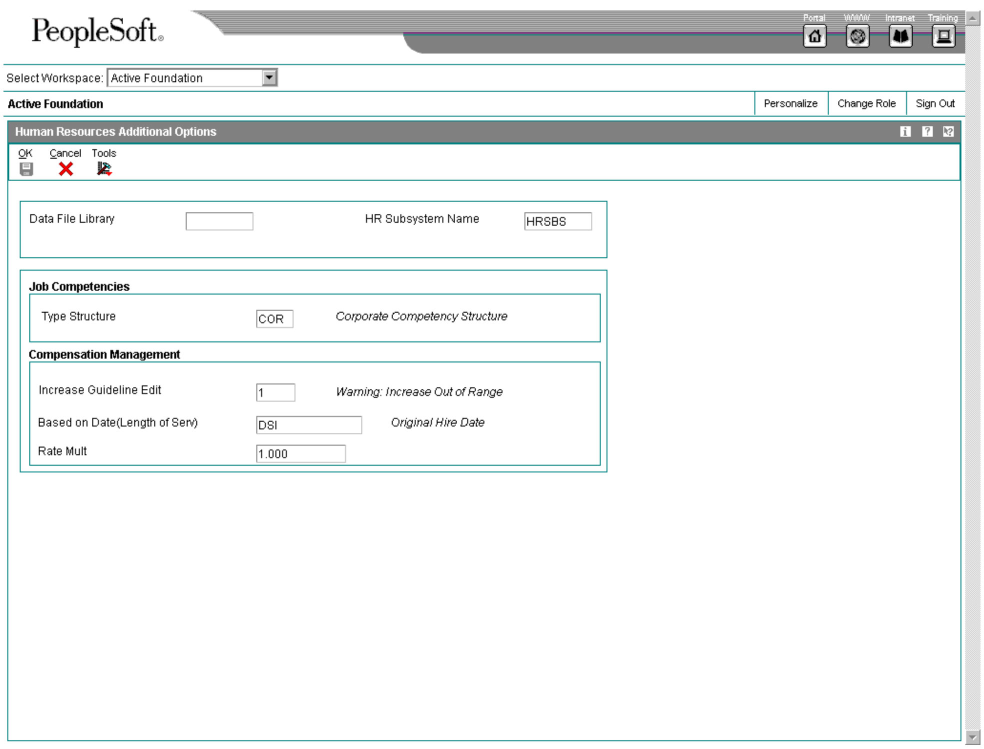
Setting Up the Additional System Options

To control certain aspects of the compensation review process, you need to set up two additional system options for compensation management. You set up one system option to specify whether to allow increase amounts to be outside the guideline range and, if you allow the amounts to be outside the range, whether to issue a warning or a hard error. You set up the second system option to specify the date on which to base the calculation of the length of service.

▶ To set up the additional system options

From the Compensation Mgmt System Setup menu (G08CM14), choose HRM 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 in the Compensation Management area, and then click OK:
   - Increase Guideline Edit
   - Based on Date(Length of Serv)



Defining Increase Type Guidelines

Organizations often have specific guidelines for the kinds of compensation increases that employees are eligible to receive. These guidelines can be based on a number of evaluation factors, such as length of service, performance appraisal ratings, and the amount of time served in a current position. Often, several factors determine an employee's compensation increase.

To track the guidelines that are used in determining employee increases and to assist in administering compensation increases that are within those guidelines, you can create increase guideline tables to define the types of increases that employees are eligible to receive. Managers will then use these guidelines to make salary decisions.

You can create increase guideline tables to facilitate a number of compensation increase scenarios:

- You can set up increase guideline tables using ranges for one evaluation factor. For example, if your company bases compensation increases on length of service alone, a table with established ranges for one evaluation factor-- length of service-- can store all of the necessary increase guidelines.
- You can set up increase guideline tables using ranges for two evaluation factors. For example, if your company bases compensation increases on length of service and performance appraisal rating, a table with established ranges for both of these evaluation factors can store all of the necessary increase guidelines.

Note

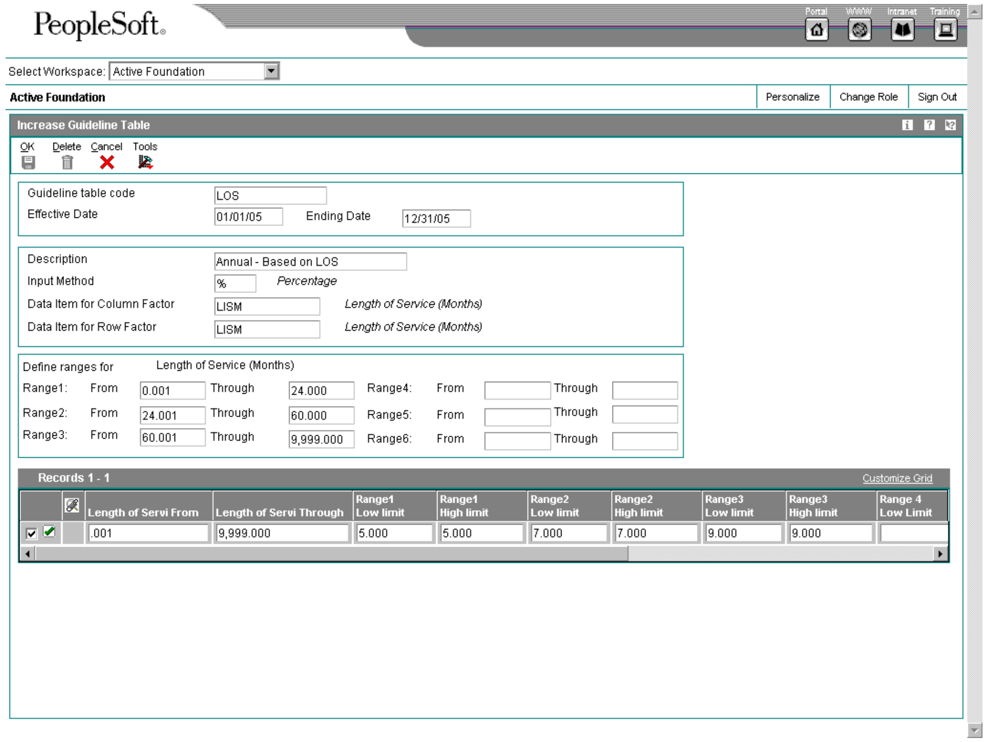
These tables are for informational use only and are not used by the system to calculate actual employee compensation increases. No employee information is updated directly as a result of these tables.

Example: Increase Guidelines Based on Length of Service

Your organization might have a compensation increase policy that is based on employees' length of service. For example, assume employees who have been employed between zero and 24 months receive 5 percent increases, employees who have been employed between 24 months and 60 months receive 7 percent increases, and employees who have been employed for more than 60 months receive increases of 10 percent.

To help administer this policy, you can set up an increase guideline table that defines the types of raises that employees are eligible to receive based on their length of service.

Using the evaluation factor of length of service, you can create three different ranges in which to group your employees. The first range includes all of the employees who have been employed between .001 and 24 months. The second range includes all of the employees who have been employed between 24.01 and 60.00 months. The last range, 60.01-9999.00, includes all of the employees who have been employed more than 60 months.



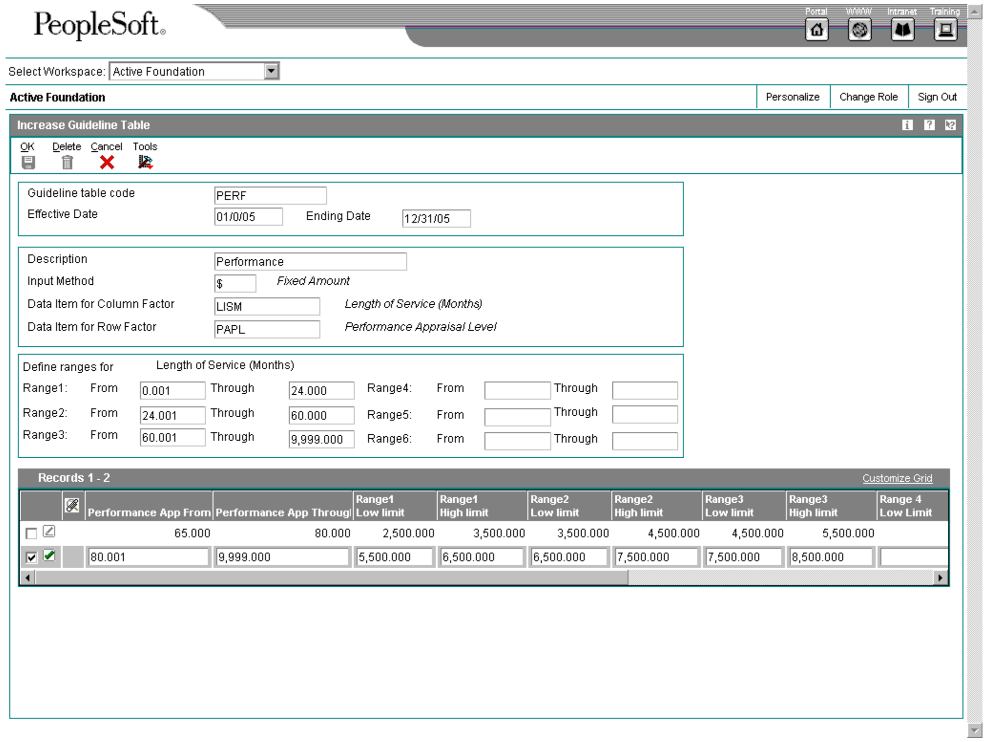
Note

You must complete both the Data Item for Column Factor field and the Data Item for Row Factor field in the Increase Guidelines Table. If you are using only one evaluation factor, such as length of service, you must complete both fields with that evaluation factor.

Example: Increase Guidelines Based on Length of Service and Performance Ratings

Your company might have a compensation increase policy that is based on employees' length of service as well as their performance appraisal ratings. For example, assume employees who have been employed between zero and 24 months and have a performance appraisal rating of 80 or higher are eligible to receive an increase of between 5500 and 6500. Employees who have been employed between 24 and 60 months and have a performance appraisal rating that is between 65 and 80 are eligible to receive an increase of between 3500 and 4500.

To help administer this policy, you can set up an increase guideline table that defines the types of raises that employees are eligible to receive, based on their length of service and their performance appraisal ratings.



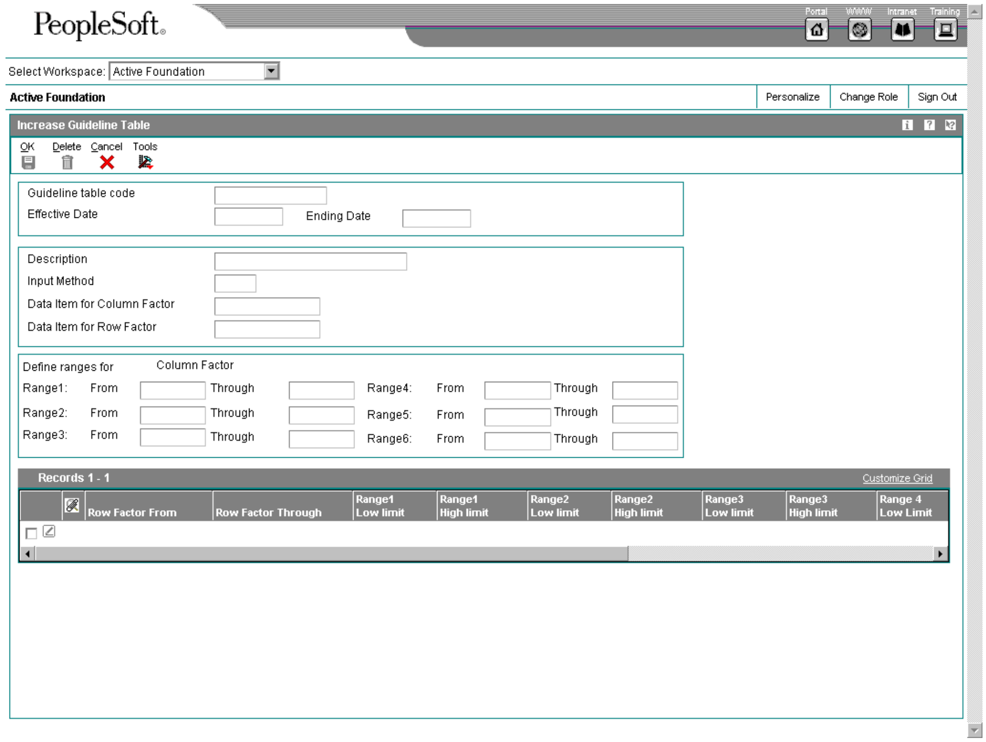
Using this Increase Guideline Table helps to ensure that each employee receives the proper increase. For example, you can determine what the compensation increase should be for an employee who has been employed for 48 months and has received a 78 on the most recent performance appraisal. Using the example above, this employee is eligible to receive an increase of between 3500 and 4500.

Which factor you use as the column factor or the row factor does not matter. Changing these factors does not affect the outcome of the table information; only the way that the information on the table is displayed affects the outcome. If you change the display of the evaluation factors, the table displays the information differently. However, an employee who has been employed for 48 months and received a 78 on the most recent performance appraisal is still eligible to receive an increase between 3500 and 4500.

► To define increase type guidelines

From the Compensation Mgmt System Setup menu (G08CM14), choose Define Increase Type Guidelines.

1. On Work with Increase Guideline Tables, click Add.



2. On Increase Guideline Table, complete the following fields:
    - Guideline table code
    - Effective Date
    - Description
    - Input Method
    - Data Item for Column Factor
    - Data Item for Row Factor
3. Complete the following optional field:
    - Ending Date
4. To define a range for the column factor that you specified, complete the following fields:
    - From
    - Through
5. To define additional ranges for the column factor, complete the same fields for the other ranges.
6. To define a range for the row factor that you specified, complete the following fields:

- From
- Through
- Range1 Low limit
- Range1 High limit

7. To define additional ranges for the row factor, complete the High and Low limit fields for the ranges that you chose in step 5.
8. Click OK.

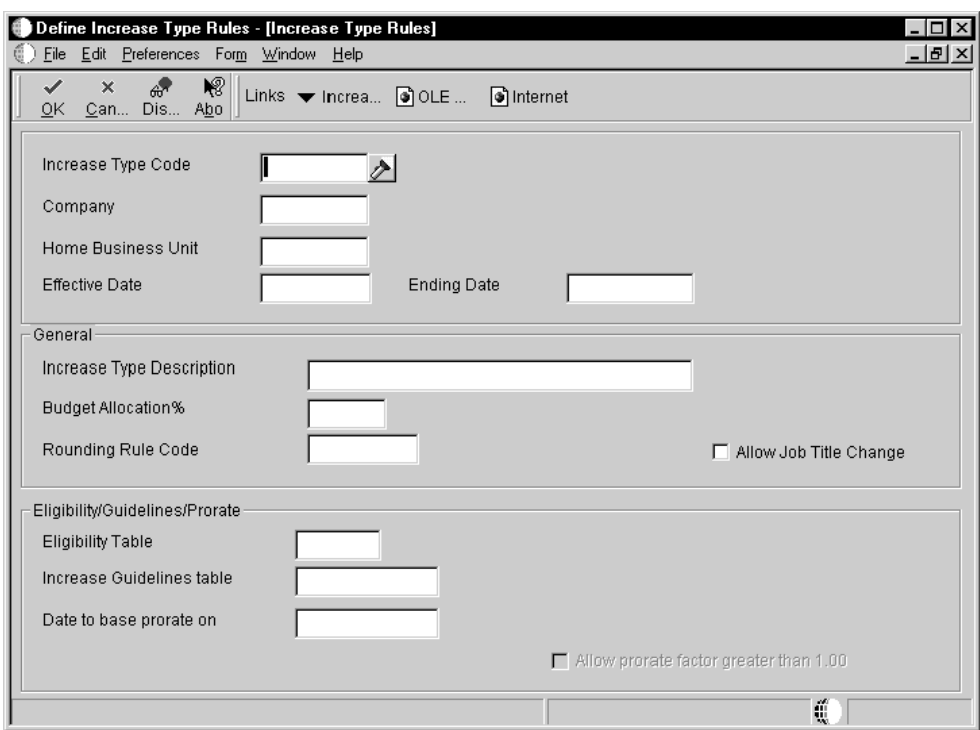
Defining Increase Type Rules

Before defining increase type rules, you need to identify your increase types. Organizations often have specific rules for the types of compensation increases that employees are eligible to receive. These rules can include eligibility rules, whether a job title change is allowed, rounding rules, salary guidelines, budget allocation, and the date on which a prorated factor is calculated. You set up the increase type rules to define the default information for a specific increase type.

► To define increase type rules

From the Compensation Mgmt System Setup menu (G08CM14), choose Define Increase Type Rules.

1. On Work With Increase Type, click Add.



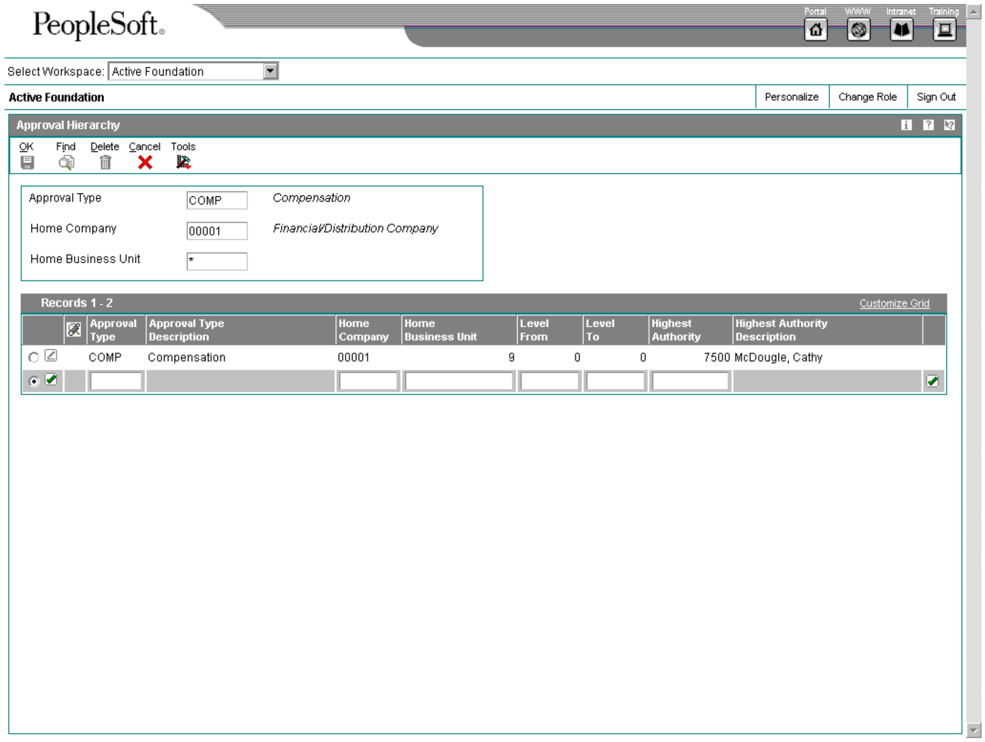
2. On Increase Type Rules, complete the following fields:
    - Increase Type Code
    - Company
    - Effective Date
3. To allow job title changes, click the following option:
    - Allow Job Title Change
4. Complete the following optional fields.
    - Home Business Unit
    - Ending Date
    - Budget Allocation%
    - Rounding Rule Code
    - Eligibility Table
    - Increase Guidelines table
    - Date to base prorate on
5. Click the following option to turn it on, and then click OK:
    - Allow prorate factor greater than 1.00

Setting Up the Approval Hierarchy

You set up the approval hierarchy to specify approval rules for an approval type and to identify who will be the highest authority for giving final approval to the compensation review. This person is usually someone in the human resources department.

► To set up the approval hierarchy

From the Compensation Mgmt System Setup menu (G08CM14), choose Define Approval Hierarchy Setup.



1. On Approval Hierarchy, complete the following fields in the detail area:
    - Approval Type
    - Home Company
2. Complete the following optional fields, and then click OK:
    - Home Business Unit
    - Level From
    - Level To
    - Highest Authority

Note

The Compensation Management system ignores the Level From and Level To fields. A supervisor cannot submit work for approval until the work for all subordinates is submitted. When a compensation review is submitted, all levels of supervisors below the submitting supervisor must approve.

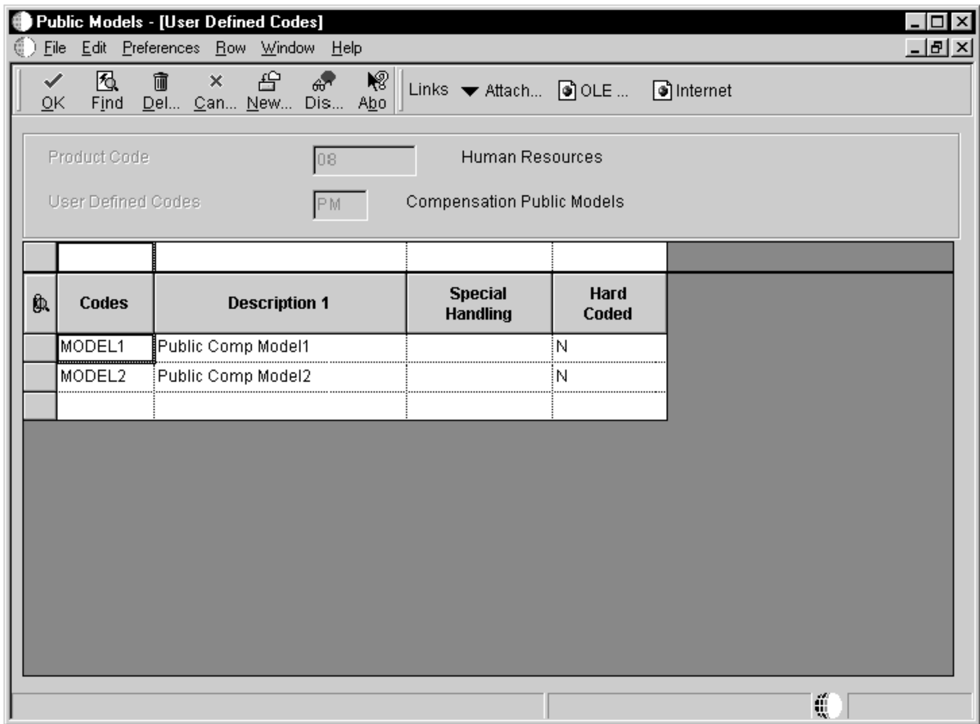
Defining Public Models

If you are planning to use public models, you must define them in a UDC table during setup. These models are visible to all managers in the management chain.

► To define public models

From the Compensation Mgmt System Setup menu (G08CM14), choose Public Models.

1. On Work With User Defined Codes, click Add.



2. On User Defined Codes, complete the following fields in the detail area:
   - Codes
   - Description 1
3. Complete the following optional fields and then click OK:
   - Special Handling
   - Hard Coded

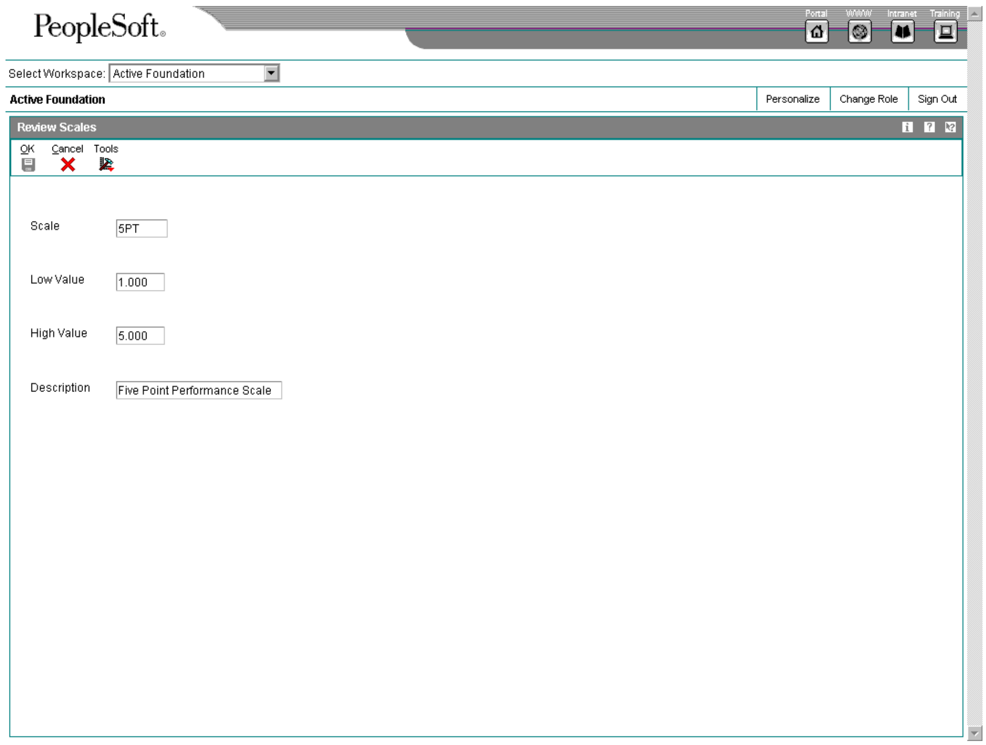
Defining the Performance Appraisal Scale

Organizations often have specific scales for employee performance appraisals. You set up performance appraisal scales to define the scales that are valid for your company.

▶ To define the performance appraisal scale

From the Compensation Mgmt System Setup menu (G08CM14), choose Scale Information.

1. On Work With Scales, click Add.



2. On Review Scales, complete the following fields and then click OK:

   - Scale
   - Low Value
   - High Value
   - Description

3. On Work With Scales, select Define Levels from the Row menu to define the levels for the scale.
4. On Define Competency Levels, complete the following fields, and then click OK:
   - Low Value
   - High Value

Generating the Employee/Supervisor Relationship Table

From the Compensation Mgmt Advanced & Tech Oper menu (G08CM13), choose Employee/Supervisor Relationship Build.

Before you open the compensation review to the managers, you need to build the Employee/Supervisor Relationship Level table to generate a list that shows the hierarchy of management above each active employee, based on the information in the Employee Master table (F060116). The system deletes any existing records prior to writing the employee's records. One record is written for each manager above the employee. The employee's immediate supervisor is written with a level 1, the supervisor's supervisor is written with a 2, and so on.

The Employee/Supervisor Relationship Level table does not automatically reflect any changes made to the Employee Master, so you should build it nightly during the time that the compensation review process is open so that the table is always current.

The processing option must be set before you run the program. When a supervisor has given notice or is going to be terminated, you must decide when to remove the supervisor’s name from the Employee/Supervisor Relationship table. The Days Prior To Termination processing option is used to specify how many days prior to termination you want to exclude the supervisor from the table build. Any supervisors with termination dates within the specified time period are not written to the table and are included in the exception report.

Processing Options for Employee/Supervisor Relationship Build (R05846)

Process Tab

This processing option specifies the default that is applied during the employee/supervisor relationship build.

---

1. Days Prior To Termination

Use this processing option to specify the number of days prior to termination during which a supervisor will still be included in the Employee/Supervisor Relationship Level table (F05840).

Generating Compensation Review Work Tables

From the Compensation Mgmt Advanced & Tech Oper menu (G08CM13), choose Compensation Review Work Tables Build.

You build the Compensation Review work tables to generate a list of the employees who will be reviewed. These work tables give the managers easy access to all of the information that you have set up during their compensation review process. When you build the work tables, the system reviews each employee's home company and home business unit to establish the available increase types for the employee's organization. For each increase type, the increase type rules specify whether to test for the employee's eligibility, calculate prorate factors, determine salary guidelines from the employee's performance appraisal, calculate budget allocation, and allow job title change. You can specify whether to globally apply the budget allocation percentages for the increase types as the recommended increase amounts. The recommended increase amounts are the basis for salary planning for the supervisors and can be overridden in the compensation review.

Set the CMPSYNC common setting to Yes to synchronize compensation work tables. See Setting Up Common Settings for Human Resources in the *Workforce Management Foundation Guide*.

This program uses the Employee Master table (F060116).

See Also

- R08830, *Compensation Review Work Tables Build* in the *Reports Guide* for a report sample

Processing Options for Compensation Review Work Tables Build (R08830)

Default Values Tab

These processing options specify default effective dates for the compensation review work tables.

---

1. New Increase Effective Date (Required)

Use this processing option to enter the new increase effective date.

2. Next Increase Effective Date

Use this processing option to enter the next increase effective date.

Edits Tab

These processing options specify whether to apply global increases and whether to clear compensation work tables prior to building new work tables.

1. Apply Global Increase

0 = Do not apply global increase
1 = Apply the increase budget allocation
2 = Apply the increase guideline average

Use this processing option to determine whether to apply global increases as starting recommended increases. Valid values:

Blank Do not apply global increases.

1 Apply the increase budget allocations.

2 Apply the increase guideline average.

2. Clear Compensation Review Work Tables Build

0 = Do not clear
1 = Clear

This field refers to the Clear Compensation Review Work tables.

Print Option Tab

This processing option specifies the print format for the compensation review work tables report.

1. Print Option

0 = Print summary of employee count

1 = Print summary by employee

2 = Print increase details by employee

Use this processing option to specify the print option. Valid values are:

Blank Print summary of employee count.

1 Print summary by employee.

2 Print increase details by employee.

Working with Compensation Management

The J.D. Edwards Compensation Management system is a salary-planning tool that empowers you, the manager or HR administrator, to make salary decisions based on real-time information. The system also provides a flexible Web tool that allows you, the manager, to make adjustment recommendations to your employees' salaries.

The compensation review process begins when HR sets up the rules and constants that define eligibility and guidelines for the use of the system. HR builds Compensation Review work tables to set up your organization's user-defined matrices for eligibility and increase guidelines. After the review work tables are built, HR can grant access to supervisors. While the salary review process is open, supervisors are notified of any changes made to the Employee Master Information table (F060116) each time that they access the system. Therefore, supervisors are confident that they are making salary recommendations using the most current employee information. In addition to an online visual indicator of data changes, supervisors also receive an e-mail to advise of the change.

As an HR administrator, you can use this application to review or change salary records of any employee. Managers using this tool by way of the Web can review and change only the salary records of employees who report to them directly. You can review each employee individually or use the quick entry feature to review the entire group at once. When you use the quick entry feature, you can apply global increases that are based on the criteria that you choose (for example, a 5 percent merit raise to all employees who are rated as outstanding).

For both input methods, you have an online display of spent and remaining budget. This information is displayed for each increase type and for the total of all of the increase types. When the managers are finished making compensation recommendations, HR turns off supervisor access to the Compensation Management system, and then runs a batch process to update the information to the live tables and to archive the salary planning information to history.

Before You Begin

- ❑ Set up Compensation Management to define the information that the system needs for processing. See *Setting Up Compensation Management*.
- ❑ Preset the processing options for the HR version (ZJDE0002) and the Manager version (ZJDE0001) of the Compensation Review Workbench.
- ❑ When HR is ready for managers to do a compensation review, HR activates the common setting CMPOPEN to give access managers to make compensation reviews. The compensation review workbench in the Manager Self-Service menu allows supervisors access only to their own employees. See *Setting Up Common Settings for Human Resources* in the *Workforce Management Foundation Guide.*

Reviewing Salary Recommendations

The Compensation Review Workbench is the initial entry point for the salary review process. The workbench provides you with a compensation planning tool to make salary recommendations using budgets, rules, and guidelines set up by HR.

The workbench allows you to perform the following tasks:

- Maintain multiple versions of different salary recommendations.
- View the salary budget allocation, budget spent, and budget remaining by increase types.

- View and change salary recommendations of a specified supervisor.

The Compensation Review Workbench can be used either as a manager or a human resources administrator workbench, as designated by how the processing option is set up. When you use the Manager Workbench, the supervisor field is disabled, and the supervisor number is automatically populated.

When you use the workbench as an HR administrator, the supervisor field is enabled to allow entry of a supervisor number. You can enter a supervisor number and review the records of the employees in that supervisor's reporting chain. You can then view or change salary recommendations, and view summary information of the reporting employees.

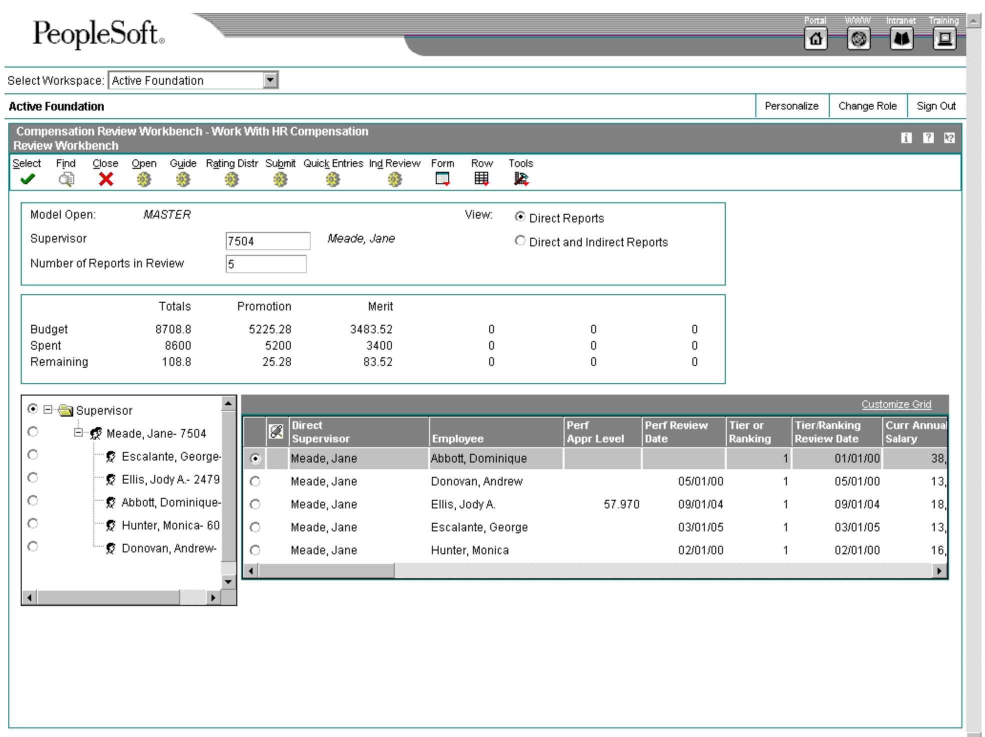
Entering Salary Recommendations for an Individual Employee

The Individual Review application allows you to enter salary recommendations for one individual employee at a time. You can make modifications to individual eligibility or job titles from this application, based on rules set up by HR.

▶ To enter salary recommendations for an individual employee

From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

1. On Work With Compensation Review Workbench, choose one of the following options:
   - Direct Reports
   - Direct and Indirect Reports



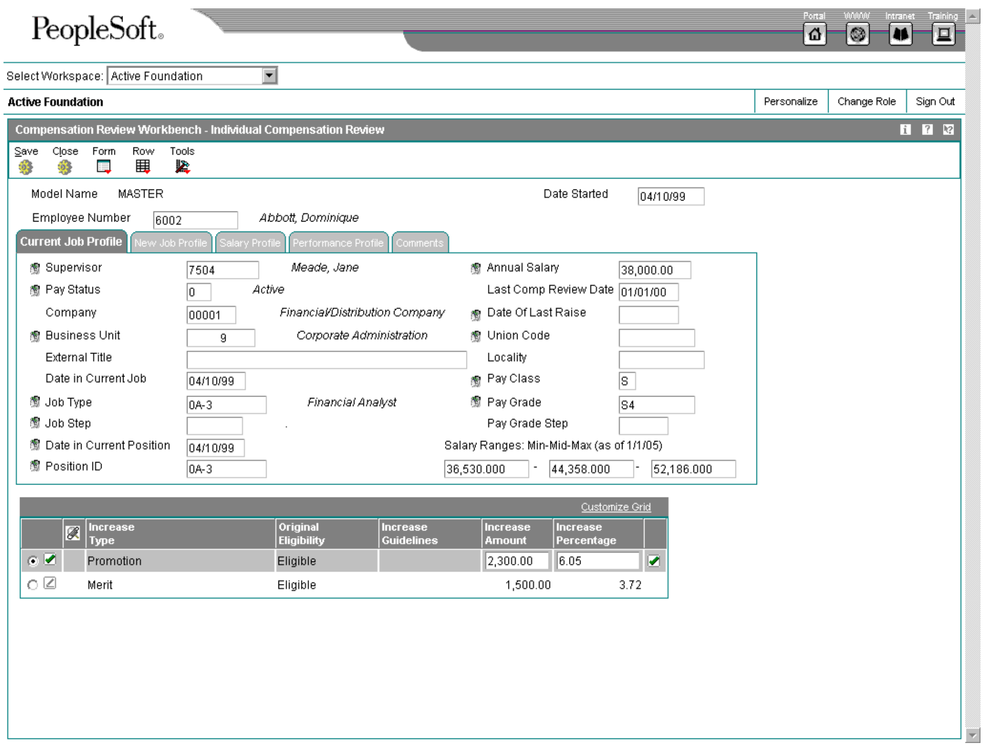
2. Complete the following field and click Find:

- Supervisor

The tree structure on the left side of the detail area shows the management hierarchy.

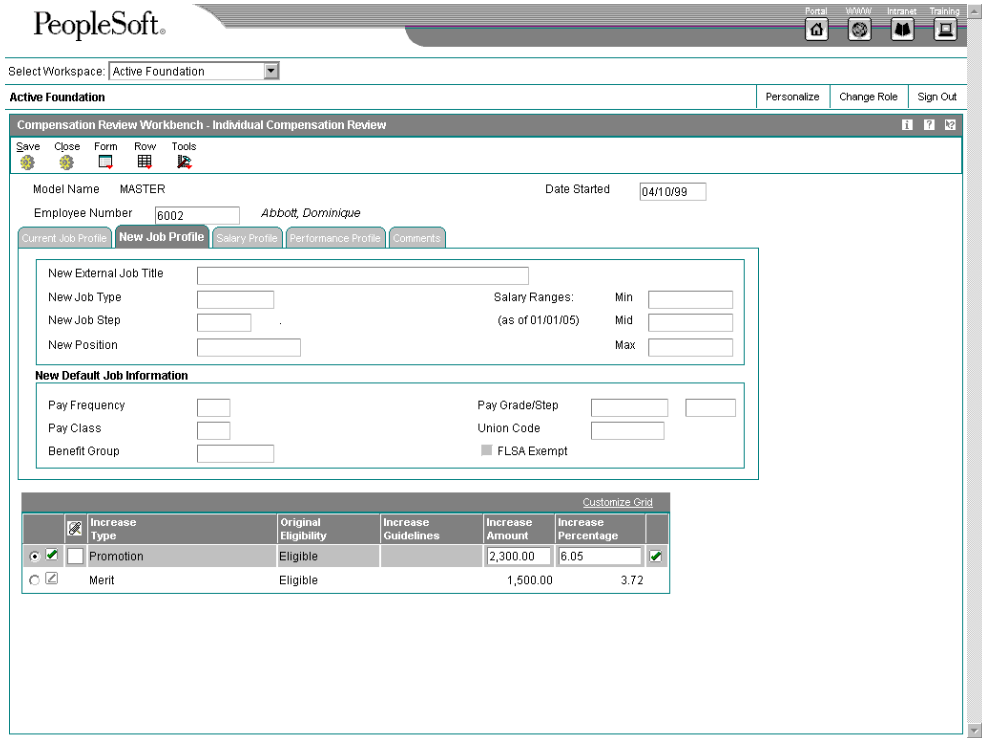
3. Choose the employee whose records you want to review or change from the right side of the detail area, and then choose Ind Review from the Row menu.

   On Individual Compensation Review, Current Job Profile is the default tab.

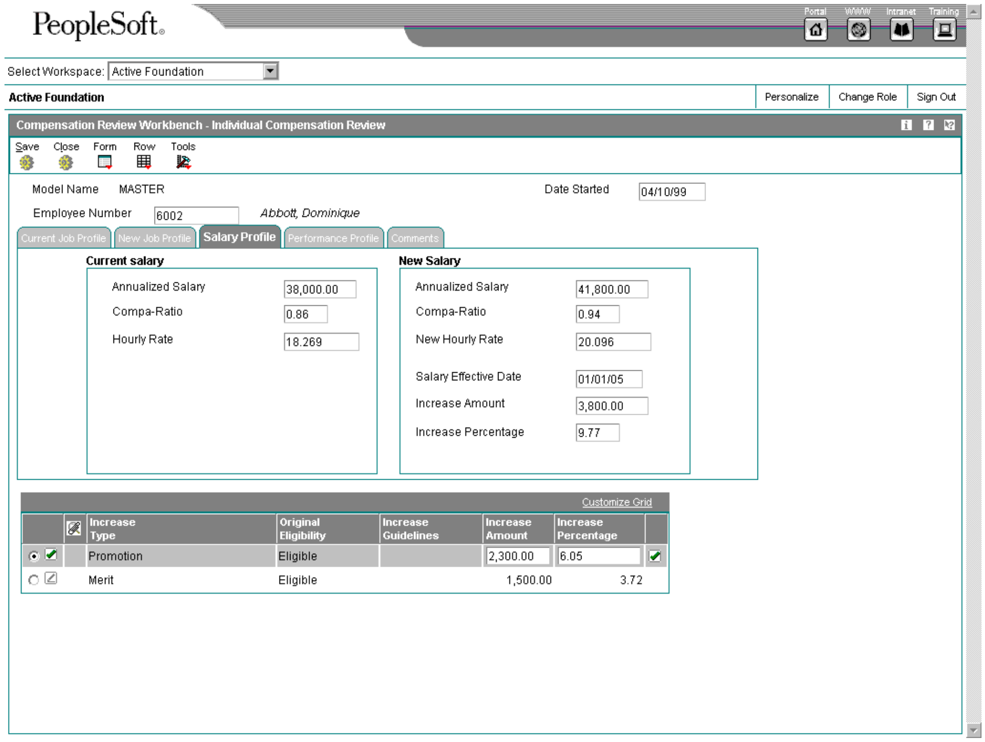


4. Review information about the employee's current job.

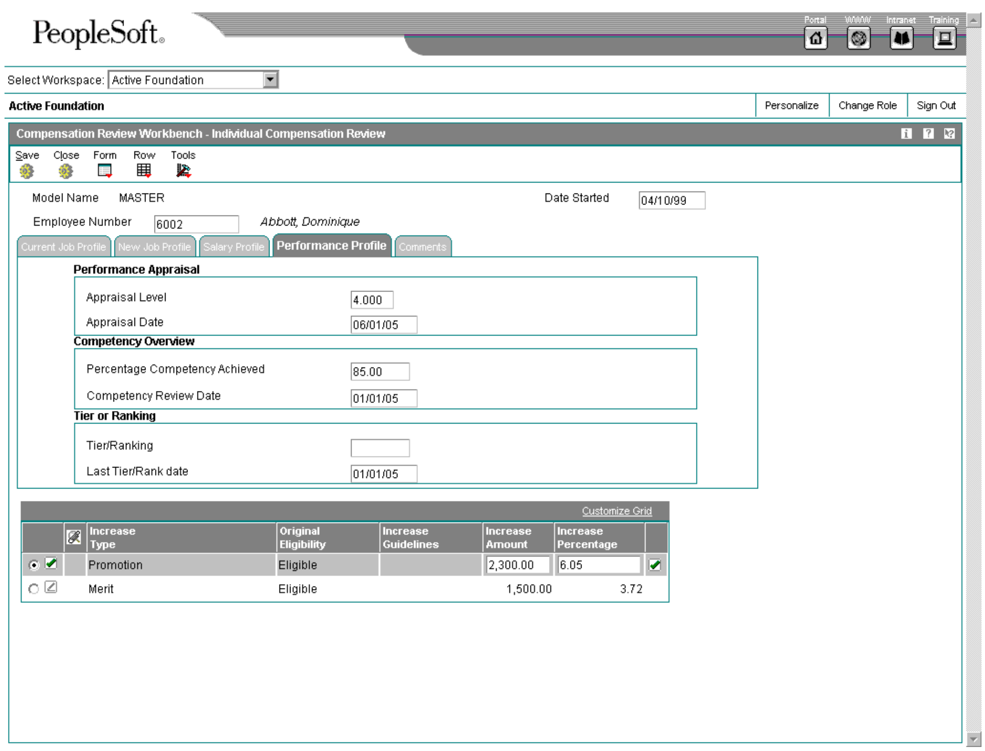
   The New Job Profile tab is enabled only if one of the increase types in the detail area allows a job title change.



5. Click the New Job Profile tab and complete the following fields to change an employee's job title:
   - New External Job Title
   - New Job Type
   - New Job Step
   - New Position
6. In the New Default Job Information area, complete any or all of the following optional fields:
   - Pay Grade/Step
   - Union Code
   - FLSA Exempt



7. Click the Salary Profile tab to review the data in the Current Salary and New Salary detail areas.



8. Click the Performance Profile tab and complete the following fields. You can enter information only if the processing options are set to allow input.

    - Appraisal Level
    - Appraisal Date
    - Percentage Competency Achieved
    - Competency Review Date
    - Tier/Ranking
    - Last Tier/Rank date

9. Click the Comments tab to enter additional information in a textual format.
10. Enter the increase amount or the increase percentage in the detail area.
11. Review the eligibility status of the employee for a new position.
12. Click Save.

    The Work With Compensation Review Workbench reappears.

13. Choose the next employee whose records you need to review or change, and repeat steps 4-13.
14. When you are finished reviewing and changing records, click Submit to submit the changes that you made to the records.

Entering Salary Recommendations for Groups of Employees

Quick Entries allows you to enter increases for multiple reports in a grid format. Also, global recommendations can be applied to a group of employees with specific criteria and as a performance appraisal, tier/ranking, increase type, or pay grade/step.

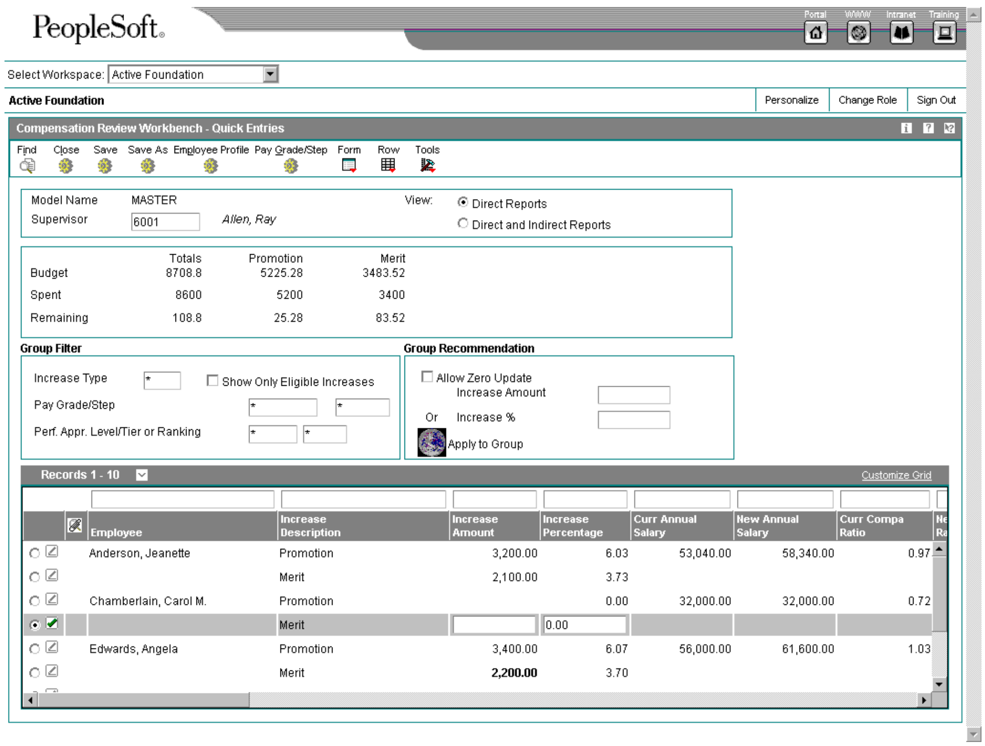
► To enter salary recommendations for groups of employees

From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

1. On Work With Compensation Review Workbench, choose one of the following options:
    - Direct Reports
    - Direct and Indirect Reports
2. Complete the following field and click Find:
    - Supervisor

    The tree structure on the left side of the detail area shows the management hierarchy.

3. Choose the employee whose records you want to review or change from the right side of the detail area.
4. Click Quick Entries.



5. On Quick Entries, choose one of the following options:
   - Direct Reports
   - Direct and Indirect Reports
6. Complete the following optional fields in the Group Filter area for selecting employees with specific criteria, and then click Find:
   - Increase Type
   - Show Only Eligible Increases
   - Pay Grade/Step
   - Curr Pay Step
   - Perf. Appr. Level/Tier or Ranking
   - Tier Ranking
7. To make global salary changes, complete one of the following fields, and then click Apply to Group.
   - Allow Zero Update

- Increase Amount
- Increase %

8. Click Save or Save As to save your work.

   If you click Save As, the Save As form appears.

9. On Save As, choose Master, Private or Public Model; and then click OK.
10. On Work With Compensation Review Workbench, click Submit to submit the changes that you made to the records.

Choosing a Model Type

The Open feature allows you to choose a model type for your compensation review. You can choose a public or private model, or the master model.

► To choose a model type

From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

1. On Work With Compensation Review Workbench, click Open.
2. On Compensation Review Model Search/Select, choose one of the following options:
   - Master
   - Public
   - Private
   - All
3. Choose a model type in the detail area and click Select.

   On Work With Compensation Review Workbench, the model type that you selected appears in the Model Open field.

Accessing the Web

The Guide feature enables you to go directly to the J.D. Edwards home Web page.

► To access the Web

From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

On Work With Compensation Review Workbench, click Guide.

The system takes you to the Microsoft Internet Explorer home page that is provided by J.D. Edwards.

Reviewing the Rating Distribution

The Rating Distribution feature gives you a performance rating distribution for supervisors' direct reports or for the organizations underneath their management hierarchies. The Model Open type drives the numbers displayed in the grid. Column sets not needed are hidden.

► To review the rating distribution

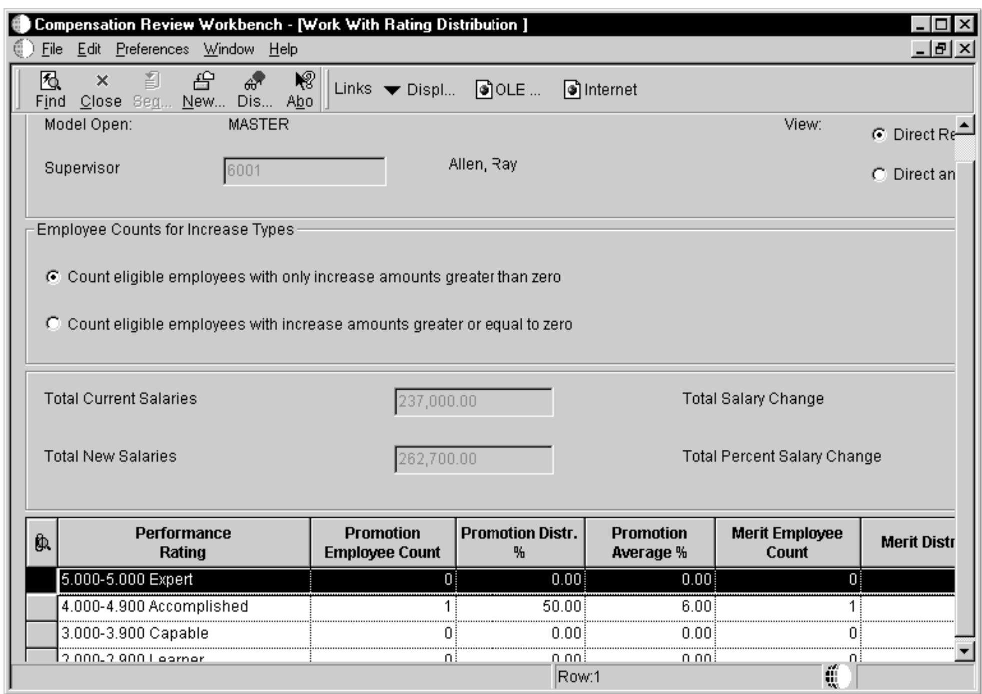
From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

1. On Work With Compensation Review Workbench, complete the following field and click Find:

    - Supervisor

    The tree structure on the left side of the detail area shows the management hierarchy.

2. Choose the employee whose records you want to review or change from the right side of the detail area.
3. Click Rating Distr (Rating Distribution).



The performance ratings are listed in the detail area. Supervisors can quickly see the average increase for the increase types and how each of the increase types are distributed to the employees, based on their performance.

Submitting Compensation Recommendations

When you have finished with the compensation review, you use the Submit feature to submit the compensation recommendation to the next higher level of supervisor.

► To submit compensation recommendations

From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

1. On Work With Compensation Review Workbench, complete the following field and click Find:

   - Supervisor

   The tree structure on the left side of the detail area shows the management hierarchy.

2. From the right side of the detail area, choose the employee whose records you want to submit.
3. Click Submit.

   You get a message warning you that all reports should be submitted at the same time.

4. Click Continue.

   The Submit Compensation Review Message notifies you if the submission has been successful.

Returning Submitted Compensation Recommendations

You use the Return feature to return a submitted compensation recommendation to a lower-level pf supervisor. After the review is returned, the supervisor can make changes to the compensation or return the work of lower level supervisors.

► To return a submitted compensation recommendation

From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

1. On Work With Compensation Review Workbench, complete the following field and click Find:

   - Supervisor

   The tree structure on the left side of the detail area shows the management hierarchy.

2. From the right side of the detail area, choose the employee whose records you want to return.
3. Click Return.

   The Return Compensation Review Message notifies you if the return has been successful.

Reviewing Salary Approvals

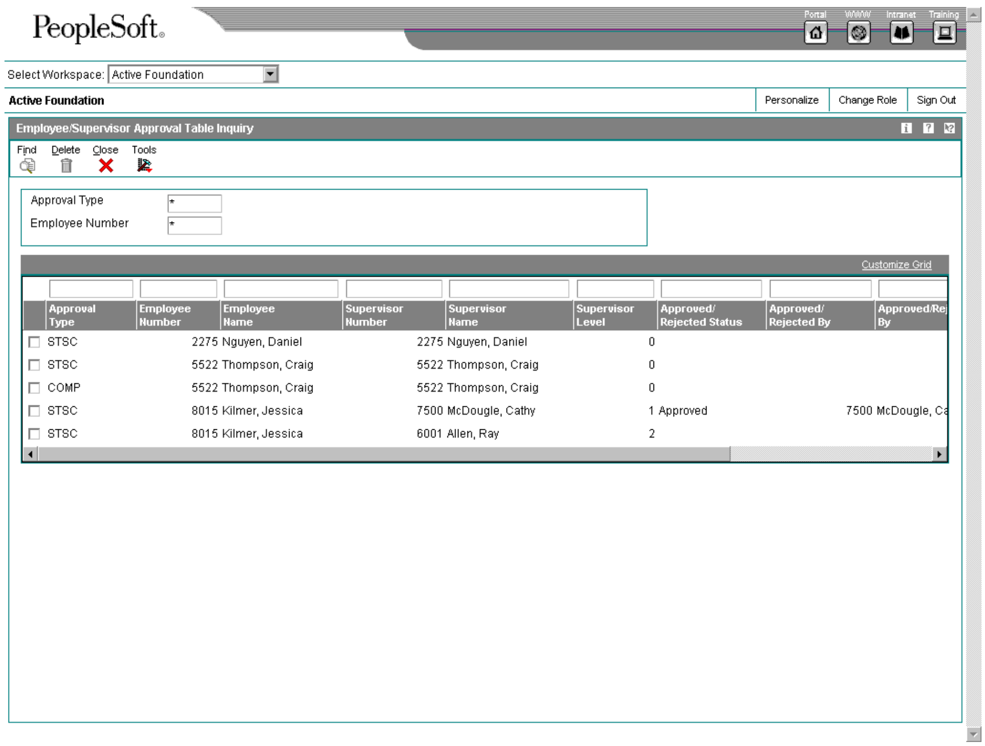
Approval Inquiry allows you to review the approval status of a particular process, such as compensation review of an employee. It tells youwhether the process was approved or rejected, and provides the dateand time that the program executed the last update to the record.

▶ To review salary approvals

From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Approval Inquiry.

On Employee/Supervisor Approval Table Inquiry, complete the following fields and click Find:

- Approval Type
- Employee Number



On the approval table, you can review the status of the salary change.

Note

You can also review salary approvals from the Compensation Review Workbench. From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench. On Work With Compensation Review Workbench, from the right side of the detail area, choose the employee whose records you want to review and choose Approval Inquiry from the Row menu.

Updating the Compensation Review

From the Compensation Mgmt Advanced & Tech Oper (Operations) menu (G08CM13), choose Compensation Review Updates.

After the compensation review period has closed and the final review has been submitted, the new compensation information needs to be updated to the Employee Master Information table (F060116). The Compensation Review Updates program creates a history record for the new total salary change and updates the history table with the different increase types that make up the new salary. The increase types are associated with the appropriate change reasons.

After HR closes the compensation review process, the following procedures should also be done:

- Set the CMPSYNC common setting to No to turn off synchronizing of the compensation work tables. See *Setting Up Common Settings for Human Resources* in the *Workforce Management Foundation Guide.*
- Set the CMPOPEN common setting to No to close the compensation review process. See *Setting Up Common Settings for Human Resources* in the *Workforce Management Foundation Guide*.

After updating the Employee Master table, the system clears the work tables and purges any comments that are stored as media object text and associated with the compensation review.

See Also

- R08832, *Compensation Review Updates* in the *Reports Guide* for a report sample

Processing Options for Compensation Review Updates (R08832)

Process Tab

These processing options specify the process mode and the change reason to use; and whether to update performance appraisal information, tier or ranking information, and job competency information.

1. Process Mode

'0'=Proof Mode

'1'=Final Mode

Use this processing option to specify the mode for the system to use when processing the compensation review update. Valid values are:

0 Proof Mode

1 Final Mode

If you use proof mode, the system prints the Summary Per Employee report for you to review. The system also prints the Eligibility Override, Job Title Change, and Salaries Outside Pay Grade Range reports if you have set the processing options for these reports to print. In proof mode, the system does not update the compensation review information to any database tables.

In final mode, the system prints the reports and updates the compensation review information to the Employee Master (F060116), Employee Master Additional Information (F060120), and HR History (F08042) tables. The system also clears the work tables and purges any comments that are associated with the compensation review.

2. Change Reason For the New Salary and any New Job. (Required)

Use this processing option to specify the change reason for the new total salary increase.

3. Update Performance Appraisal Information.

'0' =Do not update

'1'=Update

Use this processing option to specify whether to update the performance appraisal information, in addition to the new salary and new job (if any).

Valid values are:

0 Do not update to F060120

1 Update to F060120

The system changes a code other than a 0 or 1 to 0.

4. Update Tier or Ranking Information

'0'=Do not update

'1'=Update

Use this processing option to specify whether to update the tier or ranking information, in addition to the new salary and new job (if any). Valid values are:

0 Do not update to F060120

1 Update to F060120

The system changes a code other than 0 or 1 to 0.

5. Update Job Competency Information

'0'=Do not update

'1'=Update

Use this processing option to specify whether to update the job competency information, in addition to the new salary and new job (if any). Valid values are:

0 Do not update to F060120

1 Update to F060120

The system changes a code other than 0 or 1 to 0.

Print Tab

These processing options specify whether to print comments in the summary by employee report; and whether to print the eligibility override, job title change, and salary outside pay grade range reports.

---

1. Print Comment In the Summary By Employee Report
'0'=Do not print
'1'=Print

Use this processing option to specify whether to print comments in the Summary

By Employee report. Valid values are:

0 Do not print

1 Print

The system changes a code other than 0 or 1 to 0.

2. Eligibility Override Report
'0'=Do not print
'1'=Print

Use this processing option to specify whether to print the Eligibility

Override report. Valid values are:

0 Do not print

1 Print

The system changes a code other than 0 or 1 to 0.

3. Job Title Change Report
'0'=Do not print
'1'=Print

Use this processing option to specify whether to print the Job Title Change

Report. Valid values are:

0 Do not print

1 Print

The system changes a code other than 0 or 1 to 0.

4. Salary Outside Pay Grade Range Report
'0'=Do not print
'1'=Print

Use this processing option to specify whether to print the Salary Outside Pay Grade Range report. Valid values are:

0 Do not print

1 Print

The system changes a code other than 0 or 1 to 0.

Health Safety Management

Health Safety Management

Many governmental safety and health regulations and worker's compensation programs require that employers track and report worker illness and injury. Health safety management tracks information about all aspects of work-related injuries and illnesses. Using this information, you can create accurate and complete reports. You can also review this information to help you determine how your organization can provide a safer working environment for its employees.

You can use your Human Resources system to satisfy all of the government reporting requirements.

Working with Injury and Illness Information

To satisfy many governmental health safety management requirements, you can track detailed information about any injuries or illnesses that your employees suffer during the performance of their jobs within your organization. This information includes:

- Date of incident
- Time of incident
- Description of incident
- Employee's name
- Employee's occupation
- Employee's department
- Part of body affected
- Action taken
- Lost/Restricted time

You use this information to create and print health safety management reports.

You begin tracking health safety management information by opening an injury or illness case, and entering the information that many governmental health safety management organizations require.

After you enter the required information for an injury or illness, you can enter supplemental data. Supplemental data includes any additional information that you want to track about injuries and illnesses, regardless of whether you need to report the case to governmental health safety management organizations.

After you have resolved an injury or illness case, you close the case. To analyze and verify injury and illness information, you can review information online.

Opening an Injury or Illness Case

When a work-related injury or illness occurs, you open a case to begin tracking information about it. You use this information to create and run the reports, which are required by Occupational Safety and Health Administration compliance regulations.

In addition to the information that is required by the government, you can track injury and illness statistics that your organization can use to:

- Identify hazards.
- Increase safety awareness.
- Evaluate safety procedures.

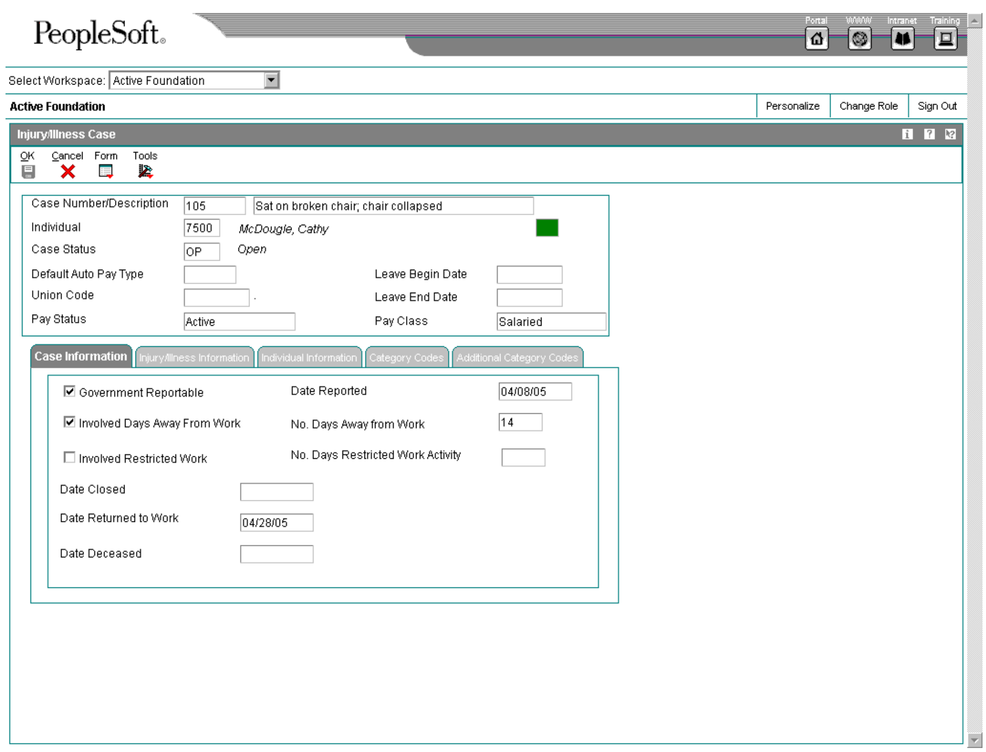
Before You Begin

- ❑ Set up the user defined code list for establishment search types (08H/ES). Establishments are the places in your organization where your employees report for work or perform their duties, or are the business units from which they are paid. See *Customizing User Defined Codes* in the *OneWorld Foundation Guide*.

▶ To open an injury or illness case

From the Daily Processing menu (G08BH1), choose Injury/Illness Case Information.

1. On Work With Injury/Illness Cases, click Add.

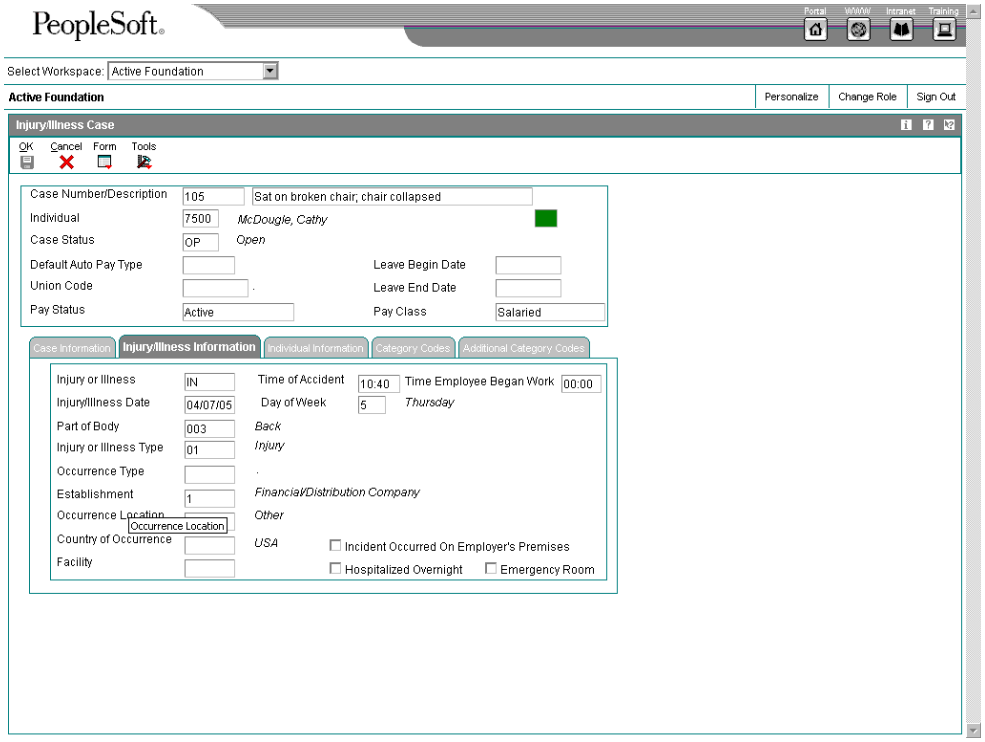


2. On Injury/Illness Case, complete the following field:

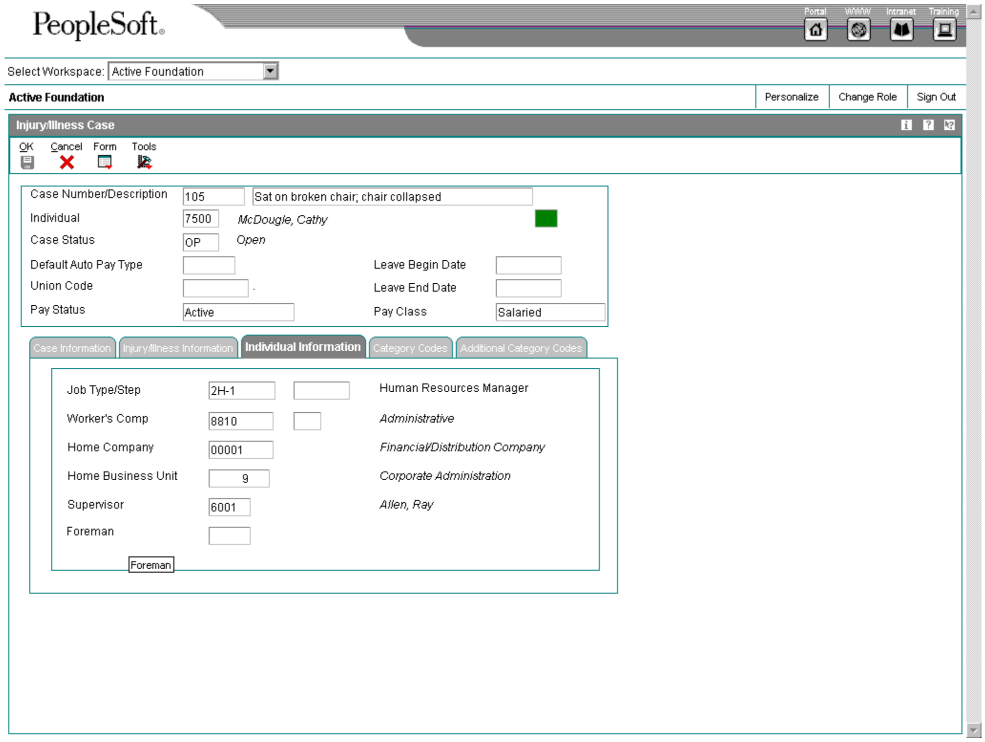
- Case Number/Description

If you leave this field blank, the system assigns the next available number.

3. Complete the following fields:
   - Individual
   - Case Status
4. Click the Case Information tab and choose the following options, if necessary:
   - Government Reportable
   - Involved Days Away from Work
   - Involved Restricted Work
5. Complete the following fields, if necessary:
   - Date Closed
   - Date Returned to Work
   - Date Deceased
   - Date Reported
6. If you chose the Involved Days Away From Work option, complete the following field:
   - No. Days Away from Work
7. If you chose the Involved Restricted Work option, complete the following field:
   - No. Days Restricted Work Activity
8. Click the Injury/Illness Information tab and complete the following fields:
   - Injury or Illness
   - Injury/Illness Date
   - Injury or Illness Type



9. Complete the following fields, if necessary:
    - Time of Accident
    - Part of Body
    - Establishment
    - Occurrence Location
    - Occurrence Type
    - Country in Which Accident Occurred
10. Click the following option, if necessary:
    - Incident Occurred on Employer’s Premises
11. Click the Employee Information tab and complete the following information:
    - Home Company
    - Home Business Unit



12. Complete the following fields, if necessary:

    - Job Type
    - Job Step
    - Worker's Comp
    - Supervisor
    - Foreman

13. Complete the optional fields on the Category Codes tab.
14. Click OK.

Entering Supplemental Data for Injury and Illness Cases

Supplemental data is any type of additional information that you want to track about any of the following:

- Employees
- Applicants
- Jobs
- Dependents
- Beneficiaries

- Requisitions
- Health safety management cases

When you set up your Human Resources system, you specify the types of supplemental data (data types) that you want to track. Supplemental data is not required by the system.

For health safety management cases, typical types of supplemental data might include:

- How the injury occurred
- Medical expenses
- Hazardous materials involved
- Hospital
- Attending physician

Use the same method to enter supplemental data as you use for any type of information that you track.

See Also

- ❑ *Working with the Supplemental Database* in the *Workforce Management Foundation Guide* for information about entering, copying, reviewing, and purging supplemental data

Closing an Injury or Illness Case

After you have resolved an injury or illness case, you close the case. To close a case, you must enter a closed status and the date when you closed the case.

► To close an injury or illness case

From the Daily Processing menu (G08BH1), choose Injury/Illness Case Information.

1. On Work With Injury/Illness Cases, complete one or all of the following fields to determine your search pattern, or leave them blank to show all cases:
    - Establishment
    - Inj/Ill Related (IN/IL)
    - Home Company
    - Home Business Unit
    - Individual
    - Case Number
    - Case Status
2. From the detail area, choose the case you want to close and then click Select.
3. On Injury/Illness Case, complete the following field:
    - Case Status

4. Click the Case Information tab, complete the following field, and then click OK

    - Date Closed

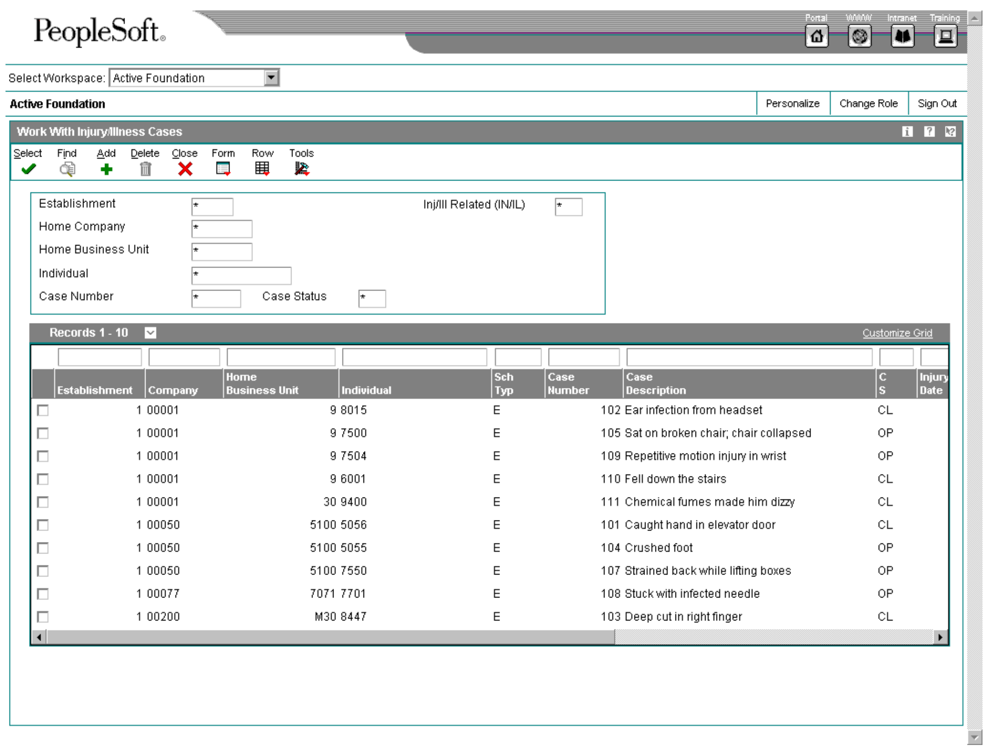
Reviewing Injury and Illness Cases by Establishment

The establishment is any single location where your organization conducts business or performs services. To determine the relative safety of each of your organization's establishments, you can review the number and types of incidents that occur at one establishment, such as a branch office. You can narrow the search to incidents that occur at a specific home business unit or to one employee.

To determine which cases are resolved and which are still open, you can also review cases by case status.

► To review injury and illness cases by establishment

From the Daily Processing menu (G08BH1), choose Injury/Illness Case Information.



1. On Work With Injury/Illness Cases, complete the following field:

    - Establishment

2. To refine your search, complete one or more of the following optional fields, and then click Find:

    - Inj/Ill Related (IN/IL)

- Home Company
- Home Business Unit
- Individual
- Case Number
- Case Status

3. Review the information in the detail area.

Reviewing Supplemental Data for Injury and Illness Cases

After you enter supplemental data for injury and illness cases, you can review that information by case or by data type. Use this information to identify unsafe conditions and develop solutions for them. You can review supplemental data for each injury or illness, including those that you do not need to report to the government.

Because you define the types of data that you want to track for injury and illness cases, the specific type of data that you can review depends on the supplemental data that you defined.

You use the same procedure to review supplemental data for injury and illness cases as you do to review supplemental data for employees.

See Also

- *To review supplemental data for a specific employee* in the *Workforce Management Foundation Guide*
- *To review supplemental data by data type* in the *Workforce Management Foundation Guide*

Reporting Injury and Illness Information to OSHA

The Occupational Safety and Health Administration (OSHA) requires that certain establishments in the United States report injury and illness information. If your organization must report injury and illness statistics to OSHA, you can use the reports that are provided by J.D. Edwards to satisfy all of the OSHA reporting requirements. J.D. Edwards provides the OSHA 200 Log and Summary reports, OSHA 300 Summary and Log reports, and the OSHA 301 Injury/Illness report to meet these requirements. All of the J.D. Edwards OSHA reports meet OSHA requirements and can be used in place of government-issued paperwork to satisfy reporting requirements.

OSHA requires that injury and illness information be reported for establishments that meet certain criteria. To ensure that your reports meet OSHA guidelines, you must set up establishment information before you can generate OSHA reports. You must also identify each employee who works in an OSHA-reportable establishment. An establishment is considered any physical location where employees work.

Note

OSHA reporting requirements changed as of January 1, 2002. To report injuries or illnesses that occurred before January 1, 2002, you must use the OSHA 200 Log and/or the OSHA 200 Summary report. To report injuries and illnesses that occur on or after January 1, 2002, use the OSHA 300 Log and/or the OSHA 300A Summary report along with the OSHA 301 Injury/Illness report.

The detailed or Log versions of the OSHA 200 and 300 reports include both case information and employee information. You can also use these reports to track company injury and illness statistics. These versions list the employees who suffered a government-reportable injury or illness, a short description of the injury or illness, and the extent or outcome of the incident.

If you do not want the detailed format, you can choose to generate the summary versions of the OSHA 200 and 300 reports. The summary versions list each type of injury or illness, and the number of occurrences for each type. Generally, you use the summary format to meet the OSHA requirements to post the reportable illness and injuries annually that occurred at each physical location.

You generate the OSHA 301 report to satisfy OSHA record-keeping requirements. When you generate the OSHA 301 report, the system retrieves the information that you entered on the Injury/Illness Case form. The OSHA 301 Injury/Illness report includes only those cases that have been defined as Government Reportable, that is, where the Government Reportable field on the Injury/Illness Case form is checked or contains a Y.

You can use your Human Resources system to satisfy all OSHA 200 and OSHA 300 reporting requirements.

Setting Up OSHA Information for Employees

You must report OSHA information for each establishment in your organization that meets OSHA reporting criteria. To do this reporting, you must identify each employee who works in an OSHA-reportable establishment. You identify the establishment in which an employee works by using supplemental data.

Before you can identify the establishment where an employee works, you must create data type EN for Establishment in the employee supplemental database. See *Setting Up Supplemental Data* in the *Workforce Management Foundation Guide* for instructions.

After you set up the establishment data type, you can attach establishment information to each employee who works in an OSHA-reportable establishment. See *Entering Supplemental Data* in the *Workforce Management Foundation Guide* for instructions.

Generating OSHA 200 and 300 Reports

You generate the OSHA 200 and OSHA 300 reports to satisfy government requirements for injury and illness reporting. You can create these reports in detail or summary mode.

The detailed or summary versions of the OSHA 200 and 300 reports include both case information and employee information. You can also use these reports to track company injury and illness statistics. These versions list the employees who suffered a government-reportable injury or illness, a short description of the injury or illness, and the extent or outcome of the incident.

If you do not want the detailed format that includes a log of each injury or illness, you can choose to generate the summary versions of the OSHA 200 and 300 reports. The summary versions list each type of injury or illness, and the number of occurrences for each type.

Generally, you use the summary format to meet the OSHA requirements to post reportable illnesses and annual injuries that occurred at each physical location.

Note

To comply with OSHA changes, you must use the OSHA 300 reports to report any injuries or illnesses that occur on or after January 1, 2002. All injuries and illnesses that occur before that date should be reported using the OSHA 200 reports.

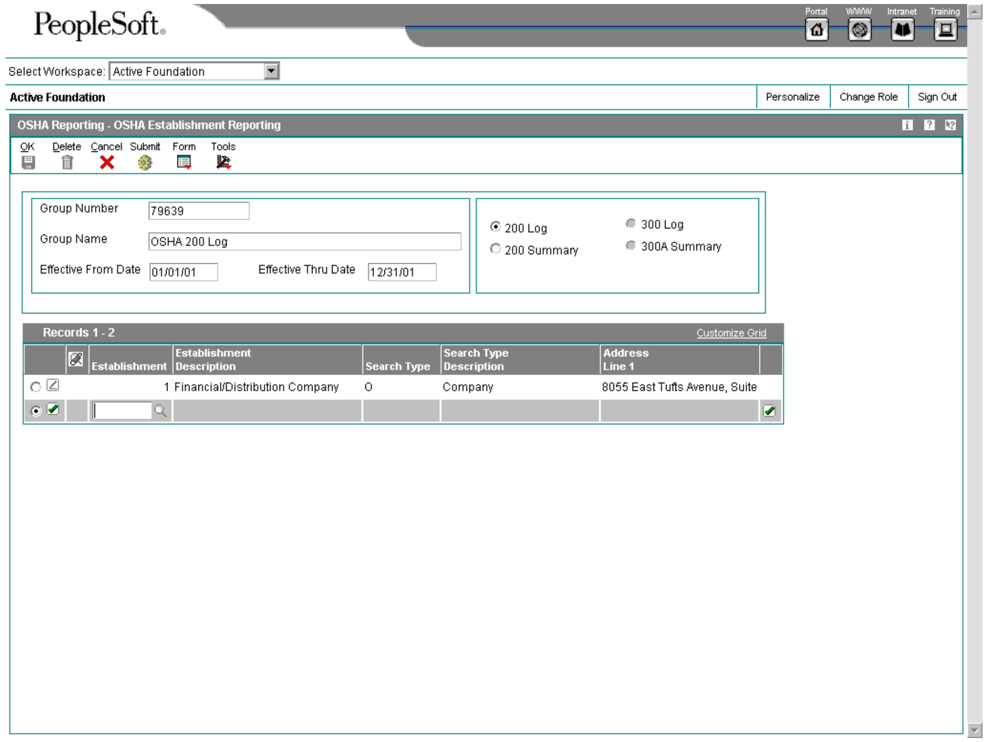
Before You Begin

- ❑ Set up UDC table 08H/ES to define all of the physical locations that you want to use as establishments for OSHA reporting.
- ❑ Set up establishment information for employees. See *Setting Up OSHA Information for Employees* for instructions.
- ❑ Map the OSHA reports to run in your local environment. See *Mapping Objects* in the *Configurable Network Computing Implementation Guide*.

► To generate OSHA 200 and 300 reports

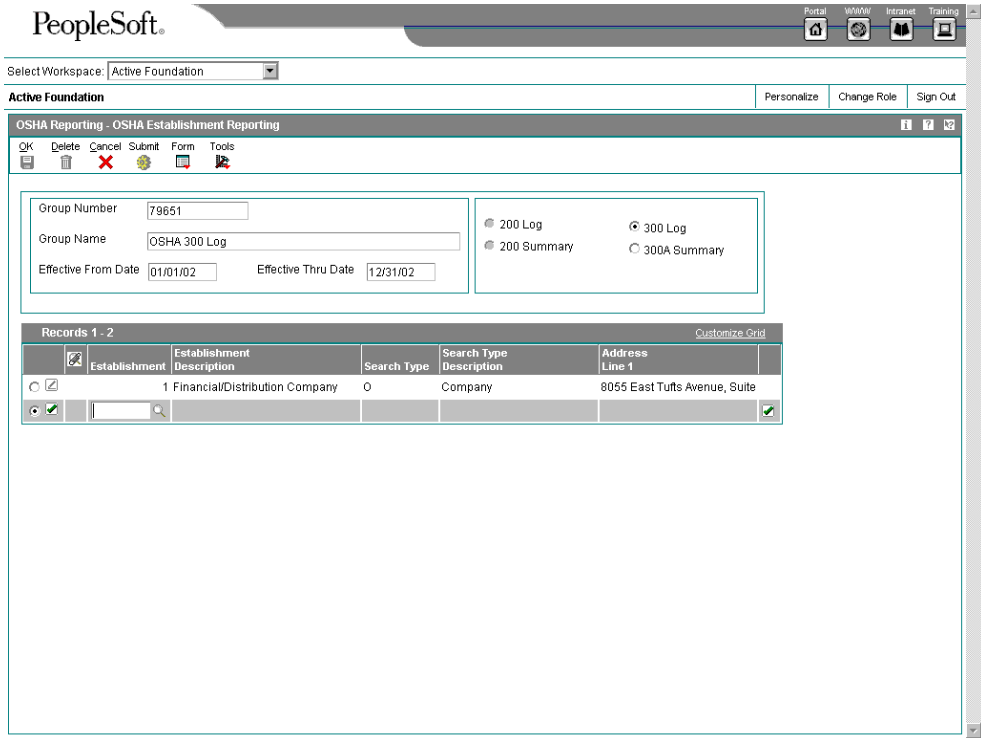
From the Governmental Reporting menu (G05BG), choose OSHA Reporting.

1. On OSHA Establishment Reporting, complete the following fields to identify the date range that you want to report:
    - Effective From Date
    - Effective Thru Date
2. To report injuries and/or illnesses that occurred before January 1, 2002, click either of the following options:
    - 200 Log
    - 200 Summary



3. To report injuries and/or illnesses that occurred on or after January 1, 2002, choose any of the following options:

   - 300 Log
   - 300A Summary



4. Complete the following field to identify each physical location that you want to include in the reports, and then click OK:

   - Estab

   You can include more than one location, or establishment, on the report.

Generating the OSHA 301 Injury/Illness Report

From the Governmental Reporting menu (G05BG), choose OSHA301 Occupation Illness/Injury Report.

You generate the OSHA 301 report to satisfy OSHA record-keeping requirements. When you generate the OSHA 301 report, the system retrieves the information that you entered on the Injury/Illness Case form. The 301 report includes only those cases that have been defined as Government Reportable, that is, where the Government Reportable field on the Injury/Illness Case form is checked or contains a Y.

Depending on your company's procedures, you can generate this report for any of the following reasons:

- To review information about specific incidents
- To compile review information about all or selected incidents that occurred within the required government reporting period
- To provide a member of your organization with information about one or more specific incidents

Note

OSHA reporting requirements changed as of January 1, 2002. This report complies with OSHA formats and standards for all injuries and illnesses that occur on or after that date.

See Also

- *Working with Injury and Illness Information*

Processing Options for OSHA 101 Injury/Illness Report (R086415)

Process Tab

These processing options specify the supplemental database codes to process and include on the OSHA 301 report.

---

1. Supplemental Database Code for

Injury/Illness Cases

Use this processing option to specify the Supplemental Database code for injury/illness cases. All supplemental database records associated with injury or illness cases will be stored with this value to distinguish them from the supplemental database records for other items, such as employees, applicants, or dependents.

2. Action When Injured Data Type

Use this processing option to designate the data type used for supplemental data stored under the "Action When Injured" heading within the injury/illness case supplemental database records.

3. How Accident Occurred Data Type

Use this processing option to designate the data type used for supplemental data stored under the "How Accident Occurred" heading within the injury/illness case supplemental database records.

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4. Physician Data Type

Use this processing option to designate the data type used for supplemental data stored under the "Physician" heading within the injury/illness case supplemental database records.

5. Hazardous Material Data Type

Use this processing option to designate the data type used for supplemental data stored under the "Hazardous Material" heading within the injury/illness case supplemental database records.

6. Object Involved Data Type

Use this processing option to designate the data type used for supplemental data stored under the "Physical Object Involved" heading within the injury/illness case supplemental database records.

7. Hospital Data Type

Use this processing option to designate the data type used for supplemental data stored under the "Hospital" heading within the injury/illness case supplemental database records.

8. Accident Location Type

Use this processing option to designate the data type used for supplemental data stored under the "Accident Location" heading within the injury/illness case supplemental database records.

Reviewing Health Safety Management Reports

You can review reports that show detailed information about the injuries and illnesses that occur in your organization. Use this information to identify potential safety hazards.

Reviewing the Case Supplemental Data Report

From the Case Supplemental Data menu (G08BSDS1), choose Case Supplemental Data Report.

To review complete information for each injury or illness case that you specify, print the Case Supplemental Data report. Use this report to identify safety hazards and to improve your organization's safety record.

The information that prints on this report is the same information that you can review online using Case Supplemental Data Inquiry. However, the report allows you to print information for several cases at one time.

See Also

- R080413, *Case Supplemental Data* in the *Reports Guide* for a report sample

Processing Options for Case Supplemental Data Report (R080413)

Narrative
1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Reviewing the Case Report by Data Type Report

From the Case Supplemental Data menu (G08BSDS1), choose Case Report by Data Type.

To review a list of all of the injury and illness cases with information in a particular data type (such as physical object involved and medical expenses), print the Case Report by Data Type report. The information that prints on this report is the same information that you can review online using Case Supplemental Data Entry.

For each case, the system lists data types in alphabetical order.

See Also

- R080403, *Case Report by Data Type* in the *Reports Guide* for a report sample

Processing Options for Case Report by Data Type (R080403)

Narrative
1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Reviewing the Occupational Illness/Injury Report

From the Case Supplemental Data menu (G08BSDS1), choose Occupational Illness/Injury Report.

To analyze health safety management statistics for your organization, you can print a report that lists detailed information about cases. You can print one version of this report to review illness cases and another to review injury cases. Use this information to identify establishments and employees who might need additional safety reviews.

See Also

- R086420, *Occupational Illness* in the *Reports Guide* for a report sample
- R086420, *Occupational Injury* in the *Reports Guide* for a report sample

Processing Options for Occupational Illness/Injury Report (R086420)

Display Tab

These processing options specify whether to display a count of the records, the percentages for level breaks, and the percentages for all of the cases examined on the report.

1. Display Totals

1 = Display Totals

0 = Do Not Display Totals

Use this processing option to specify whether to display a count of the records as a footer after each level break and as a grand total footer to be displayed at the end of the report. A default of blank will not display the totals.

2. Display Percentages For Level Breaks

1 = Display Percentages For Level Breaks

0 = Do Not Display For Level Breaks

Use this processing option to specify whether to display the percentages for a variety of categories after each level break. A default of blank will not display the percentages.

3. Display Percentages For Final Total

1 = Display Percentages

0 = Do No Display Percentages

Use this processing option to specify whether to display the percentages for a variety of categories for all the cases examined. These percentages will be displayed at the end of the report. A default of blank will not display the percentages.

Reviewing Government Reportable Illness/Injury Report

From the Case Supplemental Data menu (G08BSDS1), choose Government Reportable Illness/Injury.

To analyze health safety management statistics for your organization, you can print a report that lists detailed information about cases. You can print versions of this report to review cases by establishment, supervisor, and job type. Use this information to identify establishments and employees who might need additional safety reviews.

See Also

- R086421, *Government Reportable Illness and Injury* in the *Reports Guide* for a report sample

Processing Options for the Government Reportable Illness/Injury Report (R086421)

Display Tab

These processing options are used to select the data that system displays on the report.

---

1. Display Totals

1 = Display Totals

0 = Do Not Display Totals

Use this processing option to specify whether to display a count of the records as a footer after each level break and as a grand total footer to be displayed at the end of the report. A default of blank will not display the totals.

2. Display Percentages For Level Breaks

1 = Display Percentages For Level Breaks

0 = Do Not Display For Level Breaks

Use this processing option to specify whether to display the percentages for a variety of categories after each level break. A default of blank will not display the percentages.

3. Display Percentages For Final Total

1 = Display Percentages

0 = Do No Display Percentages

Use this processing option to specify whether to display the percentages for a variety of categories for all the cases examined. These percentages will be displayed at the end of the report. A default of blank will not display the percentages.

Appendices

Partner Processes - Criterion BluePrint

The Criterion BluePrint Human Resources planning system automates processes such as training, career development, and succession planning.

You can integrate OneWorld with Criterion BluePrint by loading job, position, and employee information from OneWorld into Criterion BluePrint.

Consult the Criterion BluePrint documentation for information about using Criterion BluePrint.

Before You Begin

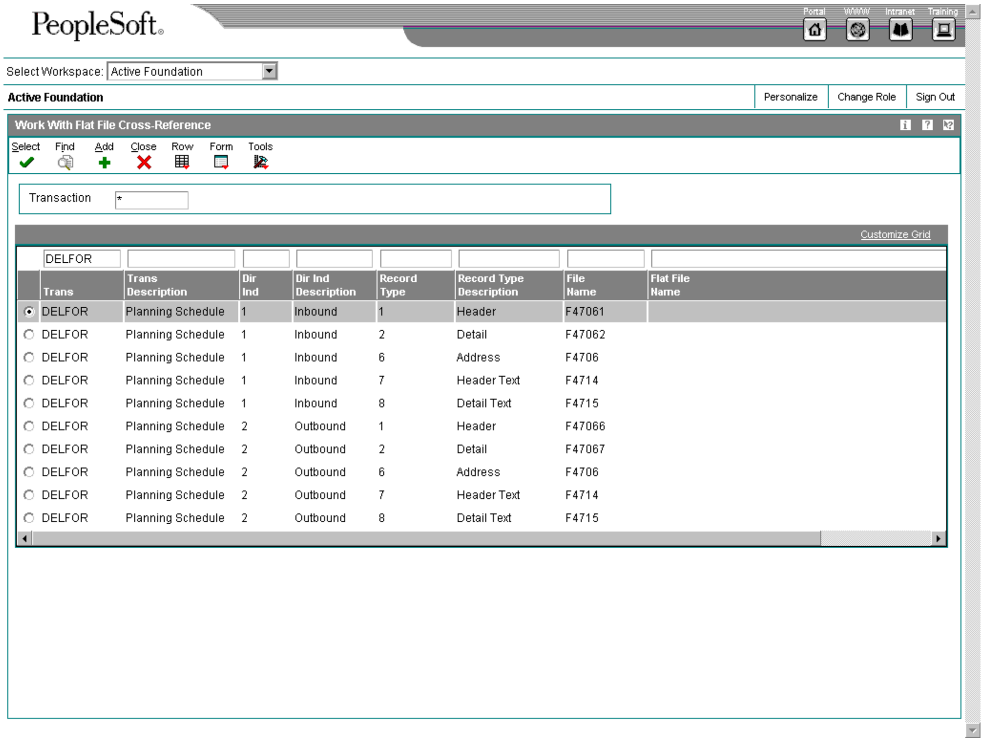
- Turn on the Criterion BluePrint module in OneWorld System Setup (P99410). See *Setting Up System Controls* in the *Workforce Management Foundation Guide*.
- Verify that the codes listed under *Transaction and User Defined Codes for Criterion BluePrint* are set up in user defined code list 00/TT. All of the transaction codes should have a 1 in the Special Handling column and a Y in the Hard Coded column. See *Understanding User Defined Codes* in the *Workforce Management Foundation Guide*.

Setting Up Flat File Cross-References for Criterion BluePrint

When you export OneWorld data to Criterion BluePrint, the system stores the data in flat files. Criterion BluePrint then retrieves the data from the flat files. You need to set up flat file cross-references to indicate what file each type of data is stored in.

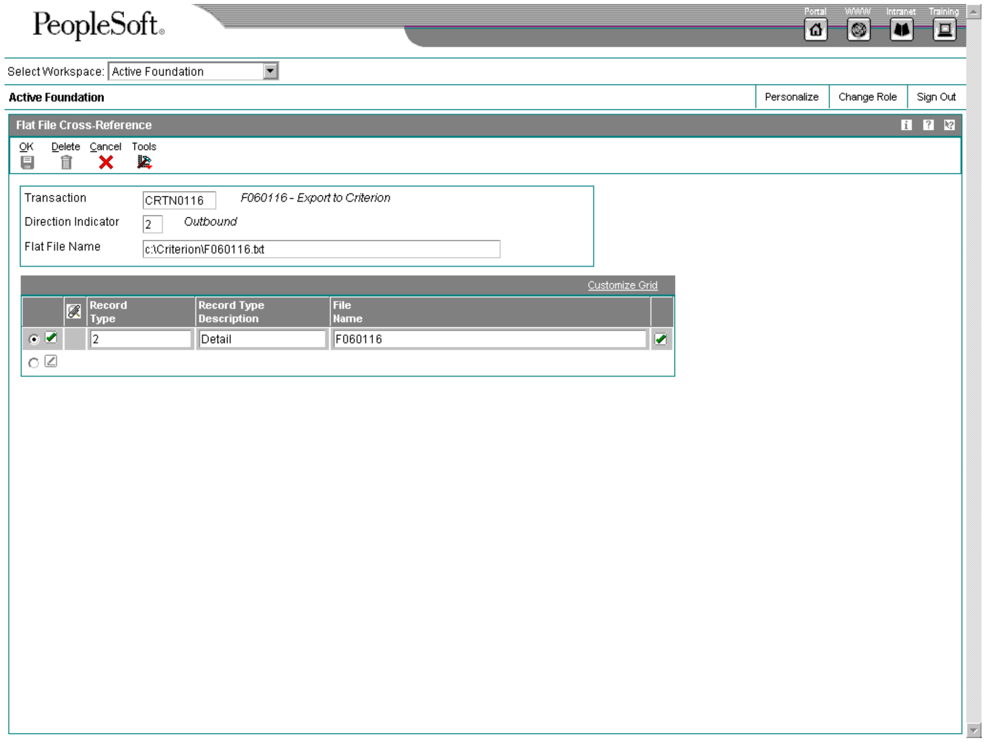
► **To set up flat file cross-references for Criterion BluePrint**

From the Criterion menu (G05BPP42), choose Flat File Cross Reference.



A sample of the code that you need to set up is supplied. However, you need to delete each code and then re-create it so that you can identify the filename of the flat files.

1. On Work With Flat File Cross-Reference, click Add.



2. On Flat File Cross-Reference, type a transaction or user defined code in the following field:

   - Transaction

3. Type 2 in the following field:

   - Direction Indicator

4. Type a filename for the flat file to which the data will be exported in the following field:

   - Flat File Name

Caution
Any folders in the filename path must already exist. OneWorld does not create the folders. Also, use double backslashes (\\) in the filename (for example, c:\\Criterion\\F060116.txt).

---

5. Type 2 in the following field in the detail area:

   - Record Type

6. Review the following field:

   - Record Type Description

7. Complete the following field and click OK:

- File Name

8. Complete steps 2 through 7 for each transaction code and user defined code that is listed under Transaction and User Defined Codes for Criterion BluePrint.

Transaction and User Defined Codes for Criterion BluePrint

The following transaction and user defined codes represent the data that is transferred from OneWorld to Criterion BluePrint. Use these codes to set up flat file cross-references.

- CRTN0116 - Export Employees to Criterion
- CRTN8001 - Export Jobs to Criterion
- CRTN8101 - Export Positions to Criterion
- UDCADDS - State
- UDCAT1 - Search Type
- UDCCTR - Country Code
- UDCEEOJ - EEO Job Category
- UDCEEOM - Ethnic Code
- UDCEST - Employment Status
- UDCFLSA - Overtime Exempt
- UDCJBCD - Job Type
- UDCJBST - Job Step
- UDCJGRP - Job Group
- UDCJSTA - Job Status
- UDCLNGP - Language Preference
- UDCMAIL - Check Route Code
- UDCMSTX - Marital Status
- UDCP001 - Category Code 1
- UDCP002 - Category Code 2
- UDCP003 - Category Code 3
- UDCP004 - Category Code 4
- UDCP005 - Category Code 5
- UDCP006 - Category Code 6
- UDCP007 - Category Code 7
- UDCP008 - Category Code 8
- UDCP009 - Category Code 9
- UDCP010 - Category Code 10
- UDCP011 - Category Code 11
- UDCP012 - Category Code 12

- UDCP013 - Category Code 13
- UDCP014 - Category Code 14
- UDCP015 - Category Code 15
- UDCP016 - Category Code 16
- UDCP017 - Category Code 17
- UDCP018 - Category Code 18
- UDCP019 - Category Code 19
- UDCP020 - Category Code 20
- UDCPAST - Pay Status
- UDCPRFQ - Pay Frequency
- UDCRCCD - Record Type
- UDCSALY - Pay Class
- UDCSEX - Gender
- UDCSHFT - Shift Code
- UDCLOC - Locality
- UDCTYC - Emer Contact Type
- UDCUN - Union

Exporting OneWorld Data to Criterion BluePrint

You can export the following items from OneWorld for use in Criterion BluePrint:

- Employee information
- Position information
- Job information
- User defined codes

OneWorld stores data in flat files, which you can import in Criterion BluePrint.

You need to export this data only once-- when you first start using OneWorld with Criterion BluePrint. After the initial export, whenever you change or add employees, positions, or jobs in OneWorld, the data is automatically exported to Criterion BluePrint by database triggers on the respective tables.

► To export OneWorld data to Criterion BluePrint

From the Criterion menu (G05BPP42), choose Export to Criterion all Files.

1. Process the Export to Criterion all Files program.
2. From the same menu, run Export User Defined Codes for version ZJDE0001 through version ZJDE0043.

   This process creates a separate file for each of the data items, as defined in the Flat File Cross-Reference setup.

3. After you export the data from OneWorld, you need to import it to Criterion BluePrint. See the Criterion BluePrint documentation for more information.

Processing Options for Export to Criterion all Files (R05100)

Position Cntrl
Enter '1' if you are using Position control

Processing Options for Export UDCs to Criterion (R050500)

Process
1. Enter the Data Item from the OneWorld System Control table (F99410) you wish to process. Blanks not allowed.
2. Enter the Transaction Type. Blanks not allowed.
3. Enter the delimitor you wish to use.
4. Enter a '1' if you wish the code to be exported according to the code length. If left blank, the code will be exported to the length of the field.
5. Enter a '1' to export a blank value if blanks exist in the UDC you are exporting.

Partner Processes - Personic Workflow

Personic Workflow is an easy-to-use software package that automates the recruiting and hiring process. It can intelligently search scanned resumes, allowing you to narrow your applicant pool according to specific criteria. For example, if you want to look only at applicants with moderate Japanese skills, you can search for those resumes. After you have selected several qualified applicants, Personic Workflow guides you through the process of interviewing and hiring.

You can integrate OneWorld with Personic Workflow by loading requisitions and other data from OneWorld into Personic Workflow. Personic Workflow then helps you find qualified applicants and guides you through the interview process. Then, when you are ready to hire an applicant, you can return the applicant's information to the Employee Master records in OneWorld.

You can set a processing option to have the system automatically purge pending employees when you run Processing Pending Employees (R060116P).

Consult the Personic Workflow documentation for information about using Personic Workflow.

Before You Begin

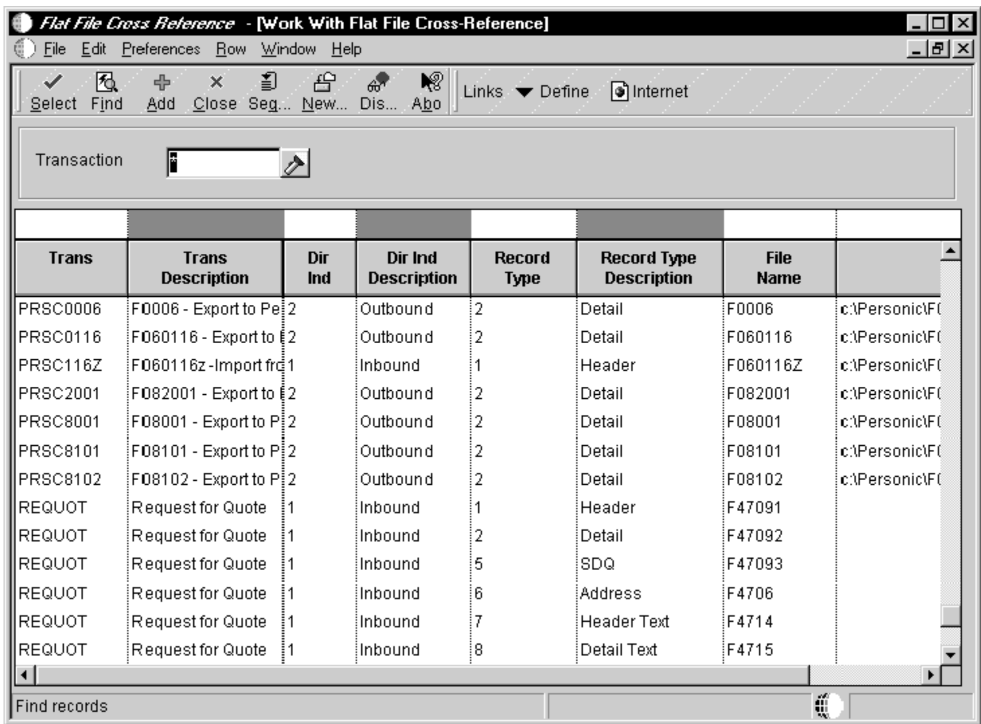
- ❑ Activate the Personic Workflow module in OneWorld System Setup (P99410). See *Setting Up System Controls* in the *Workforce Management Foundation Guide*.
- ❑ Verify that the codes listed under *Transaction and User Defined Codes for Personic Workflow* are set up in user defined code list 00/TT. All of the codes, except for F060116z - Import from Personic, should have a 1 in the Special Handling column. See *Understanding User Defined Codes* in the *Workforce Management Foundation Guide*.

Setting Up Flat File Cross-References for Personic Workflow

When you transfer data between OneWorld and Personic Workflow, the system stores the data in flat files. You need to set up flat file cross-references to indicate what file each type of data is stored in.

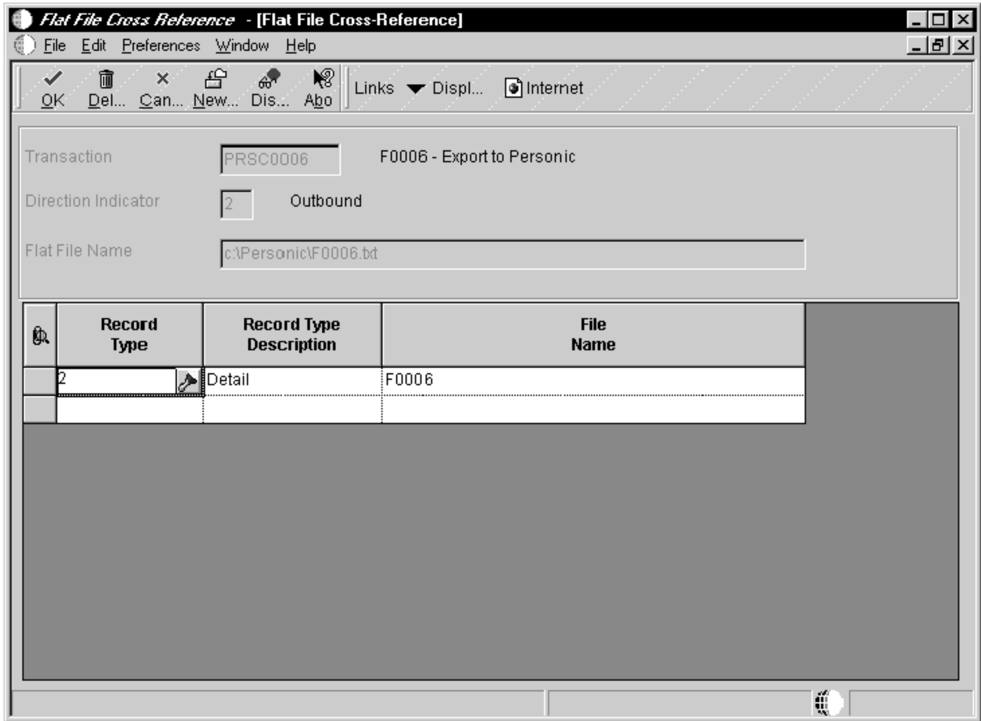
► To set up flat file cross-references for Personic Workflow

From the Personic menu (G05BPP41), choose Flat File Cross Reference.



A sample of the codes that you need to set up is supplied. However, you need to delete each code and then re-create it so that you can identify the filename of the flat files.

1. On Work With Flat File Cross-Reference, click Add.



2. On Flat File Cross-Reference, type a transaction or user defined code in the following field:

    - Transaction

3. Type 2 in the following field:

    - Direction Indicator

4. Type a filename for the flat file to which the data will be exported in the following field:

    - Flat File Name

Caution
Any folders in the filename path must already exist. OneWorld does not create the folders. Also, use double backslashes (\\) in the filename (for example, c:\\Personic\\F08001.txt).

5. Type 2 in the following field in the detail area:

    - Record Type

6. Review the following field:

    - Record Type Description

7. Complete the following field and click OK:

- File Name

8. Complete steps 2 through 7 for each transaction code that is listed under Transaction and User Defined Codes for Personic Workflow.

Transaction and User Defined Codes for Personic Workflow

The following transaction and user defined codes represent the data that is transferred between OneWorld and Personic Workflow. Use these codes to set up flat file cross-references.

- PRSC0006 - F006 Export
- PRSC0116 - F060116 Export
- PRSC116Z - F060116z Import from Personic
- PRSC2001 - F082001 Export
- PRSC8001 - F08001 Export
- PRSC8101 - F08101 Export
- PRSC8102 - F08102 Export
- UDCADDS - State
- UDCCTR - Country Code
- UDCEEOJ - EEO Job Category
- UDCEEOM - Ethnic Code
- UDCJBCD - Job Type
- UDCJBST - Job Step
- UDCMAIL - Check Route Code
- UDCREQS - Requisition Status
- UDCSALU - Prefix
- UDCSUFF - Suffix

Exporting OneWorld Data to Personic Workflow

You can export the following items from OneWorld for use in Personic Workflow:

- Managers
- Requisitions
- Cost centers
- Jobs
- Pay grades/steps
- Positions
- User defined codes

OneWorld stores data in flat files, which you can import into Personic.

You might need to export this data only once-- when you first start using OneWorld with Personic Workflow. After the initial export, any new or changed requisitions in OneWorld are sent to Personic Workflow by database triggers. However, if you add other new items, such as managers or cost centers, in OneWorld, you must export those items to Personic Workflow again.

► **To export OneWorld data to Personic Workflow**

From the Personic menu (G05BPP41), choose any of the following:

- Export Requisitions and Employees/Personic
- Export Jobs to Personic
- Export Pay Grades to Personic
- Export Positions to Personic

Note

To export centers to Personic, choose Run Outbound Cost Center Extraction from the menu, and then choose Run Export Cost Centers to Personic.

If you choose to export UDCs to Personic, run the Export UDC's to Personic for each of the following codes:

- ZJDE0021 (MAIL)
- ZJDE0022 (CTR)
- ZJDE0023 (EEOJ)
- ZJDE0026 (EEOM)
- ZJDE0030 (JBST)
- ZJDE0031 (JBCD)
- ZJDE0042 (ADDS)
- ZJDE0044 (REQS)
- ZJDE0045 (SALU)
- ZJDE0046 (SUFF)

This process creates a separate flat file for each data item and user defined code, as defined in the Flat File Cross Reference setup.

After you process all of the programs to export the data from OneWorld, you need to import it to Personic Workflow. See the Personic Workflow documentation for instructions.

Processing Options for Export Pay Grades to Personic (R05248)

Date
Enter effective date
1. Date - Effective On

Importing New Employee Information from Personic Workflow

When you have indicated a hire date for the successful applicant in Personic Workflow, you can import that applicant's information (such as name, address, and so on) into OneWorld, where it is added directly to a pending employee table. From this table, the applicant's information is transferred to the Employee Master Information table (F060116).

Before You Begin

- ❑ Export the appropriate records from Personic Workflow. See the Personic Workflow documentation for more information.

► To import new employee information from Personic Workflow

From the Personic menu (G05BPP11), choose Inbound Flat File Conversion.

1. Run version XJDE0022 to load the flat file into a pending employee table.
2. Choose Employee Work File Revisions; and then make any necessary additions, changes, and deletions in the employee records.
3. Run Process Pending Employees to transfer the records to the Employee Master Information table (F060116).

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.

Processing Options for Process Pending Employees (R060116P)

Defaults
1. Security Business Unit

1 = Default
0 = Do Not Default
2. Tax Areas

1 = Not Required
0 = Required
3. Job Information

1 = Default
0 = Do Not Default
4. Job Category Codes

1 = Default
0 = Do Not Default
5. Country Code

Enter UDC Code
6. Contact Type

Enter UDC Code
7. Home Phone Type

Enter UDC Code
8. Work Phone Type

Enter UDC Code
9. Business Unit/Job ID Cross Reference

1 = Default
0 = Do Not Default

Versions
1. Applicant Information
2. Address Book MBF

Action
1. Update Master Files

1 = Update
0 = Do Not Update

2. Purge Processed Records

1 = Purge
0 = Do Not Purge