

PeopleSoft®

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EnterpriseOne Xe  
Human Resources & Payroll  
Foundation - US PeopleBook

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## Index

## Overviews

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

This section provides overview information about the industry environment and about how the HR and Payroll Foundation system operates.

Overviews consists of the following:

- Industry Overview
- HR and Payroll Foundation Overview





# Industry Overview

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This chapter introduces the industry concepts associated with human resources, payroll, and benefits integration. In addition, it describes J.D. Edwards solutions to problems inherent in an integrated human resources, payroll, and benefits system.

The industry overview consists of:

- Industry environments and concepts for HR and Payroll Foundation
- Idea to Action: The competitive advantage

## Industry Environments and Concepts for HR and Payroll Foundation

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

The HR and Payroll Foundation integrated system does the following:

- Eliminates double entry by using a shared database that can be accessed by multiple departments. For example, when an employee is hired through the human resources department, both payroll and benefits personnel can access the applicable data such as name, address, salary, and benefit elections. This eliminates the need for the payroll and benefits departments to reenter data required by their respective systems.
- Eliminates the need for costly maintenance of interfaces among systems.
- Reduces timing problems because data is available to all authorized users after it has been updated in the HR and Payroll Foundation database.
- Provides for consistent data because data is entered once and then shared among departments.
- Provides system security to limit use to authorized users. OneWorld offers a variety of security options such as field-level and form-level security, depending on your needs. For example, the benefits department might be

allowed access to benefits-related fields only and might not have access to non-benefits related fields such as Job Title and Supervisor.

## Idea to Action: The Competitive Advantage

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Your company needs to keep track of who works when.**

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

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

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

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

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

**Processing a  
termination is  
inefficient and prone to  
error.**

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

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

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

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

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

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

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

**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.**

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

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

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

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

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

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

## **HR and Payroll Foundation Overview**

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

You can use this foundation to do the following tasks:

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

## **System Integration**

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

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

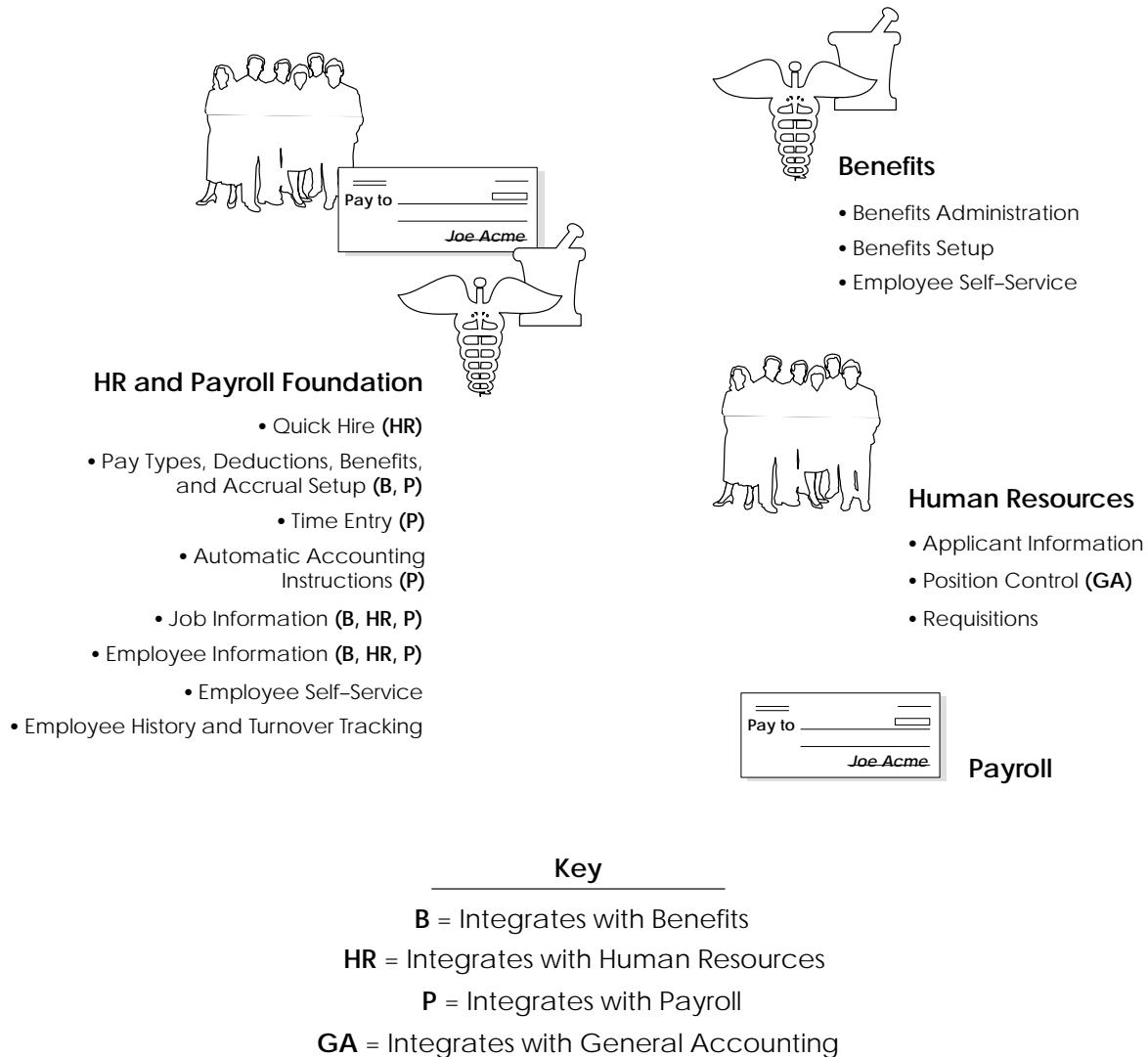
An integrated, central database means that, when the human resources clerk updates an employee's information, the employee's payroll information is also updated. A central database accomplishes the following:

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

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

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

### HR and Payroll System Integration



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

### **Address Book**

The Address Book system contains employee names, addresses, and tax IDs.

### **General Accounting**

If you are using the foundation system for stand-alone time accounting (that is, you are creating timecards, but not processing them using J.D. Edwards Payroll), you can set up the foundation system to integrate with the General Accounting system. This integration allows you to update general ledger transactions and account balances. The foundation system can create and post transactions to the general ledger using the automatic accounting instructions (AAIs) that you define. You can use full detail on your labor accounts and summarize your liabilities and cash accounts.

### **Job Cost**

You can use the HR and Payroll Foundation system to enter labor and equipment time by day. Then, you can use the Job Cost system to analyze the labor and equipment costs for a job.

### **Service/Contract Billing**

You can use the HR and Payroll Foundation system to enter labor and equipment time by job (business unit). Then, you can use the Service/Contract Billing system to do the following:

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

### **Equipment/Plant Maintenance**

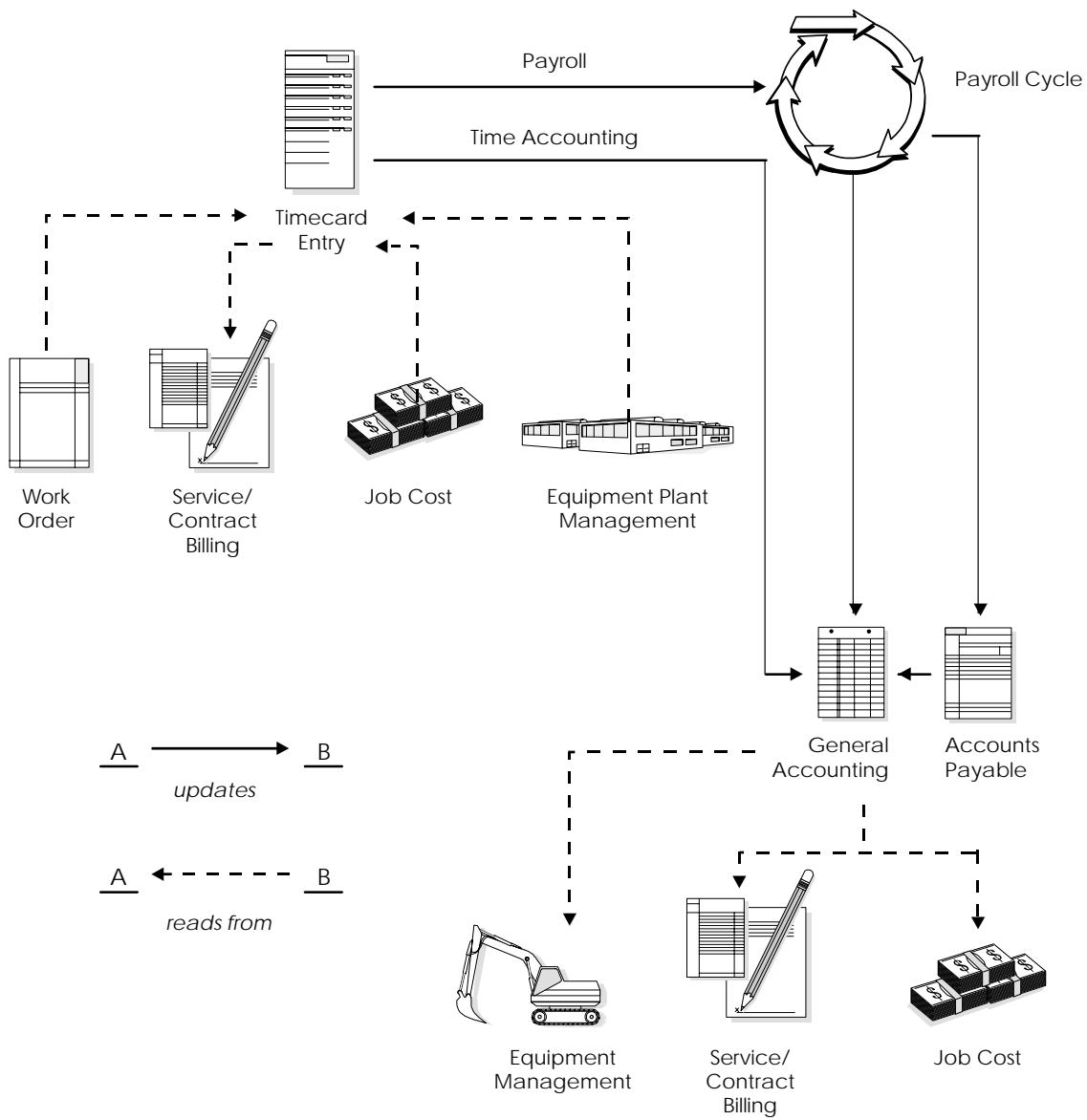
You can use the HR and Payroll Foundation system to enter labor and equipment time. Then, you can use the Equipment/Plant Maintenance system to do the following:

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

### **Work Orders**

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

The following graphic shows how HR and Payroll Foundation integrates with other J.D. Edwards systems:



## System Features

The HR and Payroll Foundation system provides the following:

- Comprehensive employee information
- Integrated employee history and turnover analysis
- Complete job information
- Complete time accounting

- Parent/child relationship reporting
- Self-service
- Enterprise Workflow Management
- Employee Quick Hire

You can also perform convenient functions such as the following:

- Future data changes
- Mass changes

### Comprehensive Employee Information

You can use your HR and Payroll Foundation system to track comprehensive employee information such as the following:

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

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

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

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

## **Integrated Employee History and Turnover Analysis**

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

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

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

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

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

## **Complete Job Information**

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

You can use job information to perform the following tasks:

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

## **Complete Time Accounting**

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

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

### Parent/Child Relationship Reporting

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

### Self-Service

Self-service allows employees to complete tasks online through a company intranet site. Self-service reduces the handling of documents between employees and the human resources department by allowing employees to access information, forms, and services through desktop computers. For example, employees can use self-service to review and update personal data and enroll in benefits online. When employees update information through self-service, the changes made by the employee can be posted to a temporary workfile, where a company representative can review the changes before posting them to the employee database.

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

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

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

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

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

An individual who is set up in the system to access these programs can review employees who have upcoming review dates, process verification-of-employment letters, and initiate the employee setup process. The

employee setup process is a Workflow-based process that sends a series of approvals and work orders to set up a new hire's equipment.

## Enterprise Workflow Management

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

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

- Terminating an employee
- Approving a requisition
- Changing an employee's salary
- Initiating new employee setup
- Reviewing upcoming employee reviews by supervisor
- Processing verification-of-employment letters
- Approving a W-4 form for an employee in the United States

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

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

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

## Employee Quick Hire

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

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

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

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

## Important Tables and Descriptions

The following list includes the important tables in the HR and Payroll Foundation system:

<b>Address Book Master (F0101)</b>	Contains name and address information for all employees. This information has a search type of E (Employee).
<b>Employee Master (F060116)</b>	Contains detailed information about employees, such as salary, pay grade, birthdate, and job type.
<b>Employee Additional Information (F060120)</b>	Contains additional information about each employee.
<b>Employee International Data (F060117)</b>	Contains country-specific information about each employee.
<b>Future Employee Master Data Changes (F06042)</b>	Contains future changes to employee master records.
<b>Job Information (F08001)</b>	Contains information for job ID and for the job evaluation. The job ID is the combination of the job type and job step.
<b>HR History (F08042)</b>	Contains employee history records for each employee master field.

<b>Supplemental Database Types of Data (F00090)</b>	Contains data types and their respective column headings. Use these data types to specify the types of supplemental information that you want to track for jobs, employees, applicants, and requisitions.
<b>Supplemental Data (F00092)</b>	Contains multiple values with a specific type of data for individual applicants, employees, jobs, and requisitions.
<b>System Options (F05001)</b>	Contains default information that applies to all records in the system. This table also contains default information that applies to specific modules.

# **Employee Information**



## Employee Information

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

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

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

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

Processing employee information includes the following tasks:

- Adding employee records one at a time
- Adding employee records using Employee Quick Hire
- Entering additional employee information
- Understanding employee compensation
- Entering employee instructions
- Revising employee information
- Working with supplemental data
- Understanding parent/child relationships
- Creating parent/child relationships by employee
- Reviewing employee information



- Running current employee reports
- Working With Point-In-Time Employee Reports
- Creating Employee Letters

## Hiring Employees with J.D. Edwards HR & Payroll Foundation

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

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

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

### **Adding employee records one at a time**

This method displays a series of forms that you need to complete to hire an employee. This method is preferable if you hire individuals with very diverse employee information so that hiring in groups is not applicable.

You can add new employee and terminated employee (rehire) records to the Employee Master table (F060116).

### **Adding multiple employee records**

This method uses the Employee Quick Hire program. It saves data entry time because you add records in groups based on similar job information.

You can add new employee, terminated employee (rehire), and applicant records to the Employee Master table (F060116).

## Adding Employee Records One at a Time

---

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

- Employee Master (F060116)
- Employee Additional Information (F060120)
- Employee International Data (F060117)
- Employee Jobs (F060118)
- Address Book (F0101)

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

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

Adding a new employee record includes the following tasks:

- Entering basic employee information
- Entering address book information
- Entering employee personal information
- Entering organizational assignment information
- Entering basic compensation information
- Entering country-specific information for an employee
- Entering employee history information
- Entering tax withholding and override information
- Updating position and requisition information

## Before You Begin

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

## Entering Basic Employee Information

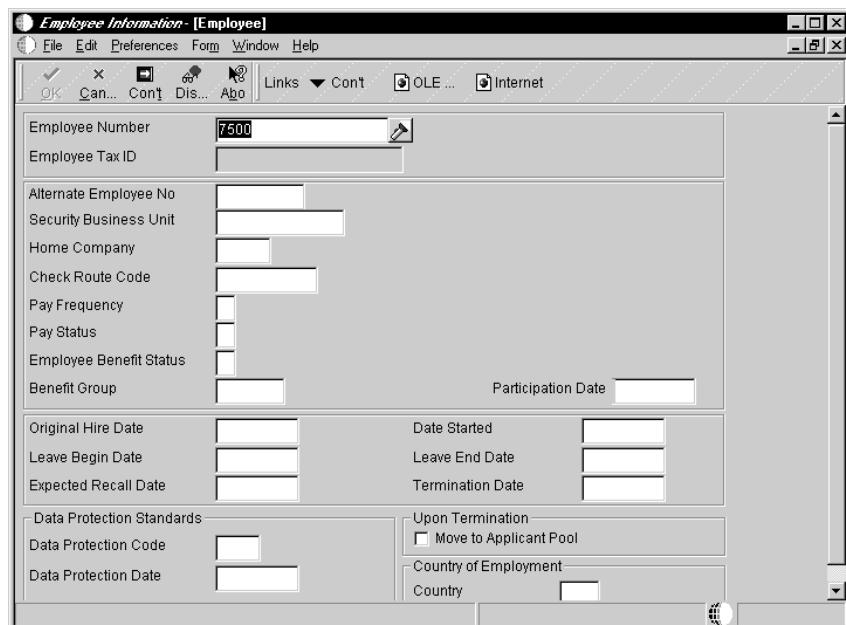
Basic employee information includes general identification information about the employee. You need this information in order to include the employee in payroll processing.

### ► To enter basic employee information

---

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

1. On Work With Employee Information, click Add.



2. On Employee, complete any of the following employee identification fields that are not already supplied by the system:
  - Security Business Unit

- Home Company
  - Pay Frequency
  - Pay Status
  - Original Hire Date
  - Date Started
  - Country
3. To enter benefits information, complete any of the following fields that are not already supplied by the system:
- Employee Benefit Status
  - Benefit Group
  - Participation Date
4. To include additional employee identification information, complete the following optional fields:
- Alternate Employee No
  - Check Route Code
5. Complete the following fields if the system displays them for your country of preference:
- Data Protection Code
  - Data Protection Date
  - Country

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

6. Click Continue.

The Address Book Revisions form appears.

After you enter basic employee information, you must enter address book information. See *Entering Address Book Information*.

**Caution:** Some of the following definitions refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>												
Security Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>A business-unit number that secures the employee's record from unauthorized access. Any user not authorized to access this business unit cannot access this employee's record.</p>												
Home Company	The company number in which the employee generally resides.												
Pay Frequency	<p>A user defined code (07/PF) that indicates how often an employee is paid. Codes are:</p> <table style="margin-left: 20px;"> <tr><td>B</td><td>Biweekly</td></tr> <tr><td>W</td><td>Weekly</td></tr> <tr><td>S</td><td>Semimonthly</td></tr> <tr><td>M</td><td>Monthly</td></tr> <tr><td>A</td><td>Annually</td></tr> <tr><td>C</td><td>European Annualized</td></tr> </table> <p>The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee.</p>	B	Biweekly	W	Weekly	S	Semimonthly	M	Monthly	A	Annually	C	European Annualized
B	Biweekly												
W	Weekly												
S	Semimonthly												
M	Monthly												
A	Annually												
C	European Annualized												

Field	Explanation
Pay Status	<p>A code that indicates whether an employee's pay status is active or inactive.</p> <p>Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run.</p>
	<p>To process an employee's last check, the pay status must contain a numeric code. After the system processes the check through final update, you can change the pay status to an alphabetic code.</p>
Original Hire Date	<p>The date on which the employee was originally hired by the company. If the employee was terminated and subsequently rehired, the new start date will be represented by the data in the Date Started (DST) field.</p>
Date Started	<p>The date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. If no original hire date exists, the system uses the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker.</p>
	<p>For the calculation tables in the Payroll system and the eligibility tables and date codes in the Human Resources system, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.</p>
Country	<p>A user defined code list 00/CN that indicates the country in which the employee resides.</p>
..... <i>Form-specific information</i> .....	<p>The value that you enter in this field determines the country for which the system displays country-specific forms and fields. For example, for an employee whose country code is CA (Canada), the system displays the National and Fiscal Data form for Canada, where you can enter information that applies to Canadian employees only, such as national occupational classification. For employees whose country code is US (United States), the system displays the National and Fiscal data form for the United States.</p>
You must enter a value in this field. Blank is not a valid value.	

Field	Explanation
Employee Benefit Status	A user defined code (06/EA) that specifies the employee action, such as new hire or rehire, for which the system searches as it tests for benefits eligibility. An * indicates that the guidelines refer to all employee actions not otherwise specified.  Do not change the codes that are hard-coded, such as A (Active) and X (Terminated). These are required codes in the system.
Benefit Group	The benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.
Participation Date	The date the employee began participating in the company deferred income or stock option plan. This date must be later than the Date Started date.
Alternate Employee No	An alternate employee number, typically the number from the employee tracking system that your organization used prior to converting to the J.D. Edwards system.  To search using this number, preface the number with a slash (/).
Check Route Code	A user defined code (07/CR) that specifies the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.
Data Protection Code	A user defined code (05/DP) that indicates whether the employee agrees to have personal information transmitted to countries other than the employee's work country.
Data Protection Date	The date on which the data protection code was last updated.

## Entering Address Book Information

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

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

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

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

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

### See Also

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

## Entering Employee Personal Information

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

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

### ► To enter employee personal information

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The screenshot shows the 'Employee Information - [Personal]' dialog box. At the top, it displays 'Employee No.' as 7500 and 'Name' as McDougle, Cathy. The dialog contains several groups of input fields:

- Names:** Preferred Name, Birth Name, Name - Employee, Additional Name, Salutation, Suffix.
- Demographics:** Ethnic Code (01, White (Not of Hispa)), Marital Status (M), Date of Birth (6/18/70), Alien Reg. No., Currency Code, Language (E, English), 1st Nationality-Citizenship (USA), 2nd Nationality (USA), 3rd Nationality (USA).
- Financial:** Gender (F), Country Of Birth, Life Ins. (Annual Salary 1) (\$50,000.00), Life Ins. (Annual Salary 2), Employee Age (As of Jan/1st) (35).

1. On Personal, complete the following fields:

- Ethnic Code
  - Gender
  - Date of Birth
2. Complete any of the following optional fields:
- Preferred Name
  - Birth Name
  - Name – Employee
  - Additional Name
  - Salutation
  - Suffix
  - Marital Status – Actual
  - Date of Birth
  - Life Ins. (Annual Salary 1)
  - Life Ins. (Annual Salary 2)
3. Complete the following fields if the system displays them for your country of preference. (These fields might not appear, depending on the employee's country code.)
- Country Of Birth
  - Alien Reg. No
  - Currency Code
  - Age – Employee
  - Language
  - 1st Nationality–Citizenship
  - 2nd Nationality
  - 3rd Nationality
4. Click Continue.

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

**Caution:** Some of the following definitions refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Ethnic Code	A user defined code (07/M) that designates minority classifications according to U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity Occupational Group (EEOG) standards. The predefined codes that J.D. Edwards provides are hard-coded. The system uses these codes to generate EEO reports and to compile Canadian Employment Equity information. Do not change these predefined codes. You can add codes, if necessary.
Birth Name	A female employee's maiden name. This information is used for all government reports.
Marital Status – Actual	This is the marital status of the employee.
Country Of Birth	A user defined code (00/CN) that identifies a country. The country code has no effect on currency conversion.  The Address Book system uses the country code for data selection and address formatting.
Date of Birth	The employee's date of birth.
Currency Code	A code that indicates the currency of a customer's or a supplier's transactions.
Life Ins. (Annual Salary 1)	A value that the system uses to calculate deductions, benefits, and accruals (DBAs) for an employee's life insurance premium. Any table method that begins with an I (Insurance) uses this field.
Life Ins. (Annual Salary 2)	A value that the system uses to calculate deductions, benefits, and accruals (DBAs) for a spouse's life insurance premium. Any table method that begins with an F uses this field.
Alien Registration Number	The alien registration number for employees who have more than one ID. For instance, if you have a foreign employee who is working under a work permit, you would record that number in this field.
Language	A user defined code (01/LP) that specifies a language to use in forms and printed reports.  Before specifying a language, a language code must exist at either the system level or in your user preferences.

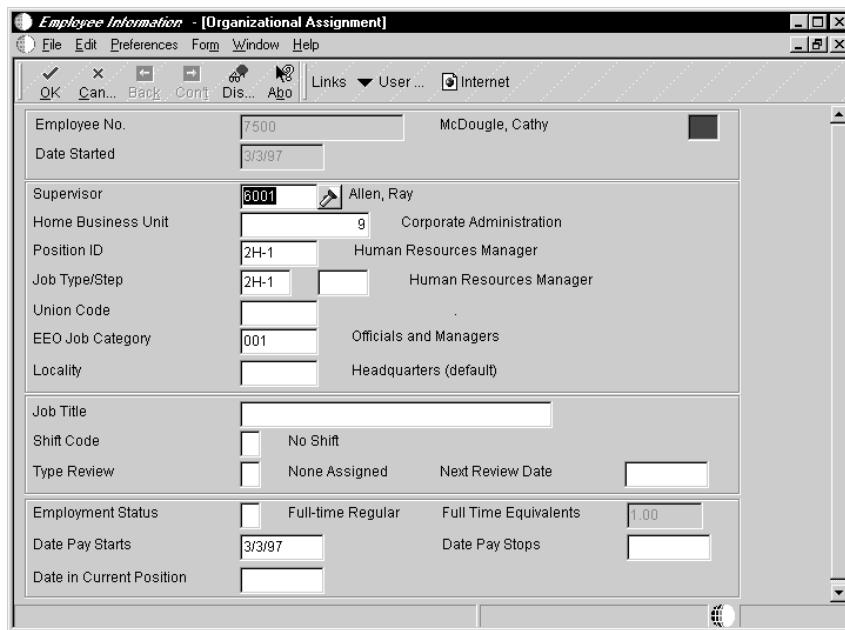
<b>Field</b>	<b>Explanation</b>
Employee Age (As of Jan 1st)	<p>For World:</p> <p>The age of the employee as of a certain date (for example, January 1st) for a given year. You can manually update this field or update it each year using the future data facility.</p> <p>For One World:</p> <p>The age of the employee as of a certain date (for example, January 1st) for a given year. You can manually update this field or the system can update this field when you run the Update Employee Master Age report (R083495).</p>
1st Nationality–Citizenship	A user defined code list (00/CN) that indicates the first country in which the employee has Citizenship.
2nd Nationality	A user defined code list (00/CN) that indicates the second country, if any, in which the employee has citizenship.
3rd Nationality	A user defined code list (00/CN) that indicates the second country, if any, in which the employee has citizenship.

## Entering Organizational Assignment Information

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

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

► To enter organizational assignment information



1. On Organizational Assignment, complete any of the following fields that are not already supplied by the system:
  - Supervisor
  - Home Business Unit
  - Mentor
  - Team
  - Position ID
  - Job Type/Step
  - Locality
  - EEO Job Category
  - Employment Status
  - Date Pay Starts
2. To enter job competency information, complete the following fields:
  - Organizational Business Unit
  - % Competency Achieved
  - Last Competency Review Date
3. To enter performance appraisal control information, complete the following fields:
  - Perf. Appraisal Level

- Last Review Type
- Last Review Date
- Type of Increase Next Review
- Next Review Date

4. Complete the following optional fields and click Continue:

- Job Title
- Union Code
- Shift Code
- Date Pay Stops

If you set the processing options to use default job information from the Job Master, the system displays Job Default Window.

	NEW	OLD
Job Type/Step	A1	DA-3
Employee Information	Semi-Monthly	Bi-Weekly
Benefit Group	EXEC	Canadian Salary
Organizational Assignment	Union Code	EEO Job Category
EEO Job Category	Officials and Managers	Officials and Managers
Basic Compensation	Salaried	Salaried
Pay Grade/Step	S7	T
Overtime Exempt	YES	YES

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

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

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Supervisor	<p>The address book number of the supervisor.</p> <p>Note: A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. Set up the default values on the default Managers and Supervisor form. The system will automatically display the information you specified on all work orders you create if the category code criterion is met. You can override the default value.</p>
Mentor	<p>A number that identifies an entry in the Address Book system. Use this number to identify mentors.</p>
Team	<p>A code that identifies a team.</p>
Position ID	<p>A code that you use for budgetary (position) control purposes. The position ID consists of:</p> <ul style="list-style-type: none"> <li>• Position (position code and its description)</li> <li>• Fiscal year</li> <li>• Home business unit</li> </ul>
	<p>For example, you can identify position A0-1 as Accounting Manager for fiscal year 2005–2006, for home business unit 41.</p>
	<p>You might choose to set up positions so that the position IDs are the same as the corresponding job IDs. Within a home business unit, positions appear in the alphanumeric sequence of their position IDs. For example, position A0-1 appears before position A0-2.</p>
Job Type (Craft) Code	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Job Step	<p>A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.</p>
Locality	<p>A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.</p>
EEO Job Category	<p>A user defined code (07/J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by J.D. Edwards. You can add codes if needed.</p>

<b>Field</b>	<b>Explanation</b>
Employment Status	<p>A user defined code (07/ES) that specifies an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. Sample valid values include the following:</p>
	<ul style="list-style-type: none"> <li>Blank Full-time regular.</li> <li>1 Full-time temporary</li> <li>2 Part-time temporary</li> <li>3 Part-time regular</li> <li>4 Seasonal</li> <li>5 Casual</li> </ul>
Date Pay Starts	<p>The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.</p>
	<p>You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).</p>
Organizational Business Unit	<p>A business unit that is included in the organizational structure for job competencies. You use organizational business units to assign job competency information to levels within your organizational structure. This business unit is independent of an employee's home business unit and security business unit.</p>
% Competency Achieved	<p>This number refers to how an employee is doing in relation to the required competency level for a particular job.</p>
	<p>This value is calculated by first calculating the Employee Competency Percent of Required (EEPCTRQD) for all employee competencies related to a job competency associated with a particular job. These percentages are then multiplied by their respective weighting factor and added together to come up with the Job Competency Percent of Required.</p>
Last Competency Review Date	<p>The date on which the last job competency review took place.</p>
Perf. Appraisal Level	<p>A code that specifies the level of proficiency at which a supervisor rates a person or asset for a particular competency type and competency code.</p>
Last Review Type	<p>A user defined code that identifies the type of the last salary or wage review that updated the employee's performance appraisal score. For releases prior to A8.1 and B.8, the code list is 06/RV. For releases A8.1, B.8, and higher, the code list is 07/RV.</p>

<b>Field</b>	<b>Explanation</b>
Last Review Date	<p>A date that indicates when the process was last reviewed.</p> <p>..... <i>Form-specific information</i> .....</p>
The date that the employee's last performance appraisal was completed.	
Next Review Type	<p>A code to define the next type of salary or wage review due. You can define this code using user defined code table system 06, type RV.</p>
Next Review Date	<p>The date on which the employee is scheduled for the next performance or salary review. This field is for information only. It is not used by any programs or processes in the system.</p>
Job Title	<p>A title associated with an employee's job.</p>
Union Code	<p>A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.</p>
Shift Code	<p>A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.</p>
	<p>For payroll and time entry:</p>
	<p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p>
	<p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.</p>
Date Pay Stops	<p>The date that an employee should no longer be included in a payroll cycle, or the date that an employee stops participating in the company's benefit plans. You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT.</p>
	<p>This date may also be the date that a deduction, benefit, or accrual instruction stops.</p>

## Processing Options for Organizational Assignment (P0801ORG)

### Defaults Tab

Use these processing options to determine what default job-related information is used to fill in the employee master record when you add or change the job type for an employee.

The application will use default information from both the Job Information table (F08001) and the Business Unit / Job ID. X-Ref table (F08005), depending on which processing option combination is set.

Processing option 1 (Job Information) will use data in the F08001 table unless processing option 3 (Business Unit / Job Information Cross Reference) is set to 1 (default). When processing option 3 is set to 1 and there is a matching business unit / job type record in the F08005 table, the union, code, benefit group, and workers compensation information comes from the F08005 table. All other data comes from the F08001 table. If there is no matching business unit / job type record in the F08005 table, all data comes from the F08001 table.

Processing option 2 (Job Category Code) will use data in the F08001 table if there is a matching job type / step record in that table. If there is no matching record, no data is used, and no data is retrieved for the processing option 1.

Processing option 3 (Business Unit / Job Information Cross Reference) will use data in the F08005 table. If processing option 1 (Job Information) is set to 1 and there is no data in the F08005 table, then data in the F08001 table is used.

#### 1. Job Information

##### Add

Use this processing option to determine whether the system enters default job information into the employee record when you specify a job type for a new employee.

The application will default pay frequency, union code, EEO job category code, pay class, pay grade, overtime exempt, pay grade step, benefit group, workers compensation, and subclass. (Note: Only union code and EEO job category display on the Organizational Assignment form. The rest of the information is used throughout the Employee Master table.) Valid values are:

- 0     Do not use default data.
- 1     Use default data.

### **Change**

Use this processing option to determine whether job information defaults into the employee record when you change a job type for an existing employee.

The application will default pay frequency, union code, EEO job category code, pay class, pay grade, overtime exempt, pay grade step, benefit group, workers compensation, and sub class. (Note: Only union code and EEO job category display on the Organizational Assignment form. The rest of the information is used throughout the Employee Master table.) Valid values are:

- 0     Do not use default data.
- 1     Use default data.

### **2. Job Category Codes**

#### **Add**

Use this processing option to determine whether job category codes default into the employee record when you specify a job type for a new employee.

The application will check F08001 to see if the user-selected job type/step exists. If it does, the application will use any payroll Category Codes (10 in all) associated with the job type/step in the Employee/Job Category Codes form. Valid values are:

- 0     Do not use default data.
- 1     Use default data.

#### **Change**

Use this processing option to determine whether job category codes default into the employee record when you change a job type for an existing employee.

The application will check F08001 to see if the user-selected job type/step exists. If it does, the application will use any payroll Category Codes (10 in all) associated with the job type/step in the Employee/Job Category Codes form. Valid values are:

- 0     Do not use default data.
- 1     Use default data.

### **3. Business Unit/Job Information Cross Reference**

#### **Add**

Use this processing option to determine whether the business unit/job information cross-reference defaults into the employee record when you specify a job type for a new employee.

The application will use the union code, workers compensation, and benefit group from the F08005 table. (Note: Only union code appears on this application. The remaining two are used in the Employee Master table.) Valid values are:

- 0     Do not use default data.
- 1     Use default data.

#### **Change**

Use this processing option to determine whether the business unit/job information cross-reference defaults into the employee record when you change a job type for an existing employee.

The application will use the union code, workers compensation, and benefit group from the F08005 table. (Note: Only union code appears on this application. The remaining two are used in the Employee Master table.) Valid values are:

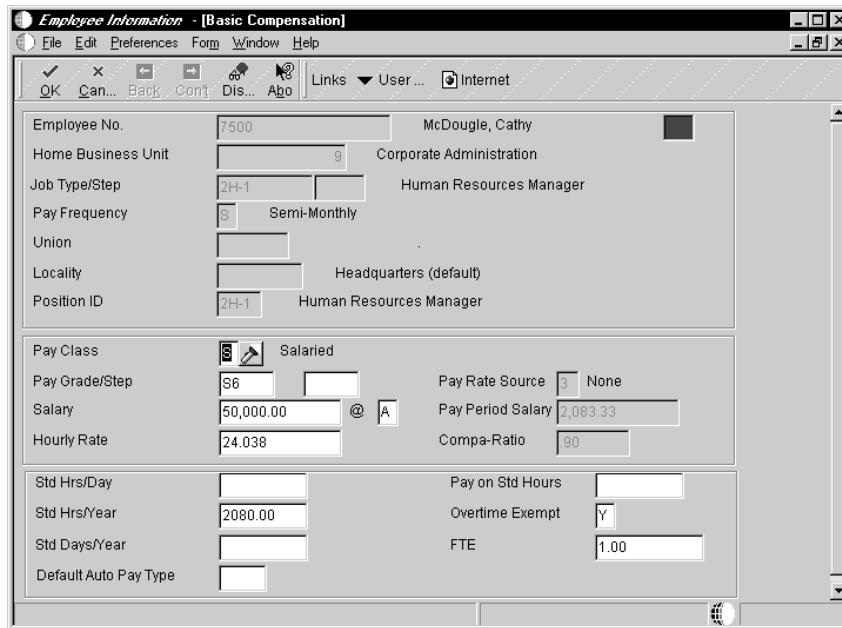
- 0     Do not use default data.
- 1     Use default data.

## **Entering Basic Compensation Information**

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

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

► To enter basic compensation information



1. On Basic Compensation, if the employee is in the salaried pay class, complete the following field:
  - Salary
2. If the employee is in the hourly pay class, complete the following field:
  - Hourly Rate
3. Complete the following fields:
  - Std Hrs/Day
  - Pay on Std Hours
  - Std Hrs/Year
  - Std Days/Year
  - Default Auto Pay Type
  - Full Time Equivalents
4. Complete the following fields if your processing options are not set up to use the default job information:
  - Pay Class (H/S/P)
  - Pay Grade
  - Pay Grade Step
  - FLSA Exempt Y/N
5. Click Continue.

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

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

**Caution:** Some of the following definitions refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Salary	<p>The amount that an employee is paid in one year, provided that the employee is paid every pay period of the year.</p> <p>For World:</p> <p>For the employee's primary job, the system stores the annual salary in both the Employee Master table (F060116) and the Employee Multiple Job table (F060118). For secondary jobs, the system stores the annual salary in the Employee Multiple Job table (F060118).</p> <p>Depending on how the Display Salary (Annual/Effective) field is set in the History Constants table (F08040), this field displays one of the following:</p> <ul style="list-style-type: none"> <li>• Annual salary. For salaried employees who are not associated with a contract calendar, this amount is either entered by the user or retrieved from the Pay Grade/Step table. For employees who are associated with a contract calendar, the system calculates this amount using the formula, ((current salary minus salary paid before change) divided by number of periods to pay) multiplied by pay frequency)</li> <li>• Effective salary, which equals ((annual salary divided by pay frequency) times periods to pay)</li> </ul> <p>For employees whose jobs are associated with a contract calendar, the system recalculates the effective salary if you enter a mid-calendar salary adjustment for the employee. After you enter a mid-calendar adjustment, the effective salary equals the salary that is to be paid to the employee from the time of the adjustment to the end of the contract.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>When you enter a value in this field for a salaried employee, the system calculates the hourly rate based on one of the following:</p> <ul style="list-style-type: none"> <li>• Standard hours per year entered at the employee level</li> <li>• Standard hours per year specified in company options</li> </ul>

Field	Explanation
Hourly Rate	<p>The employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.</p>
	<p>In the Employee Master table, this is the employee's base hourly rate. In the Union Rates table, this is the straight time rate.</p>
	<p>Note: If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.</p>
Std Hrs/Day	<p>The number of hours that the employee normally works in one day. If you leave this field blank, the default is the standard number of hours per day that you defined in the payroll company constants (company options, in OneWorld).</p>
	<p>For example, if, in the payroll company constants (company options), you specified 8 as the standard number of hours per day, but a few employees normally work 7 hours per day, enter 7 in this field for those employees.</p>
Std Hrs/Year	<p>The number of work hours in the year. When you do not set your payroll company constants to use the Pay Grade Step table as the pay-rate source, the system uses this number to compute the hourly rate when you supply the annual salary (or to compute the annual salary when you supply the hourly rate).</p>
	<p>When you set your constants to use the Pay Grade Step table as the pay rate source, the system uses the following sequence to search for the standard number of hours that it uses to calculate the salary or hourly rate per pay period:</p>
	<ul style="list-style-type: none"> <li>• Employee entry forms (this field)</li> <li>• Pay Grade Step table (hours per day multiplied by days per year)</li> <li>• Payroll company constants for the employee's company</li> <li>• Payroll company constants for the default company (company 00000)</li> <li>• Data dictionary</li> <li>• System default value of 2080 standard hours per year</li> </ul>
	<p>..... <i>Form-specific information</i> .....</p>
	<p>When you enter a value in this field, that value overrides the default value from the Pay Grade Step table.</p>

Field	Explanation
Std Days/Year	The number of workdays in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year. When you set up the human resources constants (System Options, in OneWorld) and you use the pay grade step table as the default source for the pay rate, the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate.
Pay on Std Hours	The standard number of hours that you want to pay an hourly employee for in each payroll, regardless of whether the employee works more or less hours. If you leave this field blank, time entry is required.
Default Auto Pay Type	A code that you use to designate the default pay type that the system uses in the generation of automatic payments in those instances where the system does not use the employee labor distribution instructions.  If you leave this field blank, the system uses pay type 001.
FTE	The full-time equivalent (FTE) amount. This figure is the portion of a full-time worker that an employee represents within the business unit. For example, an employee who works 20 hours per week would represent .50 (1/2 FTE). This number cannot be greater than 1 for any employee.
Pay Class	<p>A code that indicates how an employee is paid. Valid codes are:</p> <ul style="list-style-type: none"> <li>Blank</li> <li>H      Hourly</li> <li>S      Salaried</li> <li>P      Piecework</li> </ul> <p>..... <i>Form-specific information</i> .....</p> <p>Depending on how your processing options are set, the system might automatically complete this field with the pay class entered for the employee's job. When you add or change employee information, any value that you enter in the Pay Class field overrides the default value entered at the job level.</p>

<b>Field</b>	<b>Explanation</b>
Pay Grade/Step	<p>A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.</p> <p>To set up pay grades, use Pay Grades by Class (P082001). If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
Overtime Exempt	<p>A code that indicates whether the employee fits the rules of the Fair Labor Standards Act (FLSA) and thus does not have to be paid for working overtime. Valid codes are:</p> <p>Y Yes, the employee fits the rules and does not have to be paid for working overtime.</p> <p>N No, the employee does not fit the rules and is to be paid for working overtime.</p>

## Processing Options for Basic Compensation Information

### Process

1. Workflow threshold      Enter a salary  
Zero = default  
Zero = default
  2. Workflow change threshold      Enter salary percent  
threshold
- Rate - Salary, Annual
- 
- Percent
- 

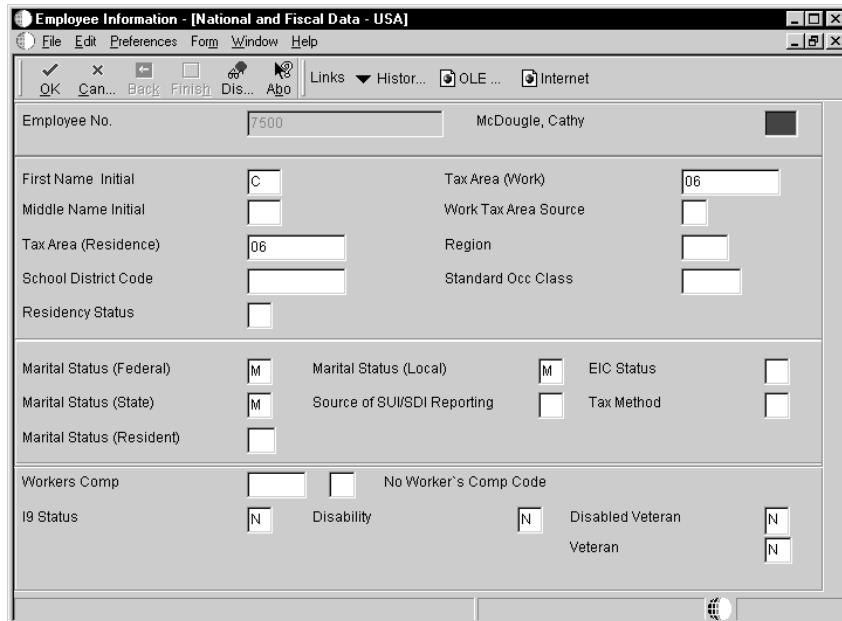
## Entering Country-Specific Information for an Employee

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

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

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

## ► To enter country-specific information for an employee



1. On National and Fiscal Data - USA, if you set the processing options for Employee Information to require a tax area, complete the following fields:
  - Tax Area (Work)
  - Tax Area (Residence)
2. To enter additional tax information, complete the following fields:
  - School District Code
  - Work Tax Area Source
  - Marital Status (Federal)
  - Marital Status (State)
  - Marital Status (Local)
  - Marital Status (Resident)

- Source of SUI Reporting
  - EIC Status
  - Tax Method
  - Worker's Comp. Insurance Code
  - Sub Class - Workers Comp
3. To enter government reporting information, complete the following fields:
- I9 Status
  - Disability
  - Disabled Veteran
  - Veteran
4. Enter any of the following additional fields:
- Residency Status
  - Region
  - Standard Occ Class
5. To add the current employee record to the Employee Master table (F060116), click Finish.

Continue the current process by completing the next form.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

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Field	Explanation
Tax Area (Work)	A code that identifies a geographical location and the tax authorities for the employee's work site. Authorities include both employee and employer statutory requirements. In the payroll-tax calculation software made by Vertex, the tax-area code is synonymous with GeoCode. To determine the valid codes for your location, refer to the documentation for the tax-calculation software that you are using.  For WorldSoftware: If you are using the Time Accounting system without either the Payroll or Human Resources systems, the system does not calculate taxes. However, you must enter a value in this field before you can exit the form. You use the Tax Area Information form on the Additional Constants and Tables menu to set up a tax area.

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<b>Field</b>	<b>Explanation</b>
Tax Area (Residence)	A code that identifies a geographical location and the tax authorities for the employee's residence. Authorities include both employee and employer statutory requirements. This code is synonymous with GeoCode. Refer to Vertex System's Master GeoCode File for valid codes for your locations.
School District Code	A user-defined code from UDC table 06/SD that determines the school district tax for taxation purposes. Vertex automatically calculates the school district tax. Used by the public sector.
Work Tax Area Source	<p>This code is used to determine the source for obtaining the tax area code for the employee's work location.</p> <p>N      Use time entry, job master, employee labor rules or employee master to determine Tax Area.</p> <p>E      Always use the Work Tax Area from the employee master on time record.</p>
	When blank the system assumes N.
Marital Status (Federal)	A user defined code (07/MS) that specifies the employee's federal marital status code as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.
Marital Status (State)	<p>The employee's "Work" state marital status code as retrieved from the state W-4. This code is used in the computation of all state payroll taxes associated with the state in which the employee performed work.</p> <p>If you leave this field blank, the Federal status is used.</p>
Marital Status (Local)	<p>The employee's Local marital status code as retrieved from the locality's W-4. This code is used in the computation of all local (city, county) payroll taxes associated with the state in which the employee performed work.</p> <p>If you leave this field blank, the Federal status is used.</p>
Marital Status – Resident State	A user defined code (system 06, type MS) that specifies the marital status code for the state of residence. It is used for tax computations. This code is related to specific VERTEX system codes (see the VERTEX Tax Manual for their explanation). Also, two special codes have been provided: one designates single for Federal and married for State, and the other designates married for Federal and single for State.

<b>Field</b>	<b>Explanation</b>
Source of SUI Reporting	<p>Use this field to specify the work tax area that is used for SUI reporting. You can specify that the system use either the resident state or the work state, regardless of where the employee worked. FUI is calculated in the same state where SUI is calculated. Weeks Worked are the number of weeks the employee worked in the taxed state. Valid values are:</p>
	<ul style="list-style-type: none"> <li>N      Use the work tax area in the time entry record to determine SUI. (This is the default value.)</li> <li>R      Always use residence tax area from Employee Master table even if the time entry record is different.</li> <li>W      Always use work tax area from Employee Master table even if the time entry record is different.</li> </ul>
EIC Status	<p>A code that specifies whether the employee qualifies for the earned income credit and elects for the employer to give him or her the advance. Valid values are:</p> <ul style="list-style-type: none"> <li>N      The employee does not qualify (default).</li> <li>Y      The employee qualifies.</li> <li>B      The employee qualifies and his or her spouse also qualifies.</li> </ul>
Tax Method	<p>A code that indicates to the payroll-tax calculation system made by Vertex how to calculate certain taxes. The codes are contained in user defined code table 07/TM.</p>
Workers Comp	<p>A code that specifies worker's compensation insurance (WCI). This code should correspond to the classifications on your periodic worker's-compensation insurance reports.</p>
Sub Class – Workers Comp	<p>The subclass code defines any special circumstances associated with the workers compensation insurance (WCI) code that result in multiple rates for the same WCI code. The multiple rates may be due to location, risk, and so forth. The subclass should remain blank if multiple rates do not exist. Default codes are:</p> <ul style="list-style-type: none"> <li>Blank    There are no special circumstances associated with this code.</li> <li>F        There are special circumstances associated with this code.</li> </ul>

<b>Field</b>	<b>Explanation</b>
I9 Status	<p>A code that indicates the method used to verify that this employee is eligible to work in the United States. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y I9 form on file</li> <li>P Passport used for verification</li> <li>R Resident alien or alien registration card</li> <li>S Social Security card</li> <li>L Driver's license and Social Security card</li> <li>V Visa (worker's permit)</li> <li>B Birth certificate</li> <li>N Waiting for verification</li> </ul>
Disability	<p>A code indicating whether this employee has a mental or physical disability. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Yes, this employee has a mental or physical disability.</li> <li>N No, this employee does not have a mental or physical disability.</li> <li>U Unknown</li> </ul>
Disabled Veteran	<p>A code indicating whether this employee is a disabled veteran. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Yes, this employee is a disabled veteran.</li> <li>N No, this employee is not a disabled veteran.</li> </ul> <p>This field is used to generate the Veterans Employee (VETS-100) report.</p>
Veteran	<p>A code that indicates the veteran status of the employee. Valid codes are:</p> <ul style="list-style-type: none"> <li>N No, this employee is not a veteran.</li> <li>Y Yes, this employee is a veteran.</li> <li>V This employee is a Vietnam veteran.</li> </ul>
Residency Status	<p>This code is used to identify out-of-state employees for which the employer must withhold tax for the state of residence. The available codes are:</p> <ul style="list-style-type: none"> <li>W The system uses only the work state to calculate taxes.</li> <li>N The work state has a reciprocal agreement with the employee's state of residence; therefore, the system also calculates the tax based on a reciprocity agreement. (Default)</li> <li>R The system uses only the residence tax area to calculate State Income Tax. SUI/SDI will be calculated in the work state.</li> </ul>
Region	<p>A region within a state. This field is intended for use in preparation of unemployment reports for Alaska.</p>
Standard Occ Class	<p>A series of codes that identify occupational titles and their definitions. These codes are used in one or more states in the preparation of unemployment reports.</p>

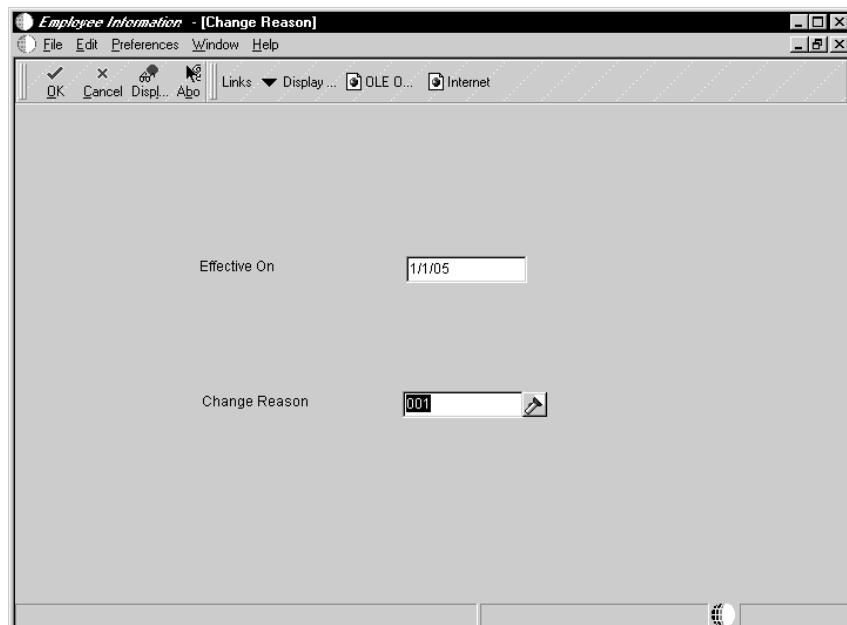
## Entering Employee History Information

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

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

### ► To enter employee history information

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

- Effective On
- Change Reason

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

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

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1,

these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Effective On	<p>A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The effective date that you want to record all the changes to the HR History table (F08042) and the Employee Turnover Analysis table (F08045). The changes that you make to the Employee Master table take effect immediately. If you are adding an employee record and you do not enter a date in this field, the system uses the Date Started as the effective date.</p>
Change Reason	<p>A user defined code (06/T) that indicates the reason an employee's record changed. For example, you can enter the reason you are recommending a salary or rate change.</p> <p>Note: If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item.</p>

## Entering Tax Withholding and Override Information

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

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

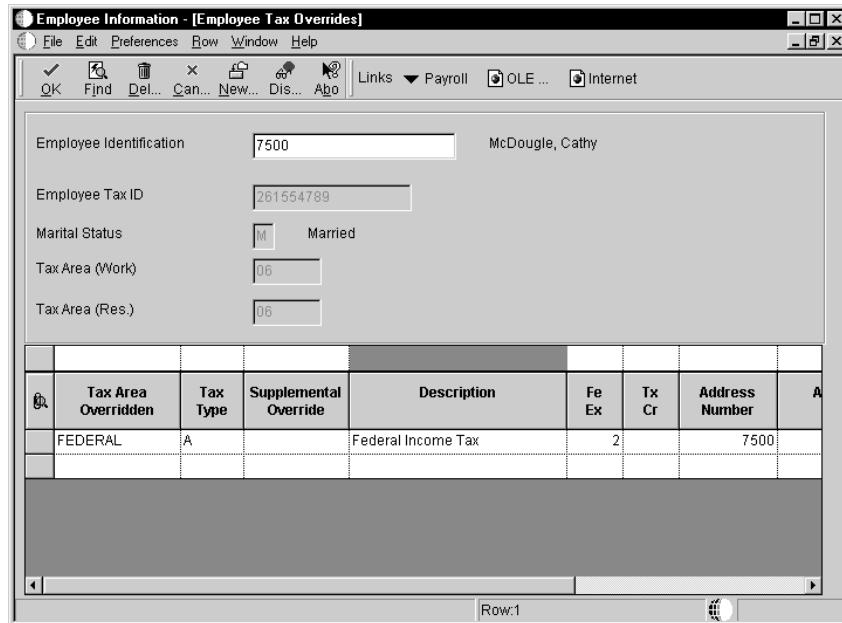
Quantum for Payroll Tax currently supports percentages or additional monetary amount overrides (not flat amount overrides) of federal tax calculations for supplemental pay. Flat amount overrides add to the supplemental rate for federal taxes. All override methods are supported for state taxes. To override an employee's taxes on supplemental pay, leave the Tax Area and Tax Type fields

blank. Tax overrides for supplemental pay functions only if the supplemental pay is a payment by itself.

**Caution:** If you use a flat dollar override of zero for the Federal A tax, “Statutory Exempt” appears on the employee’s year-end form. To prevent the system from calculating federal income taxes without indicating that the employee is exempt from the tax, change the employee’s exemption to 99.

## ► To enter tax withholding and override information

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



3. On Employee Tax Overrides, complete the following field for the Federal A tax type:
  - Fe Ex
4. Complete any of the following optional fields:
  - Additional Federal Withholding
  - F T
  - E O

The first record in the detail area is the Federal A tax type. Use it to specify tax exemptions and overrides for federal income tax. The system

uses exemptions that you enter into this record for all state and local authorities for which there is no specific entry lower in the detail area. However, the override amounts do not carry forward.

5. To enter an override for a state or local tax, move the cursor to the first blank row and complete the following fields:
  - Tax Area Overridden
  - Tax Type
  - F T
  - E O
6. Complete one or both of the following optional fields for state or local taxes:
  - Fe Ex
  - Tx Cr
7. Repeat steps 5 and 6 for as many tax types as necessary.
8. To enter a supplemental override of a federal or state tax, or to add an additional local residence tax, move the cursor to the next blank line, complete the following fields, and then click OK.:
  - Supplemental Override
  - F T
  - E O

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

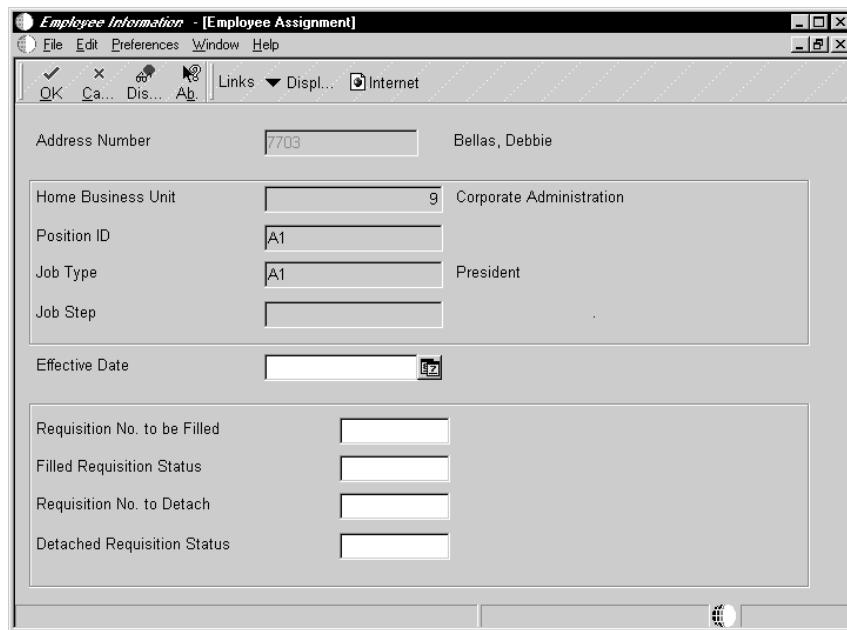
<b>Field</b>	<b>Explanation</b>										
Fe Ex	<p>The number of payroll tax withholding exemptions claimed on the employee's W-4. If this field is left blank for federal exemptions, zero exemptions will be used. The number of federal exemptions will also be used for state and local tax calculations unless separate entries are created for state and local tax areas.</p>										
	<p>Special conditions:</p> <ul style="list-style-type: none"> <li>• For the state of Arizona, use this field to specify the level of tax (percentage of federal income tax).</li> <li>• For the state of Connecticut, leave this field blank.</li> <li>• For the state of Louisiana, enter the number of credits.</li> </ul>										
	<p>For more information about requirements for the states of Arizona, Connecticut, and Louisiana, see the documentation for Quantum for Payroll Tax.</p>										
Tx Cr	<p>U.S. Payroll:</p> <p>For the state of New Jersey, this field is used to specify which withholding table to use:</p>										
	<table border="0"> <tr> <td style="padding-right: 20px;">0</td> <td>table B</td> </tr> <tr> <td style="padding-right: 20px;">1</td> <td>table A</td> </tr> <tr> <td style="padding-right: 20px;">2</td> <td>table C</td> </tr> <tr> <td style="padding-right: 20px;">3</td> <td>table D</td> </tr> <tr> <td style="padding-right: 20px;">4</td> <td>table E</td> </tr> </table>	0	table B	1	table A	2	table C	3	table D	4	table E
0	table B										
1	table A										
2	table C										
3	table D										
4	table E										
	<p>For the state of Mississippi, this field represents the number of dependents claimed on form 62-420. You must enter 25 in the Tax Area field and F in the Tax Type field for this deduction to work.</p>										
	<p>Note: If secondary credits are used in any other state, you may put a value here in combination with the state code and F tax type.</p>										
	<p>Canadian Payroll:</p>										
	<p>This field is used to override the number of weeks worked for Employment Insurance Premiums (if the Tax Type entry on this line equals CC). If you enter this field, you should also manually compute and enter the premium in the amount field on this line.</p>										
Additional Federal Withholding	<p>An additional amount to be withheld over and above the calculated withholding. This could represent a flat withholding amount in situations in which the employee elects to completely bypass the calculated amount. The authority to which each element relates is determined by the tier code of the tax authority. Whether the amount is to be an additional amount or a flat withholding is specified in the employee's master file record.</p>										

<b>Field</b>	<b>Explanation</b>
F T	<p>A code that represents the method in which the additional tax is calculated. The code that you enter in this field indicates the function that is performed by the value that you enter in the Additional Federal Withholding field.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>% A percentage that replaces the tax rate from the tax table.</li> <li>A An amount that is added to the tax computed from the tax table.</li> <li>F An amount that replaces the tax computed from the tax table.</li> <li>X An additional amount added to the standard exemption amount and deducted (exempt) from the annualized gross pay to determine taxable pay.</li> <li>Y An amount that overrides the standard exemption amount and is subtracted from the annualized gross pay prior to the tax calculations.</li> </ul>
E O	<p>Use this field to override the 125 cash option at the company level. Enter a 1 in this field to indicate that the employee is taking a cash option. This field can only be used with SUI and SDI taxes (G, H, I, and J).</p>
Supplemental Override	<p>A code that allows you to override supplemental taxes for federal and state taxes and to add additional local residence taxes. Valid values are:</p> <ul style="list-style-type: none"> <li>F Override the federal supplemental tax for this employee.</li> <li>S Override the state supplemental tax for this employee.</li> <li>R Add additional local residence tax.</li> </ul> <p>When you override supplemental taxes, you must leave the Tax Area and Tax Type fields blank.</p>

## Updating Position and Requisition Information

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

► To update position and requisition information



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

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

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

This task completes the current process.

Field	Explanation
Effective Date	The date that the current status of a candidate requisition becomes active.
Requisition No. to be Filled	The number that identifies the requisition. This number must be unique. The system automatically assigns a unique number if you leave this field blank when you enter the requisition.

Field	Explanation
Filled Requisition Status	<p>The current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from user defined code table 08/CN.</p> <p>You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are:</p> <ul style="list-style-type: none"> <li>CAN Any candidate code</li> <li>DET Any code indicating that the position is detached or no longer filled</li> <li>FIL Any code indicating that the position has been filled</li> <li>REJ Rejected</li> <li>TMP Temporarily filled</li> </ul> <p>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."</p>
Requisition No. to Detach	<p>An approved and unfilled requisition number that the system uses for verification when you enter requisition activity. When you enter a number in this field, the system compares the business unit and position ID associated with the requisition to the business unit and position ID on this form.</p> <p>If the values in these fields are the same, the system indicates that the requisition is filled and places the employee number in the Last Filled By field on Requisition Entry.</p> <p>If the values in these fields are not the same, the system displays a warning message. You can either correct the discrepancy or press Enter again to have the system accept the employee activity.</p> <p>The system verifies the value in this field only if you enter a number in it and the Requisition Master table exists on your system.</p>

<b>Field</b>	<b>Explanation</b>
Detached Requisition Status	<p>The current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from user defined code table 08/CN.</p> <p>You can group candidate requisition status codes based on the hard-coded Special Handling Code values in the table.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>CAN Any candidate code</li> <li>DET Any code that indicates that the position is detached or no longer filled</li> <li>FIL Any code that indicates that the position has been filled</li> <li>REJ Rejected</li> <li>TMP Temporarily filled</li> </ul> <p>Candidate requisition status codes that have special handling codes 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.”</p>

## Processing Options for Employee Master (P0801)

### Defaults Tab

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

#### 1. Security Business Unit

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

#### 2. Tax Area

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

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

## Versions Tab

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

### 1. Organizational Assignment Version

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

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

### 2. Basic Compensation Version

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

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

## Termination Tab

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

### 1. Candidate Requisition Status

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

### 2. Requisition Status

This processing option applies only if you have set up your system options (P05001S) to automatically create a new requisition when an employee is terminated. Use this processing option to define the user defined code (08/RS)

for the requisition status that you want to assign to the new requisition. If you leave this processing option blank, the system will not create a new requisition when you terminate an employee.

### **3. Organizational Structure Type**

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

### **4. Applicant Status**

Use this processing option to define the user defined code (08/AS) for the applicant status that you want to assign to terminated employees who will be returned to the applicant pool for future hiring considerations. If you leave this field blank, the system does not assign an applicant status to the terminated employee.

## **Adding Employee Records Using Employee Quick Hire**

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

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

- Setting up default information for employee records
- Adding employee records for applicants, rehires, and new hires
- Working with new employee information

Position budgeting is not accounted for when you use Employee Quick Hire to add employee records.

### **Setting Up Default Information for Employee Records**

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

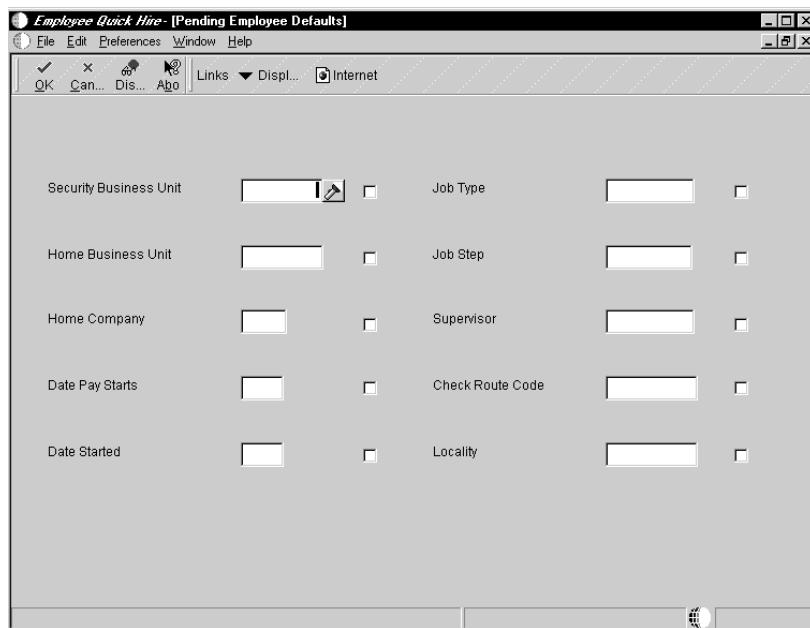
You can change the default information for each group of employees that you are about to enter records for.

#### **To set up default information for employee records**

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

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



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

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

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

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

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

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

<b>Field</b>	<b>Explanation</b>
Security Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Home Business Unit	The number of the business unit in which the employee generally resides.
Home Company	The company number in which the employee generally resides.
Date Pay Starts	<p>The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.</p> <p>You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).</p>
Date Started	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.
Job Type	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
Supervisor	<p>The address book number of the supervisor.</p> <p>Note: A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. Set up the default values on the default Managers and Supervisor form. The system will automatically display the information you specified on all work orders you create if the category code criterion is met. You can override the default value.</p>

Field	Explanation
Check Route Code	A user defined code (07/CR) that specifies the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.

## Adding Employee Records for Applicants, Rehires, and New Hires

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

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

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

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

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

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

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

- Your company has acquired another company and you need to enter the newly acquired employees into OneWorld. Using Quick Hire, you can

enter the new employees in groups based on their supervisor. You might decide to specify the start date, supervisor, business unit, home company, and locality as default information.

- Your company uses seasonal employees and rehires many of the same employees each year. Using Quick Hire, you can select the employees that are eligible for rehire from the terminated employee database and activate their employee records. In addition, you might choose to specify the date that pay starts and the supervisor as default information.

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

Setting the processing option to directly update the Employee Master and other tables updates the Human Resources History table (F08042). Setting the processing option to use the Quick Hire Transaction table (F060116Z) does not update the Human Resources History table until you run the Process Pending Employees report (R060116P).

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

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

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

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

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

## Before You Begin

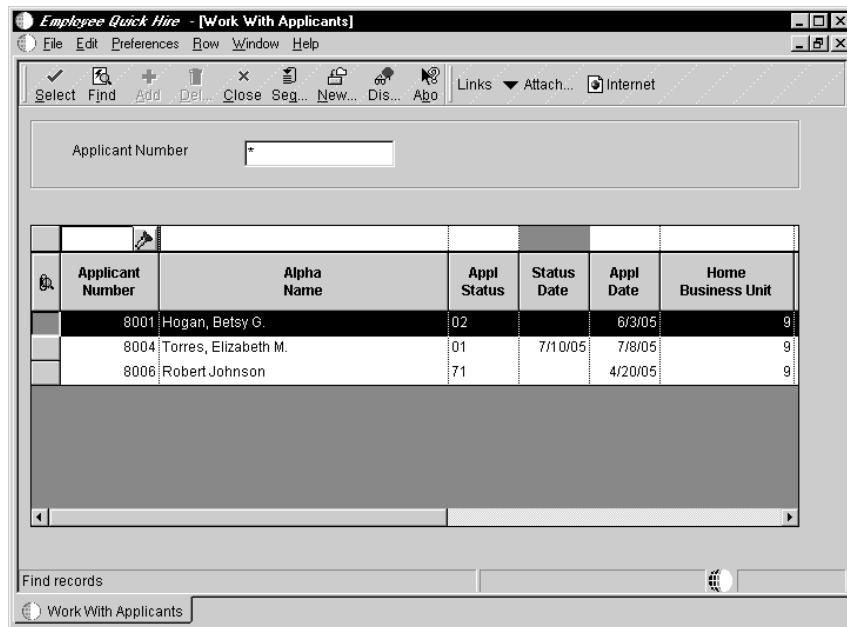
- Set up default information for every new group of individuals that you hire with similar job information. See *Setting Up Default Information for Employee Records*.
- If you need to initiate the employee setup process after you add employee records, set the processing options for Employee Quick Hire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

### ► To add employee records for applicants

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

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

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



2. On Work With Applicants, complete the following field and click Find:
  - Applicant Number
3. Choose applicant records and click Select.

A check mark appears in each row header.

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

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

5. Complete the following fields on the Employee Quick Hire form to update employee information:
  - Date Started
  - Date Pay Starts
  - Chg Rsn
6. Complete any other fields needed to update employee information and click OK.

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

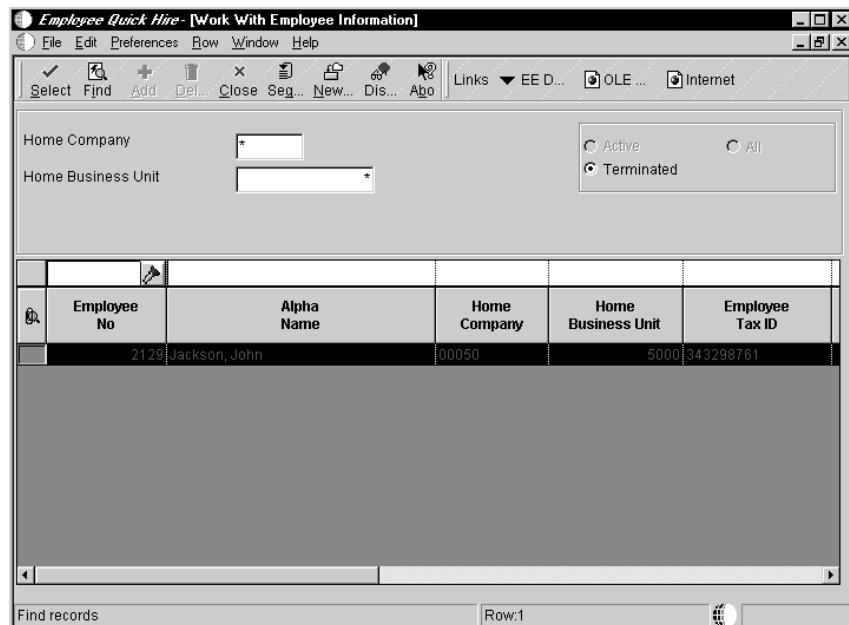
<b>Field</b>	<b>Explanation</b>
Applicant Number	<p>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members.</p> <p>..... <i>Form-specific information</i> .....</p> <p>This number becomes the applicant's employee number if the applicant is hired. You can either enter this number or you can leave the field blank and the system automatically assigns the next available number. Each applicant number must be unique. If you enter a number that already exists, the system displays an error message.</p>
Chg Rsn	<p>A user defined code (06/T) that indicates:</p> <ul style="list-style-type: none"><li>• The reason that you are changing an active employee's record.</li><li>• The reason that you are terminating an employee.</li><li>• The reason that you are recommending the change in salary or rate. If you are reactivating an employee, you must change the code in this field to a numeric character.</li></ul> <p>Note: The default reason code for new hires is the default value for the Change Reason data item.</p>

► **To add employee records for rehires**

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

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

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



2. On Work With Employee Information, complete the following fields to help narrow your search and click Find:

- Home Company
- Home Business Unit

3. Choose applicant records and click Select.

A check mark appears in the row header.

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

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

5. Complete the following fields to update employee information:

- Date Started

- Date Pay Starts
  - Chg Rsn
6. Complete any other fields needed to update employee information and click OK.
  7. If your processing options are set to update the Quick Hire Transaction table (F060116Z), review the employee information and, if correct, proceed to the task *Working with New Employee Information* to update the Employee Master, Applicant Master, Address Book, and Requisition Activity tables.

### To add employee records for new hires

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

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

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

- Security Business Unit
  - Co
  - Gender
  - Country of Employment
  - Res. Tax Area
  - Work Tax Area
  - Original Hire Date
  - Date Started
  - Date Pay Starts
3. To record job information, complete any of the following fields that are not already supplied by a default value:
- Employee Number
  - Supervisor
  - Job Typ
  - Job Step
  - S h
  - Loc
  - Emp St
  - R C
  - B S
  - Pay Grade
  - Pay Grade Step
  - F L
  - WCI Code
  - Benefit Group
  - S C
  - Union Code
  - Part Date
4. To record tax information, complete any of the following fields that are not already supplied by a default value:
- I9
  - MS TX
  - MS ST
  - Pay St

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

- Check Route Code
- Req No.
- Candidate Req Status
- E M
- Remark 1
- Days Year

<b>Field</b>	<b>Explanation</b>														
Search Type	<p>A user defined code (01/ST) that identifies the kind of address book record that you want the system to select when you search for a name or message. Examples include the following:</p> <table style="margin-left: 20px; border-collapse: collapse;"> <tr><td style="padding-right: 20px;">E</td><td>Employees</td></tr> <tr><td>X</td><td>Ex-employees</td></tr> <tr><td>V</td><td>Suppliers</td></tr> <tr><td>C</td><td>Customers</td></tr> <tr><td>P</td><td>Prospects</td></tr> <tr><td>M</td><td>Mail distribution lists</td></tr> <tr><td>T</td><td>Tax authority</td></tr> </table>	E	Employees	X	Ex-employees	V	Suppliers	C	Customers	P	Prospects	M	Mail distribution lists	T	Tax authority
E	Employees														
X	Ex-employees														
V	Suppliers														
C	Customers														
P	Prospects														
M	Mail distribution lists														
T	Tax authority														
Alpha Name	<p>The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.</p>														
Employee Tax ID	<p>The employee's tax identification number. Enter this number without dashes. In the United States, this is the Social Security number. In Canada, this is the Social Insurance number.</p> <p>The system does not let you enter duplicate tax IDs.</p> <p>If your default company is not Canadian or United States, and the international code is set to Y, you can enter a 16-character identification in the tax ID field.</p> <p>The number you enter in this field can also be used as the employee number.</p>														

<b>Field</b>	<b>Explanation</b>												
Pay Freq	<p>A user defined code (07/PF) that indicates how often an employee is paid. Codes are:</p> <table style="margin-left: 20px;"> <tr><td>B</td><td>Biweekly</td></tr> <tr><td>W</td><td>Weekly</td></tr> <tr><td>S</td><td>Semimonthly</td></tr> <tr><td>M</td><td>Monthly</td></tr> <tr><td>A</td><td>Annually</td></tr> <tr><td>C</td><td>European Annualized</td></tr> </table> <p>The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee.</p>	B	Biweekly	W	Weekly	S	Semimonthly	M	Monthly	A	Annually	C	European Annualized
B	Biweekly												
W	Weekly												
S	Semimonthly												
M	Monthly												
A	Annually												
C	European Annualized												
Pay Cl	<p>A code that indicates how an employee is paid. Valid codes are:</p> <table style="margin-left: 20px;"> <tr><td>Blank</td><td></td></tr> <tr><td>H</td><td>Hourly</td></tr> <tr><td>S</td><td>Salaried</td></tr> <tr><td>P</td><td>Piecework</td></tr> </table>	Blank		H	Hourly	S	Salaried	P	Piecework				
Blank													
H	Hourly												
S	Salaried												
P	Piecework												
Annual Salary	<p>The amount that an employee is paid in one year, provided that the employee is paid every pay period of the year.</p> <p>For World:</p> <p>For the employee's primary job, the system stores the annual salary in both the Employee Master table (F060116) and the Employee Multiple Job table (F060118). For secondary jobs, the system stores the annual salary in the Employee Multiple Job table (F060118).</p> <p>Depending on how the Display Salary (Annual/Effective) field is set in the History Constants table (F08040), this field displays one of the following:</p> <ul style="list-style-type: none"> <li>• Annual salary. For salaried employees who are not associated with a contract calendar, this amount is either entered by the user or retrieved from the Pay Grade/Step table. For employees who are associated with a contract calendar, the system calculates this amount using the formula, ((current salary minus salary paid before change) divided by number of periods to pay) multiplied by pay frequency)</li> <li>• Effective salary, which equals ((annual salary divided by pay frequency) times periods to pay)</li> </ul> <p>For employees whose jobs are associated with a contract calendar, the system recalculates the effective salary if you enter a mid-calendar salary adjustment for the employee. After you enter a mid-calendar adjustment, the effective salary equals the salary that is to be paid to the employee from the time of the adjustment to the end of the contract.</p>												

<b>Field</b>	<b>Explanation</b>
Hourly Rate	<p>The employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.</p>
	<p>In the Employee Master table, this is the employee's base hourly rate. In the Union Rates table, this is the straight time rate.</p>
	<p>Note: If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.</p>
EEO Job	<p>A user defined code (07/J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by J.D. Edwards. You can add codes if needed.</p>
Ethnic Code	<p>A user defined code (07/M) that designates minority classifications according to U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity Occupational Group (EEOG) standards. The predefined codes that J.D. Edwards provides are hard-coded. The system uses these codes to generate EEO reports and to compile Canadian Employment Equity information. Do not change these predefined codes. You can add codes, if necessary.</p>
Co	<p>The company number in which the employee generally resides.</p>
Country of Employment	<p>A user defined code list 00/CN that indicates the country in which the employee resides.</p>
Res. Tax Area	<p>A code that identifies a geographical location and the tax authorities for the employee's residence. Authorities include both employee and employer statutory requirements. This code is synonymous with GeoCode. Refer to Vertex System's Master GeoCode File for valid codes for your locations.</p>

## Adding Employee Records Using Employee Quick Hire

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<b>Field</b>	<b>Explanation</b>
Work Tax Area	<p>A code that identifies a geographical location and the tax authorities for the employee's work site. Authorities include both employee and employer statutory requirements. In the payroll-tax calculation software made by Vertex, the tax-area code is synonymous with GeoCode. To determine the valid codes for your location, refer to the documentation for the tax-calculation software that you are using.</p> <p>For WorldSoftware: If you are using the Time Accounting system without either the Payroll or Human Resources systems, the system does not calculate taxes. However, you must enter a value in this field before you can exit the form. You use the Tax Area Information form on the Additional Constants and Tables menu to set up a tax area.</p>
Original Hire Date	The date on which the employee was originally hired by the company. If the employee was terminated and subsequently rehired, the new start date will be represented by the data in the Date Started (DST) field.
Date Started	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.
Date Pay Starts	<p>The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.</p> <p>You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).</p>
Employee Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members.
Job Typ	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.

<b>Field</b>	<b>Explanation</b>
S h	<p>A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.</p>
	<p>For payroll and time entry:</p>
	<p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p>
	<p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.</p>
Loc	<p>A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.</p>
Emp St	<p>A user defined code (07/ES) that specifies an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. Sample valid values include the following:</p> <ul style="list-style-type: none"> <li>Blank Full-time regular.</li> <li>1 Full-time temporary</li> <li>2 Part-time temporary</li> <li>3 Part-time regular</li> <li>4 Seasonal</li> <li>5 Casual</li> </ul>
R C	<p>A code that identifies whether the employee is to be handled through the Recharge processing option for the Payroll Journal Entry program. Valid codes are:</p> <ul style="list-style-type: none"> <li>1 Payroll Processing Only</li> <li>2 Payroll and Recharge Processing</li> <li>3 Recharge Processing Only</li> </ul>
	<p>After a timecard has been added, you cannot change its record type.</p>
B S	<p>A user defined code (06/EA) that specifies the employee action, such as new hire or rehire, for which the system searches as it tests for benefits eligibility. An * indicates that the guidelines refer to all employee actions not otherwise specified.</p>
	<p>Do not change the codes that are hard-coded, such as A (Active) and X (Terminated). These are required codes in the system.</p>

## Adding Employee Records Using Employee Quick Hire

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<b>Field</b>	<b>Explanation</b>
Pay Grade	<p>A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.</p> <p>To set up pay grades, use Pay Grades by Class (P082001).</p> <p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
Grade Step	<p>A code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate.</p> <p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
F L	<p>A code that indicates whether the employee fits the rules of the Fair Labor Standards Act (FLSA) and thus does not have to be paid for working overtime. Valid codes are:</p> <p style="margin-left: 40px;">Y Yes, the employee fits the rules and does not have to be paid for working overtime.</p> <p style="margin-left: 40px;">N No, the employee does not fit the rules and is to be paid for working overtime.</p>
WCI Code	<p>A user defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers compensation insurance reports.</p>
Benefit Group	<p>The benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.</p>

<b>Field</b>	<b>Explanation</b>
S C	<p>The subclass code defines any special circumstances associated with the workers compensation insurance (WCI) code that result in multiple rates for the same WCI code. The multiple rates may be due to location, risk, and so forth. The subclass should remain blank if multiple rates do not exist. Default codes are:</p> <ul style="list-style-type: none"> <li>Blank There are no special circumstances associated with this code.</li> <li>F There are special circumstances associated with this code.</li> </ul>
Union Code	<p>A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.</p>
Part Date	<p>The date the employee began participating in the company deferred income or stock option plan. This date must be later than the Date Started date.</p>
I9	<p>A code that indicates the method used to verify that this employee is eligible to work in the United States. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y I9 form on file</li> <li>P Passport used for verification</li> <li>R Resident alien or alien registration card</li> <li>S Social Security card</li> <li>L Driver's license and Social Security card</li> <li>V Visa (worker's permit)</li> <li>B Birth certificate</li> <li>N Waiting for verification</li> </ul>
MS TX	<p>A user defined code (07/MS) that specifies the employee's federal marital status code as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.</p>
MS ST	<p>A user defined code (system 06, type MS) that specifies the marital status code for the state of residence. It is used for tax computations. This code is related to specific VERTEX system codes (see the VERTEX Tax Manual for their explanation). Also, two special codes have been provided: one designates single for Federal and married for State, and the other designates married for Federal and single for State.</p>

<b>Field</b>	<b>Explanation</b>
Pay St	<p>A code that indicates whether an employee's pay status is active or inactive.</p> <p>Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run.</p> <p>To process an employee's last check, the pay status must contain a numeric code. After the system processes the check through final update, you can change the pay status to an alphabetic code.</p>
R S	<p>This code is used to identify out-of-state employees for which the employer must withhold tax for the state of residence. The available codes are:</p> <ul style="list-style-type: none"> <li>W     The system uses only the work state to calculate taxes.</li> <li>N     The work state has a reciprocal agreement with the employee's state of residence; therefore, the system also calculates the tax based on a reciprocity agreement. (Default)</li> <li>R     The system uses only the residence tax area to calculate State Income Tax. SUI/SDI will be calculated in the work state.</li> </ul>
T S	<p>This code is used to determine the source for obtaining the tax area code for the employee's work location.</p> <ul style="list-style-type: none"> <li>N     Use time entry, job master, employee labor rules or employee master to determine Tax Area.</li> <li>E     Always use the Work Tax Area from the employee master on time record.</li> </ul> <p>When blank the system assumes N.</p>
Stat Code	<p>A code that allows you to override supplemental taxes for federal and state taxes and to add additional local residence taxes. Valid values are:</p> <ul style="list-style-type: none"> <li>F     Override the federal supplemental tax for this employee.</li> <li>S     Override the state supplemental tax for this employee.</li> <li>R     Add additional local residence tax.</li> </ul> <p>When you override supplemental taxes, you must leave the Tax Area and Tax Type fields blank.</p>

<b>Field</b>	<b>Explanation</b>
SUI Rpt	<p>Use this field to specify the work tax area that is used for SUI reporting. You can specify that the system use either the resident state or the work state, regardless of where the employee worked. FUI is calculated in the same state where SUI is calculated. Weeks Worked are the number of weeks the employee worked in the taxed state. Valid values are:</p> <ul style="list-style-type: none"> <li>N      Use the work tax area in the time entry record to determine SUI. (This is the default value.)</li> <li>R      Always use residence tax area from Employee Master table even if the time entry record is different.</li> <li>W      Always use work tax area from Employee Master table even if the time entry record is different.</li> </ul>
T M	A code that indicates to the payroll-tax calculation system made by Vertex how to calculate certain taxes. The codes are contained in user defined code table 07/TM.
Lc St	<p>The employee's Local marital status code as retrieved from the locality's W-4. This code is used in the computation of all local (city, county) payroll taxes associated with the state in which the employee performed work.</p> <p>If you leave this field blank, the Federal status is used.</p>
Vet	<p>A code that indicates the veteran status of the employee. Valid codes are:</p> <ul style="list-style-type: none"> <li>N      No, this employee is not a veteran.</li> <li>Y      Yes, this employee is a veteran.</li> <li>V      This employee is a Vietnam veteran.</li> </ul>
Dis Vet	<p>A code indicating whether this employee is a disabled veteran. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y      Yes, this employee is a disabled veteran.</li> <li>N      No, this employee is not a disabled veteran.</li> </ul> <p>This field is used to generate the Veterans Employee (VETS-100) report.</p>
Disb	<p>A code indicating whether this employee has a mental or physical disability. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y      Yes, this employee has a mental or physical disability.</li> <li>N      No, this employee does not have a mental or physical disability.</li> <li>U      Unknown</li> </ul>

## Adding Employee Records Using Employee Quick Hire

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<b>Field</b>	<b>Explanation</b>
Address Line 1	<p>The first line of the mailing address for an employee, customer, or supplier in the Address Book system.</p> <p>The Internal Revenue Service (IRS) restricts the size of the address that prints on an employee's year-end tax returns. To comply with IRS regulations, the system uses the following restrictions:</p> <ul style="list-style-type: none"> <li>• On W-2 returns, the system prints only the last three nonblank address lines plus the city, state, and postal code.</li> <li>• On 1099 returns, the system prints only the last nonblank address line plus the city, state, and postal code.</li> <li>• On U.S. federal magnetic media, the system writes only the last nonblank address line plus the city, state, and postal code.</li> </ul>
Salu	A code that identifies the proper title for a given employee. Some examples are Mr., Ms., Dr., and so on.
Suff	A code that identifies the credentials for a given employee. Some examples are Phd, MD, CPA, and so on.
P C	<p>A code that lets you test the deposit instructions for one pay period before actually processing a deposit. Adding an employee to this form automatically activates this person in the automated deposit system. The system prenotes this employee in the next applicable payroll run to test the auto deposit instructions you have set up before actually depositing a check. In the prenote test, the system creates a no-dollar entry for this employee and sends it to the employee's bank account. In addition, the employee receives a check for this amount. After the test, the system changes this field to N. To repeat this test, enter P in this field.</p> <p>If you leave this field blank, the system uses the default value of P.</p> <p>If you change an employee's automatic deposit instructions, the system creates a prenote. If you do not want a prenote, you must change the value in the Pernote Flag field to N.</p> <p>You cannot use this field for Canadian employees.</p>
Check Route Code	A user defined code (07/CR) that specifies the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.
Req No.	The number that identifies the requisition. This number must be unique. The system automatically assigns a unique number if you leave this field blank when you enter the requisition.

<b>Field</b>	<b>Explanation</b>
Candidate Req Status	<p>The current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from user defined code table 08/CN.</p>
	<p>You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are:</p>
	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
	<p>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.”</p>
E M	<p>A code in WorldSoftware or an option in OneWorld software that indicates whether this address is an employee.</p>
	<p>Valid codes for WorldSoftware are:  Y Yes, this is an employee.  N No, this is not an employee.</p>
	<p>For OneWorld software, a selected option means the address is an employee.</p>
	<p>This code is informational only. It has no predetermined use in the Address Book system.</p>
Remark 1	<p>A 40-character field that you can use to enter text.</p>
Days Year	<p>The number of workdays in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year. When you set up the human resources constants (System Options, in OneWorld) and you use the pay grade step table as the default source for the pay rate, the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate.</p>

## Processing Options for Employee Quick Hire (P060116Q)

### Defaults Tab

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

### **1. Security Business Unit**

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

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

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

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

### **2. Tax Areas**

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

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

### **3. Job Information**

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

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

### **4. Job Category Codes**

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

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

## 5. Emergency Contact Type

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

## 6. Business Unit/Job ID Cross Reference

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

- 1     Use default business unit/job ID information.
- 0     Do not use default business unit/job ID information.

## Versions Tab

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

### 1. Applicant Information Version

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

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

### 2. Address Book MBF Version

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

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

### 3. Address Book Search Form Version

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

## Action Tab

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

### 1. Update Master Files

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

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

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

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

### 2. New Hire

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

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

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

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

In addition, the following will occur:

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

## Working with New Employee Information

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

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

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

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

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

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

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

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

### **Understanding the Relationship Between Quick Hire and New Hire Employee Setup**

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

1. When an employee record is added to the Employee Master table through Quick Hire, OneWorld automatically generates the New Hire Employee Setup record.
2. An e-mail message is automatically sent to the employee's supervisor, requesting the supervisor to identify the setup tasks necessary for the employee. OneWorld determines which supervisor to e-mail based on the entry in the Supervisor field in OneWorld. If this field is left blank, a message will not be generated.
3. Using Manager Self-Service, the new employee's manager accesses OneWorld and enters the setup tasks that are necessary for the employee. The setup tasks can also be supplied automatically based on the employee's job type.
4. When the tasks have been identified for the new employee and the Employee Setup Record has been approved, OneWorld initiates the New Hire Setup Workflow process, which e-mails the individuals in your organization who are responsible for completing the necessary tasks. For example, if the manager has indicated that the new employee will need a network signon, security badge, and building key, you can direct the workflow process to e-mail the IT Manager, Security Manager, and Facilities Manager, respectively.

The New Hire Setup Workflow process can be customized to meet the needs of your organization. Processing options on the Managers Employee Setup form allow you to easily customize the process. For example, your organization might choose to require approval at the process level or at the task level, or you might

choose to escalate certain tasks if the designated individuals do not complete the tasks in an appropriate time frame.

## **Running the Process Pending Employees Report**

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

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

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

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

### Processing Options for Process Pending Employees Report

#### Defaults

1. Security Business Unit \_\_\_\_\_  
1 = Default  
0 = Do Not Default
2. Tax Areas \_\_\_\_\_  
1 = Required  
0 = Not 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

### Revising New Employee Records

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

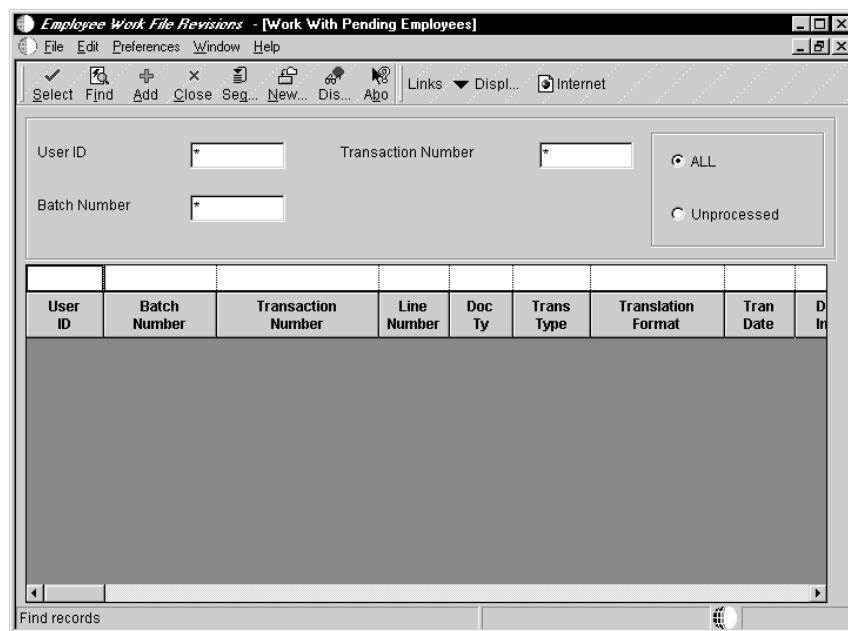
If you entered the incorrect information when you added employee records, you can revise the records that you just added or correct any errors in the new records as indicated in the Process Pending Employees report.

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

### ► To revise new employee records

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



1. On Work With Pending Employees, complete the following fields:
  - User ID
  - Batch Number
  - Transaction Number
2. Click one of the following options and click Find:
  - All
  - Unprocessed
3. If you need to add a record, click Add.

4. Choose a record or a group of records that need changes and click Select.
5. On Pending Employee Revisions, change the appropriate fields.
6. Click OK.
7. Rerun the Pending Employee report and repeat this task as many times as necessary until your batch runs successfully.

<b>Field</b>	<b>Explanation</b>
User ID	The source of the transaction. This can be a user ID, a workstation, the address of an external system, a node on a network, and so on. This field helps identify both the transaction and its point of origin.
Batch Number	The number that the transmitter assigns to the batch. During batch processing, the system assigns a new batch number to the J.D. Edwards transactions for each control (user) batch number it finds.
Transaction Number	The number that an Electronic Data Interchange (EDI) transmitter assigns to a transaction. In a non-EDI environment, you can assign any number that is meaningful to you to identify a transaction within a batch. It can be the same as a J.D. Edwards document number.
All	An indicator to mark records as successfully processed through the batch processing system. After a record has been marked as processed, it can no longer be updated through the batch processing program.  Valid values for WorldSoftware are: 0      Unprocessed only 1      Processed and unprocessed  For OneWorld software: On      The system shows records that have been successfully processed. Off     The system shows records that have not yet been processed.
Unprocessed	An indicator to mark records as successfully processed through the batch processing system. After a record has been marked as processed, it can no longer be updated through the batch processing program.  Valid values for WorldSoftware are: 0      Unprocessed only 1      Processed and unprocessed  For OneWorld software: On      The system shows records that have been successfully processed. Off     The system shows records that have not yet been processed.

## **Purging Pending Employee Information**

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

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

## **Entering Additional Employee Information**

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

Entering additional employee information includes the following tasks:

- Entering payroll information for employees
- Entering additional benefits information for employees
- Entering user defined information for employees

### **Entering Payroll Information for Employees**

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

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

#### **► To enter payroll information for employees**

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

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

The screenshot shows a software interface titled "Employee Information - [Employee Payroll Revisions]". The window has a menu bar with File, Edit, Preferences, Form, Window, and Help. Below the menu is a toolbar with OK, Cancel, Disc..., Info..., Help..., Links, History, and Internet buttons. The main area contains the following fields:

- Employee No.**: 7500, Mc Dougale, Cathy
- Payroll Processing** section:
  - Pay Cycle Code:
  - Employee Classification Status:
  - Work Schedule:
  - Record Type:  1
  - Pre-Note Code:
  - Wage Attachment Payee:
  - Vacation Factor:
  - Maximum Net Pay:
  - Labor Distribution Method:
  - Labor Distribution Multiplier:
  - Distribution Rate:
- Date Of Last Raise**:
- Date of Next Raise**:
- Business Unit - Last Worked**:
- Date of Last Check**:
- Geographic Tax Data** section:
  - Home State:
  - Federal (and default)
  - Home City:
  - Default Working City
  - Work State:
  - Federal (and default)

3. On Employee Payroll Revisions, complete the following fields:
  - Pay Cycle Code
  - Employee Classification Status
4. To enter geographic tax information, complete the following fields:
  - Home State
  - Home City
  - Work State
5. To enter labor distribution instructions, complete the following fields:
  - Labor Distribution Method
  - Labor Distribution Multiplier
  - Distribution Rate
6. Complete any of the following additional fields and click OK:
  - Work Schedule
  - Record Type
  - Pre-Note Code
  - Wage Attachment Payee
  - Vacation Factor
  - Amount – Maximum Net Pay
  - Date of Next Raise
  - Business Unit – Last Worked

**Caution:** Some of the following explanations refer to user defined code tables for System 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Pay Cycle Code	A code that identifies the values for a master payroll cycle.
Employee Classification Status	A code that represents the employee's classification status. Valid values are: Y      Eligible N      Not Eligible
Home State	The employee's home state for tax reporting purposes. This code designates the state in which the employee resides.  Note: For W-2 reporting, use the numeric value equivalent of the designated state. For example: 06 - Colorado, 05 - California. Otherwise, the system produces undesirable report results. If you leave this field blank, the system uses the value in the Tax Area (Resident) field on Pay and Tax Information as the employee's resident (base) state.
Home City	The location or city where the employee resides.
Work State	The employee's work state for tax reporting purposes. This code indicates the state in which the employee normally works. The system uses this code to compute state income tax withholding. You can override this code during time entry, if necessary.
Labor Distribution Method	Controls whether the labor costs include a flat burden for payroll taxes and benefits. Valid values are: 0      The flat burden factor is always 1.0000, so the resulting amount for the flat burden is zero. 1      The flat burden factor is always greater than or equal to 1.0000, so the labor costs include a flat burden.
Labor Distribution Multiplier	A multiplier to load direct labor costs with burden. For example, a factor of 1.32 loads every dollar of labor cost with 32 cents worth of burden.

<b>Field</b>	<b>Explanation</b>						
Distribution Rate	<p>A rate used for the billing of labor services. This rate is often referred to as the billing or recharge rate. The extended amount based on this rate will be charged to the primary distribution account on the timecard with an offset being made to an account derived from the Accounting Rules table. This rate will not affect the employee's payroll. To allow billing rates in time entry, you must set the employee's record type as either 2 or 3 on the Basic Employee Entry form.</p> <p>Enter a rate on any of the following forms to override the rate in the Employee Primary Job table:</p> <ul style="list-style-type: none"> <li>• Pay Rate Information</li> <li>• Employee Labor Distribution</li> <li>• Occupational Pay Rates</li> <li>• Time Entry by Employee</li> <li>• Time Entry by Job or Business Unit</li> <li>• Daily Timecard Entry</li> <li>• Time Entry by Employee with Equipment</li> <li>• Time Entry by Shop Floor Control</li> </ul>						
Work Schedule	<p>A user defined code to designate intra-pay period work schedules. This code can be used for reporting and to select employees to be included in a payroll run. For example:</p> <table style="margin-left: 40px;"> <tr> <td>A</td> <td>Monday through Friday</td> </tr> <tr> <td>B</td> <td>Saturday through Wednesday</td> </tr> <tr> <td>C</td> <td>Monday through Thursday (4 x 10 hrs)</td> </tr> </table>	A	Monday through Friday	B	Saturday through Wednesday	C	Monday through Thursday (4 x 10 hrs)
A	Monday through Friday						
B	Saturday through Wednesday						
C	Monday through Thursday (4 x 10 hrs)						
Record Type	<p>A code that identifies whether the employee is to be handled through the Recharge processing option for the Payroll Journal Entry program. Valid codes are:</p> <table style="margin-left: 40px;"> <tr> <td>1</td> <td>Payroll Processing Only</td> </tr> <tr> <td>2</td> <td>Payroll and Recharge Processing</td> </tr> <tr> <td>3</td> <td>Recharge Processing Only</td> </tr> </table> <p>After a timecard has been added, you cannot change its record type.</p>	1	Payroll Processing Only	2	Payroll and Recharge Processing	3	Recharge Processing Only
1	Payroll Processing Only						
2	Payroll and Recharge Processing						
3	Recharge Processing Only						

<b>Field</b>	<b>Explanation</b>
Pre-Note Code	<p>A code that lets you test the deposit instructions for one pay period before actually processing a deposit. Adding an employee to this form automatically activates this person in the automated deposit system. The system prenotes this employee in the next applicable payroll run to test the auto deposit instructions you have set up before actually depositing a check. In the prenote test, the system creates a no-dollar entry for this employee and sends it to the employee's bank account. In addition, the employee receives a check for this amount. After the test, the system changes this field to N. To repeat this test, enter P in this field.</p> <p>If you leave this field blank, the system uses the default value of P.</p> <p>If you change an employee's automatic deposit instructions, the system creates a prenote. If you do not want a prenote, you must change the value in the Prenote Flag field to N.</p> <p>You cannot use this field for Canadian employees.</p>
Wage Attachment Payee	<p>The address book number for the supplier who receives the final payment.</p> <p>In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.</p> <p>For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.</p>
Vacation Factor	<p>Enter the number of pay periods that this check includes. This factor directs the Vertex payroll tax program to treat the pay as a vacation advance. The system averages the computed taxes over the number of pay periods you enter. See the Vertex system manual for an explanation on the method the system uses to calculate tax for vacation advances.</p>
Max/Min Net Pay	<p>The lowest amount to be generated as a check, bank advice, or payslip. The system does not allow zero amount checks if you have specified a minimum check amount. You can leave this field blank. Generally, this field's value will specify the minimum amount that must be paid to the employee.</p>
Business Unit – Last Worked	<p>The last business unit (job) number associated with this employee. This field is used for distribution of paychecks and in the generation of journal entries. When you process a payroll cycle that includes the employee, the system automatically updates this field.</p>

## Entering Additional Benefits Information for Employees

Additional benefits information includes information related to the following:

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

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

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

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

### Before You Begin

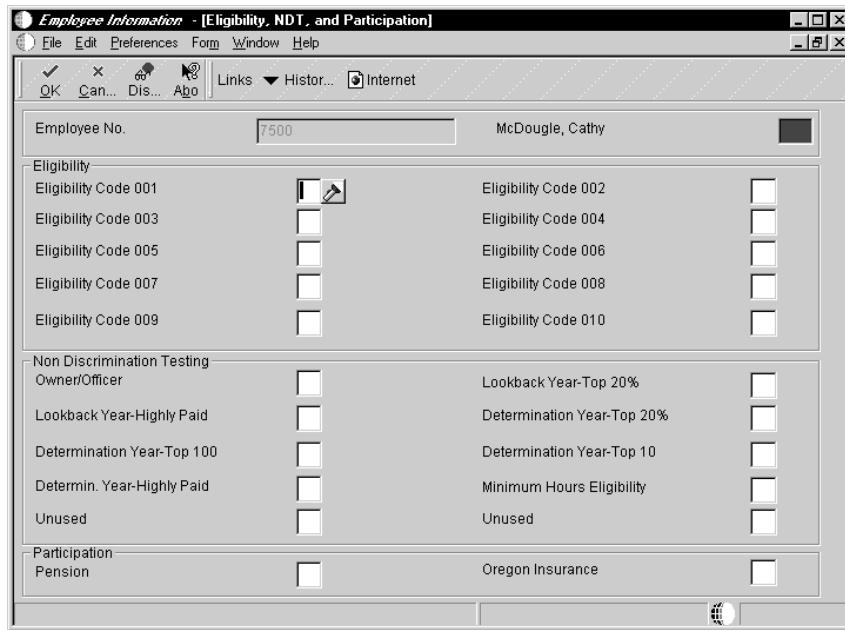
Set up eligibility codes in UDC 05/YB.

#### ► **To enter additional benefits information for employees**

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

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



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

**Caution:** Some of the following explanations in the following field tables refer to user defined code tables for System 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

---

<b>Field</b>	<b>Explanation</b>
Eligibility Code 001	<p>A code to specify an employee's eligibility for or participation in various user defined plans or programs. For example, these codes can be used to designate the following:</p> <ul style="list-style-type: none"> <li>Voluntary Accidental Death &amp; Dismemberment Insurance</li> <li>Overtime Call Up</li> <li>Profit Sharing</li> <li>Political Action Committee</li> <li>Coffee Fund</li> <li>U.S. Citizen</li> </ul>

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Field	Explanation
Owner/Officer	The non-discrimination testing code that you use to identify owners and officers of the company.
Lookback Year-Top 20%	The non-discrimination testing code that identifies the top 20% most highly compensated employees for the previous year.
Lookback Year-Highly Paid	The non-discrimination testing code that identifies the employees who were highly-compensated in the previous year.
Determination Year-Top 20%	The non-discrimination testing code that identifies the top 20% most highly compensated employees for the determination year.
Determination Year-Top 100	The non-discrimination testing code that identifies the 100 employees who were paid the most during the determination year.
Determination Year-Top 10	The non-discrimination testing code that identifies the 10 employees who were paid the most during the determination year.
Determin. Year-Highly Paid	The non-discrimination testing code that identifies the employees who were highly-compensated in the determination year.
Minimum Hours Eligibility	A code that indicates an employee has worked the minimum number of hours required for participating in your organization's 401(k) plan. When you run the Determine Eligibility by Hours program (P083675), the system automatically completes this field with "yes" for each employee who has worked at least the minimum number of hours.
Pension	A code that specifies whether the employee is eligible to participate in the company's pension or 401(k) plan. When you process W-2 information for employees, the code that you enter in this field determines whether the system places an X, indicating employee eligibility, in the pension box of the employee's W-2 form.
Oregon Insurance	A code to specify whether an employee is participating in the Oregon Industrial Insurance program. The Oregon SUI continuation report uses the code in this field to determine what to enter in the appropriate box on the tax return.

## Entering User Defined Information for Employees

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

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

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

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

Entering user defined information for employees includes the following tasks:

- Entering information in category codes
- Entering user defined dates

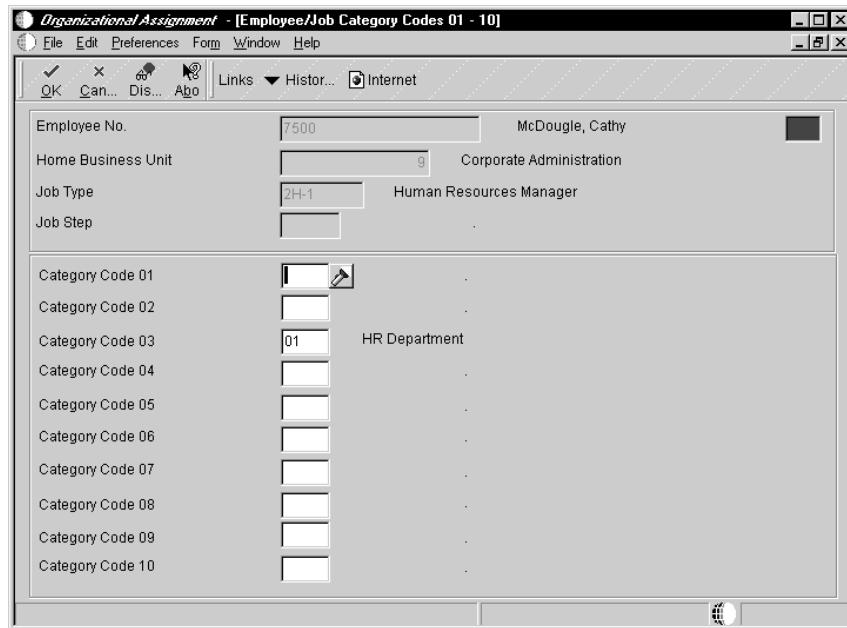
### ► **To enter information in category codes**

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

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

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



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

### ► To enter user defined dates

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

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

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

## Entering Additional Employee Information

The screenshot shows a Windows application window titled "Organizational Assignment - [Employee/Job User Defined Dates 01 - 10]". The window has a standard Windows title bar with icons for minimize, maximize, and close. Below the title bar is a menu bar with File, Edit, Preferences, Form, Window, and Help. A toolbar below the menu bar contains OK, Cancel, Discard, and Abort buttons, along with Links, History, and Internet buttons. The main area of the window contains several input fields and labels:

Employee No.	7500	McDougle, Cathy	
Home Business Unit		Corporate Administration	
Job Type	2H-1	Human Resources Manager	
Job Step			
User Defined Date 01		User Defined Date 06	
User Defined Date 02		User Defined Date 07	
User Defined Date 03		User Defined Date 08	
User Defined Date 04		User Defined Date 09	
User Defined Date 05		User Defined Date 10	

3. On User Defined Dates, complete any applicable fields and click OK.



# Understanding Employee Compensation

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

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

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

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

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

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

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

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

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

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

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

- Scenario 1: The Pay Rate table as the default pay rate source

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

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

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

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

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

The following list provides the guidelines for changing the values on the Basic Compensation form (W0801CMBP):

**Hourly rate**

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

**Standard hours per year**

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

The system recalculates the annual salary for the employee.

**Full-time equivalents (FTE)**

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

## Overriding the Default Pay Rate Source

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

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

## See Also

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

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

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

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

The following list provides the guidelines for changing the values on the Basic Compensation form (W0801CMBP):

**Pay grade step**

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

**Hourly rate**

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

**Standard hours per year**

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

**Salary**

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

**FTE**

When you change the FTE for an employee, you must also delete the employee's salary and standard hours per year. The system adjusts the employee's standard hours per year and salary, based on the pay grade step.

## Overriding the Default Pay Rate Source

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

See *Scenario 3: No Pay Rate Source as the Default Pay Rate Source* for information about salary and hourly rate calculations for such employees.

### See Also

- *Understanding Pay Rate Source Setup, Setting Up Pay Grades and Setting Up Pay-Grade Steps* for more information about pay grade tables

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

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

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

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

**Salary**

When you change the employee's salary, the system recalculates the hourly rate, based on the new salary and the standard hours per year for the employee.

**Standard hours per year** When you change the standard hours per year for an employee, the system recalculates the hourly rate, based on the new standard hours per year and the existing salary.

**FTE** Changing the FTE for an employee has no effect on salary and hourly rate calculations.

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

**Hourly rate** Changing the hourly rate for an employee has no effect on standard hours per year. The system recalculates the annual salary for the employee, based on the new hourly rate and the standard hours per year for the employee.

**Standard hours per year** When you change the standard hours per year for an employee, the system recalculates the salary, based on the new standard hours per year and the employee's hourly rate.

**FTE** Changing the FTE field for an employee has no effect on salary and hourly rate calculations.

### See Also

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



## **Entering Employee Instructions**

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

Entering employee instructions includes the following tasks:

- Entering employee deduction, benefit, and accrual instructions
- Entering labor distribution instructions
- Understanding Split Time
- Entering automatic-deposit instructions

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

### **Entering Employee Deduction, Benefit, and Accrual Instructions**

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

1. One-time DBA override in Time Entry
2. Employee DBA instructions
3. Group DBAs
4. DBA setup

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

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

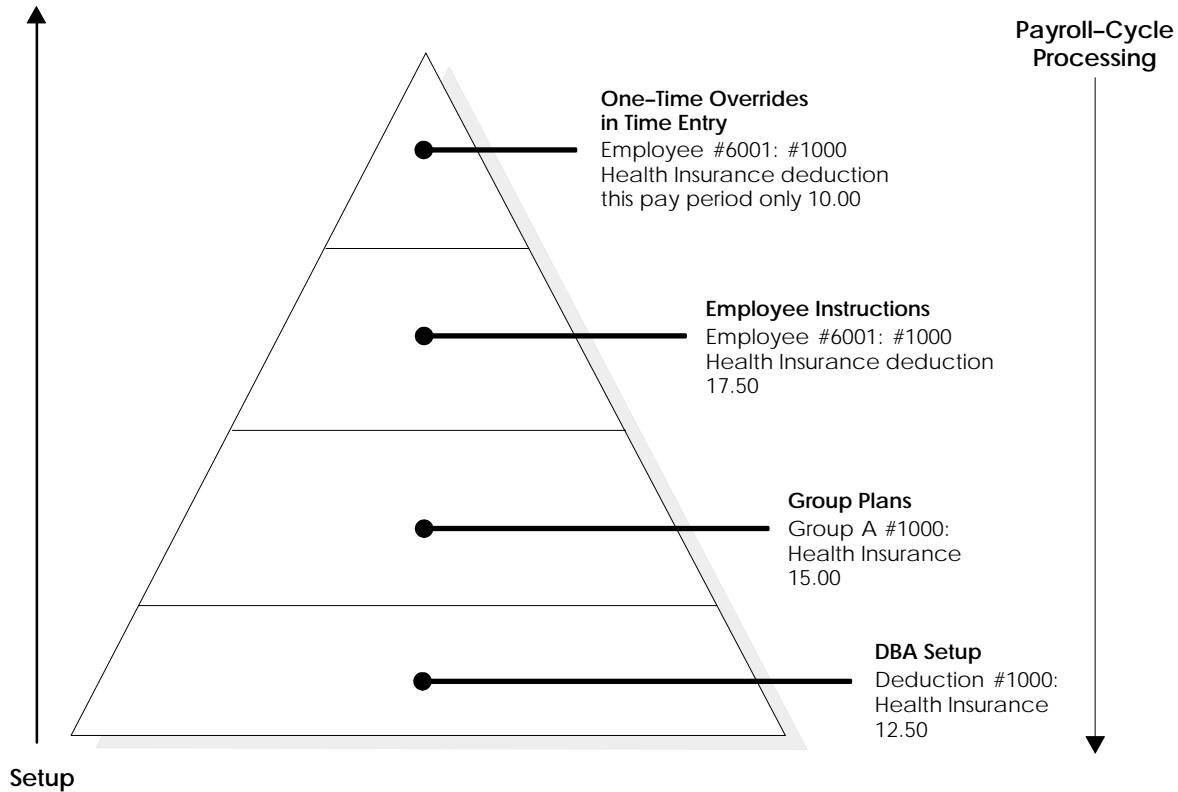
To help you understand how to assign DBAs, the following graphic illustrates the order in which the system manages DBA setup and DBA calculations:

**DBA setup**

When you set up DBAs, you first set up general DBAs that apply to the majority of your employees. Then you set up DBAs that apply to specific groups of employees or specific employees. Finally, you can apply one-time DBA overrides for specific employees for any one pay period.

**DBA calculations**

During the payroll-cycle processing, the system first calculates one-time DBA overrides. If there are no DBA overrides, then the system searches for DBAs that apply to the individual employee or employee groups. If no employee-specific DBAs or group plan DBAs exist, the system calculates any general DBAs.



The information that you enter on the DBA Instructions form represents the third level of DBA assignment, the employee level.

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

- Enter exceptions by employee for a group of DBAs
- Enter overrides for DBA amounts, dates, and limitations
- Set up start and stop dates for a DBA
- View expired or cleared DBA transactions

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

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

Although you can use this form to assign all DBAs for an employee, maintaining the lists requires considerable effort. For this reason, J.D. Edwards recommends that you assign the majority of an employee's DBAs in a group plan and that you use DBAs for an individual employee only for exceptions to the group plans.

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

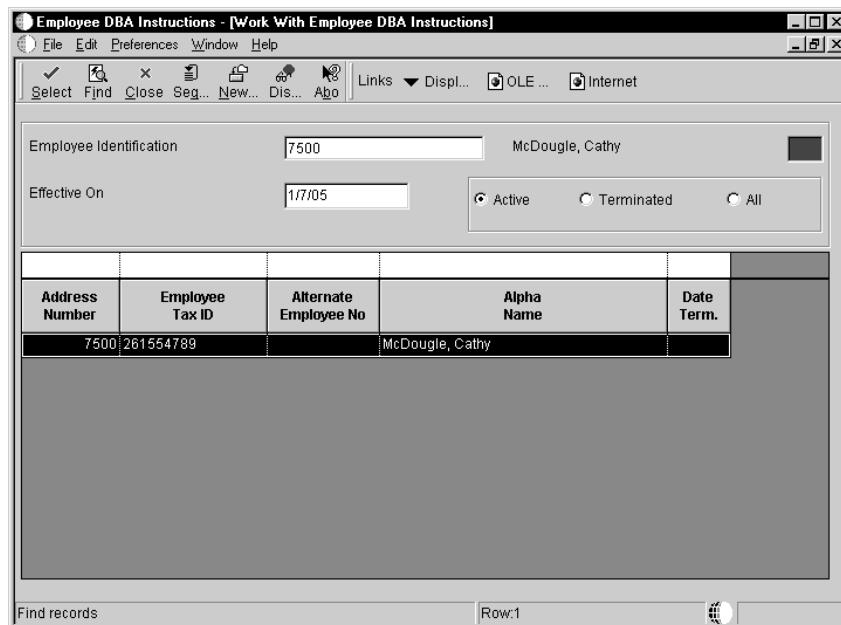
If you are using the HR-Benefits module, the system automatically assigns DBA codes to an employee record when you enroll the employee in benefit plans. The DBA codes for these benefit plans appear on Employee DBA Instructions.

### See Also

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

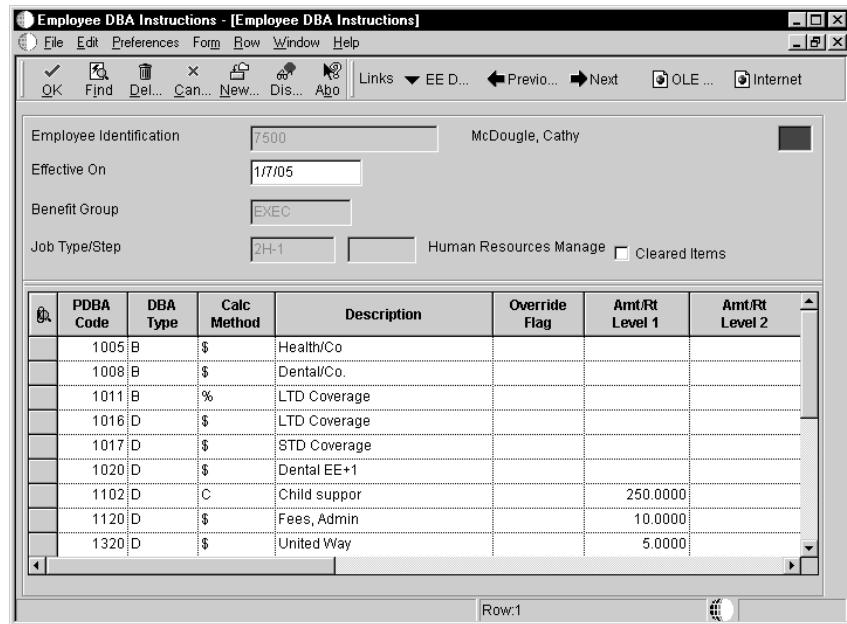
► To enter employee deduction, benefit, and accrual instructions

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



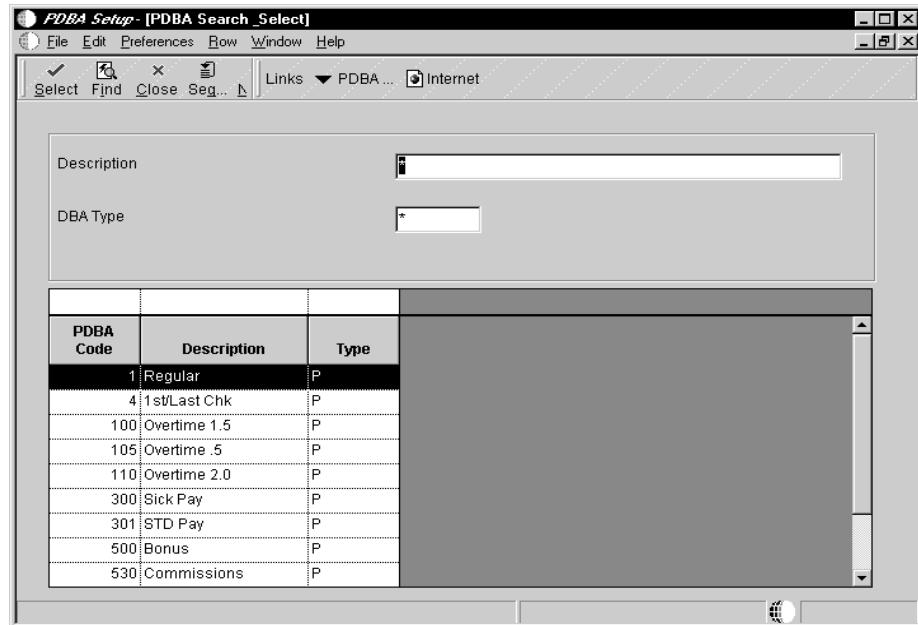
1. On Work With Employee DBA Instructions, complete either of the following fields:
  - Employee Identification
  - Effective On
2. Click one the following options to narrow your search and click Find:
  - Active
  - Terminated
  - All
3. On Work With Employee DBA Instructions, choose one or more records and click Select.

The Employee DBA Instructions form appears, which displays information for the employee record first selected.



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

- PDBA Code



7. On PDBA Search and Select, choose a DBA and then choose PDBA Recap from the Row menu.
8. On DBA Recap, review the information and then click Cancel.

The system returns you to the PDBA Search and Select form.

9. Choose a DBA and click Select.

The system displays the Employee DBA Instructions form again with the DBA code.

10. On Employee DBA Instructions, continue assigning a DBA by completing the following optional fields:
  - Amt/Rt Level 1
  - Amt/Rt Level 2
  - Pay Start Date
  - Pay Stop Date
11. If you are integrating Payroll with Accounts Payable and you need to activate vouchering for this employee, complete the following field:
  - Voucher Flag
12. To specify a payee for the voucher, complete the following field:
  - Payee No
13. Review the default information in the following fields and, if necessary, enter override information:
  - DBA Type
  - Calc Method
  - Description
  - Override Flag
  - Group Code
  - Table Code
  - Amount Due
  - Prior DBA
  - Ded Per 1
  - Nbr Per
  - Union Code
  - Job Type
  - Job Step
  - Explanation –Remark–

- Limit \$ Pay Period
  - Limit \$ Monthly
  - Limit \$ Quarterly
  - Limit \$ A/L1
  - Limit \$ A/L2
  - Limit % Period
14. Click OK.
15. To obtain the next employee record, click Next and repeat steps 4–14.
16. When you are finished assigning DBA instructions to employees, click OK.

If any of the DBAs that you entered are for wage attachments, the system displays the Work with Wage Attachments form. See *Entering Wage Attachments for Employees* in the *Payroll Guide*.

## Related Task

### **Deleting a DBA Instruction**

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

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

Field	Explanation
PDBA Code	A code that defines the type of pay, deduction, benefit, or accrual.  Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

<b>Field</b>	<b>Explanation</b>
Amt/Rt Level 1	<p>A value that is either a percentage, a monetary amount, or an hourly rate, depending on where it is used:</p> <ul style="list-style-type: none"> <li>1 For a deduction, benefit, or accrual, the meaning of this value depends on the method of calculation. The method determines whether the deduction is a flat monetary amount, a percentage, or a multiplication rate. Table method DBAs, depending on which table method they use, can either use this amount in the calculation or ignore it. If there are exceptions to the table calculation, you can override the table code in the detail area, set up a flat monetary DBA amount, or override the amount with a one-time override for a timecard.</li> <li>2 For a pay type, amounts entered in this field override the hourly rate.</li> </ul>
Amt/Rt Level 2	<p>The second amount or rate associated with a deduction, benefit, or accrual. Because many DBA types require multiple tiers, two levels of Amount (Rate) exist. The system uses the first level, Amount (Rate) 1, until the annual limit is reached. Then, the second level, Amount (Rate) 2, begins the next time the employee is paid. Amount (Rate) 2 continues until the second annual limit is reached.</p> <p>This field works in conjunction with the annual limit fields.</p> <p>The rate you enter in this field supersedes any other table rate for an employee, except for one-time overrides during time entry.</p>

Field	Explanation
Pay Start Date	<p>The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.</p> <p>You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).</p> <p>..... <i>Form-specific information</i> .....</p> <p>Enter the date an instruction starts, for example, the date the system should start a deduction.</p> <p>The start date must be less than or equal to the timecard date. To start a DBA at the beginning of a pay cycle, make the start date equal to the first day of the pay cycle. For example, if the pay cycle runs from 10/01 to 10/15, start the DBA on 10/01.</p> <p>If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.</p> <p>For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.</p> <p>For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.</p>

<b>Field</b>	<b>Explanation</b>
Pay Stop Date	<p>The date that an employee should no longer be included in a payroll cycle, or the date that an employee stops participating in the company's benefit plans. You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT.</p>
	<p>This date may also be the date that a deduction, benefit, or accrual instruction stops.</p>
	<p>..... <i>Form-specific information</i> .....</p>
	<p>The stop date must be less than the timecard date. To stop a DBA before the next pay cycle, make the stop date one day prior to the first day of the next pay cycle. For example, if the pay cycle runs from 10/01 through 10/15, set the DBA stop date as 9/30.</p>
	<p>If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.</p>
	<p>For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.</p>
	<p>For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.</p>
Voucher Flag	<p>A code used to determine whether the system should generate a voucher for the DBA, tax, or wage attachment during the final update phase of the payroll processing cycle. Valid codes are:</p>
	<p>N      No, do not generate a voucher</p>
	<p>Y      Yes, generate a voucher</p>
Payee No	<p>The address book number for the supplier who receives the final payment.</p>
	<p>In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.</p>
	<p>For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.</p>

<b>Field</b>	<b>Explanation</b>
DBA Type	<p>A code used to distinguish between the following types of payroll entries:</p> <ul style="list-style-type: none"> <li>P Time Cards (Earnings)</li> <li>D Deductions withheld</li> <li>B Benefit (both cash and non cash)</li> <li>A Accrual of sick, vacation, compensation, and so forth</li> </ul>
	<p>Note: These codes may only be changed by J.D. Edwards  If you enter an * in this field the system displays all four types of PDBAs.</p>
Calc Method	<p>A user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.</p>
Name – Remark Explanation	<p>A name or remark that describes an element in the J.D. Edwards systems.</p>
Override Flag	<p>A Yes/No field indicating whether the system treats the Amount/Rate field as a zero amount override. You use this field primarily when an employee is part of a group plan yet does not receive a particular benefit in that plan.</p>

<b>Field</b>	<b>Explanation</b>
Group Code	<p>Specify a code common to all deduction or benefits that share the same limitations (for example, pay period dollar amount or percentage, monthly, annual, and so on). The system takes these limits from the first deduction encountered in the group and withhold for all deductions until the limit is reached for the aggregate.</p>
	Example:
	<p>Deduction 6400, Group A, Annual Limit = \$1000, No Pay Period Limit Deduction 6430, Group A, No Annual or Pay Period Limit Deduction 7700, Group A, No Annual or Pay Period Limit Deduction 9400, Group B, No Annual or Pay Period Limit Deduction 7550, Group B, No Annual Limit, Pay Period Limit = \$50</p>
	<p>For this example, the system looks at the deductions assigned to Group A, and applies a \$1000 annual limit for all three deductions. The system continues to take the deductions from an employee's paycheck until a total of \$1000 has been deducted between all entities in Group A for the year. For deductions in Group B, the system deducts no more than \$50 per pay period between for the two deductions.</p>
	<p>When you enter a value in Split Deduction Flag for an employee who has multiple families, you must enter a group limit code.</p>
Table Code	<p>The table used if the calculation requires table values.</p>
Amount Due	<p>The balance or amount due on an open invoice or voucher.  In the Address Book Master file (F0101) this is a memo amount field used to determine if a particular order exceeds a credit limit. See Order Processing system.</p>
Prior DBA	<p>A code that identifies another DBA whose limit must be met first before this DBA calculates. For example; deduction 1400 has an annual limit of \$2,000.00. After this limit is met, deduction 1500 begins calculation and withholding.</p>
	<p>The DBA number of the predecessor must be lower than the successor's number.</p>

Field	Explanation
Ded Per 1	<p>A code designating the pay period in which the system calculates the DBA or auto deposit. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y      Take the DBA or auto deposit during the current period.</li> <li>N      Do not take the DBA or auto deposit during the current period.</li> <li>*      Take the DBA or auto deposit only during the first pay period of each month that the employee works based on the ending date of this month's pay period.</li> <li>blank   Continue to look for a code at the lower level. The system searches for DBA or auto deposit rules first at the employee level, then at the group level, and finally at the DBA master level. If the field is blank at all levels, the system does not calculate the DBA or auto deposit in that period.</li> <li>M      Use this value only in the field for a fifth period to calculate the benefit during the special, or manual, timecard post. M applies only to benefits based on gross hours or dollars. An M implies a Yes for a weekly withholding frequency. You should not use this value for any DBA with B in the Method of Calculation field.</li> </ul>
Nbr Per	<p>The number of periods a deduction or benefit should be taken. The system automatically decreases this number by one for each period taken.</p> <p>You must enter a value in this field if you automate the Number of Periods field.</p> <p>For World: You must enter a value in this field if you entered Y (Yes) in the Use Number of Periods field (located on the DBA Additional Information window, accessed from the DBA Setup form).</p>
Union Code	<p>A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.</p>
Job Type	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Job Step	<p>A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.</p>

<b>Field</b>	<b>Explanation</b>
Limit \$ Pay Period	The maximum amount that can be withheld or accrued in a pay period for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.
Limit \$ Monthly	The maximum amount that can be withheld or accrued in a month for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.
Limit \$ Quarterly	The maximum amount that can be withheld or accrued in a quarter for a deduction or benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.
Limit \$ A/L1	The maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.
<p>NOTE: For the Payroll system, this field can represent either an initial annual limitation or a final limitation in a year:</p> <ul style="list-style-type: none"> <li>• If the Annual (Level 1) field is not blank, this amount represents the first level of the yearly limitation. The value in Annual (Level 2) represents the final limitation.</li> <li>• If an annual limit is specified on a DBA calculation table, the annual limit from the table will take precedence over annual limits defined at the master DBA or employee levels.</li> </ul>	
Limit \$ A/L2	The maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.
<p>NOTE: This field represents the second level annual limitation. It is used when there is an initial limitation and a corresponding rate, which is followed up by a new rate and a final limitation. This field can not be used independently. There must always be a value in the Annual (Level 1) field.</p>	
Limit % Period	The maximum percentage of pay that the calculated deduction or benefit amount may not exceed. This percentage works in conjunction with the dollar limits of the deduction or benefit, so whichever limit is reached first stops the calculation. For accrual transactions, this field represents an hour's limit.

Field	Explanation
Cleared Items	<p>A field that specifies whether cleared deductions appear on the form. To display cleared items, click the Cleared Items check box.</p> <p>The system categorizes deductions as cleared when the following occur:</p> <ul style="list-style-type: none"> <li>• The through date of the deduction is older than the system date.</li> <li>• The Declining Balance flag for the deduction is turned on and the amount due is 0.</li> <li>• The Use Number of Periods flag is turned on and the number of periods is 0.</li> </ul>

## Entering Labor Distribution Instructions

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

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

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

- If an employee always spends 80% of the time processing payroll and 20% managing other staff, then you can allocate the time 80% to G/L account Regular Pay and 20% to G/L account Regular Pay-Managers using labor distribution instructions.
- If an employee spends 5 hours per week performing administrative duties and 35 hours performing regular salaried duties, you can allocate the amount to two different G/L accounts.
- In the previous example, you can specify the start and stop dates of the instructions. These dates control when the labor distribution instructions can be used. If you entered a timecard on a different date, the instructions would not apply, and you could not copy them in time entry.
- If you are entering a batch of timecards for employees whose time needs to be allocated identically, you can assign labor distribution instructions to one employee in the batch and then copy the instructions to all of the other employees in the batch. An example of this would be in a hospital setting where a group of general nurses works on a unit part of the time and also works in the HR Department in Occupation Health evaluating employees' on-the-job injuries the rest of the time.

- When an employee works for a business unit or company other than the home company, you can override the position ID so that budget allocations reflect the position ID of the business unit or company where the employee performed work. This feature is useful in the public sector and in organizations in which budget tracking by position is critical to maintain or justify the appropriate workforce.

You use labor distribution instructions to complete the following procedures:

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

### ► To enter labor distribution instructions

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

- On Work With Labor Distribution Instructions, click Add.

Pay Code	Pay Description	Hours/Percent	Account Number	Pay Start Date	Pay Stop Date
1	Regular	20.00	9.8118		
1	Regular	80.00	9.8115		

- On Labor Distribution Instructions, complete the following fields:

- Employee Identification

- Percent or Hours
  - Pay Code
  - Account Number
3. If an employee has more than one job, complete the following fields:
- Job Type
  - Job Step
  - Home Business Unit
4. To override default job, pay, or tax information, complete any of the following optional fields:
- Pay Start Date
  - Pay Stop Date
  - WCI Code
  - WCI Class
  - Rate – Hourly
  - Billing Rate
  - Burden Rate
5. Click OK to save the record.

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Field	Explanation
Employee Identification	This field may hold the employee number, TAX ID or Alternate number. The value this field holds, depends on the employee number mode setup in the Payroll Constants for Company 00000.
Percent or Hours	A code that indicates whether the corresponding Shift Differential field contains an hourly rate or a percentage. Valid values are: H      The amount in the Shift Differential field is added to the hourly rate. %      The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.
Percent or Hours	A code that indicates whether the corresponding Shift Differential field contains an hourly rate or a percentage. Valid values are: H      The amount in the Shift Differential field is added to the hourly rate. %      The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.

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<b>Field</b>	<b>Explanation</b>
Pay Code	<p>A code that defines the type of pay, deduction, benefit, or accrual.</p> <p>Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.</p>
Account Number	<p>A field that identifies an account in the general ledger. You can use one of the following formats for account numbers:</p> <ul style="list-style-type: none"> <li>• Standard account number (business unit.object.subsidiary or flexible format)</li> <li>• Third G/L number (maximum of 25 digits)</li> <li>• 8-digit short account ID number</li> <li>• Speed code</li> </ul> <p>The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program.</p>
Job Type	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Job Step	<p>A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.</p>
Home Business Unit	<p>The number of the business unit in which the employee generally resides.</p>
Pay Start Date	<p>The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.</p> <p>You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).</p> <p style="text-align: right;">..... <i>Form-specific information</i> .....</p> <p>You can use this field only if the method you are using is based on hours. You can set a range of pay period ending dates during which a particular labor distribution instruction is effective. Leave these fields blank for any standard, continuous distribution instructions.</p>

Field	Explanation
Pay Stop Date	<p>The date that an employee should no longer be included in a payroll cycle, or the date that an employee stops participating in the company's benefit plans. You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT.</p>
	<p>This date may also be the date that a deduction, benefit, or accrual instruction stops.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p>
	<p>You can use this field only if the method you are using is based on hours. You can set a range of pay period ending dates during which a particular labor distribution instruction is effective. Leave these fields blank for any standard, continuous distribution instructions.</p>
WCI Code	<p>A user defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers compensation insurance reports.</p>
WCI Class	<p>The subclass code defines any special circumstances associated with the workers compensation insurance (WCI) code that result in multiple rates for the same WCI code. The multiple rates may be due to location, risk, and so forth. The subclass should remain blank if multiple rates do not exist. Default codes are:</p>
	<p>Blank There are no special circumstances associated with this code.</p>
	<p>F There are special circumstances associated with this code.</p>
Hourly Rate	<p>The employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.</p>
	<p>In the Employee Master table, this is the employee's base hourly rate. In the Union Rates table, this is the straight time rate.</p>
	<p>Note: If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.</p>

<b>Field</b>	<b>Explanation</b>
Billing Rate	<p>A rate used for the billing of labor services. This rate is often referred to as the billing or recharge rate. The extended amount based on this rate will be charged to the primary distribution account on the timecard with an offset being made to an account derived from the Accounting Rules table. This rate will not affect the employee's payroll. To allow billing rates in time entry, you must set the employee's record type as either 2 or 3 on the Basic Employee Entry form.</p> <p>Enter a rate on any of the following forms to override the rate in the Employee Primary Job table:</p> <ul style="list-style-type: none"> <li>• Pay Rate Information</li> <li>• Employee Labor Distribution</li> <li>• Occupational Pay Rates</li> <li>• Time Entry by Employee</li> <li>• Time Entry by Job or Business Unit</li> <li>• Daily Timecard Entry</li> <li>• Time Entry by Employee with Equipment</li> <li>• Time Entry by Shop Floor Control</li> </ul>
Burden Rate	An hourly rate to be used when charging 'burden' associated with the actual billing (recharge) amounts.

## Processing Options for Employee Labor Distribution Instructions

Labor Distrb'n

Choose how you wish the Worker's  
Comp Code to default : \_\_\_\_\_

- '1' = From the Employee Master file regardless of the EE Labor Distribution Entry.
- '2' = From the Employee Master file only if the field is left blank.
- '3' = From the Data Dictionary if the field is left blank. ( Default )

## Understanding Split Time

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

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

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

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

### Examples: Activating Split Time

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

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

<b>Pay Code</b>	<b>Description</b>	<b>Hours or Percent</b>	<b>Account #</b>
1	Regular	60	9.8115
1	Regular	40	9.8118

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

<b>Pay Code</b>	<b>Description</b>	<b>Hours</b>	<b>Account #</b>
801	Vacation	24	9.8115
801	Vacation	16	9.8118

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

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

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

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

<b>Pay Code</b>	<b>Description</b>	<b>Hours</b>	<b>Account #</b>
801	Vacation	40	9.8118

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

<b>Pay Code</b>	<b>Description</b>	<b>Hours</b>	<b>Account #</b>
1	Regular	24	9.8115
1	Regular	16	9.8118
801	Vacation	40	9.8118

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

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

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

### Entering Automatic-Deposit Instructions

You can identify any of the following three methods of payment for each employee:

- Check
- Automatic deposit
- Cash

You enter automatic-deposit instructions for any employee who wants all or part of each payment deposited directly in a bank account.

You can perform the following additional functions:

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

#### Before You Begin

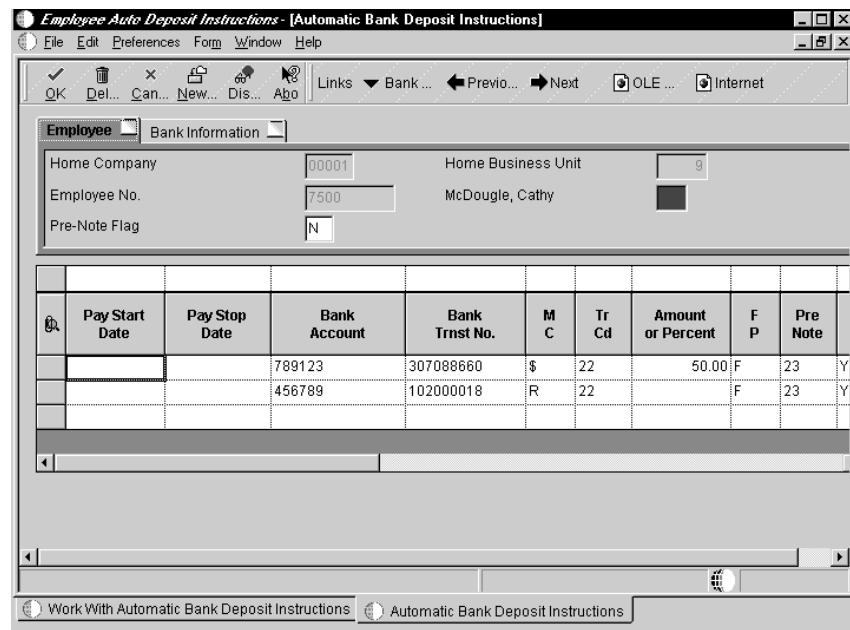
- Set up the processing options that provide the originating bank number, service class code, and standard entry class.

#### **To enter automatic-deposit instructions**

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

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



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

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

4. Complete the following optional fields:

- Pay Start Date
- Pay Stop Date

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

- Pre-Note Flag

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

- Originating Bank
- SCC
- SEC

5. Review the values supplied by the system for the following fields:

- F P
- Pre Note

- Ded Per 1
  - Ded Per 2
  - Ded Per 3
  - Ded Per 4
  - Ded Per 5
6. To create additional automatic bank deposit instructions, repeat steps 3–5.
  7. When you are finished entering instructions, click OK, or click Next to enter information for the next employee.

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<b>Field</b>	<b>Explanation</b>
Bank Account	<p>The employee's unique account number at the financial institution. You can obtain the number from the MICR line of a voided check or a deposit slip from the employee's account. You must include dash cue symbols in the field. However, they are recorded in a translated mode as a hyphen (-). You can also obtain account numbers from other sources, such as passbooks or debit cards. When transcribing information, left justify and enter only numbers (0 through 9), alphabetic (A through Z), and hyphens (-). If less than 17 characters are required, leave the unused spaces blank. Spaces left within the depositor's account number will be ignored when the paperless entry is prepared. For example, 0123 4 56789 will appear as 0123456789 in the entry record, and 0123-4 56789 will appear as 0123-456789.</p> <p>If you change this number, the system automatically prenotes the employee's auto deposit record again.</p> <p>Note: The Financial Organization Account Number (FOA#) is used as the company's unique bank account number rather than the employee's unique bank account number in the following tables:</p> <p style="text-align: center;">F06560 - Bank Reconciliation - Issue Table F06561 - Bank Reconciliation - Paid Table</p>

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<b>Field</b>	<b>Explanation</b>
Bank Trnst No.	<p>The bank transit number for the employee's financial institution. Banks might refer to this number as the ABA or payment routing number. This number can be obtained from the employee's check or deposit slip. It is located between the MICR colons (:) at the bottom of the check.</p>
	<p>For U.S. banks, this number contains 9 digits. If this number does not contain nine digits, you must contact the employee's financial institution to obtain the correct number.</p>
	<p>For Canadian banks, this number contains 8 digits. Therefore, Canadian clients must enter the bank transit number with a leading zero.</p>
	<p>If you change this number for an employee, the system creates a prenote for the employee's next auto deposit.</p>
M C	<p>An employee can in a variety of ways split up net pay. This code specifies the method(s) in which a segment is to be computed:</p>
	A      A specific amount is to be deposited.
	%      A percentage of net pay is to be deposited. You must enter a whole number. Do not use decimals.
	C      A specific amount is to be generated as a payroll check.
	P      A specific amount is to be generated as cash.
	R      The remainder of the net pay, after % and/or specific amount segments are processed, is to be deposited in the bank. This is the default.
	Q      The remainder of the net pay, after % and/or specific amount segments are processed, is to be generated as cash.
	D      The remainder of the net pay, after % and/or specific amount segments are processed, is to be generated as a payroll check.
	<p>You can have only one R, Q, or D instruction per employee.</p>
	<p><b>NOTE:</b> Even if you have only one line, you must designate a remainder record as the last instruction. This code identifies how to distribute any money left over from rounding. You can only use R, Q, or D as the remainder record. You cannot use the Distribution Start Date and Stop Date fields for remainder records.</p>
Amount or Percent	<p>The actual gross pay amount for an employee. This is to be distinguished from the distributed gross pay amount used for labor distribution. See data item DPAY.</p>
	<p>When using Work Order Time Entry, this field is used to record miscellaneous pay for an employee, (i.e. piece rate bonus).</p>

<b>Field</b>	<b>Explanation</b>
Tr Cd	<p>A code used to distinguish various types of bank accounts, for example, checking, savings, or credit union. Currently the following codes have been assigned:</p>
	Demand Account Credits
	20 - Reserved
	21 - Credit entry to return automated deposit
	22 - Automated Deposit
	Savings Account Credits
	30 - Reserved
	31 - Credit entry to return automated deposit
	32 - Automated Deposit
	Demand Account Debits
	25 - Reserved
	26 - Debit entry to return automated payment
	27 - Automated Payment
	Savings Account Debits
	35 - Reserved
	36 - Debit entry to return automated payment
	37 - Automated Payment
	NOTE: If you leave this field blank, the system uses the default value of 22.
Pay Start Date	<p>The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.</p>
	<p>You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).</p>
Pay Stop Date	<p>The date that an employee should no longer be included in a payroll cycle, or the date that an employee stops participating in the company's benefit plans. You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT.</p>
	<p>This date may also be the date that a deduction, benefit, or accrual instruction stops.</p>

<b>Field</b>	<b>Explanation</b>
Pre-Note Flag	<p>A code that lets you test the deposit instructions for one pay period before actually processing a deposit. Adding an employee to this form automatically activates this person in the automated deposit system. The system prenotes this employee in the next applicable payroll run to test the auto deposit instructions you have set up before actually depositing a check. In the prenote test, the system creates a no-dollar entry for this employee and sends it to the employee's bank account. In addition, the employee receives a check for this amount. After the test, the system changes this field to N. To repeat this test, enter P in this field.</p> <p>If you leave this field blank, the system uses the default value of P.</p> <p>If you change an employee's automatic deposit instructions, the system creates a prenote. If you do not want a prenote, you must change the value in the Prenote Flag field to N.</p> <p>You cannot use this field for Canadian employees.</p>
Originating Bank	<p>This is the transit routing number used to identify the financial organization to which the deposit tape is being sent for processing. Obtain this code from the bank at which your company's payroll account is maintained.</p> <p>This bank will serve as a clearing house for your employees' automatic deposits. Using the "Individuals Financial Organization No" (IFO#) and "Financial Organization Account Number" (FOA#), this bank will route--through electronic funds transfers (EFT)--each employee's deposit to his own account at his own financial institution.</p>
SCC	<p>This code identifies the general classification of dollar entries to be exchanged. This standard is used to facilitate transmission of data between organizations. Automated Clearing House (ACH) entries required for payroll deposits use the following service class codes:</p> <p>200 – ACH entries mixed debit and credits;</p> <p>220 – ACH credits only (batch format); or</p> <p>225 – ACH debits only (batch format).</p> <p>At the time of this writing only the use of class 200 is recommended.</p>

<b>Field</b>	<b>Explanation</b>
SEC	<p>This code permits various kinds of paperless entries to be distinguished. The following entry classes have been defined:</p> <ul style="list-style-type: none"> <li>SIA Single item authorization; and</li> <li>PPD Pre-arranged payments and deposits.</li> </ul> <p>At the time of this writing only "PPD" is recommended for the entry class.</p>
F P	<p>This code only applies to method code A (see BDM). If there is not enough net pay remaining to process the amount specified in the amount/percentage field, a value of "P" in this field specifies that a partial amount can be generated for the bank and account specified for the segment. A value of "F" specifies that if the full amount cannot be generated, the segment is ignored.</p> <p>If you leave this field blank, the system uses F as the default value.</p>
Pre Note	<p>A code used to distinguish various types of debit and credit nondollar prenotification transactions that must precede the first actual automated paperless transaction with dollars for an employee.</p> <p>Demand Account Credits</p> <ul style="list-style-type: none"> <li>23 Prenotification of Credit Authorization</li> <li>24 Prenotification of Credit/Mailed Authorization</li> </ul> <p>Savings Account Credits</p> <ul style="list-style-type: none"> <li>33 Prenotification of Credit Authorization</li> <li>34 Prenotification of Credit/Mailed Authorization</li> </ul> <p>Debits are not currently handled by this Payroll system.</p> <p>Automatic prenoting is only done one time. Therefore, if your bank requires multiple prenote cycles, you can manually set the transaction code (TCOD) for this record to a prenote code and leave it that way for as long as necessary.</p>

<b>Field</b>	<b>Explanation</b>
Ded Per 1	<p>A code designating the pay period in which the system calculates the DBA or auto deposit. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y      Take the DBA or auto deposit during the current period.</li> <li>N      Do not take the DBA or auto deposit during the current period.</li> <li>*      Take the DBA or auto deposit only during the first pay period of each month that the employee works based on the ending date of this month's pay period.</li> <li>blank   Continue to look for a code at the lower level. The system searches for DBA or auto deposit rules first at the employee level, then at the group level, and finally at the DBA master level. If the field is blank at all levels, the system does not calculate the DBA or auto deposit in that period.</li> <li>M      Use this value only in the field for a fifth period to calculate the benefit during the special, or manual, timecard post. M applies only to benefits based on gross hours or dollars. An M implies a Yes for a weekly withholding frequency. You should not use this value for any DBA with B in the Method of Calculation field.</li> </ul>

## Processing Options for Auto Deposit Instructions

### Bank Info.

- |   |       |
|---|-------|
| 1. Originating Financial Organization No. | <hr/> |
| 2 .Service Class Code                     | <hr/> |
| 3 . Standard Entry Class                  | <hr/> |

## Revising Employee Information

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

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

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

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

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

Revising employee information includes the following tasks:

- Changing employee salaries
- Correcting employee information
- Processing future changes
- Processing mass changes
- Updating Employee Master records
- Entering leave-of-absence information
- Terminating an employee
- Completing a termination using Workflow

## Changing Employee Salaries

You might need to change salaries for an employee or a group of employees. For example, you might give an employee a raise to complement a promotion, or you might increase all salaries because of inflation.

You have the following options for changing employee salaries:

- Changing an employee's salary using Workflow
- Changing employee salaries using salary planning
- Changing an employee's salary using pay rate information

Workflow is an electronic message delivery system that you can use to process salary changes automatically. The Workflow process includes obtaining approval for salary increases over a specified limit and updating the Employee Master table (F060116). Workflow is designed to save time and reduce errors to salary changes.

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

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

Alternatively, you can change employee salaries as follows:

**Individual employee changes**

You can manually change the Salary field on the Basic Compensation form.

See *Correcting Employee Information* for information about how to change an employee's salary manually.

**Future date changes** If a salary change will not take effect until a future date, you can enter information using the Future Data EE Master Revisions form.

See *Processing Future Changes* for more information about changing salaries for a future date.

**High-volume changes** You can reduce data entry time by changing salaries for groups of employees using the Employee Master Mass Changes form.

See *Processing Mass Changes* for more information about changing salaries for groups of employees.

## Changing an Employee's Salary Using Workflow

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

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

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

Changing an employee's salary using Workflow includes the following procedures:

- Initiating a salary change
- Approving a salary change

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

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

### Before You Begin

- Create a congratulatory letter if needed. See *Mailmerge Workbench* in the *OneWorld Foundation Guide*.
- Choose a version and set up your processing options for Basic Compensation.
- Verify that the Workflow process EEMAST1 is activated in the Process Master. See *Activating or Deactivating a Workflow Process* in the *Enterprise Workflow Management Guide* for more information.

### ► To initiate a salary change

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

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

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

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

The screenshot shows the 'Basic Compensation' window with the title bar 'Basic Compensation - [Basic Compensation]'. The menu bar includes File, Edit, Preferences, Form, Window, and Help. The toolbar has OK, Cancel, Back, Cont, Dis..., and Abo buttons. The main area displays employee information: Employee No. 7500, Name McDougle, Cathy; Home Business Unit 9, Corporate Administration; Job Type/Step 2H-1, Human Resources Manager; Pay Frequency S, Semi-Monthly; Union; Locality Headquarters (default); Position ID 2H-1, Human Resources Manager. Below this, the Pay Class is set to Salaried, Pay Grade/Step S6, Salary 50,000.00, Hourly Rate 24.038. Pay Rate Source is set to None. The Pay Period Salary is 2,083.33, and the Compa-Ratio is 90. Other fields include Std Hrs/Day, Std Hrs/Year 2080.00, Std Days/Year, Default Auto Pay Type, Pay on Std Hours, Overtime Exempt Y, and FTE 1.00.

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

- Salary

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

Field	Explanation
Employee Identification	This field may hold the employee number, TAX ID or Alternate number. The value this field holds, depends on the employee number mode setup in the Payroll Constants for Company 00000.

<b>Field</b>	<b>Explanation</b>
Salary	<p>The amount that an employee is paid in one year, provided that the employee is paid every pay period of the year.</p> <p>For World:</p> <p>For the employee's primary job, the system stores the annual salary in both the Employee Master table (F060116) and the Employee Multiple Job table (F060118). For secondary jobs, the system stores the annual salary in the Employee Multiple Job table (F060118).</p> <p>Depending on how the Display Salary (Annual/Effective) field is set in the History Constants table (F08040), this field displays one of the following:</p> <ul style="list-style-type: none"> <li>• Annual salary. For salaried employees who are not associated with a contract calendar, this amount is either entered by the user or retrieved from the Pay Grade/Step table. For employees who are associated with a contract calendar, the system calculates this amount using the formula, <math>((\text{current salary} - \text{salary paid before change}) / \text{number of periods to pay}) \times \text{pay frequency}</math></li> <li>• Effective salary, which equals <math>((\text{annual salary} / \text{pay frequency}) \times \text{periods to pay})</math></li> </ul> <p>For employees whose jobs are associated with a contract calendar, the system recalculates the effective salary if you enter a mid-calendar salary adjustment for the employee. After you enter a mid-calendar adjustment, the effective salary equals the salary that is to be paid to the employee from the time of the adjustment to the end of the contract.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>When you enter a value in this field for a salaried employee, the system calculates the hourly rate based on one of the following:</p> <ul style="list-style-type: none"> <li>• Standard hours per year entered at the employee level</li> <li>• Standard hours per year specified in company options</li> </ul>

## Processing Options for Basic Compensation Information

### Process

1. Workflow      Enter a salary  
threshold      Zero = default  
Zero = default

Rate - Salary, Annual

2. Workflow      Enter salary percent  
change threshold  
threshold

Percent

### ► To approve a salary change

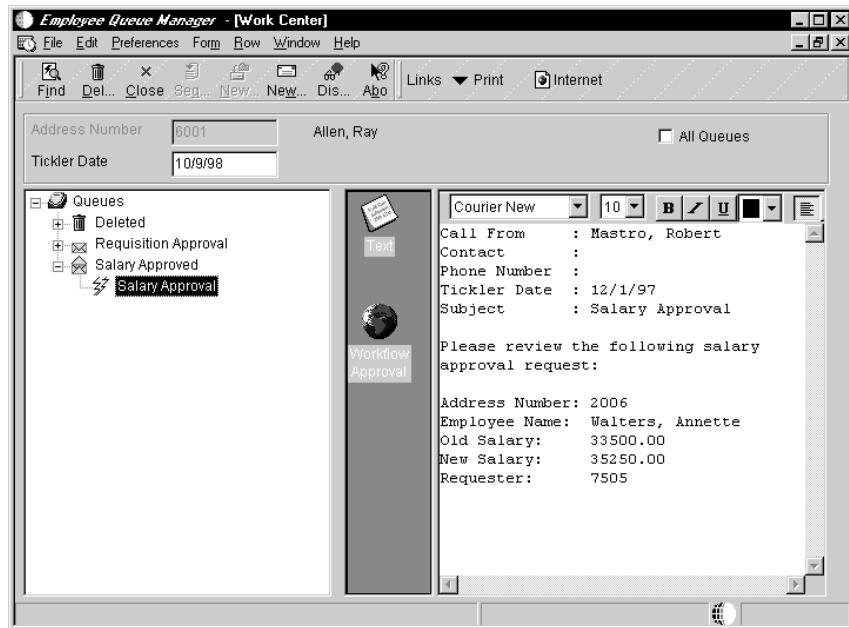
From the Workflow Management menu (G02), choose Employee Queue Manager.

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

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

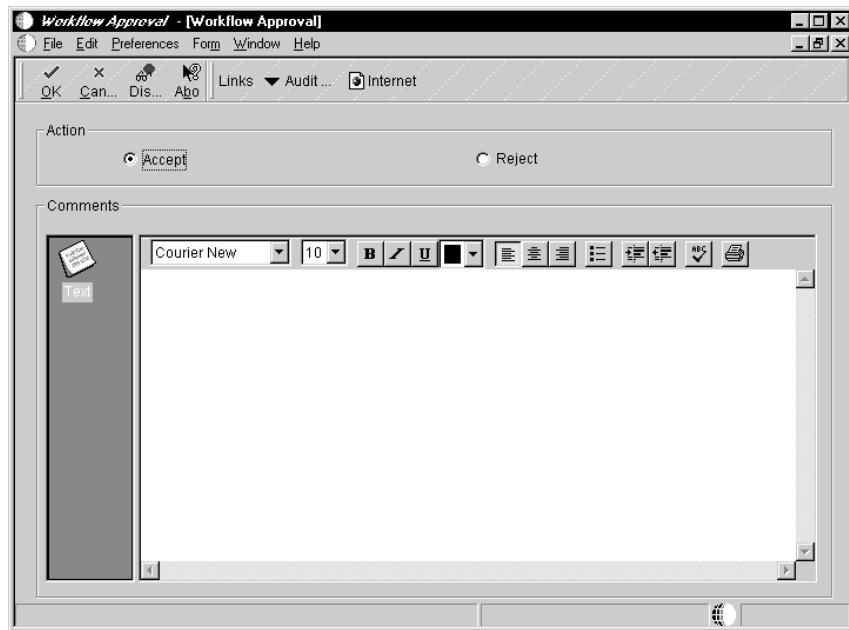
**Note:** If more than one approval is needed for a salary change, the change will not take effect until all supervisors respond.

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



All salary requests pending approval appear in the right queue.

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



- On Workflow Approval, click one of the following options to accept or reject the salary change request, add text if applicable, and click OK.

- Accept
- Reject

6. On Employee Queue Manager, click Close.

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

<b>Field</b>	<b>Explanation</b>
Skip To Name	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.
Search Type	A user defined code (01/ST) that identifies the kind of address book record that you want the system to select when you search for a name or message. Examples include the following: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists T Tax authority
Cat Code 1	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

## Changing Employee Salaries Using Salary Planning

With Salary Planning, you can calculate salary changes for employees using a third-party spreadsheet such as Excel or Lotus. Salary Planning imports the information to update the Salary or Hourly Rate fields on the Basic Compensation form (W0801CMPB) and the Employee Master table (F060116).

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

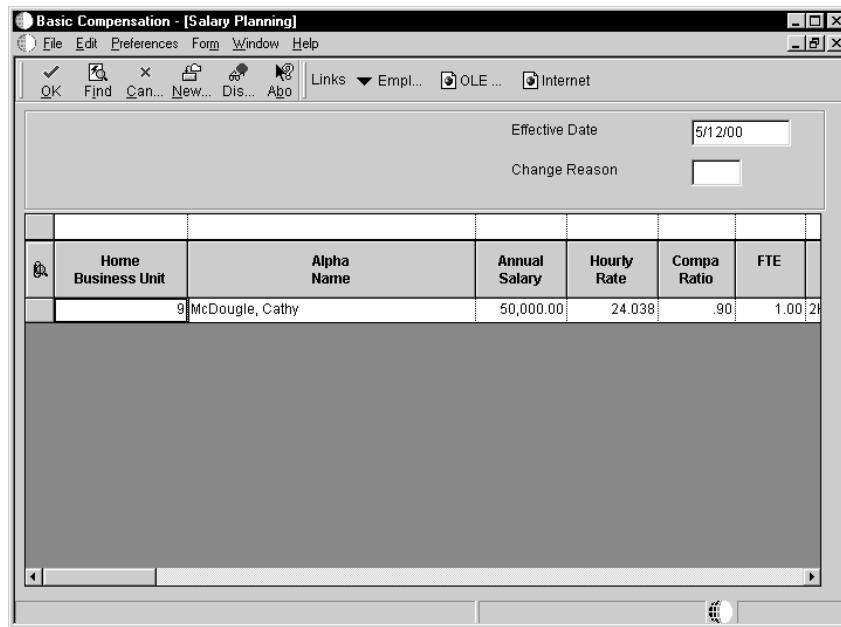
### See Also

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

► **To change employee salaries using salary planning**

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

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



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

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

7. Calculate any necessary changes and then save and close the file.

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

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

## Changing an Employee's Salary Using Pay Rate Information

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

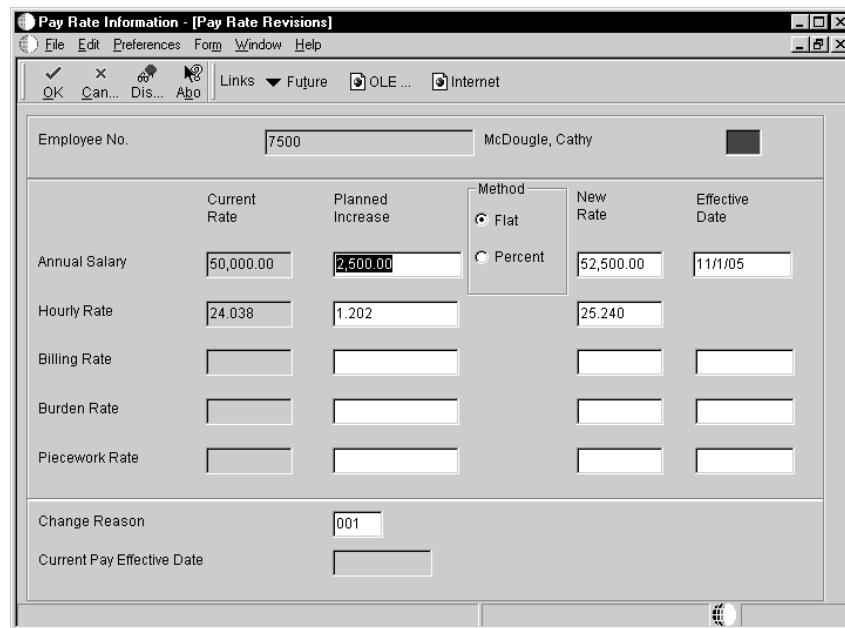
You use pay rate information to update only one employee record at a time. Information entered in the Pay Rate Information program (P060131) updates the Employee Master table (F060116).

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

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

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



3. On Pay Rate Revisions, review the current rates in any of the following fields of the Current Rates column:

- Annual Salary
- Hourly Rate
- Billing Rate
- Burden Rate
- Piecework Rate

4. To define a future pay change as a percent or flat amount increase, click either the Flat or the Percent option in the Method area.
5. Complete as many of the fields as necessary in the Planned Increase column for each rate that you are changing.

Add a monetary amount or a percentage to each field, depending on the method you have chosen.

6. Complete as many of the following fields as necessary in the Effective Date column for each rate that you are changing:
  - Next Raise Date
  - New Bill Rate Date
  - Date – New Bill Rate
  - New Piece Rate Date
7. Complete the following field:
  - Change Reason

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

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<b>Field</b>	<b>Explanation</b>
Annual Salary	<p>The amount that an employee is paid in one year, provided that the employee is paid every pay period of the year.</p> <p>For World:</p> <p>For the employee's primary job, the system stores the annual salary in both the Employee Master table (F060116) and the Employee Multiple Job table (F060118). For secondary jobs, the system stores the annual salary in the Employee Multiple Job table (F060118).</p> <p>Depending on how the Display Salary (Annual/Effective) field is set in the History Constants table (F08040), this field displays one of the following:</p> <ul style="list-style-type: none"> <li>• Annual salary. For salaried employees who are not associated with a contract calendar, this amount is either entered by the user or retrieved from the Pay Grade/Step table. For employees who are associated with a contract calendar, the system calculates this amount using the formula, ((current salary minus salary paid before change) divided by number of periods to pay) multiplied by pay frequency)</li> <li>• Effective salary, which equals ((annual salary divided by pay frequency) times periods to pay)</li> </ul> <p>For employees whose jobs are associated with a contract calendar, the system recalculates the effective salary if you enter a mid-calendar salary adjustment for the employee. After you enter a mid-calendar adjustment, the effective salary equals the salary that is to be paid to the employee from the time of the adjustment to the end of the contract.</p>

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Field	Explanation
Hourly Rate	<p>The employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.</p>
	<p>In the Employee Master table, this is the employee's base hourly rate. In the Union Rates table, this is the straight time rate.</p>
	<p>Note: If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.</p>
Billing Rate	<p>A rate used for the billing of labor services. This rate is often referred to as the billing or recharge rate. The extended amount based on this rate will be charged to the primary distribution account on the timecard with an offset being made to an account derived from the Accounting Rules table. This rate will not affect the employee's payroll. To allow billing rates in time entry, you must set the employee's record type as either 2 or 3 on the Basic Employee Entry form.</p>
	<p>Enter a rate on any of the following forms to override the rate in the Employee Primary Job table:</p>
	<ul style="list-style-type: none"> <li>• Pay Rate Information</li> <li>• Employee Labor Distribution</li> <li>• Occupational Pay Rates</li> <li>• Time Entry by Employee</li> <li>• Time Entry by Job or Business Unit</li> <li>• Daily Timecard Entry</li> <li>• Time Entry by Employee with Equipment</li> <li>• Time Entry by Shop Floor Control</li> </ul>
Burden Rate	<p>An hourly rate to be used when charging 'burden' associated with the actual billing (recharge) amounts.</p>
Piecework Rate	<p>The rate paid for the type of component (piece) produced. If you enter a rate in this field, this rate overrides the rate in the Employee Master table.</p>
Method for Pay Increase	<p>The method by which the pay increase amount is to be calculated. The increase can either be a percentage of the current amount or a monetary amount.</p>
Date – New Bill Rate	<p>The date on which the new billing rate for an employee goes into effect. The new rates actually go into effect AFTER THE PAYROLL PROCESSING RUN that has a payroll date on or after this date.</p>
Next Raise Date	<p>The date that the hourly or annual pay rate for the employee increases. The new rate goes into effect after a payroll cycle completes with a pay period end date on or after the date of the next raise.</p>

Field	Explanation
Date – New Bill Rate	The date on which the new billing rate for an employee goes into effect. The new rates actually go into effect AFTER THE PAYROLL PROCESSING RUN that has a payroll date on or after this date.
Date – New Bill Rate	The date on which the new burden billing rate for an employee takes effect. The new rates actually go into effect AFTER THE PAYROLL PROCESSING RUN that has a payroll date on or after this date.
New Piece Rate Date	The date on which the new piecework rate for an employee goes into effect. The new rates actually go into effect AFTER THE PAYROLL PROCESSING RUN that has a payroll date on or after this date.
Chg Rsn	<p>A user defined code (06/T) that indicates:</p> <ul style="list-style-type: none"> <li>• The reason that you are changing an active employee's record.</li> <li>• The reason that you are terminating an employee.</li> <li>• The reason that you are recommending the change in salary or rate. If you are reactivating an employee, you must change the code in this field to a numeric character.</li> </ul> <p>Note: The default reason code for new hires is the default value for the Change Reason data item.</p>
Date – Last Raise	The date of the employee's last raise. For the stand-alone HR system, this is the date when you update salary and wages. If you also have the Payroll system, this date is automatically updated when a payroll is run. You define pay effective dates using Pay Rate Information.

## Correcting Employee Information

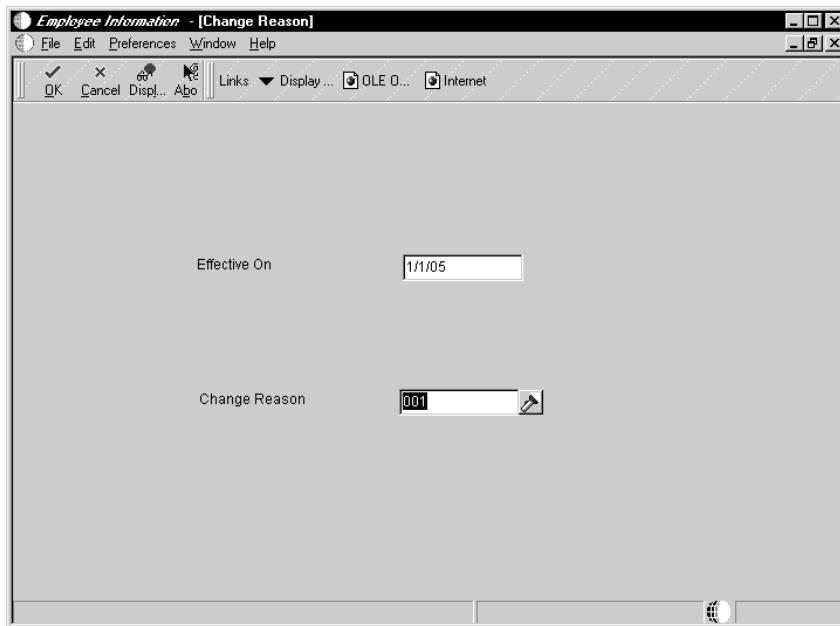
You can review employee information and update it as necessary. For example, when an employee receives a promotion, you typically update the employee's salary, job type, and pay grade.

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

### ► To correct employee information

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

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



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

### See Also

- *Correcting Employee History*

## Processing Future Changes

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

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

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

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

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

You can enter the following types of future changes:

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

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

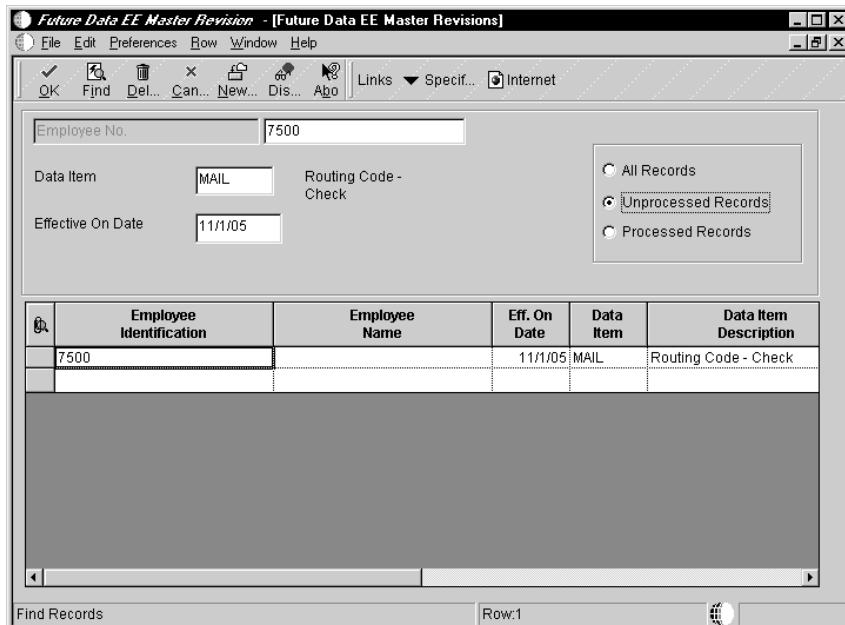
- Future Employee Master Data Changes table (F06042)
- Employee Master table (F060116)

### Before You Begin

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

► **To process future changes**

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



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

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

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

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

Field	Explanation
Data Item	<p>For World, the RPG data name. This data field has been set up as a 10-byte field for future use. Currently, it is restricted to 4 bytes so that, when preceded by a 2-byte table prefix, the RPG data name will not exceed 6 bytes.</p> <p>Within the Data Dictionary, all data items are referenced by this 4-byte data name. As they are used in database tables, a 2-character prefix is added to create unique data names in each table specification (DDS). If you are adding an error message, this field must be left blank. The system assigns the error message number using next numbers. The name appears on a successful add. You should assign error message numbers greater than 5000. Special characters are not allowed as part of the data item name, with the exception of #, @, \$.</p> <p>You can create protected data names by using \$xxx and @xxx, where you define xxx.</p> <p>For OneWorld, a code that identifies and defines a unit of information. It is an 8-character, alphabetical code that does not allow blanks or special characters such as: % &amp; , . +.</p> <p>Create new data items using system codes 55-59.</p> <p>The alias cannot be changed.</p>

<b>Field</b>	<b>Explanation</b>
Effective On	<p>The date to update the employee record with the new information. When updating the Employee Master table using the final update step of the payroll cycle, the system updates any changes with an effective date that is less than or equal to the pay-period end date of the payroll.</p>
	<p>For example, assume that your company processes a payroll on July 1 for work dates June 16–30 and another payroll on July 16 for work dates July 1–15. You want the system to apply the future data changes to the Employee Master table for the July 16 payroll. Therefore, the effective date that you enter for the future change should be between the dates of the previous payroll (June 16–30, in this case). When you process the 7/16 payroll, the system updates the change to the employee records.</p>
	<p>The system automatically submits the update program as part of the final update step. Only those employees included in the payroll are processed for future changes.</p>
	<p>Because informational changes update tables during the final update step of the payroll cycle, the system does not use the updated information until the next payroll cycle. For example, if the current payroll cycle is updating an employee's salary, the employee will not receive the new salary until the next payroll.</p>
	<p>..... <i>Form-specific information</i> .....</p> <p>For Payroll: Enter the date to apply the change to the employee record. This is not the pay period ending date. You must enter a date that updates the employee record before the payroll when the change is to take effect.</p>
Future Value	<p>A code that indicates a selection or a future set of information. When the effective date of the revision arrives, the value you enter in this field replaces an existing value in the Employee Master table.</p>
	<p>..... <i>Form-specific information</i> .....</p> <p>The new information for the field. You can enter more than one change for the same field if you use different effective dates.</p>

Field	Explanation
Chg Rsn	<p>A user defined code (06/T) that indicates:</p> <ul style="list-style-type: none"> <li>• The reason that you are changing an active employee's record.</li> <li>• The reason that you are terminating an employee.</li> <li>• The reason that you are recommending the change in salary or rate. If you are reactivating an employee, you must change the code in this field to a numeric character.</li> </ul> <p>Note: The default reason code for new hires is the default value for the Change Reason data item.</p>

## Processing Mass Changes

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

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

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

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

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

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

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

- You can request a batch job to update the changes.

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

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

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

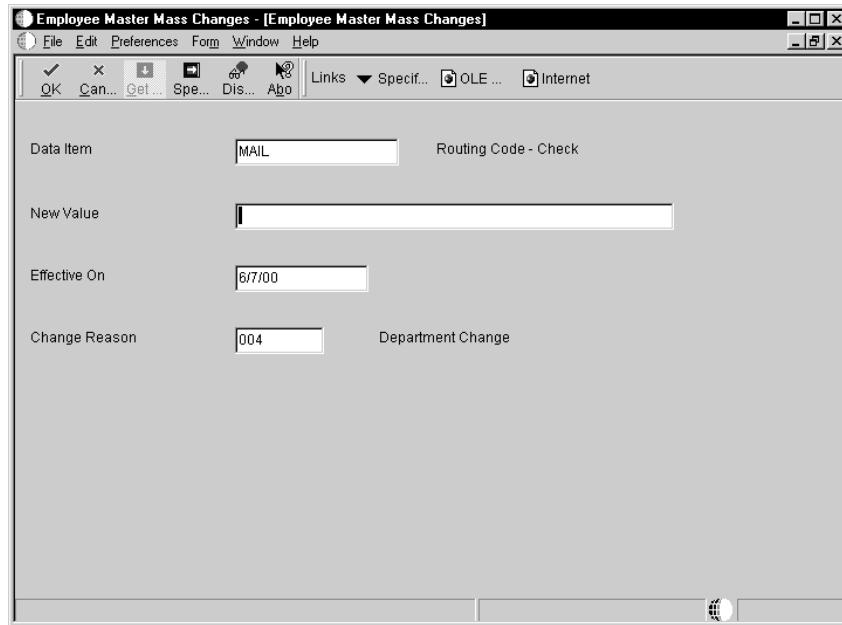
### Before You Begin

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

### ► To process mass changes

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From the Employee Advanced and Technical Operations menu (G05BE3), choose Employee Master Mass Changes.



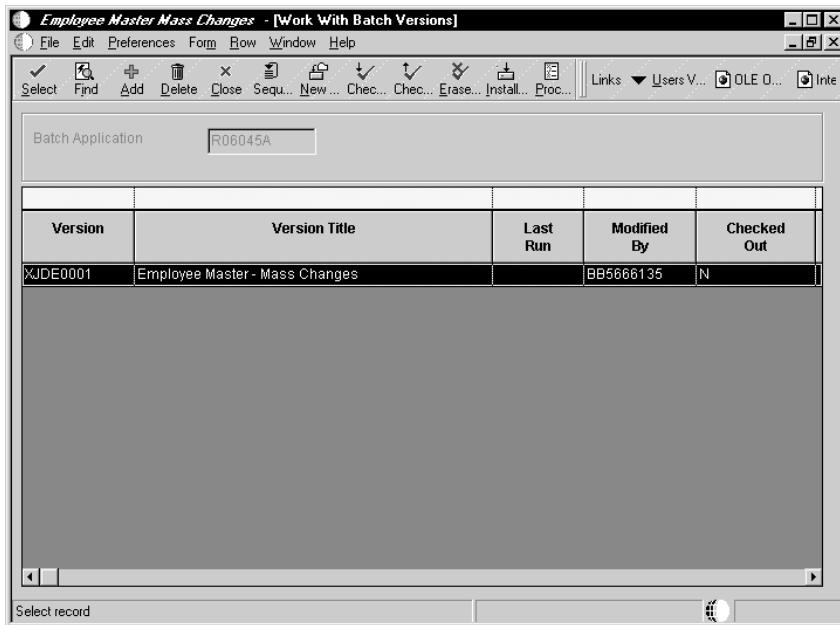
1. On Employee Master Mass Changes, complete the following fields:

- Data Item
- New Value
- Effective On

- Change Reason

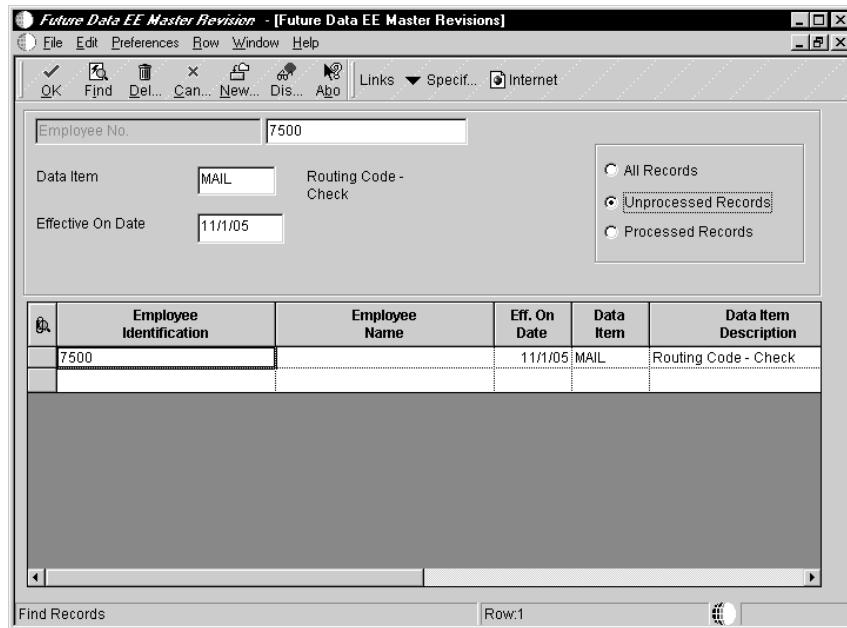
When you enter the New Value data, you can click Get UDC to access the user defined code table associated with the data item that you entered.

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



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

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



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

After you enter mass changes, update the Employee Master record. See *Updating Employee Master Records*.

Field	Explanation
New Value	A code that indicates a selection or a future set of information. When the effective date of the revision arrives, the value you enter in this field replaces an existing value in the Employee Master table.
Method for Numeric Change	A method that the system uses to calculate the amount of a numeric increase. When you choose method F (Flat Rate Increase), the final amount is the original amount plus the indicated flat rate increase. When you choose method % (Percentage Increase), the final amount is the original amount multiplied by the indicated percentage plus the original amount. When you leave this field blank the final value is the value entered in the New Value field.

## Processing Options for Employee Master Mass Changes Report (R06045A)

### Report Tab

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

#### 1. Update F06042

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

Valid values are:

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

#### 2. Print Report

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

Valid values are:

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

## Updating Employee Master Records

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

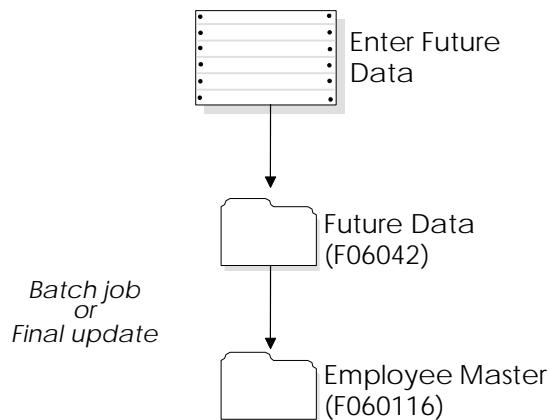
After you enter mass or future changes for one or more employees, you can do one of the following:

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

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

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

The following graphic illustrates how the system processes data changes.



## Processing Options for Future Data Employee Master Update

### Default

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

Pay Period Ending Date \_\_\_\_\_

## Entering Leave-of-Absence Information

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

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

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

### ► To enter leave-of-absence information

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

1. On Work With Employee Information, to locate the employee for whom you need to enter leave-of-absence information, complete the following fields:
  - Home Company
  - Home Business Unit
2. To help narrow your search, choose one of the following options and click Find:
  - Active
  - Terminated
  - All
3. Choose the employee record and click Select.
4. On Employee, complete the following fields:
  - Pay Status
  - Leave Begin Date
  - Leave End Date
5. Click OK and review the following field for a color change:
  - Employee Status Flag

<b>Field</b>	<b>Explanation</b>
Pay Status	<p>A code that indicates whether an employee's pay status is active or inactive.</p>
	<p>Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run.</p>
	<p>To process an employee's last check, the pay status must contain a numeric code. After the system processes the check through final update, you can change the pay status to an alphabetic code.</p>
Leave Begin Date	<p>The date on which an employee's paid or unpaid leave of absence begins. Use this date to indicate the leave for the Family and Medical Leave Act.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>If you are using Position Control, the system enters a leave of absence as unpaid leave and adjusts the projected year-end calculations accordingly.</p>
Leave End Date	<p>The date on which an employee's paid or unpaid leave of absence expires.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>If you are using Position Control, the system enters a leave of absence as unpaid leave and adjusts the projected year-end calculations accordingly.</p>
Employee Status Flag	<p>A color in the box at the top right corner of the form that indicates the current payroll status of an employee. The following colors indicate:</p> <ul style="list-style-type: none"> <li>Green – Active employee not included in the current payroll cycle.</li> <li>Fuchsia - Active employee included in the current payroll cycle.</li> <li>Red – Terminated employee. The employee's termination date does not equal zero.</li> <li>Yellow – Employee on leave of absence. The employee has a leave of absence begin date less than today's date and an end date that is greater than or equal to today's date.</li> </ul>

## Terminating an Employee

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

Entering termination information allows you to do the following:

- Keep your employee information current

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

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

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

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

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

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

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

- Create and send a copy of an Employee Property report (R080400) to the employee's supervisor if the employee has company property.

## Before You Begin

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

### ► To terminate an employee

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

1. On Work With Employee Information, to locate the employee whom you need to terminate, complete the following field and click Find.
  - Employee No
2. Choose the employee record and click Select.
3. On Employee, complete the following fields:
  - Employee Pay Status
  - Termination Date
4. Complete the following fields, if applicable, and click OK:
  - Move to Applicant Pool
  - Expected Recall Date
  - Employee Benefit Status

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

Field	Explanation
Termination Date	The date that the employee was terminated, if applicable.
Expected Recall Date	The date on which the employee can be recalled for employment, if known.
Employee Benefit Status	<p>A user defined code (06/EA) that specifies the employee action, such as new hire or rehire, for which the system searches as it tests for benefits eligibility. An * indicates that the guidelines refer to all employee actions not otherwise specified.</p> <p>Do not change the codes that are hard-coded, such as A (Active) and X (Terminated). These are required codes in the system.</p>
Move to Applicant Pool	<p>A code that you use to indicate whether a terminated employee should be moved into the applicant pool. When you move an employee to the applicant pool, the system changes the employee search type to applicant (A). If you do not move the employee to the applicant pool, the system changes the employee search type to terminated (X).</p> <p>If the applicant table does not exist, the system always changes the employee search type to terminated (X).</p>

## Completing a Termination Using Workflow

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

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

Completing a termination using workflow includes the following tasks:

- Understanding termination using workflow
- Approving the termination

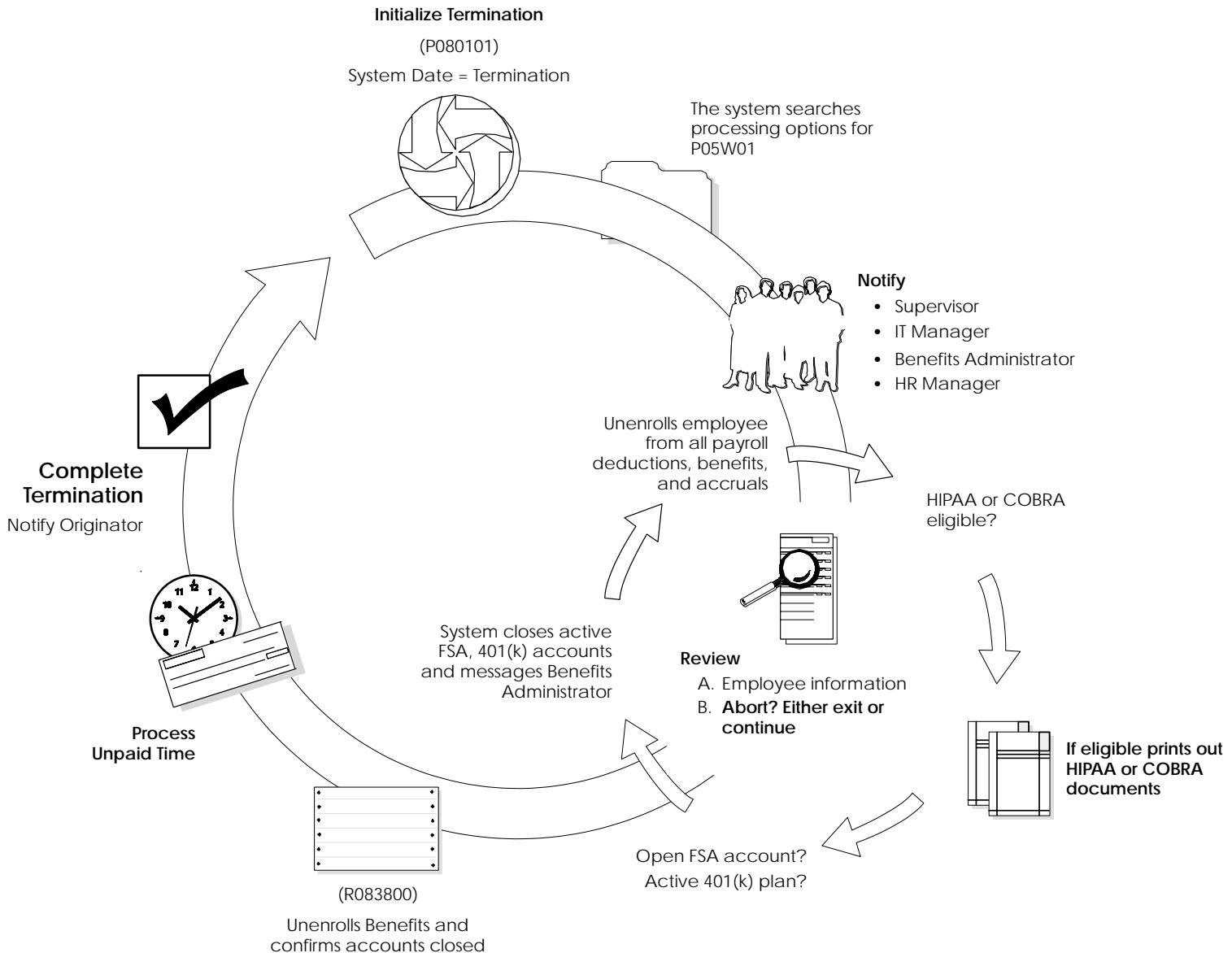
## **Understanding Termination Using Workflow**

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

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

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

Terminating an Employee Using Workflow



## Notification of the Appropriate Parties

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

Workflow might notify the following people about a termination:

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

## Review of the Timecards and Benefits Information

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

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

Workflow sends an Enrollment with Eligibility form (P08334) to the benefits administrator confirming all the employee's benefits before the termination. If the employee has an active FSA, 401K, or RRSP account, Workflow informs the benefits administrator that the employee's FSA, 401K, or RRSP accounts are closing and then closes the account automatically using Batch Enrollment.

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

Workflow also searches for the following employee information:

- Declining balance owed

- COBRA and HIPAA eligibility

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

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

### Approval of the Termination

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

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

### Processing the Payment

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

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

### Completion of the Termination

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

### Approving the Termination

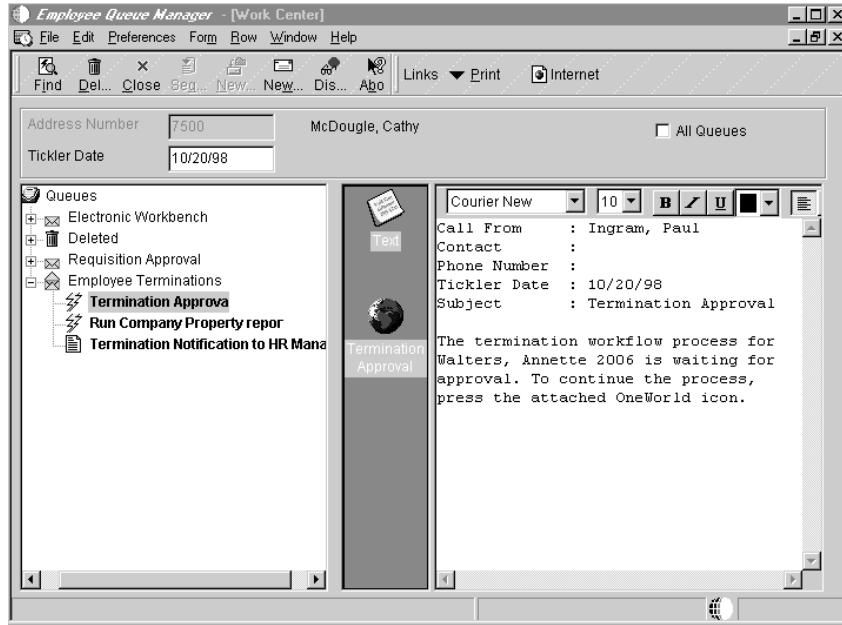
After the termination Workflow has notified the appropriate parties and reviewed the employee timecards and benefits information, the system sends a request to a manager to approve the termination. The manager can review the termination information and then either approve or abort the termination process.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

## ► To approve the termination

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

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

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



5. Click Termination Approval and review the employee termination request in the right queue.
6. To approve or reject a termination request, click the OneWorld icon.
7. Click the Termination Approval icon in the right cue.

8. On Termination Approval, review the status of the following fields under the Status heading:
  - Unprocessed Checks
  - Unpaid Time
  - Unpaid Sick, Vacation, Holiday Accrual
  - Unpaid DBA's
  - Payroll Lockout
9. Choose one of the following options under the Action heading. The termination does not proceed until you respond.
  - Continue
  - Abort
  - Skip Time Entry
  - Wait for Payroll Lockout

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

If you click Wait for Payroll Lockout, the system temporarily stops the termination process until a payroll completes. If you click Continue, the system continues the termination. If you click the Abort option, the Abort form appears. If you click Skip Time Entry, the employee's time entry record appears on the Time Entry Revisions form (W051131A).

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

If you click Continue and then click OK, Workflow continues the termination process and processes a payment. See *Processing the Payment*.

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

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

## Processing Options for HRM Termination Workflow (P05W01)

### EE Termination Tab

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

#### 1. Send Batch Enrollment

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

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

#### 2. Send Completion messages

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

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

#### 3. Send Enrollment with Eligibility

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

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

#### 4. Send Time Entry notifications

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

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

### **5. Time Entry is installed?**

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

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

### **6. HRM Payroll Installed?**

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

- 0     The Payroll system is not installed.
- 1     The Payroll system is installed.

### **7. HRM Benefits Installed?**

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

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

### **8. Pay Sick Accrual**

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

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

### **9. Pay Vacation Accrual**

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

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

### **10. Pay Holiday Accrual**

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

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

## Working with Supplemental Data

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Supplemental data is any type of information that you want to track that is not already provided for by the system. It can include detailed information about employees, such as their education or experience, or information unique to your business requirements, such as information about foreign languages spoken.

J.D. Edwards provides supplemental databases that you can use to track related types of supplemental data. The HR and Payroll Foundation system contains a supplemental database for each of the following:

- Employees (E)
- Jobs (J)
- Applicants (A)
- Requisitions (R)

When you set up your system, you define the types of supplemental information that you want to track in each of the supplemental databases. You can track different types of supplemental information for each database. For example, you might choose to track professional references for applicants but not for employees.

Working with supplemental data includes the following tasks:

- Entering supplemental data for employees
- Copying supplemental data
- Reviewing supplemental data for a specific employee
- Reviewing supplemental data by data type
- Working with multiskill search

### Before You Begin

- Set up supplemental data. See *Setting Up Supplemental Data*.

## **Entering Supplemental Data for Employees**

Supplemental data is any type of information that you want to track that is not already provided for by the system. Supplemental data is not required by the system.

For employees, typical types of supplemental data might include the following:

- Emergency contacts
- Job skills
- Foreign language competencies
- Work history

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

- Narrative
- Code
- Program

For narrative-format data types, you enter free-form text. For code-format data types, you enter values in predefined fields. When you enter values in code format, you can attach narrative information to the records. Program-format data types allow you to group programs in a manner that is convenient for you. For example, you can set up a program-format data type that allows you to access Requisition Activity when you are entering supplemental data for applicants.

Entering supplemental data includes the following tasks:

- Entering supplemental data in code format
- Entering supplemental data in narrative format

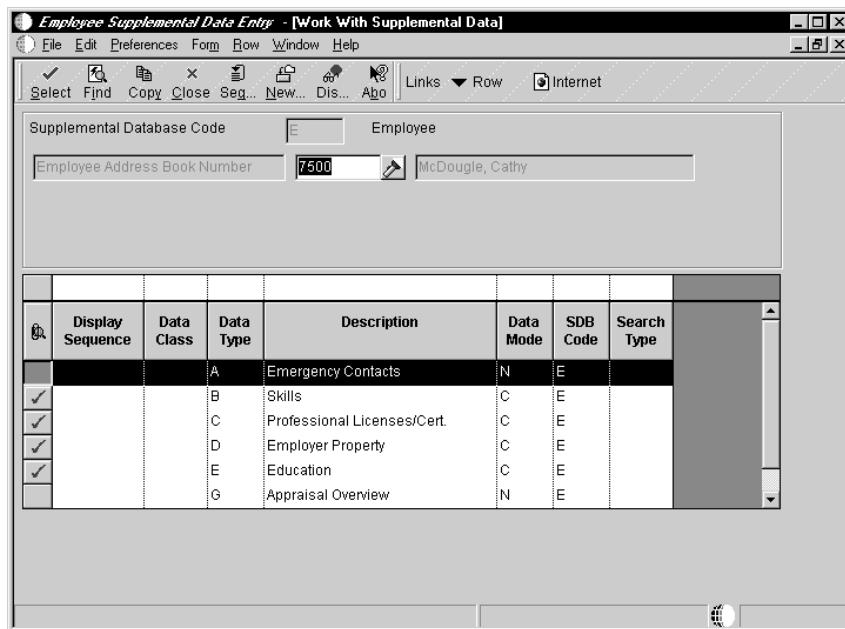
### **Entering Supplemental Data in Code Format**

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

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

► To enter supplemental data in code format

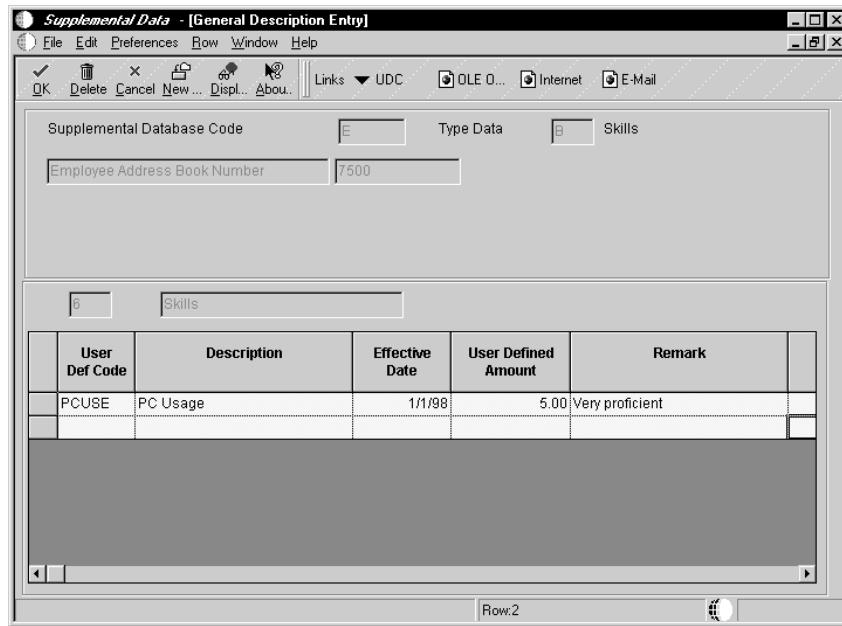
From the Employee Supplemental Data menu (G05BSDE1), choose Employee Supplemental Data Entry.



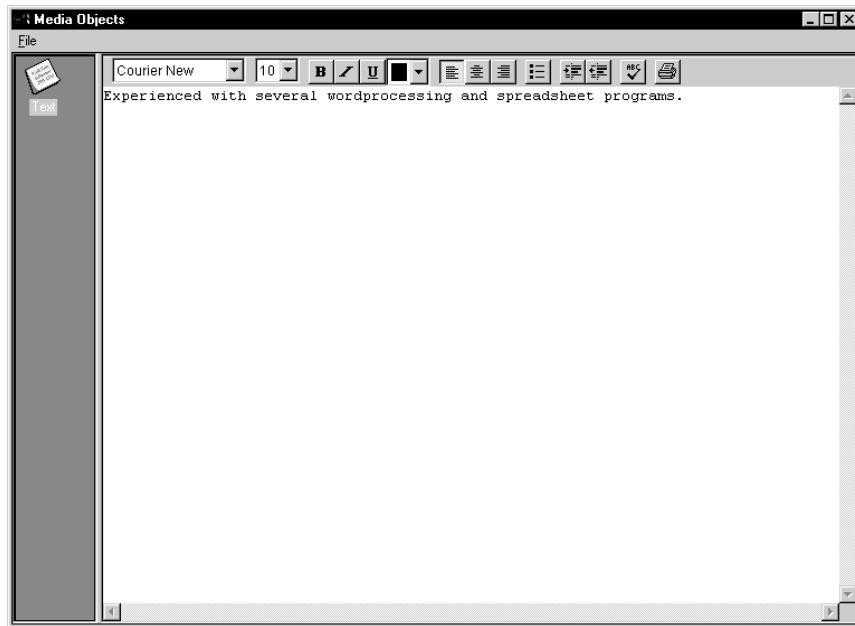
1. On Work With Supplemental Data, to locate the employee for whom you want to enter supplemental data, complete the following field and click Find:
  - Address Number

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

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



4. On General Description Entry, complete the following fields:
  - User Def Code
  - Effective Date
5. Complete any of the following fields that apply to this data type:
  - User Defined Amount
  - Remark
  - Remarks Line 2
  - User Defined Amount #2
  - Addl Date
  - Ending Date
  - User Def Days
6. To add additional information in narrative format, double click the row header.



7. On Media Objects, choose Add and then Text.
8. Enter the appropriate information and choose Save & Exit from the File menu.

When General Description Entry reappears, a paper clip icon appears in the row header to indicate that an attachment exists for that data item.

<b>Field</b>	<b>Explanation</b>
User Def Code	<p>A list of valid codes for a specific user defined code list.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The data you enter in the User Def Code (alias KY) field depends on how you set up the UDC (alias GDC1) and corresponding Product Code (alias SY) and Record Type (RT) fields on the Data Type Revisions form. If you associated the UDC (alias GDC1) field with a UDC table, the data you enter in the User Def Code (alias KY) field must be a valid value from the associated UDC table. If you did not associate the UDC (alias GDC1) field with a UDC table, the system accepts any data (within size constraints) that you enter in the User Def Code (alias KY) field.</p>

<b>Field</b>	<b>Explanation</b>
Effective Date	<p>The effective date is used generically. It can be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>The date on which a supplemental data type takes effect. For example, if you are using supplemental data to track employees' professional licenses and certification, you can enter the expiration date of each license or certification.</p>
User Defined Amount	<p>A quantity that represents the statistical or measurable information related to the code that is defined for the data type. For example, if the data type relates to bid submittal codes, this field could be for bid amounts. Or, if the data type relates to Human Resources Benefits Administration, this field could be for the cost of election coverage. If the data type relates to bonuses, this could be the bonus amount.</p>
Remark	<p>A generic field that you use for a remark, description, name, or address.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>The data you enter in the Remark (alias RMK) field depends on how you set up the Remark 1 (alias GDC2) and corresponding System Code (alias SY1) and Record Type (alias RT1) fields on the Data Type Revisions form. If you associated the Remark 1 (alias GDC3) field with a record, the data you enter in the Remark (alias RMK) field must be a valid value in the associated record. If you did not associate the Remark 1 (alias GDC3) field with a record, the system accepts any data (within the size constraints) that you enter in the Remark (RMK) field.</p>
Remarks Line 2	<p>A generic field that you use for a remark, description, name, or address.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>The data you enter in the Remarks Line 2 (alias RMK2) field depends on how you set up the Remark 2 (alias GDC4) and corresponding System Code (alias SY2) and Record Type (alias RT2) fields on the Data Type Revisions form. If you associated the Remark 2 (alias GDC4) field with a record, the data you enter in the Remarks Line 2 (alias RMK2) field must be a valid value in the associated record. If you did not associate the Remark 1 (alias GDC3) field with a record, the system accepts any data (within the size constraints) that you enter in the Remarks Line 2 (alias RMK2) field.</p>

Field	Explanation
User Defined Amount #2	The second Amount associated with the code defined for this Supplemental Data Type. For example, if you have a stock option plan, you could track the number of shares in User Defined Amount and the strike price in User Defined # 2.
Addl Date	A date that can be used with supplemental data information. For example, you can enter a verification date in this field to show when information was last reviewed and possibly updated.
Ending Date	The date on which the record, transaction, or table becomes inactive or the date through which you want information to appear.
..... <i>Form-specific information</i> .....	
	If you do not use ending effective dates, set the processing option to 1. If you leave both the Effective Date field and the processing option blank, the system uses the ending date from the system constant.
User Def Days	The days associated with the code defined for this supplemental data type. For example, engineering change order leadtime days represent an association.

## Entering Supplemental Data in Narrative Format

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

### ► To enter supplemental data in narrative format

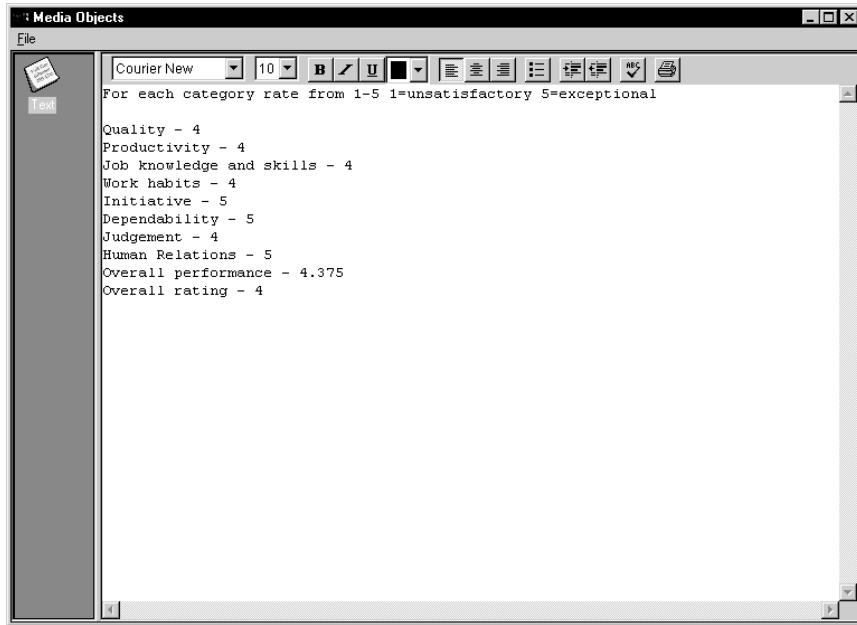
From the Employee Supplemental Data menu (G05BSDE1), choose Employee Supplemental Data Entry.

1. On Work With Supplemental Data, to locate the employee for whom you want to enter supplemental data, complete the following field and click Find:
  - Address Number

The system displays the available types of supplemental data. An N in the Data Mode column indicates that the data type is in narrative format.

2. To determine whether narrative information exists in a particular data type, choose the row in the detail area or move the cursor to its row header. If narrative information exists, a paper clip icon appears.

3. Choose a row in the detail area that contains an N in the Data Mode column and click Select.



4. On Media Objects, choose Add from the File menu and then choose Text.
5. Enter the appropriate information and choose Save & Exit from the File menu.

### Processing Options for Work with Supplemental Data

#### Processing

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

## Copying Supplemental Data

When you need to enter the same supplemental data for two or more employees, you can save time and reduce typing errors by copying information from one employee's supplemental data to another employee's record. You might do this when you need to enter very similar information for two employees. For example, when two employees have the same emergency contact, you can enter the emergency contact for one of the employees and then copy it to the other employee's record. After you copy supplemental data, you can revise it as necessary.

When you copy supplemental data, remember the following guidelines:

- You can copy supplemental data within the same database only. This means that you can copy data from one employee to another, but you cannot copy information from an applicant to an employee.
- You can copy code format information only. You cannot copy narrative text.
- You can copy information from one code-format data type to a different code-format data type. For example, if you have a code-format data type for skills and another code-format data type for professional licenses, you can copy one employee's skills information into another employee's professional licenses data type.

### Before You Begin

- Determine the employee number of the employee whose data you are copying and the employee to whom you are copying the data.

#### ► To copy supplemental data

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

1. On Work With Supplemental Data, to locate the employee whose supplemental data you want to copy, complete the following field and click Find:
  - Address Number
2. In the detail area, choose the row that contains the information that you need to copy and click Copy.
3. On General Description Entry, enter the address number of the employee record to which you are copying the supplemental data in the following field:
  - Address Number

4. Click OK.

## **Reviewing Supplemental Data for a Specific Employee**

Use Supplemental Data Inquiry to review complete information for a specific employee. This program compiles all of an employee's supplemental information into an easy-to-read, resume-style format.

You can also print employee resumes for internal use.

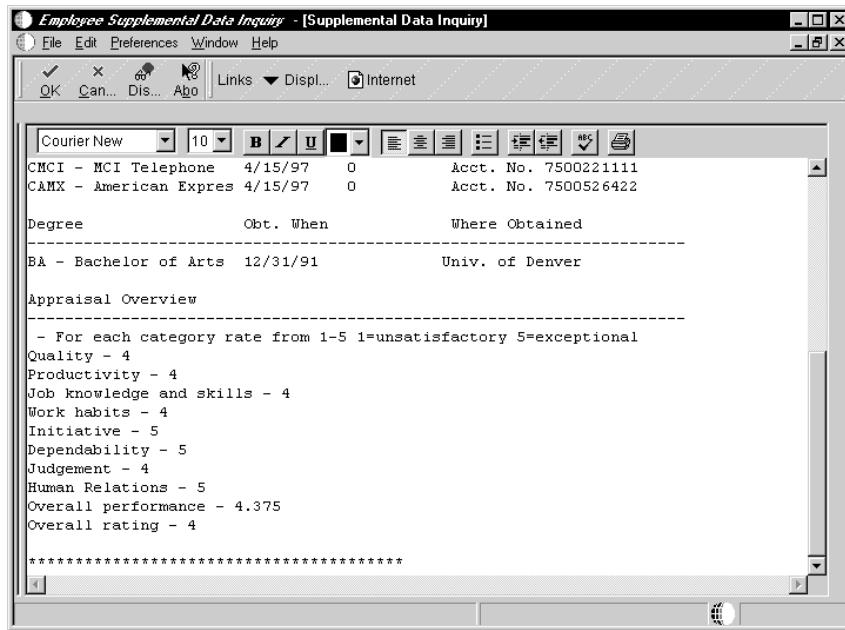


### **To review supplemental data for a specific employee**

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

1. On Work With Employee Information, to locate the employee record, complete any of the following fields and click Find:
  - Employee No
  - Home Company
  - Home Business Unit
  - Active
  - Terminated
  - All
2. Choose the employee record and choose Supplemental Data Inquiry from the Row menu.



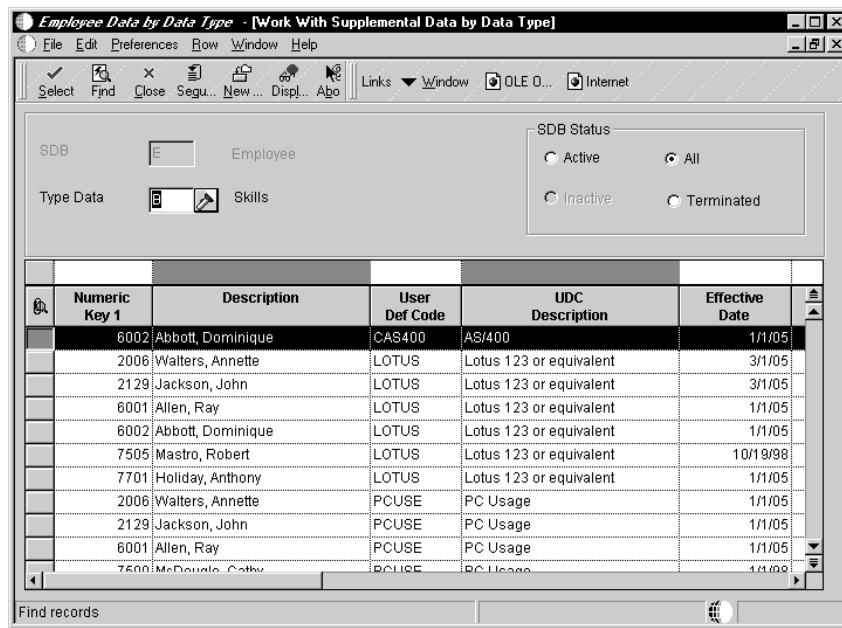
3. On Supplemental Data Inquiry, review the information.

## Reviewing Supplemental Data by Data Type

You can review all employees who have information entered for a specific data type. For example, you can review training supplemental information to identify employees who have had management training. Or you can review professional licenses information to identify which employees need to renew their licenses within the next month.

### ► To review supplemental data by data type

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



1. On Work With Supplemental Data by Data Type, complete the following fields to narrow your search:
  - Type Data
  - Active
  - All
  - Terminated
2. Click Find.

## Working with Multiskill Search

You can search your supplemental database for records that meet criteria that you define. You typically use this type of search when you are looking for a person to fill a vacancy within your organization.

For example, you can search for all employees and applicants who meet the following criteria:

- Have an MBA degree
- Speak French
- Are certified public accountants
- Know RPG programming

When you perform the search, the system lists all of the people who meet the multiple criteria. You can enter up to 20 search criteria.

The criteria that you enter can be based on either an AND condition or an OR condition. This means that you can search for people who meet either all of the criteria or some of the criteria. For example, you can search for people who meet the following criteria:

- Know C programming AND have a degree in either computer science or mathematics
- Have an MBA degree from any college OR a BA in business from Harvard

The system processes search criteria in the order in which you list them. When any of the criteria that you specify are based on an OR condition, the order in which you enter the search criteria is important.

### Example: Entering Search Criteria

Suppose that you are searching for people who know C programming and have a degree in either mathematics or computer science. To locate that group of people, enter the following search criteria in the order listed:

C programming

AND

Degree in computer science

OR

C programming

AND

Degree in mathematics

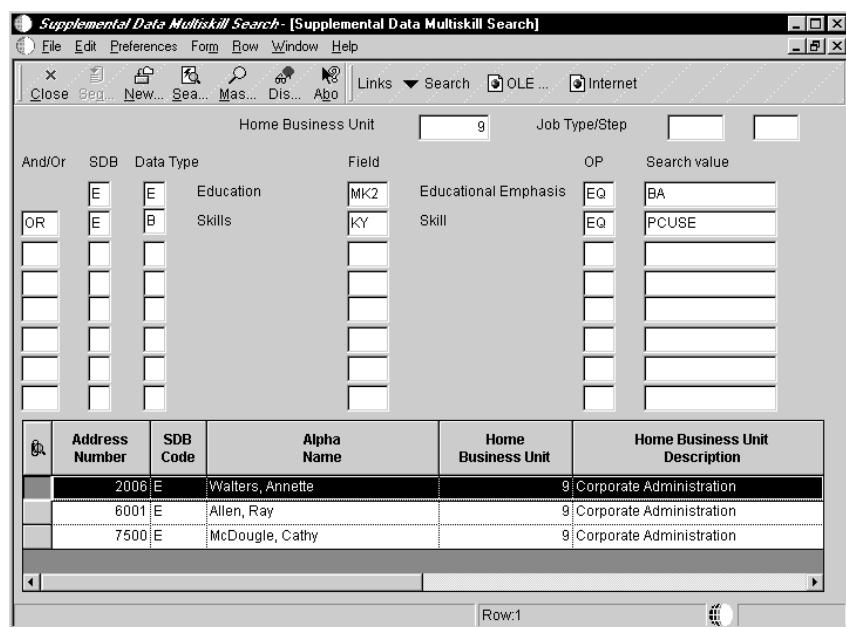
To locate the people who meet this search criteria, the system completes the following steps:

1. Locates the people who know C programming. (For demonstration purposes, call this group of people group A.)
2. Searches group A for people who have degrees in computer science. (Call these people group B.)
3. Searches group A for people who have degrees in mathematics. (Call these people group C.)

The result of the search is the total of the people in groups B and C.

► **To work with multiskill search**

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



1. On Supplemental Data Multiskill Search, to limit the search, complete the following optional fields:
  - Home Business Unit
  - Job Type/Step
2. To enter the search criteria, complete the following fields and click Search:
  - And/Or
  - SDB
  - Data Type
  - Field
  - OP
  - Search value

The records that meet the search criteria appear in the grid on the bottom half of the form.

3. To inquire further on a record, choose the record and click Master.

Field	Explanation
And/Or	<p>A code that designates whether the test parameters or criteria are based on an AND condition or an OR condition.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>For example, to identify employees who are either CPAs or who have MBAs, enter the code for professional licenses and certificates in the Data Type field and CPA in the Search Value field. On the second line, enter the code for education in the Data Type field and MBA in the Search Value field. Link the two lines by entering Or in the And/Or field of the second line.</p>
	<p>As another example, to identify employees who are both CPAs and who have MBAs, enter the code for professional licenses and certificates in the Data Type field and CPA in the Search Value field. On the second line, enter the code for education in the Data Type field and MBA in the Search Value field. Link the two lines by typing And in the And/Or field of the second line.</p>
	<p>To search for applicants who speak Spanish and German, enter Spanish as the first search value, German as the second search value, then enter And in this field. To search for applicants who speak Spanish or German, enter Spanish as the first search value, German as the second search value, then enter Or in this field.</p>
SDB	<p>A code that you use to set up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills. The supplemental database code is used only in the OneWorld version of the Supplemental Database.</p>
Data Type	<p>The type of data from the supplemental database that the system uses in a multiple information search.</p>
Field	<p>A code that indicates which data item within the data type is to be included in the multiskill search.</p>
OP	<p>A code that identifies the operands in Boolean logic. You can specify any of the following codes:</p>
	EQ Equal to
	LT Less than
	LE Less than or equal to
	GT Greater than
	GE Greater than or equal to
	NE Not equal to
	NL Not less than
	NG Not greater than

Field	Explanation
Search value	<p>You must enter a search value based on the data you entered in the profile for the selected field.</p> <p>This field is case sensitive. For example, assume that you want to search for the word Active. If the data was originally entered into the database as Active, then you must enter the value into the search field as Active. Do not enter ACTIVE or active.</p> <p>You can also use the % wildcard character to search for data starting with, ending with, or containing one or more consecutive characters. For example:</p> <ul style="list-style-type: none"><li>• BA% displays all words that begin with the letters B and A, such as bamboo and bachelor.</li><li>• %ing displays all words that end with ing.</li><li>• %BA% displays any words that contain the letters B and A, such as abate, cabbage, or bachelor.</li></ul>

## **Understanding Parent/Child Relationships**

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To provide executives and managers with a summary of the reporting relationships within your organization, you can define an organizational structure. An organizational structure shows the flow of information within your organization. The organizational structure that you define can vary from business to business, or even from department to department within your business.

You can use an organizational structure to show reporting relationships among employees and supervisors. These relationships are called parent/child relationships.

You can define two types of parent/child relationships:

- A relationship in which an employee address can appear multiple times
- A relationship in which an employee address can appear only once

After you define a parent/child relationship, you can periodically review and revise that relationship to reflect staff additions or turnover.

### **See Also**

- *Creating Parent/Child Relationships by Employee.*
- If you have the Human Resources system, you can also define parent/child relationships by position. See *Working with Parent/Child Relationships by Position* in the *Human Resources Guide*.



## **Creating Parent/Child Relationships by Employee**

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When you define organizational structures, you create hierarchies of relationships between parents and children. For example, a large business might have headquarters in one city and several regional offices that are subsidiaries of the headquarters. You can define an organizational structure in which you set up the regional offices as children, or subsidiary business units, of the headquarters. The regional offices can in turn be parents, or higher-level business units, of local offices. For each office, you can set up an organizational structure by employee, with upper-level managers as parents of mid-level managers, and mid-level managers as parents of employees.

Each employee can have only one immediate supervisor. The system prevents you from entering a manager as a subordinate of an employee.

You use one of the following modes to define an organizational structure by employee:

- Enter child positions for a higher-level parent
- Enter a parent position for subordinate child positions

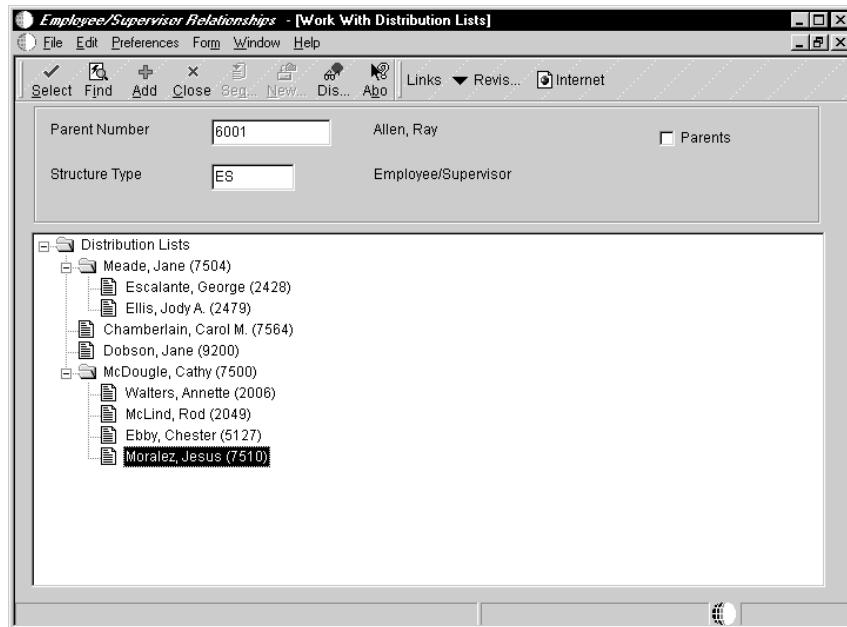
After you create parent/child relationships, you can revise these relationships as necessary to reflect changes within your organization. To access the processing options for Address Parent/Child Revisions, you must go through Interactive Versions.

### **Before You Begin**

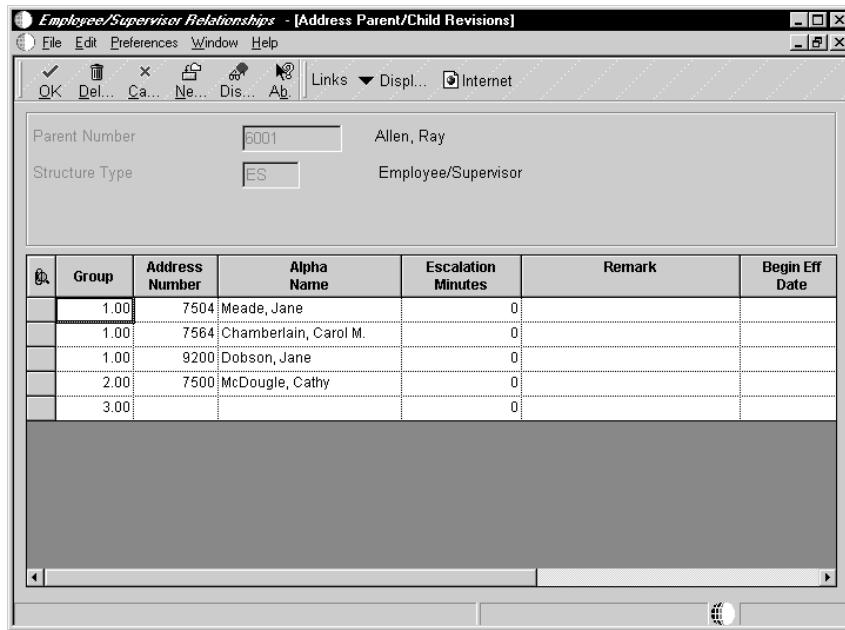
- Set up parent/child structure types in user defined code table 01/TS. See *Understanding User Defined Codes*.

### ► To create parent/child relationships by employee

From the Employee Management menu (G05BE1), choose Employee/Supervisor Relationships.



1. On Work With Distribution Lists, to review existing parent/child relationships, complete the following field and click Find:
  - Parent Number
2. To create a new parent/child relationship, click Add.



3. On Address Parent/Child Revisions, complete the following fields:

- Parent Number
- Structure Type
- Address Number

4. Complete the following optional fields and click OK:

- Remark
- Begin Eff Date
- End Eff Date

<b>Field</b>	<b>Explanation</b>
Parent Number	<p>The address book number of the parent company. The system uses this number to associate a particular address with a parent company or location. For example:</p> <ul style="list-style-type: none"> <li>• Subsidiaries with parent companies</li> <li>• Branches with a home office</li> <li>• Job sites with a general contractor</li> </ul>
	<p>This address must exist in the Address Book Master table (F0101) for validation purposes. Any value you enter in this field updates the Address Book Organizational/Structure table (F0150) for the blank structure type.</p>
	<p>The value you enter in the Parent Number field updates the Address Organization Structure Master table (F0150) if the Structure Type field is blank.</p>
	<p>..... <i>Form-specific information</i> .....</p>
	<p>The Address Book number of the primary level in a hierarchy, or reporting relationship. A parent in one hierarchy can be a child in another hierarchy. A hierarchy can be organized by business unit, employee, or position. For example, you can create a hierarchy that shows the reporting relationships between employees and supervisors.</p>
Structure Type	<p>A user defined code (01/TS) that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, e-mail).</p>
	<p>When you create a parent/child relationship for the Accounts Receivable system, the structure type must be blank.</p>
	<p>..... <i>Form-specific information</i> .....</p>
	<p>Identifies the type of distribution list, such as WFS for workflow, ORG for group, and EML for e-mail.</p>
Remark	<p>A generic field that you use for a remark, description, name, or address.</p>
Begin Eff Date	<p>The date on which the address number appears in the structure. The Beginning Effective Date field prevents the address number from occurring in the structure until the beginning effective date is the same as the current date. If left blank, the address number always occurs in a structure unless there is an ending effective date.</p>
End Eff Date	<p>The date on which the address book record will cease to exist in the structure.</p>

## Processing Options for Address Parent/Child Revisions

### Process

- 1.) Enter a '1' to display workflow information. \_\_\_\_\_

## Processing Options for Parent/Child Relationships

### Defaults

- 1.) Enter the default Structure Type \_\_\_\_\_
- 2.) Enter the Version of Organizational Structure Revisions to call. If left blank version ZJDE0001 will be used. \_\_\_\_\_



# Reviewing Employee Information

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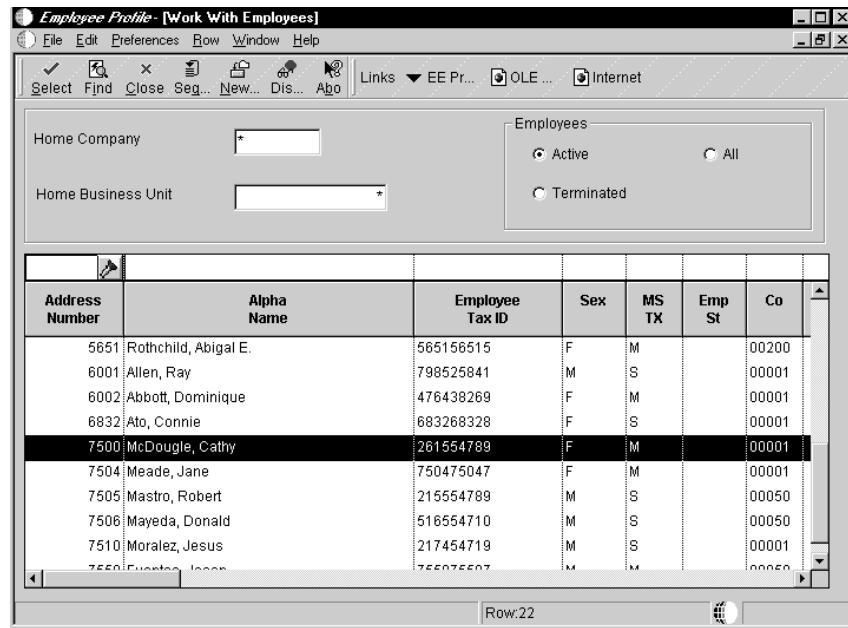
Reviewing employee information is a necessary task for Human Resources personnel. The Employee Profile program centralizes employee information in a few inquiry-only forms. Locating information with Employee Profile is a quick way to locate an employee's personal, company, job, and history information.

Employees can review their own information by accessing Employee Personal Profile from the Employee Self-Service menu. Managers can review this information by accessing Managers Workbench from the Manager Self-Service menu.

## ► To review employee information

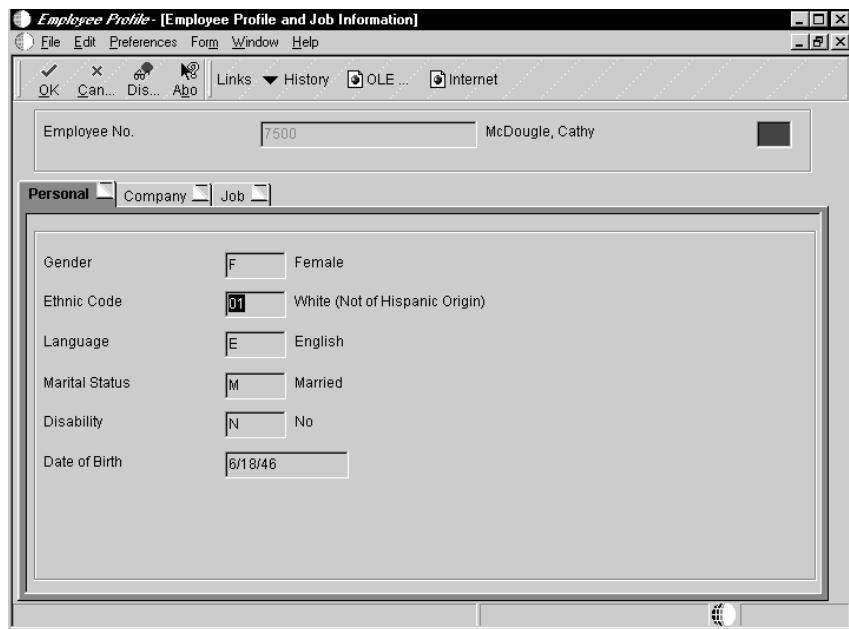
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From the Employee Management menu (G05BE1), choose Employee Profile.



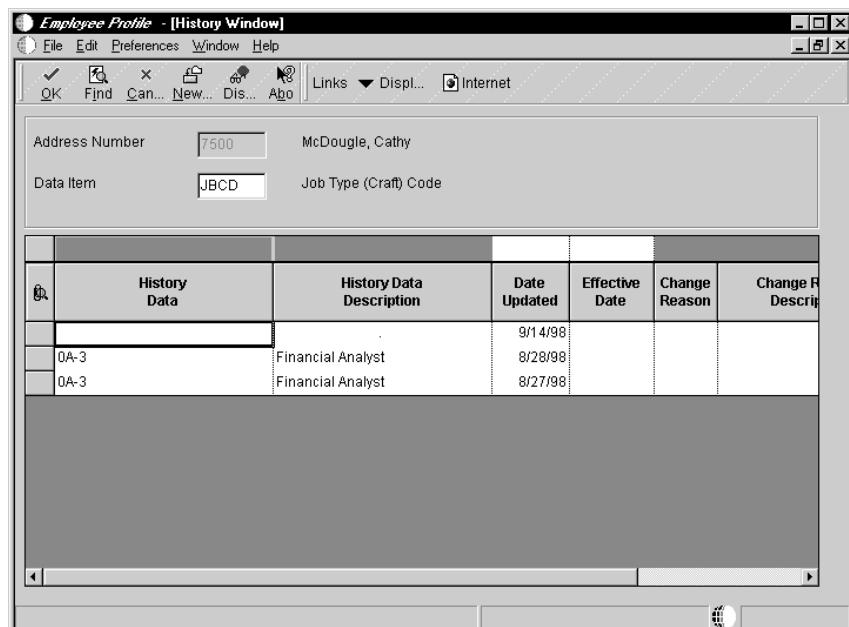
1. On Work with Employees, to narrow your search for selecting an employee, click an option in the Employees area, complete the following optional fields, and click Find:
  - Home Company
  - Home Business Unit

2. Choose an employee record and click Select.



The screenshot shows the 'Employee Profile - [Employee Profile and Job Information]' window. At the top, there are buttons for OK, Cancel, Print, Find, New, Dis..., and Abort. A menu bar includes File, Edit, Preferences, Form, Window, and Help. Below the menu is a toolbar with Links, History, OLE..., and Internet buttons. The main area displays employee information for employee number 7500, named McDougle, Cathy. The 'Personal' tab is selected, showing fields for Gender (F, Female), Ethnic Code (01, White (Not of Hispanic Origin)), Language (E, English), Marital Status (M, Married), Disability (N, No), and Date of Birth (6/18/46). Other tabs for Company and Job are visible.

3. On Employee Profile and Job Information, review employee information under the Personal, Company, and Job tabs.
4. To access history information for any field, click in any field and choose History from the Form menu.



The screenshot shows the 'Employee Profile - [History Window]' window. The top bar includes File, Edit, Preferences, Window, Help, and a toolbar with OK, Find, Can..., New..., Dis..., Abort, Links, History, OLE..., and Internet buttons. The main area shows two fields: Address Number (7500) and Data Item (JBCD, Job Type (Craft) Code). Below these is a table titled 'History' with columns: History Data, History Data Description, Date Updated, Effective Date, Change Reason, and Change R Description. The table contains three rows of data related to the JBCD data item.

	History Data	History Data Description	Date Updated	Effective Date	Change Reason	Change R Description
0A-3		.	9/14/98			
0A-3	Financial Analyst	Financial Analyst	8/28/98			
0A-3	Financial Analyst	Financial Analyst	8/27/98			

5. On History Window, review history for the data item.

# Running Employee Reports

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You can run either of two types of employee reports:

- Current employee reports
- Employee supplemental data reports

Run current employee reports to review the most recent changes made to employee master records.

You can run a supplemental data report, one of the current employee reports category, to review current, auxiliary information associated with your employees. You can review this information by individual employee, all employees, and supplemental data type.

Running employee reports consists of the following tasks:

- Running current employee reports
- Running employee supplemental data reports

## See Also

- *Working With Point-In-Time Employee reports*

## Running Current Employee Reports

Running the employee reports allows you to review the accuracy of employee information recently entered in the Payroll system. Running employee reports consists of the following tasks:

- Running the Employee Roster report
- Running the Employee Roster with Rate report
- Running the Update Employee Master Age report

## **Running the Employee Roster Report**

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

The Employee Roster report lists all employees or selected groups of employees entered in the Payroll system. You run this report to verify that the following employee information has been entered correctly:

- Home company
- Business unit
- Basic dates
- Group plan
- Workers compensation
- Federal and state tax exemption
- Job type and job step
- Pay status
- EEO status

### **See Also**

- R064011, *Employee Roster* in the *Reports Guide* for a report sample

## **Processing Options for Employee Roster**

### **Address**

1. Enter '1' to print address information
- 

## **Running the Employee Roster with Rate Report**

From the Employee Management menu (G05BE1), choose Employee Roster with Rate.

The Employee Roster with Rate report contains the same information as the Employee Roster report plus the following information:

- Salary amounts
- Person who last changed the payroll data and the date that the change occurred
- Work and residence tax areas
- Employment status
- Termination/change status

- Contract employee information
- Earned income credit status
- Residence status
- Tax method
- Pay frequency and class
- FLSA (Fair Labor Standards Act) exemption status

#### See Also

- R064021, *Employee Roster with Rate* in the *Reports Guide* for a report sample

### Processing Options for Employee Roster with Rate Report

Employee No \_\_\_\_\_

1. Enter 'A' to print Address Book number, 'S' for Social Security number or 'O' for Third number \_\_\_\_\_

### Running the Update Employee Master Age Report

From the Employee Advanced and Technical Operational menu (G05BE3), choose Update Employee Master Age as of.

The Update Employee Master Age Report updates each employee's age in the Employee Age field on the Personal form (W0801EMPD). The system calculates the new value based on each employee's Date of Birth value and the date specified in your processing options.

#### See Also

- R083495, *Update EE Master Age as of* in the *Reports Guide* for a report sample

### Processing Options for PO Update EE Master Age as of Date

Date: \_\_\_\_\_

1. Enter the as of date to be used when calculating employees age. \_\_\_\_\_

### Running Employee Supplemental Data Reports

You can run reports to review employee supplemental information in the following ways:

- As an individual employee summary
- As a summary of all your employees and their related profile data
- By supplemental data type

Running employee supplemental data reports consists of the following tasks:

- Running the Employee Supplemental Data report
- Running the Employee Data by Data Type report

### **Running the Employee Supplemental Data Report**

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

To review complete supplemental information for one or more employees, run the Employee Supplemental Data report. This report compiles all of an employee's supplemental data into an easy-to-read, resume-style format.

The report includes a summary of data stored in the following tables for each of the employees that you select:

- HRM Supplemental Data Types (F08090)
- Human Resources User Defined Codes (F08092)
- Human Resources General Description-Narration (F08093)
- Employee Master (F060116)

The information that prints on this report is the same information that you can review on Employee Supplemental Data Inquiry (P0801).

You can list employees alphabetically by last name or numerically by employee number.

### **See Also**

- R080410A, *Employee Supplemental Data* in the *Reports Guide* for a report sample

## Processing Options for Employee Supplemental Data

### Cover Page

1. Print Cover Page (Y/N)
2. Print Instructions (Y/N)

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### Form Options

1. Form Type
2. Max Form Width
3. Max Form Length
4. Location of Page Overflow

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### Printer Option

1. Print Queue
2. Hide in Print Queue (Y/N/S/T)
3. Lines/Inch
4. Char./Inch
5. Number of Report Copies

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### 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.

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## Running the Employee Data by Data Type Report

From the Employee Supplemental Data menu (G05BSDE1), choose Employee Data by Data Type Report.

Run the Employee Data by Data Type report to review all employees who have information in a particular supplemental data type category, such as language skills. The information that prints on this report is the same information that you can review online using the Employee Supplemental Data Entry program (P00092).

You can list employees alphabetically by last name or numerically by employee number.

This report includes a summary of data as it applies to certain employees from the following tables:

- Supplemental Database Data Type (F00091)
- Supplemental Data (F00092)

- Employee Master (F060116)

**See Also**

- R080400, *Employee Data by Data Type* in the *Reports Guide* for a report sample

## **Processing Options for Employee Data by Data Type Report**

**Narrative**

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

## **Working with Point-In-Time Employee Reports**

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Similar to currently available employee reports, you can run point-in-time employee reports to review changes that have been made to the employee master record. The primary difference is that in the point-in-time report group, a view of an employee's record, or any group of employee records, can be produced as of a specific date. For example, you might need to produce a report to satisfy a governmental inquiry that includes the top 10 salaried employees for each business unit, as of a specific date, including each employee's surname, job, position, and mailing address, and the name of the person to whom each reported.

Working with point-in-time employee reports requires two tasks:

- Preparing data for point-in-time reports
- Running point-in-time reports

### **Preparing Data for Point-In-Time Reports**

To prepare data for reports, you must verify the integrity of the data in the HR History table (F08042), build a new Point-In-Time Employee Master table (F0601161), and then review your data selection. After these tasks have been completed and possible errors fixed in employee records, you can run any of the point-in-time reports.

If errors exist in the HR History table, running the HR History Data Integrity Check will automatically produce an error report. You must fix errors listed in this report to include the records in a subsequent report. To correct data or add missing data to employee records, you use the Update Employee History program (P050420).

The Build/Delete Point-In-Time Employee Master program creates a new Point-In-Time Employee Master table (F0601161), based on the existing Employee Master table (F060116), that includes two new data fields: Effective Date and Version. The additional fields allow multiple records for employees, covering different points in time, to exist in the table. A combination of data from the Employee Master table and the HR History table (F08042) is used to build the point-in-time records.

When employee records for a specific date are not available in the HR History table, the program uses the next earlier date available. If an earlier date is not

available, the program provides an exception report that lists the next date available for each record.

Preparing data for point-in-time reports includes the following tasks:

- Verifying the integrity of the HR history data
- Building a new Point-In-Time Employee Master table
- Reviewing the data selection

### **Verifying the Integrity of the HR History Data**

From the Point-In-Time Employee Master menu (G05B31), choose HR History Data Integrity Check.

Run HR History Data Integrity Check (R08042D) to review all employee records in the HR History table to ensure that each record includes an associated effective date. The new table that you will build in the next task, *Building a New Point-In-Time Employee Master Table*, will not include records that do not have an associated effective date.

When selected employee records do not contain all the data needed for point-in-time reporting, the HR History Data Integrity Check automatically generates a report that includes the employee records with missing data.

You use the Update Employee History program (P050420) to enter the missing data listed on the error report. Then you rerun HR History Data Integrity Check to ensure that no more errors occurred. When you build a new Point-In-Time Employee Master table, the system will not include any records with incomplete data. Only employees who have an original hire date that is equal to or earlier than the date that you select will be included in the new table.

Although not a required task, verifying the integrity of the data and entering corrections as needed ensures that all applicable data will be included in your point-in-time reporting.

#### **See Also**

- *Correcting Employee History*, for procedures to correct HR History data

### **Building a New Point-In-Time Employee Master Table**

From the Point-In-Time Master menu (G05B31), choose Build/Delete Point-In-Time Employee Master.

After you verify the integrity of your employee record data, and before you review your data selection, use the Build/Delete Point-In-Time Employee Master program to create a new Point-In-Time Employee Master table (F0601161) that

the system will use to generate point-in-time reports. This table is a mirror image of the Employee Master table (F060116) with two additional fields: Effective Date and Version. These additions allow you to generate multiple employee records for multiple points in time.

When selected employee records are not available for the specified date, the system selects data for the next earlier date. If no earlier data is available, the system automatically generates an exception report that includes the employee records with missing data, the date, and values from the next earlier date. Possible circumstances that could cause this situation are:

- Historical records have been archived and no longer exist in the HR History table.
- Data was not tracked in history prior to a specified date.
- HR History has been purged or initialized.

By resetting a processing option, you can also use the Build/Delete Point-In-Time Employee Master program to delete data from the Point-In-Time Employee Master table. Do this to remove point-in-time versions that are no longer useful and to reduce the size of the Point-In-Time Employee Master table.

**Note:** This process requires at least one minute per employee record. When working with a large number of employee records, you might want to consider this time requirement before you begin.

### Before You Begin

- Verify that point-in-time information has been included appropriately in your data. See *Verifying the Integrity of the HR History Data*.

### Processing Options for Build/Delete Point-In-Time Employee Master

#### Parameters

Effective Date	_____
Version Name	_____
Build/Delete	_____
0 or Blank = Build	_____
1 = Delete	_____

### Reviewing the Data Selection

After you build the Point-In-Time Master table, and before you generate a point-in-time report, you should review the records that you have selected to ensure that they include the correct group of employee records and the correct data. Using the Point-In-Time Master, you can:

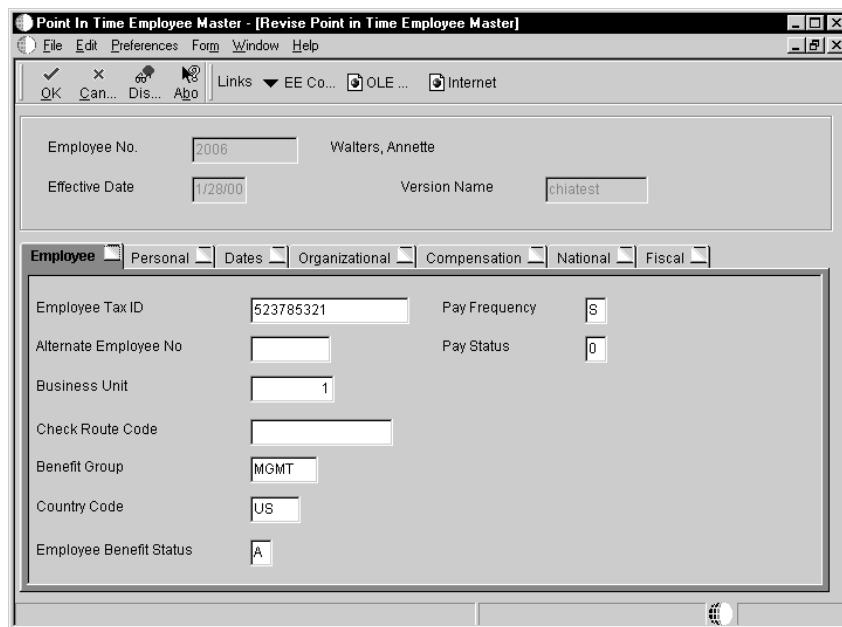
- View existing batches
- Create or delete batches

- Select a batch to view more detail

► **To review the data selection**

From the Point-In-Time Employee Master menu (G05B31), choose Point-In-Time Employee Master.

1. On Work With Point-In-Time Employee Master, complete the following fields and click Find:
  - Effective Date
  - Version Name
  - User ID
2. To ensure that the desired records have been included, choose a version and click Select.
3. To ensure that the desired data has been included, choose an individual employee record and click Select.



4. On Revise Point-In-Time Employee Master, review the data on each of the tabs. Add or change missing data if necessary so that the record will be included in your point-in-time report. When finished, click OK.
5. On Change Reason, enter the date and the reason for the changes that you entered. Use Database Correction for the Change Reason if you do not know the reason that data was wrong or missing, and then click OK.
6. If records were missing or if you discovered inaccurate data in selected records, repeat the tasks listed below before running point-in-time reports:

- Verifying the integrity of the HR History data
- Building a new Point-In-Time Employee Master table
- Reviewing the data selection

Field	Explanation
Effective Date	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.
Version Name	The version name that you assigned to a date-effective snapshot of a business unit category code structure when you created the snapshot.
User ID	For World, the IBM-defined user profile. For OneWorld, the identification code for a user profile.

## Before You Begin

- Create a new Point-In-Time Employee Master table. See *Building a New Point-In-Time Master Table*.

## Processing Options for Point-In-Time Employee Master

### Update

Point in Time Employee Master and  
HR History  
0 = No  
1 = Yes (F0601161)  
2 = Yes (F0601161 and F08042)

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## Running Point-In-Time Reports

The system provides several point-in-time reports. To create your own custom reports, use the Point-In-Time Report Director (P91400). The Report Director offers an automated approach for creating user-defined reports using the Point-In-Time Master table.

Running point-in-time employee reports consists of the following tasks:

- Running a Point-In-Time Employee Roster report
- Running a Point-In-Time Employee Roster with Rate report
- Creating custom point-in-time reports

## **Before You Begin**

- Prepare data for point-in-time reporting. See *Preparing Data for Point-In-Time Reports*.

## **Running a Point-In-Time Employee Roster Report**

From the Point-In-Time Employee Master menu (G05B55631), choose Employee Roster.

After you review your data selection, use the Point-In-Time Employee Roster report to review all or selected groups of employees, as of a specific date, that are entered in the Payroll system. You can run this report to analyze employee information, prepare responses to governmental inquiries, or verify that the following employee information has been entered correctly:

- Home company
- Business unit
- Basic dates
- Group plan
- Workers' compensation
- Federal and state tax exemption
- Job type and job step
- Pay status
- EEO status

## **Processing Options for Point-In-Time Roster Report**

Address

1. Enter '1' to print address \_\_\_\_\_  
information

Point in Time

Effective Date: \_\_\_\_\_  
Version Name: \_\_\_\_\_

## **Running the Point-In-Time Employee Roster with Rate Report**

From the Point-In-Time Employee Master menu (G05B31), choose Employee Roster with Rate.

After you review your data selection, use the Point-In-Time Employee Roster with Rate report to review all or selected groups of employees, as of a specific date. This report is useful in preparing information in response to a governmental inquiry, analyzing employee information, and ensuring accurate

data entry. In addition to the reporting parameters of the Point-In-Time Roster report, this report contains the following information:

- Salary amounts
- Person who last changed the payroll data and the date that the change occurred
- Work and residence tax areas
- Employment status
- Termination/change status
- Contract employee information
- Earned income credit status
- Residence status
- Tax method
- Pay frequency and class
- FLSA (Fair Labor Standards Act) exemption status

### Processing Options for Point-In-Time Employee Roster With Rate Report

Employee No \_\_\_\_\_

1. Enter 'A' to print Address Book number, 'S' for Social Security number or 'O' for Third number \_\_\_\_\_

Point in Time \_\_\_\_\_

Effective Date: \_\_\_\_\_  
Version Name: \_\_\_\_\_

### Creating Custom Point-In-Time Reports

After reviewing the selected data in your Point-In-Time Employee Master table, use the Point-In-Time Report Director (P91400) to create custom, point-in-time reports that might be required to meet your needs. The Director helps you create a report by guiding you step-by-step through the design process.

The Report Director uses templates that contain default criteria. When you choose the Point-In-Time template in the Director, the Director presents the default criteria through Director forms. You can modify the OneWorld templates and create your own templates or programs.

The Point-In-Time Report Director provides smart fields that enhance your report writing capabilities and reduce the amount of time required to create a custom report. Smart fields are predesigned components of logic and processing that you can select for a particular field, rather than writing code to create the desired functions. Available smart fields include:

- Amount Variance. Used to include the specific amount between the salary levels of employees that you have selected for a point-in-time version in a new report.
- Salary Percent Variance. Used to include the specific percentage difference between the salary levels for a selected employee group.
- Salary Midpoint. Used to include the midpoint salary levels for a selected employee group.

These Smart Fields work in conjunction with the Director's processing options to specify the desired functions.

## See Also

- *Working with Director Templates* for information about Report Directors
- *Working with Smart Field Templates* for information about smart fields
- *Adding or Modifying Director Templates* for information about director templates

# Creating Employee Letters

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When you need to send written information to employees, you can use the mailmerge features of your J.D. Edwards OneWorld software to efficiently produce letters for small, infrequent mailings or large, mass mailing projects. For example, you can quickly generate a letter to a group of employees who will be included in a new marketing campaign. Or you can generate a mass mailing to all employees to announce a new benefit option.

You use Print Employee Letters (P08452) to create one letter or a batch of personalized letters. You can use a letter from an existing sample, create your own, or replace custom information as each letter is printed.

You use Employee Letters - Mass Mailing (R08451) to prepare to send letters to a large number of people or to preselected groups of people.

You can use MailMerge Workbench to add or change text in the business documents included with OneWorld, to create entirely new documents, and to delete documents.

Creating employee letters includes the following tasks:

- Preparing employee letters
- Creating mass mailing letters

## Before You Begin

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

## Preparing Employee Letters

The Print Employee Letters program automates the process of printing customized letters that you want to send to people who are listed in the employee master table. You can select employees from a table, specify a form letter, and print customized copies for each recipient. You can also sort employee records and select a specific group for which you want to print letters.

You can use either of two approaches to customize the content of letters that you will print for specific individuals:

- Enter direct changes to a selected form letter just before you print it.
- Edit an existing form letter or create a new letter using MailMerge Workbench.

### ► To prepare an employee letter

---

From the Employee Management menu (G05BE1), choose Print Employee Letters.

1. On Print Employee Letters, click Find to display all employees.

Employee Name	Employee Number	Employee Tax ID	Home Business Unit	Home BU Description
Abbott, Dominique	6002	476438269	9	Corporate Admini
Abrams, Brooke	6044	604460446	9	Corporate Admini
Allen, Ray	6001	798525841	9	Corporate Admini
Anderson, Jeanette	8014	801480148	9	Corporate Admini
Ato, Connie	6832	683268328	9	Corporate Admini
Beck, Jeremy	4803		6100	Protective Service
Bellas, Debbie	7703	481560670	7071	Corporate Admini
Bennett, Jody	8446	332482462	M30	Eastern Manufact
Breton, Josephine	4801		6100	Protective Service
Brown, Harvey J.	8447	265987246	M30	Eastern Manufact
Carmichael, Bradley P.	5056	605660565	5100	Potomac Hotel
Chamberlain, Carol M.	7564	756475647	9	Corporate Admini

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

If you set up letter to use this value, this date will print on your letter.
3. Complete the following field to choose the desired letter template.
  - Employee Letter Document
4. To create multiple letters, click Find, and then select multiple employee records from the table.
5. To create a single letter, complete the following fields, click Find, and then choose the employee record:
  - Employee Identification

- Employee Name
6. Choose Generate Letter from the Row menu.

Depending on the setup options you choose when you set up the mailmerge application and your letter, a Print form might appear.

7. If a Print form appears, verify that the OLEQUE option has been selected, and then click OK.

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

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

The system might display a Print dialog form, which will require that you perform step 9.

9. If a Print form appears, verify that the form contains the correct information and click OK.

---

<b>Field</b>	<b>Explanation</b>
Employee Identification	This field may hold the employee number, TAX ID or Alternate number. The value this field holds, depends on the employee number mode setup in the Payroll Constants for Company 00000.
Employee Name	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.
Mailing Date	This indicates the date that prints on your letter.
Employee Letter Document	This field identifies which Employee Letter document will be used from the MailMerge (P980014) application.

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## Creating Mass Mailing Letters

From the Employee Management menu (G05BE1), choose Employee Letters - Mass Mailing.

To prepare for mass mailing projects and frequent communication to selected groups of employees, you can use Employee Letters - Mass Mailing (R08451). You can create multiple report versions to address specific groups of employees or for repetitive mailing projects. For example, you can send a letter offering a new company benefit to all of the employees who share the same company code.

You can sort employee records to select the group desired. This selection process uses data from the Employee Master table (F060116).

A processing option determines which letter template the system will use. The data selection determines which employees will receive the letter.

# **Self-Service**



# Employee Self-Service

Self-service allows employees to complete tasks online through a company intranet site. Self-service reduces the handling of documents between employees and the human resources department by allowing employees to access information, forms, and services through desktop computers. For example, employees can use self-service to review and update personal data and enroll in benefits online. When employees update information through self-service, the changes made by the employee can be posted to a temporary workfile, where a company representative can review the changes before posting them to the employee database.

Employees can use self-service to perform the following functions online:

- Change name and address
- Change emergency contact information
- Request a verification-of-employment letter
- Request paid time off
- Review benefits information and enroll for new benefits
- Review and change dependents and beneficiaries information
- Review timecards

The type of information that is available on your self-service website is defined by your company. For example, your company might allow employees to make address changes but not benefits changes.

Employee self-service includes the following tasks:

- Working with personal information using self-service
- Reviewing employee personal profile information
- Working with timecard information using self-service
- Reviewing pay stubs using self-service
- Working with paid time off using employee self-service
- Entering benefits information
- Entering automatic deposit information using self-service
- Working with competency information using self-service



## See Also

- *Entering a W-4 Form* in the *Global Solutions: United States* Guide.
- *Revising a W-4 Form* in the *Global Solutions: United States* Guide.

## **Working with Personal Information Using Self-Service**

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You can use Employee Self-Service to review and change personal information online. As personal circumstances change, use this approach to review or change the current status of personal information, obtain documentation regarding employment, or review your paid time off. You must have a OneWorld signon to access Employee Self-Service.

Working with personal information using self-service includes the following tasks:

- Requesting a verification-of-employment letter
- Changing name and address information
- Changing emergency contact information
- Reviewing paid time off

### **Requesting a Verification-of-Employment Letter**

OneWorld's self-service Verification of Employment (VOE) enables employees to submit requests online to verify salary and employment information. Concurrently, they can review the salary and employment information associated with their employee records.

Using processing options, the employer controls the user level. An employee can review information at the employee user level and make changes allowed for employees. An HR person can review information at the HR user level and perform functions that are allowed only at an administrative level.

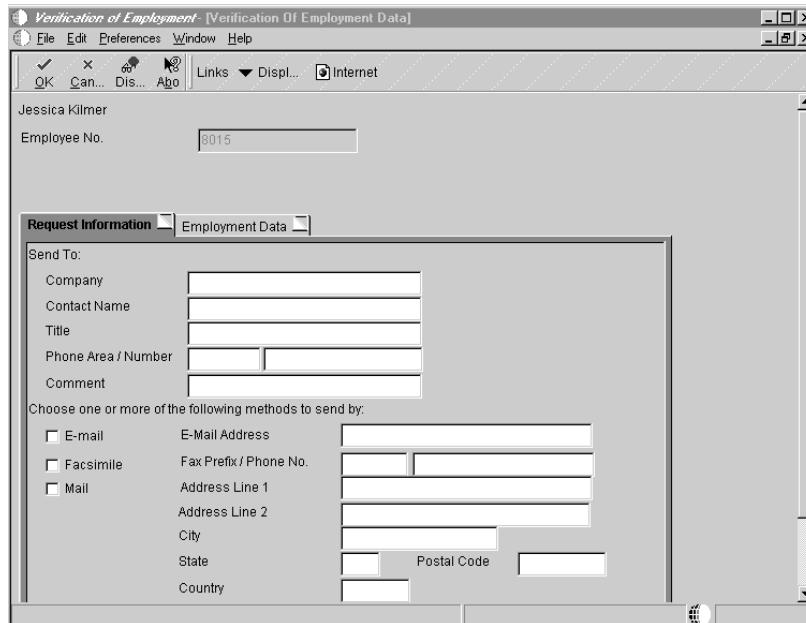
After an employee has submitted a request for employment verification, a workflow process is started, that forwards the request to a designated HR person. That person then reviews the employment and salary information that the system has generated, makes any necessary revisions, and can then forward the information directly to the party previously specified by the employee.

Employees can use self-service to request that a verification-of-employment letter be sent to a creditor or loan officer. After requesting the letter, employees can review the progress of the request. The human resources administrator can print or e-mail the completed letter.

## ► To request a verification-of-employment letter

From the Employee Self-Service menu (G05BESS1), choose Verification of Employment.

1. On Work with Verification Of Employment Requests, complete the following field and click Add:
  - Request Date



2. On Verification Of Employment Data, complete the following field on the Request Information tab:
  - Contact Name
3. Complete the following optional fields:
  - Company
  - Title
  - Phone Area / Number
  - Comment
4. Complete one or more of the following contact method fields:
  - Mail
  - Facsimile
  - E-mail

For release B73.3.1, the Facsimile contact method is not available.

5. Complete the following fields that apply to the contact method you have chosen:

- E-Mail Address
- Fax Prefix / Phone No
- Address Line 1
- Address Line 2
- State
- City
- Postal Code
- Country

6. Click the Employment Data tab.

The screenshot shows a software application window titled "Verification of Employment - Verification Of Employment Data". The window has a menu bar with File, Edit, Preferences, Window, and Help. Below the menu is a toolbar with OK, Cancel, Dis..., and Help buttons. The main area displays "Jessica Kilmer" and "Employee No. 0015". A tab bar at the bottom shows Request Information and Employment Data, with Employment Data selected. The Employment Data section contains the following fields:

- Date Started: 2/1/98
- Job Type/Step Description: Administrative Assistant
- Continued Employment: High (radio button selected)
- Pay Frequency: B (radio button selected)
- Pay Class(H/S/P): H (radio button selected)
- Date Of Last Raise: [empty]
- Date of Next Raise: [empty]
- Comment: [empty]
- Amount Of Increase: [empty]
- Pay Period Salary: 2,140.00
- Base: 8,560.00
- Overtime: [empty]
- Commission: [empty]
- Bonus: [empty]
- Other: [empty]

Below these fields are three columns: Current Year, One Year Prior, and Two Years Prior, each with four empty input fields corresponding to the categories above. The window has scroll bars on the right and bottom.

7. Review the following pay information fields and click OK:

- Date Started
- Job Type/Step Description
- Continued Employment
- Pay Frequency
- Pay Class(H/S/P)
- Date Of Last Raise
- Amount Of Increase
- Date of Next Raise

- Pay Period Salary
- Comment
- Current Year Base
- Current Year Overtime
- Current Year Commission
- Current Year Bonus
- Current Year Other
- One Year Prior Base
- One Year Prior Overtime
- One Year Prior Commission
- One Year Prior Bonus
- One Year Prior Other
- Two Years Prior Base
- Two Years Prior Overtime
- Two Years Prior Commission
- Two Years Prior Bonus
- Other

The Work with Verification of Employment Requests form appears. Your letter is pending review.

8. To review the status of your request, repeat step 1, but click Find instead of Add.
9. Review the following field and click OK:
  - Revd Flag

---

<b>Field</b>	<b>Explanation</b>
Request Date	<p>The date that an item is to arrive or that an action is to be complete.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The date of the request. If you are adding a request for a verification of employment letter, enter today's date. If you are reviewing a request, enter the date on which you initially added the request.</p>

---

<b>Field</b>	<b>Explanation</b>												
Date Started	<p>The date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. If no original hire date exists, the system uses the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker.</p> <p>For the calculation tables in the Payroll system and the eligibility tables and date codes in the Human Resources system, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.</p>												
Job Type/Step Description	<p>The description associated with the job type and job step. This description is stored in the Job Information table (F08001).</p>												
Continued Employment	<p>A field that indicates the employee's potential for continuing employment with the organization. Valid values are stored in the user defined code table 05/V3.</p>												
Pay Frequency	<p>A user defined code (07/PF) that indicates how often an employee is paid. Codes are:</p> <table style="margin-left: 20px;"> <tr><td>B</td><td>Biweekly</td></tr> <tr><td>W</td><td>Weekly</td></tr> <tr><td>S</td><td>Semimonthly</td></tr> <tr><td>M</td><td>Monthly</td></tr> <tr><td>A</td><td>Annually</td></tr> <tr><td>C</td><td>European Annualized</td></tr> </table> <p>The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee.</p>	B	Biweekly	W	Weekly	S	Semimonthly	M	Monthly	A	Annually	C	European Annualized
B	Biweekly												
W	Weekly												
S	Semimonthly												
M	Monthly												
A	Annually												
C	European Annualized												
Pay Class(H/S/P)	<p>A code that indicates how an employee is paid. Valid codes are:</p> <table style="margin-left: 20px;"> <tr><td>Blank</td><td></td></tr> <tr><td>H</td><td>Hourly</td></tr> <tr><td>S</td><td>Salaried</td></tr> <tr><td>P</td><td>Piecework</td></tr> </table>	Blank		H	Hourly	S	Salaried	P	Piecework				
Blank													
H	Hourly												
S	Salaried												
P	Piecework												
Date Of Last Raise	<p>The date of the employee's last raise. For the stand-alone HR system, this is the date when you update salary and wages. If you also have the Payroll system, this date is automatically updated when a payroll is run. You define pay effective dates using Pay Rate Information.</p>												
Amount Of Increase	<p>Amount of increase is the difference between two values. A negative value indicates a decrease.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>A monetary increase as a result of a raise occurring on the Date of Last Raise.</p>												

Field	Explanation
Date of Next Raise	The date that the hourly or annual pay rate for the employee increases. The new rate goes into effect after a payroll cycle completes with a pay period end date on or after the date of the next raise.
Pay Period Salary	Pay Period Salary is calculated by dividing the annual salary by the number of pay periods.
Comment	A comment, description or remark. This entry can be up to 40 characters in length.
Current Year Base	Amount paid from all pay types considered to be base salary for the current year.
Current Year Overtime	Amount paid from all pay types considered to be overtime pay for the current year.
Current Year Commission	Amount paid from all pay types considered to be commission pay for the current year.
Current Year Bonus	<p>The amount of bonus pay that the employee earned, year-to-date in the current year. The system calculates this amount by searching the employee's timecards for pay types that represent bonus pay. It then calculates the amount of the employee's earnings during the year that were attributed to the bonus pay types.</p> <p>Note: When you set up a pay type, you use the Pay Type Category field (PTCT) to identify it as part of a related group of pay types, such as regular pay, bonus pay, commissions, and so on. You define pay type categories in user defined code list 06/PC.</p>
Current Year Other	Amount paid from all pay types considered to be other pay for the current year. Other pay is anything other than base salary, overtime, commission, and bonus.
One Year Prior Base	The amount paid from all pay types considered to be base salary for the year prior to the current year.
One Year Prior Overtime	Amount paid from all pay types considered to be overtime pay for the year prior to the current year.
One Year Prior Commission	Amount paid from all pay types considered to be commission pay for the year prior to the current year.

<b>Field</b>	<b>Explanation</b>
One Year Prior Bonus	<p>The amount of bonus pay that the employee earned in the year prior to the current year. The system calculates this amount by searching the employee's timecards for pay types that represent bonus pay. It then calculates the amount of the employee's earnings during the year that were attributed to the bonus pay types.</p> <p>Note: When you set up a pay type, you use the Pay Type Category field (PTCT) to identify it as part of a related group of pay types, such as regular pay, bonus pay, commissions, and so on. You define pay type categories in user defined code list 06/PC.</p>
One Year Prior Other	Amount paid from all pay types considered to be other pay, for the year prior to the current year. Other pay is anything other than base salary, overtime, commission, and bonus.
Two Years Prior Base	Amount paid from all pay types considered to be base salary, for the year that is two years prior to the current year.
Two Years Prior Overtime	Amount paid from all pay types considered to be overtime pay, for the year that is two years prior to the current year.
Two Years Prior Commission	Amount paid from all pay types considered to be commission pay, for the year that is two years prior to the current year.
Two Years Prior Bonus	<p>The amount of bonus pay that the employee earned in the year that is two years prior to the current year. The system calculates this amount by searching the employee's timecards for pay types that represent bonus pay. It then calculates the amount of the employee's earnings during the year that were attributed to the bonus pay types.</p> <p>Note: When you set up a pay type, you use the Pay Type Category field (PTCT) to identify it as part of a related group of pay types, such as regular pay, bonus pay, commissions, and so on. You define pay type categories in user defined code list 06/PC.</p>
Two Years Prior Other	Amount paid from all pay types considered to be other pay, for the year two years prior to the current year. Other pay is anything other than base salary, overtime, commission, and bonus.

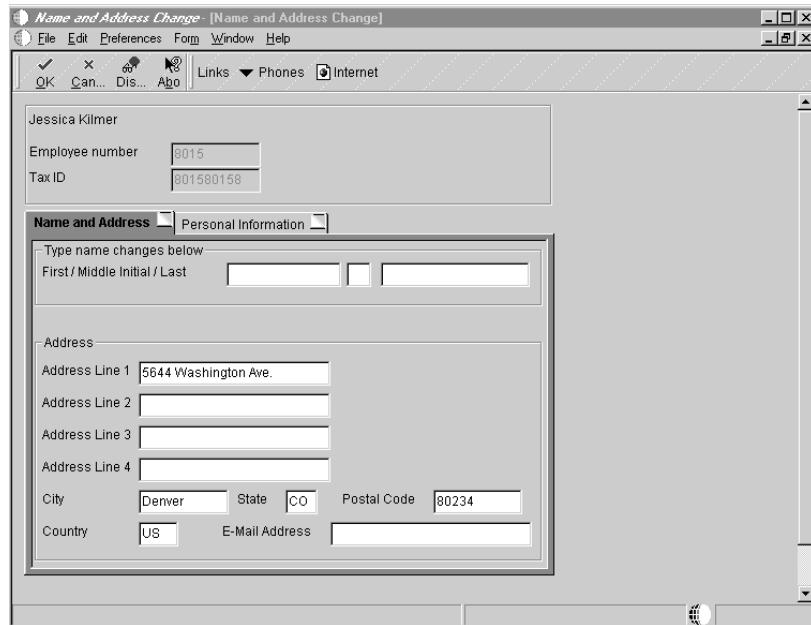
Field	Explanation
Revd Flag	<p>A user defined code (05/V2) that indicates the progress of your verification of employment letter. Valid values are:</p> <ul style="list-style-type: none"> <li>0 Pending. The administrator has not yet reviewed your request. You can change your request information if you need to.</li> <li>1 Reviewed. The administrator has reviewed your request. Changing your request information is not advisable.</li> <li>2 Processed. The administrator has processed your verification of employment letter.</li> </ul>

## Changing Name and Address Information

You can use self-service to update your name, address, and telephone number. The human resources administrator does not need to manually enter that information. The changes made by the employee can be posted to a temporary workfile, where a company representative can review the changes before posting them to the employee database. The system administrator might have attached a personal photo on this application for you to view.

### ► To change name and address information

From the Employee Self Service menu (G05BESS1), choose Life Events. From the Life Events menu (G05LE1), choose one of the following life event menu items: Marriage, Divorce, Children, Moving. Then choose Name and Address change. Alternatively, from the Employee Self Service menu (G05BESS1), choose Employment Events. From the Employment Events menu (G05EE1), choose Name and Address Change.



1. On Name and Address Change, to enter name and address information, complete the following fields on the Name and Address tab:
  - First / Middle Initial / Last
  - Address Line 1
  - Address Line 2
  - Address Line 3
  - Address Line 4
  - City
  - State
  - Postal Code
  - Country
  - E-Mail Address
2. Click the Personal tab.
3. View your personal photo if the system administrator has set this up.

### Processing Options for Employee Name and Address Change

#### Workflow Setup

1. Address Number of HRM/Payroll person or a Distribution List who will update Payroll files ( i.e. Vertex, GeoCode for Resident Tax Area) if either City or State or Postal Code has changed

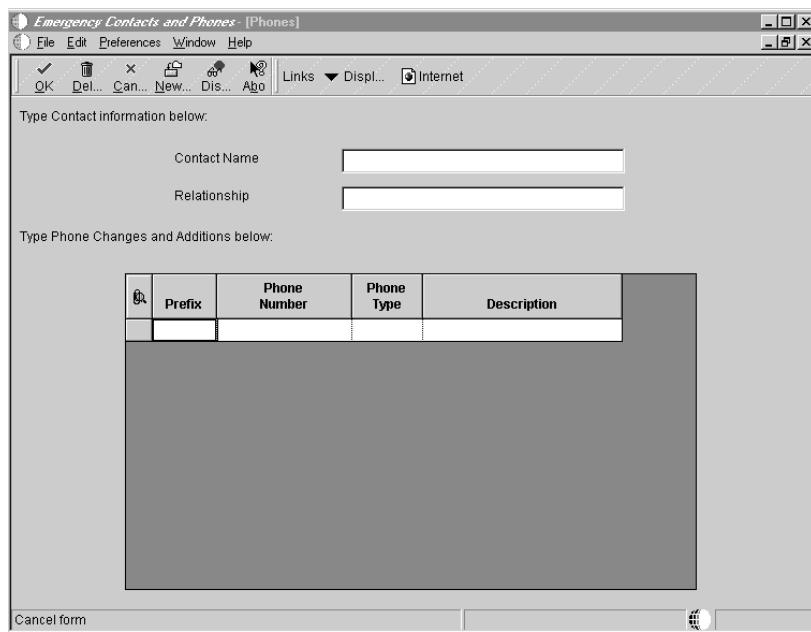
## Changing Emergency Contact Information

You can use self-service to update your emergency contact information. The human resources department does not need to manually enter that information because self-service automatically updates the employee database.

### ► To change emergency contact information

From the Employee Self Service menu (G05BESS1), choose Life Events. From the Life Events menu (G05LE1), choose one of the following life event menu items: Marriage, Divorce, Children, Moving. Then choose Emergency Contacts and Phones. Alternatively, from the Employee Self Service menu (G05BESS1), choose Employment Events. From the Employment Events menu (G05EE1), choose Emergency Contacts and Phones.

1. On Work With Emergency Contacts, click Add.



2. On Phones, complete the following fields:
  - Contact Name
  - Relationship
  - Prefix
  - Phone Number
  - Phone Type
3. To delete an emergency contact, choose a record and then click Delete.
4. Click OK.

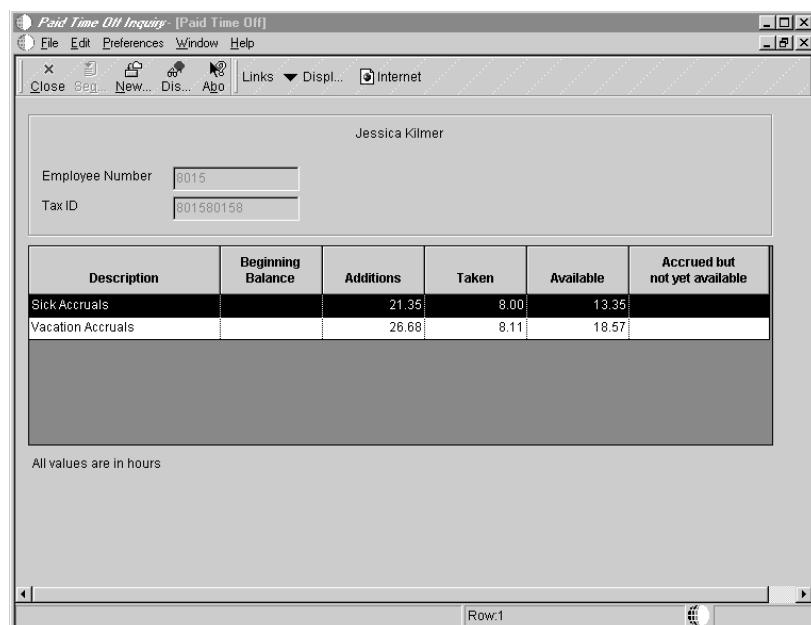
## Reviewing Paid Time Off

You can use self-service to review your paid time-off accruals and balances. The Paid Time Off Inquiry program (P053020) displays your beginning balance, the time you have accrued, the time you have taken, the time that is available to take, and the time that has accrued but is not yet available.

### ► To review paid time off

From the Employee Self Service menu (G05BESS1), choose Paid Time Off Inquiry.

You can use self-service to review your paid time-off accruals, deductions, and balances for the current year.



On Paid Time Off, review the following fields:

- Description
- Beginning Balance
- Additions
- Taken
- Available
- Accrued but not yet available



# Reviewing Employee Personal Profile Information

---

Use the Employee Personal Profile program (P060116) to review information that currently exists in your company's records. The information that you can review is in the following categories:

- Personal
- Company (Self-Service)
- Job (Self-Service)

The information in this location is for review only; you cannot change any of the fields. If you find information that is not accurate, or if you want to add information, you can use the Contact HR function to send a message to your HR Department requesting changes or additions.

Managers can review this information from the Manager's Workbench. The HR administrator can review this information by accessing Employee Profile from the Employee Management menu.

## Before You Begin

- Ensure that the Human Resource field in the processing options for Employee Personal Profile has been set to the HR administrator's address number. The Enrollment tab of the processing options is not functional for this application. Do not enter or change the value for this tab.

## ► To review employee personal profile information

---

From the Employee Self-Service menu (G05BESS1), choose Employee Personal Profile.

1. On Employee Profile and Job Information, review the data on the Personal tab.
2. Click each of the subsequent tabs and review the information.
3. If you find information that requires correction or you desire to have new information added, click Contact HR.
4. On Send Internal Mail, complete the following fields:
  - Subject
  - Phone Number

The system provides the default address number of the HR administrator in the Send To field, as specified by the processing option. The system provides your name as the default in the Call From field, which is not available for change. The remaining fields do not apply and should be left blank.

5. Use the text area of the form to communicate detailed information that you want to provide to HR. When finished, click OK.

Workflow sends your message to the HR administrator for action on your request.

Field	Explanation
Subject	For World, this is a text summary, fewer than 40 characters, of the message that you will enter in greater detail in the text entry area of the form. In OneWorld, this is a short text summary of your message.
Phone Number	The telephone number where the HR administrator can reach you for clarification, if needed.

## Processing Options for Employee Profile (P060116)

### Enrollment Tab

This processing option specifies the default that is applied for an enrollment option that is used in another application. This processing option is not functional for this application and should not be changed.

#### 1. Enrollment

Do not change the value for this processing option. While this processing option is functional when the form is used in another application, it is not functional for Employee Personal Profile. The default value should remain 0.

### Human Resource Tab

This processing option specifies the default that is applied for sending an email message to the appropriate HR representative.

#### 1. Human Resources

Use the processing option to specify the address book number that is used to retrieve the e-mail address that is stored in the Remark field on the Who's Who Address Book form.

## Working with Timecard Information Using Self-Service

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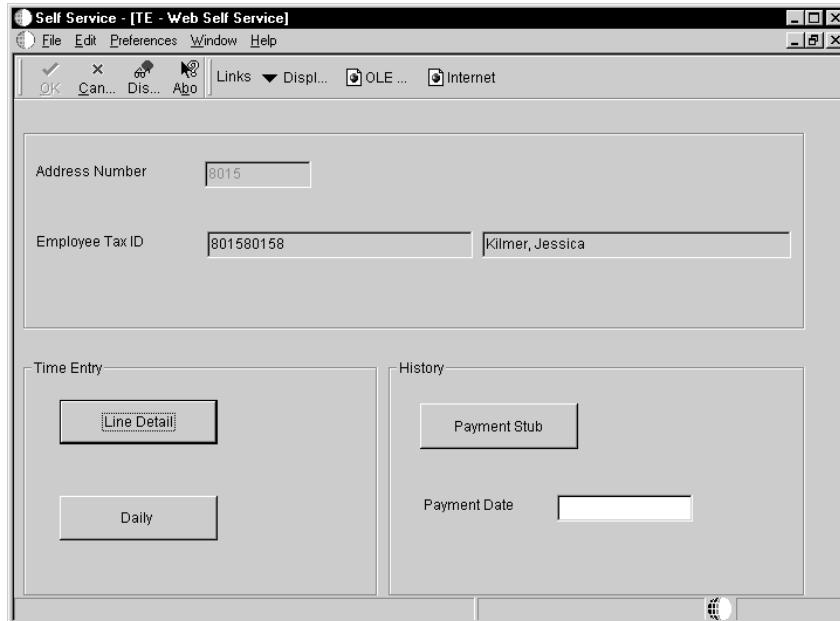
Use Employee Self-Service to enter, revise, and review your timecard information online. Whether you need to enter time on a daily or weekly basis or review existing time entry information, this approach will allow direct access to your timecard and reduce the time required to enter the information.

The Self-Service Time Entry Floods program (P051191) allows you to enter timecards using either the Daily Timecard Entry program (P051141) or the Time Entry program (P051131). You can enter timecards per pay period with Line Detail. The Daily Time Entry program might be preferable if you need to report your time every day. This program reduces data entry time because the form includes the days of the week on the entry grid.

### ► To work with timecard information using self-service

---

From the Time Entry menu (G05BT1), choose Self-Service.



1. On Time Entry Web Self-Service, to enter timecard information, choose either Line Detail or Daily in the Time Entry area.

2. Proceed to the task *Entering Timecards for Employees* and review the information for entering daily timecards or entering timecards per pay period.
3. After entering your time, if you want to review your pay stubs, proceed to the task *Reviewing Pay Stubs Using Employee Self-Service*.
4. Click OK.

## Reviewing Pay Stubs Using Employee Self-Service

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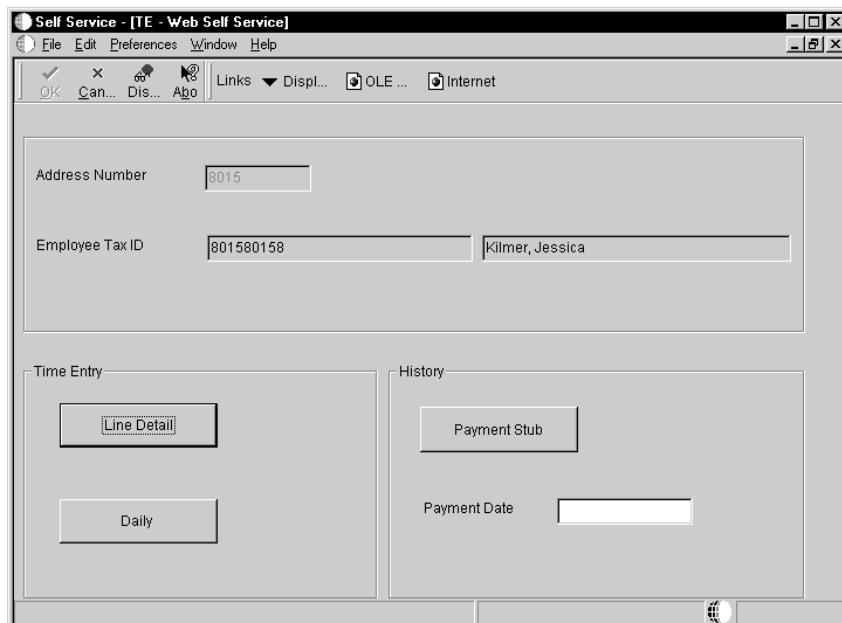
Use Employee Self-Service to review the accuracy of your pay stubs and ensure that they are complete.

The Self-Service Time Entry program (P051191) allows you to review your pay stubs.

### ► To review pay stubs using self-service

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From the Time Entry menu (G05BT1), choose Self Service. Disregard this navigation and continue with the steps if you have entered a timecard with time entry self-service.



1. On TE - Web Self Service, to review previous check stubs, complete the following optional field and click Payment Stub in the History area:
  - Payment Date

The screenshot shows a Windows application window titled "Self Service - [Work With Pay Stub History]". The menu bar includes File, Edit, Preferences, Form, Window, and Help. The toolbar contains icons for Select, Find, Close, Seg..., New..., Dis..., Abo, Links, Pay St..., OLE..., and Internet. The main area has fields for "Employee Identification" (8015) and "Alpha Name" (Kilmer, Jessica). Below these are fields for "From Check Date" and "Through Check Date", both set to asterisks (\*). The main content is a grid table with columns: Address Number, Alpha Name, Employee Tax ID, Alternate Number, and Check Date. The data shows multiple entries for employee 8015 Kilmer, Jessica, with various check dates ranging from 1/19/00 to 5/6/00.

Address Number	Alpha Name	Employee Tax ID	Alternate Number	Check Date
8015	Kilmer, Jessica	801580158		1/19/00
8015	Kilmer, Jessica	801580158		2/24/00
8015	Kilmer, Jessica	801580158		2/10/00
8015	Kilmer, Jessica	801580158		1/27/00
8015	Kilmer, Jessica	801580158		1/13/00
8015	Kilmer, Jessica	801580158		6/17/00
8015	Kilmer, Jessica	801580158		6/3/00
8015	Kilmer, Jessica	801580158		5/20/00
8015	Kilmer, Jessica	801580158		5/6/00

2. On Work With Pay Stub History, choose your pay stub and click Select.

The screenshot shows a Windows application window titled "Self Service - [Pay Stub History Information]". The menu bar includes File, Edit, Preferences, Form, Window, and Help. The toolbar contains icons for Close, Seg..., New..., Dis..., Abo, Links, Print, OLE..., and Internet. The main area has fields for "Address Number" (8015), "Alpha Name" (Kilmer, Jessica), "Route" (empty), "Check Date" (2/24/00), "Pay Period Ending Date" (2/18/00), and "Check No." (2018). The main content is a grid table with columns: Seq., Pay Type, Pay/Accrual Description, Hours, Hourly Rate, Gross Pay, YTD Amount, DBA Code, and Ded Desc. The data shows various pay components like Regular, Sick Pay, Vacation, and deductions like Federal Income Tax, Federal FICA, etc. At the bottom, there are summary fields: Gross Pay (2,140.00), Deductions (806.01), and Net Pay (1,333.99).

Seq.	Pay Type	Pay/Accrual Description	Hours	Hourly Rate	Gross Pay	YTD Amount	DBA Code	Ded Desc
1	P	Regular	64.00	26.750	1,712.00	8,132.00		Gross Wage
2	P	Sick Pay	8.00	26.750	214.00	214.00		Federal Inc
3	P	Vacation	8.00	26.750	214.00	214.00		Federal FICA
4	A	Sick			5.34	21.36		Federal Med
5	A	Vac Imm Avl			6.67	26.68		CO Departm
6		* Sick Taken/Available *					1010	Dental EE
7		* Vacation Taken/Available *					3002	Life Ins.
8							4002	Med- EE+1
9							7000	401(k)

Gross Pay 2,140.00 - Deductions 806.01 = Net Pay 1,333.99

3. On Pay Stub History Information, review the copy of your pay stub.
4. To print the information, choose Print from the Form menu.
5. Click Close.

## Working with Paid Time Off Using Self-Service

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Most organizations have vacation and sick or personal leave policies that allow employees to earn paid time off based on the number of hours they work. You use Paid Time Off Planning and Request (P053040) to accomplish the following:

- Review your accrued time
- Request future dates that you plan to use as paid time off
- Cancel a previous request for paid time off

Two calendar functions are provided on Planning Paid Time Off. Use the large calendar to review specific dates that you can use when entering information in the End Date and Start Date fields. When you click the search button in each of these fields, you can use the calendar to enter a date into the selected field.

The system will include or exclude weekends in the calculation of your paid time off based on how you set the processing option. Using the default setting, the system will exclude weekends in the calculation. The historical time information is calculated as of the end of the previous pay period.

When you initiate a request to use future days as paid time off, your supervisor receives a Workflow message that indicates that your request is waiting for approval. When your supervisor reviews the request and responds, Workflow returns the message to you.

Working with paid time off using self-service includes the following tasks:

- Reviewing and requesting paid time off
- Canceling a previous request for paid time off

### Reviewing and Requesting Paid Time Off

The information that the system provides includes a beginning balance that reflects your company's policies. In some cases, time may be carried from a previous year to the current year. The time accrued includes time that you have earned since the beginning of the current year that has been added to the beginning balance. The amount of time that you have taken has been subtracted, resulting in the time you currently have available.

► **To review and request paid time off**

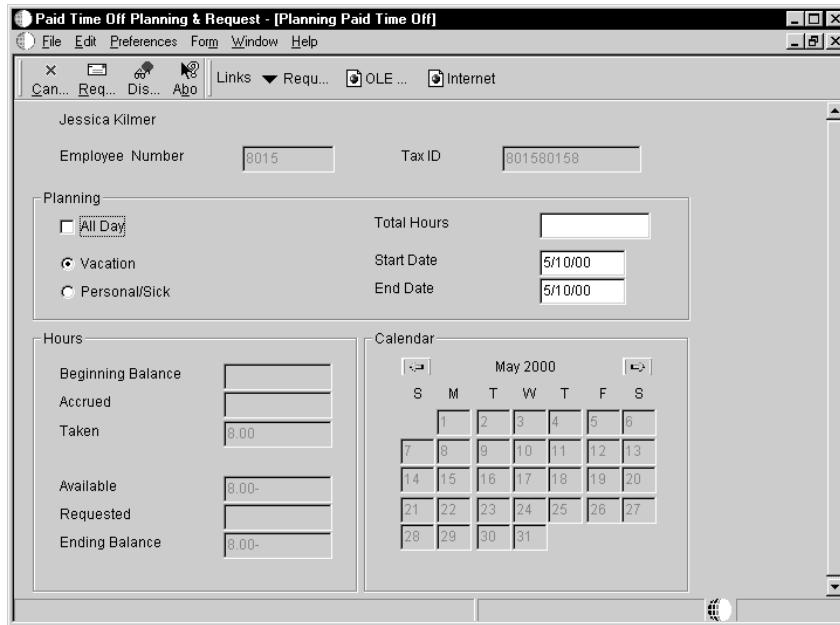
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From the Employee Self-Service menu (G05BESS1), choose Paid Time Off Planning and Request.

1. On Planning Paid Time Off, review the number of hours in each of the following fields:
  - Beginning Balance
  - Ending Balance
  - Taken
  - Available
2. Click Personal/Sick to review the number of hours that you have accrued that can be used as personal or sick days.
3. To start a request for paid time off, choose either Vacation or Personal/Sick.
4. Complete the following fields:
  - Total Hours
  - End Date
  - Start Date

If you use the tab function after completing the Total Hours field, the system adds the new information to the Requested and Ending Balance fields. If you click All Day, the system will automatically use eight hours as a full work day.

**Note:** Entering the start date and then the end date results in a temporary error that will clear when you tab out of the end date field. You can avoid this error by entering the end date first.



5. From the Form menu, choose Request.

The information that you entered on this form will be carried over to Request Paid Time Off.

6. On Request Paid Time Off, review the person specified in the Send To field to verify that the system has entered your supervisor's name. If this information is incorrect, click the search button to locate and enter the correct name.
7. Enter any explanation that might be appropriate in the Notes section and then click OK.

<b>Field</b>	<b>Explanation</b>
Total Hours	The number of hours that you are requesting to take as paid time off. You can click on All Day if you are requesting one or more full days off and leave this field blank.
Start Date	The first day that you plan to use as paid time off.
End Date	The last day that you plan to use as paid time off.

### Canceling a Previous Request for Paid Time Off

You can cancel a previous request if you submitted a request for paid time off in error, or when your personal plans have changed. Use the cancel function of Paid Time Off Planning and Request to remove a request for paid time off and keep your historical information accurate.

► **To cancel a previous request for paid time off**

---

From the Employee Self-Service menu (G05BESS1), choose Paid Time Off Planning and Request.

1. On Planning Paid Time Off, use the same review and data entry procedure that you used for your request, including the hours and dates from your previous request.
2. From the Form menu, click Cancel Request.

The Notes field that you might have used on the Request form is not required and is not available on Cancel Request.

3. On Cancel Request, verify that the system has supplied your supervisor's name in the Send To field and click OK.

## **Processing Options for Paid Time Off Planning and Request**

### **Process Tab**

These procession options specify how the system will calculate paid time off. You can include weekends, which can be weekdays other than Saturday or Sunday, or exclude them in the calculation.

#### **1. Include Weekends**

Use this processing option to specify whether the system will include Saturday and Sunday when calculating paid time off. Valid values are:

Blank Exclude Saturday and Sunday  
1      Include Saturday and Sunday

## **Entering Benefits Information Using Employee Self-Service**

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You use Employee Self-Service to manage your benefit plans online. Whether enrolling in a new plan, updating information, or reviewing current information, you can enroll or make changes to a plan, change from one benefit plan to another, and establish or change dependent and beneficiary designations.

Typically two types of opportunities are available during which you can enroll in benefit plans. Occasionally a company might offer a third type. The types of enrollment opportunities are as follows:

- Open enrollment
- Life event
- Special enrollment

You enroll in new benefit plans for the upcoming year during an open benefits enrollment period. Companies normally offer open enrollment once each year. The open enrollment period lasts for a certain length of time that is specified by the company. The benefits for which you enroll usually last for one year. To continue benefits each year, employees must participate in open enrollment. During this time, eligible employees choose benefits from the benefits package that the company offers and complete their enrollment. Some companies provide certain mandatory benefit plans that are automatically in force for all employees. Although the mandatory benefit plans might continue automatically, each employee must complete an annual enrollment to select and enroll in plans that are not mandatory.

Life events, such as marriage or having a child, are opportunities when an employee can change his or her benefit information. These opportunities should not be confused with open enrollment, when you enroll in new benefits for the coming year.

The company might offer a special enrollment, in addition to the annual open enrollment. For example, the company might create a special enrollment for health club or child care benefits that the company is introducing prior to the next open enrollment.

How you enter benefits information depends on whether you are participating in an open enrollment or you are entering changes resulting from a life event. You can also enter benefit changes resulting from a life event during the open enrollment period. For example, if you have a new child after you complete open enrollment, but before the start of the new benefit year, you can change

your benefits to include the new child for the current year and then enter changes to your open enrollment for the coming year.

Entering benefits information includes the following tasks:

- Enrolling in benefit plans
- Changing benefit plans

## See Also

- *Setting Up Self-Service for Benefits Enrollment*

## Enrolling in Benefit Plans

You can use self-service to enroll in benefit plans during an open enrollment or special enrollment period. You can repeatedly change your open enrollment choices prior to the closing of the open enrollment period.

The processing options for the Open Benefits Enrollment program (P08530) define some of the steps in the following task. For example, you can set a processing option to cause the system to display a Benefits Enrollment Message form. This form contains two options, one for continuing with benefits enrollment and one for finishing benefits enrollment. You can define the message that appears on the form with a processing option.

You can review the cost of your new enrollment options before you actually enroll in benefit plans. The system displays the total cost of the plans in which you have enrolled. This amount will be deducted from your paycheck each pay period. The system updates your total deductions as you enroll in different plans.

If your employer offers flex plans, the company will provide flex credits that you can use to enroll in benefit plans. Different benefit plans will have different flex costs. The system displays your flex credits available, spent, and remaining, in addition to any amount that the company will withhold from your pay for nonflex plans. If you enroll in plans for which the flex cost exceeds the flex credits that you have available, you will receive a warning telling you that you are overspending your flex credits. In this situation, the amount that you are overspending will be deducted from your pay each pay period on a pre-tax basis.

You can calculate the amount that the company will deduct from your pay for each benefit plan that you select. As you complete each selection and return to the summary form, the system will update your total deductions on the Election Amounts tab. When enrolling in your company's 401(k) benefit plan, you can calculate the amount that the company will deduct before returning to the summary form. Because you enter your participation in a 401(k) benefit plan as

a percentage, this feature allows you to see the total deduction that will result from your choice. You can change the percentage that you enter any number of times until you make your decision.

If you enroll during a special enrollment period when a limited number of benefit categories are available for an enrollment change, the system displays an additional category that holds the flex cost and credit amounts of the plans in which you are already enrolled that you cannot change at the time. This category is labeled *totals from categories not available for changes*.

Enrolling in benefit plans through self-service includes entering dependent and beneficiary information. If you set up Open Benefits Enrollment (P08530) appropriately, you can link beneficiary or dependent coverage with benefit plans.

You enter dependent and beneficiary information after enrolling in your benefit plans. Entering dependent and beneficiary information is the second part of the process for entering your benefit plans. If you set up your benefit plans to link a dependent or beneficiary with the benefit plan, the system automatically displays the forms to enter dependent and beneficiary information after you enroll in or change your benefit plans.

**Note:** If your company is not in an open enrollment period, you cannot choose plans using Open Benefits Enrollment. For information about how to enter benefit changes or select new plans after you have experienced a qualifying life event, such as marriage or having a child, see *Changing Benefit Plans*.

Enrolling in benefit plans includes the following tasks:

- Enrolling in plans during open benefits enrollment
- Enrolling dependents and entering beneficiary information



### To enroll in plans during open benefits enrollment

---

From the Employee Self Service menu (B05BESS1), choose Open Benefits Enrollment.

1. On View Current Elections - Open Enrollment, review your benefit election categories, and then click the Change Benefits option.

The screenshot shows the 'Open Benefits Enrollment - [New Benefits Summary - Open Enrollment]' window. At the top right, the Tax ID is listed as 801580158. On the left, there is a sidebar with icons for 'Submit', 'Dependents', 'Beneficiaries', 'Your Name/Address', and 'Enroll in Plans'. The main area displays 'Your Total Payroll Deductions' as 135.04. Below this is a table:

Benefit Categories	New Coverage	Payroll Deduction
Dental Benefits	Dental Coverage - Employee Only	7.50
Medical Benefits	Medical Coverage - Employee Only	15.50
401(k) Benefits	401(k) Retirement Savings Plan	107.00
	Totals from categories not available for changes	5.04

2. On New Benefits Summary - Open Enrollment, choose a benefit category in which you want to enroll or want to change.

Each underlined benefit category is a link that, when selected, opens the next form.

The screenshot shows the 'Open Benefits Enrollment - [Medical Benefits]' window. The message area states: 'You are provided with more than one medical plan. It is requested that you select one or show proof that you have medical coverage elsewhere.' The Tax ID is 801580158. The sidebar includes icons for 'OK / Return To Summary', 'Ok / Go To Previous Category', and 'Ok / Go To Next Category'. The main area shows 'Your Total Payroll Deductions' as 135.04 and 'Current Coverage: Medical Coverage - Employee Only (15.50)'. Below this is a table:

Elect X	Available Plans	Payroll Deduction
	Medical Coverage - Employee Only	15.50
	Medical Coverage - Employee and One Dependent	12.00
X	Medical Coverage - Employee and Family	25.00

3. On the Open Benefits Enrollment form that describes the benefit category, choose a benefit plan and enter an X in the Elect column.
4. If you are finished enrolling in benefit plans, click OK/Return To Summary and go to step 8.

5. If you are enrolling in more benefit plans, click OK/Go To Next Category.

The system displays the next group of available plans on the next benefit category form.

6. Repeat steps 3–5 for each additional benefit plan in which you want to enroll.

If you want to choose a different plan from a benefit category that you previously elected, click OK/Go To Previous Category and repeat steps 3–5. When you are finished enrolling in benefit plans, click OK/Return to Summary and go to step 8.

7. When you choose a 401(k) benefit plan, to view the amount that the system deducts from your paycheck, enter a percentage in the Enter Amount/Rate column and click Calculate Plan Amount.

You can try different percentages, viewing the changed amount with each trial, before making a final decision.

The screenshot shows a Windows application window titled "Open Benefits Enrollment - [New Benefits Summary - Open Enrollment]". The menu bar includes File, Edit, Preferences, Form, Row, Window, and Help. The toolbar contains icons for Save, New, Can..., Guide, Curr..., Dis..., Abo, Links, Cancel, OLE..., and Internet. The main area displays a summary of payroll deductions:

Election Amount(s)		Personal
Your Total Payroll Deductions 144.54		

On the left, there is a sidebar with icons for Click On Icon: Submit, Dependents, Beneficiaries, Your Name/Address, and Enroll in Plans. The user's name, Jessica Kilmer, and Tax ID (801580158), are displayed at the top. Below the summary, a table lists benefit categories and their details:

Benefit Categories	New Coverage	Payroll Deduction
Dental Benefits	Dental Coverage - Employee Only	7.50
Medical Benefits	Medical Coverage - Employee and Family	25.00
401(k) Benefits	401(k) Retirement Savings Plan	107.00
	Totals from categories not available for changes	5.04

At the bottom, there is a "Row:1" indicator and a small icon.

8. On New Benefits Summary - Open Enrollment, review the benefit plans that you selected and the overall cost of your benefits. Then click Submit.

Depending on how your processing options are set up, a Benefits Enrollment Message form might appear.

9. If a Benefits Enrollment message appears, click the appropriate option.

The Dependents - Open Enrollment form appears if the plan allows you to include a dependent.

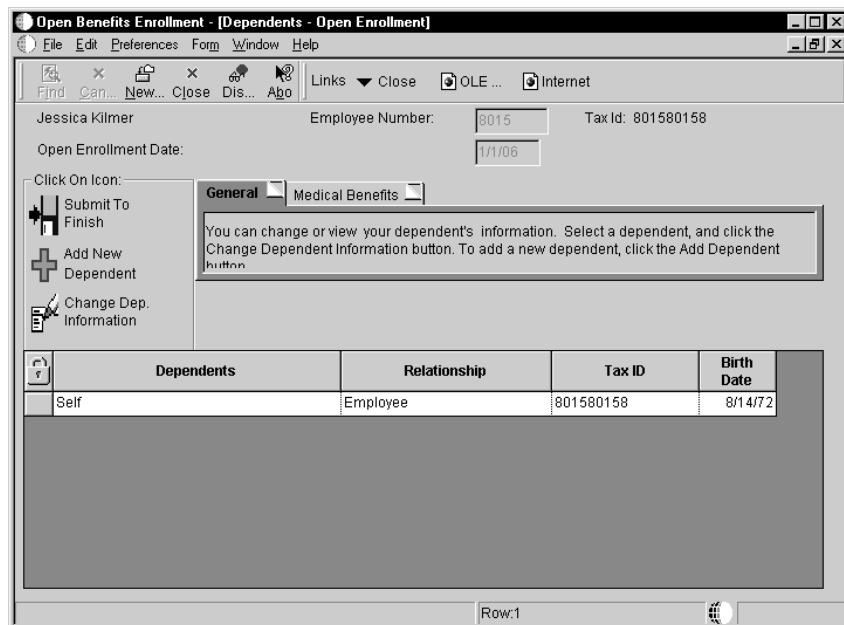
## Before You Begin

- Follow the steps for enrolling in benefit plans. See *To enroll in plans during open benefits enrollment.*

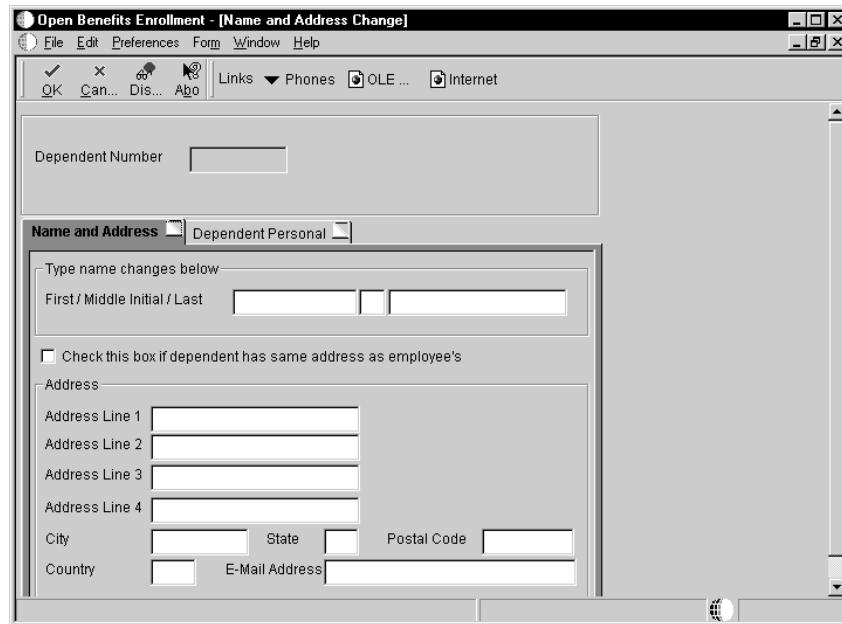
### ► To enroll dependents and enter beneficiary information

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Perform this task after you enroll in plans during open benefits enrollment.



1. On Dependents - Open Enrollment, to add a dependent, on the General tab, click the Add New Dependent option.
2. If you already have dependents listed in the detail area and you need to change dependent information, choose the dependent record and click the Change Dependent Information option.



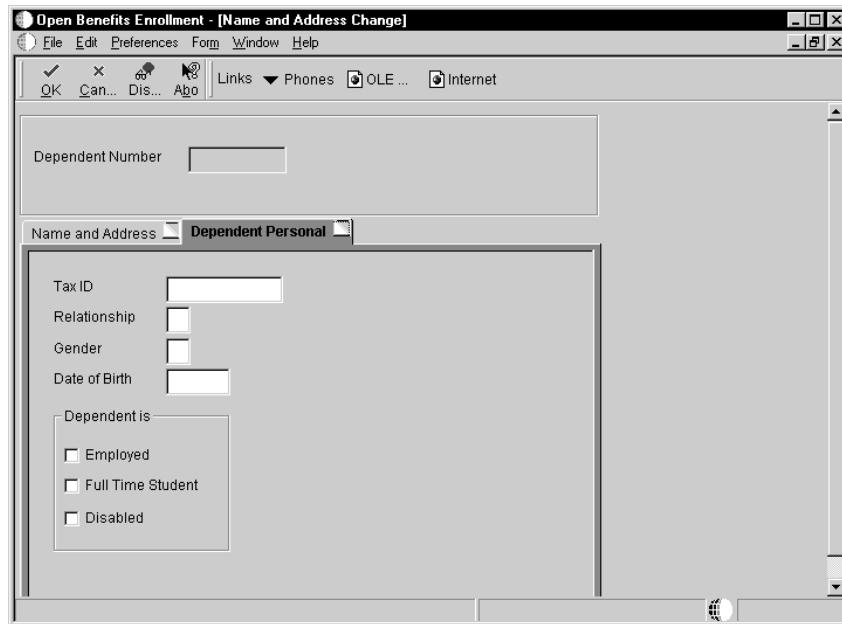
3. On Name and Address Change, on the Name and Address tab, click the option that specifies whether the dependent shares your address.

The system automatically supplies your address information.

4. To enter address information that is different from your address, complete any of the following fields:

- First / Middle Initial / Last
- Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- City
- State
- Postal Code
- Country
- E-Mail Address

5. Click the Dependent Personal tab.



6. Complete the following fields:

- Tax ID
- Relationship
- Gender
- Date of Birth

7. Click one of the following fields as applicable, and then click OK:

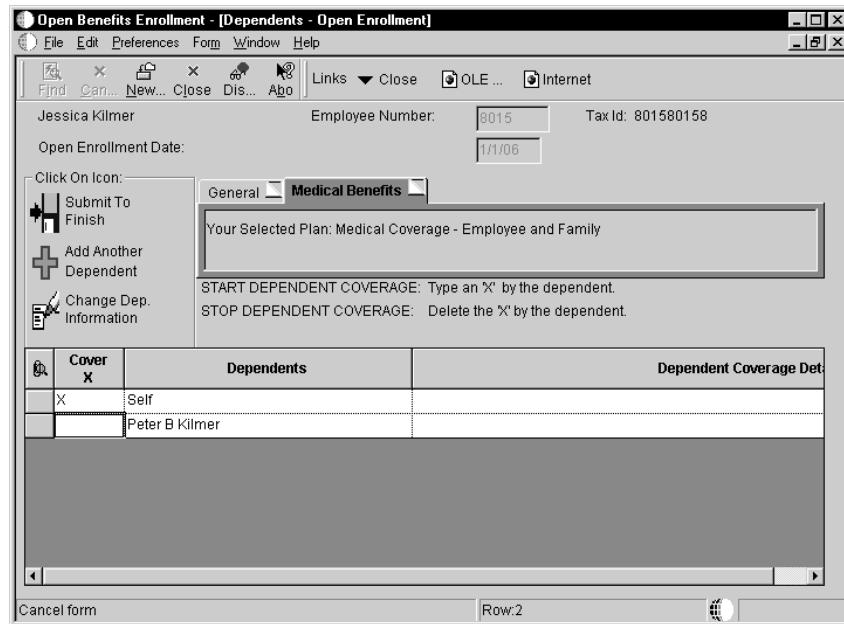
- Employed
- Full Time Student
- Disabled

The system returns you to the Dependents - Open Enrollment form, automatically displays the General tab, and supplies the dependent's information in the detail area.

If you set up a plan to link dependents, and the plan includes a maximum number of dependents, an error results if you add a larger number of dependents than is allowed for the plan.

8. Repeat steps 1–7 for each dependent record that you are adding or changing.
9. If you entered common settings that link dependent coverage with benefit plans, then a benefit plan tab will appear for the plan that has dependent coverage. Click that tab and review the dependents that appear in the detail area.

## Entering Benefits Information Using Employee Self-Service



10. Enter an X or remove the X in the Cover X field to start or stop the coverage for each dependent.
11. Complete the following field for each dependent if it appears in the detail area:
  - Primary Care Physician Number
12. Repeat steps 9–11 for each benefit plan tab.
13. Review the information and click Submit.

The Beneficiaries - Open Enrollment form appears with beneficiary information that you already entered as dependent information.

14. If a benefit plan tab appears on the form, click the tab.

If the plan allows beneficiary coverage, review the new beneficiary information that is supplied in the detail area.

15. To add or change more beneficiaries to a specific plan, repeat steps 1–8. Instead of adding or changing dependent information, add or change beneficiary information, and then click Submit To Finish.

The system returns you to the Beneficiaries - Open Enrollment form.

16. Enter a percentage in the following field for each primary beneficiary that you choose:
  - New Primary %
17. Enter a percentage in the following field for each secondary beneficiary that you choose:
  - New Secondary %
18. Repeat steps 14–17 for each benefit plan tab.
19. Click Submit To Finish.

<b>Field</b>	<b>Explanation</b>
Gender	Valid codes are: M – Male F – Female
Tax ID	The identification code required by various tax authorities. This can be a social security number, federal or state corporate tax ID, sales tax number, and so on. Do not enter separator characters. The system verifies the number and prints the separators in their correct format, according to the value of TAXC (Person/Corporation Code). If there is no value for TAXC, the system uses the Corporate Entity.  Attention Accounts Payable users: The supplier master record supplies the default value for the tax ID for 1099 processing.
Date of Birth	The employee's date of birth.
Employed	A code that indicates whether the participant is employed (anywhere). Codes are: Y Yes, the participant is employed. N No, the participant is not employed.
Full Time Student	A code that indicates whether the participant is a full time student. Codes are: Y Yes, the participant is a full time student. The SCA (School Attending) field must contain the name of the school. N No, the participant is not a full time student. The SCA (School Attending) field cannot contain an entry.
Disabled	A code that indicates whether the participant is currently disabled. Codes are: Y Yes, the participant is disabled. N No, the participant is not disabled.  If the participant is currently disabled, you must type a date in the Date of Disability field.

<b>Field</b>	<b>Explanation</b>
Tax ID	<p>The identification code required by various tax authorities. This can be a social security number, federal or state corporate tax ID, sales tax number, and so on. Do not enter separator characters. The system verifies the number and prints the separators in their correct format, according to the value of TAXC (Person/Corporation Code). If there is no value for TAXC, the system uses the Corporate Entity.</p> <p>Attention Accounts Payable users: The supplier master record supplies the default value for the tax ID for 1099 processing.</p>
Relationship	A user defined code (system 08/type RL) that defines the relationship of the dependent or beneficiary to the employee.
Primary Care Physician Number	A code that identifies the employee's or dependent's Primary Care Physician (PCP).
New Primary %	<p>The percentage of any proceeds from the benefit that goes to the new participant you have entered. For example, you can designate that as the primary beneficiary, the participant is to receive 90% of the proceeds from a life insurance policy.</p> <p>This figure must have a value between zero and 100.</p>
New Secondary %	The percentage of any proceeds from the benefit that goes to the new participant you have entered. For example, you can designate that as the secondary beneficiary, the participant is to receive the remainder of the proceeds from a life insurance policy. If you specified 90% for the primary participant, then you might specify 10% for the secondary participant.

## **Processing Options for Open Benefits Enrollment (P08530)**

### **Event**

- 1) Enter the allowable enrollment event code \_\_\_\_\_
- 2) Enter a general text to describe the enrollment event indicated above. The general text will be used to title the forms. \_\_\_\_\_

### **Display**

- 1) Enter a '1' to display a window with the following message after submit is clicked on the Benefit Summary form. A blank will not display the window. \_\_\_\_\_

This window's message can be used

- to inform the employee of the possibility that they have automatically been enrolled in mandatory and/or default plans.
- 2) Enter the message that is to appear in the window described above.
- 3) Enter the URL for your company benefits guide.

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### Versions

- 1) Enter the Version of the Employee Name and Address Change application to use. If left blank, ZJDE0001 is used.

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## Changing Benefit Plans

You can use self-service to change your benefit plans during an open enrollment or special enrollment period, or when you have a life event that necessitates a change in enrollment. You can repeatedly change your open enrollment choices prior to the closing of the open enrollment period. Changing your benefit plans online includes entering dependent and beneficiary information for each plan that allows it. Qualifying life events are as follows:

- Marriage
- Divorce
- Children
- Moving

After you experience a life event, you can change your benefit information as necessary. Each life event includes two or more of the following options:

- Name and address change
- Emergency contacts and phones
- Benefit changes
- W-4 form

Each company defines the parameters for each of the life events. If you have questions about qualifications for one or more of the life events, contact your HR administrator.

You can change dependent and beneficiary information through self-service after you enroll in your benefit plans. Changing dependent and beneficiary information is the second part of the process for changing your benefit plans. If you set up benefits self-service to link dependents and beneficiaries with the benefit plan, the system automatically displays the forms to enter dependent and beneficiary information after you change your benefit plans.

**Note:** You perform this task only to implement changes and for life events. This task cannot be performed in place of open benefits enrollment.

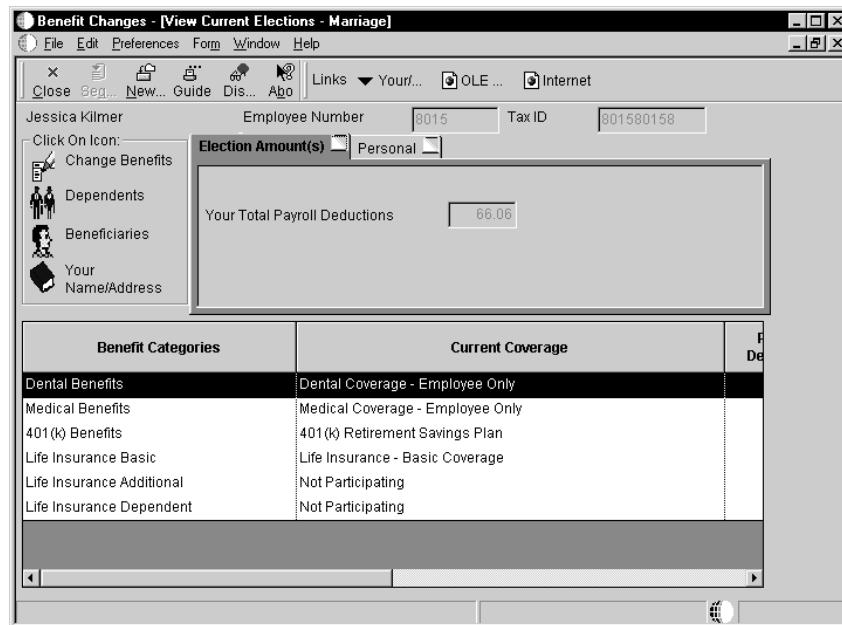
Changing Benefit Plans includes the following tasks:

- Changing benefit plans after a life event
- Changing dependent and beneficiary information after a life event

### ► To change benefit plans after a life event

---

From the Employee Self Service menu (G05BESS1), choose Life Events. From the Life Events menu (G05LE1), choose one of the following Life Events: Marriage, Divorce, Children, or Moving. Then choose Benefits Changes.



1. On View Current Elections, review your benefit election categories and click Change Benefits.

## Entering Benefits Information Using Employee Self-Service

The screenshot shows the 'Benefit Changes - [New Benefits Summary - Marriage]' window. At the top, there's a menu bar with File, Edit, Preferences, Form, How, Window, Help. Below the menu is a toolbar with icons for New..., Can..., Guide, Curr..., Dis..., Abo, Links, Cancel, OLE..., and Internet. The main area displays employee information: Jessica Kilmer, Employee Number 8015, Tax ID 801580158. On the left, there's a sidebar with icons for Click On Icon: Submit, Dependents, Beneficiaries, Your Name/Address, and Enroll in Plans. A section titled 'Election Amount(s)' contains tabs for Personal and a text input field showing 'Your Total Payroll Deductions' as 66.06. Below this is a section for entering event dates. The central part of the window shows a table of benefit categories:

Benefit Categories	New Coverage	Payroll Deduction
Dental Benefits	Dental Coverage - Employee Only	7.50
Medical Benefits	Medical Coverage - Employee Only	12.00
Totals from categories not available for changes		46.56

2. On New Benefits Summary, complete the following field and click Enroll in Plans.

- Date – Effective

The screenshot shows the 'Benefit Changes - [Dental Benefits]' window. The interface is similar to the previous one, with a menu bar, toolbar, and employee information at the top. The sidebar includes icons for Click On Icon: Ok / Return To Summary, Ok / Go To Previous Category, and Ok / Go To Next Category. The main area displays 'Your Total Payroll Deductions' as 66.06. Below this, it shows 'Current Coverage: Dental Coverage - Employee Only (7.50)'. A table lists available dental plans:

Elect X	Available Plans	Payroll Deduction
X	Dental Coverage - Employee Only	7.50
	Dental Coverage - Employee and Family	13.00
	Dental Coverage - Employee and One Dependent	11.00

3. On the Benefit Changes form for the first benefit plan, clear the existing selection and then enter an X in the Elect X column to select the desired category of the benefit plan.
4. If you are finished changing your benefit plans, click OK/Return To Summary and go to step 8.

5. If you are changing more benefit plans, click OK/Go To Next Category.

The system displays the next group of available plan options for the next benefit category.

6. Repeat steps 3–5 for each additional plan that you need to change.
7. To change a plan that you previously elected, click Select/Back and repeat steps 3–5.

The screenshot shows a software interface titled "Benefit Changes - [New Benefits Summary - Marriage]". At the top, there's a menu bar with File, Edit, Preferences, Form, Bow, Window, Help. Below the menu is a toolbar with icons for New, Can..., Guide, Curr..., Dis..., Abo, Links, Cancel, OLE..., and Internet. The main area has fields for Employee Number (0015) and Tax ID (801580158). On the left, a sidebar titled "Click On Icon:" lists "Submit", "Dependents", "Beneficiaries", "Your Name/Address", and "Enroll in Plans". In the center, a box titled "Election Amount(s)" contains "Personal" and "Your Total Payroll Deductions" (71.56). Below this is a date input field "Enter your event date (for example marriage, birth date):" with the value "3/10/00". The bottom section is a grid table:

Benefit Categories	New Coverage	Payroll Deduction
Dental Benefits	Dental Coverage - Employee and Family	13.00
Medical Benefits	Medical Coverage - Employee Only	12.00
	Totals from categories not available for changes	46.56

At the bottom, there are buttons for "Create new Grid Format" and "Row:1".

8. On Benefits Changes - New Benefits Summary, review the benefit plans that you elected and the total cost of your benefits.
9. Click Submit.

Depending on how your processing options are set up, a Benefits Enrollment Message form might appear.

10. Click the appropriate option.

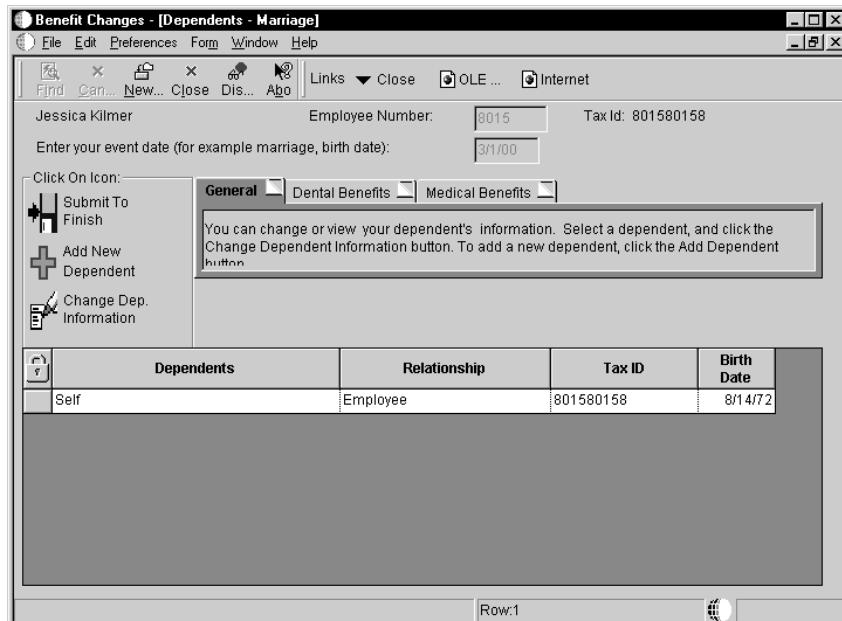
The Benefit Changes - Dependents form appears if the plan allows you to add or change a dependent. Proceed to the task To change dependent and beneficiary information after a life event.

#### **To change dependent and beneficiary information after a life event**

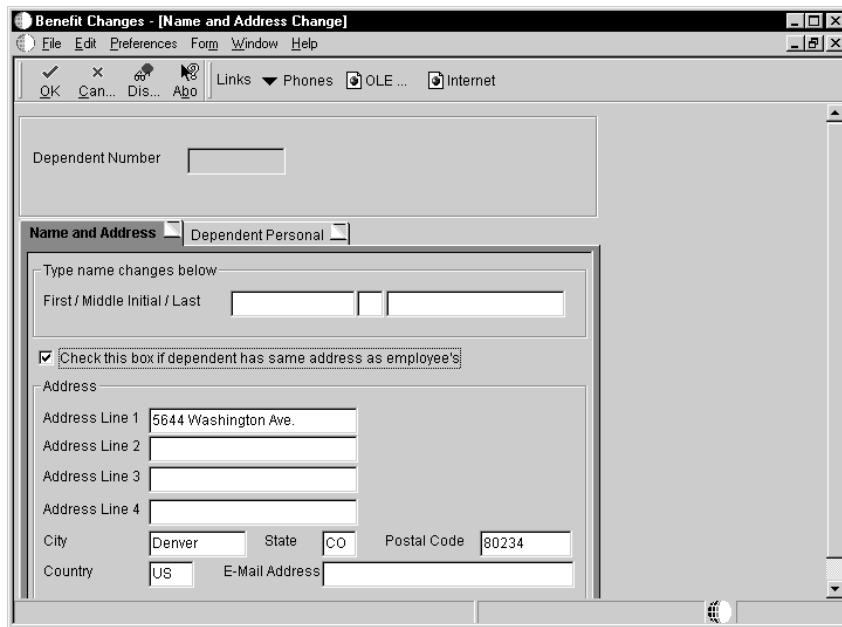
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Perform this task after you change benefits after a life event.

## Entering Benefits Information Using Employee Self-Service



1. On Benefit Changes - Dependents, to change a dependent's information on the General tab, choose the dependent and click the Change Dependent Information option.
2. To add a dependent, click the Add New Dependent option.



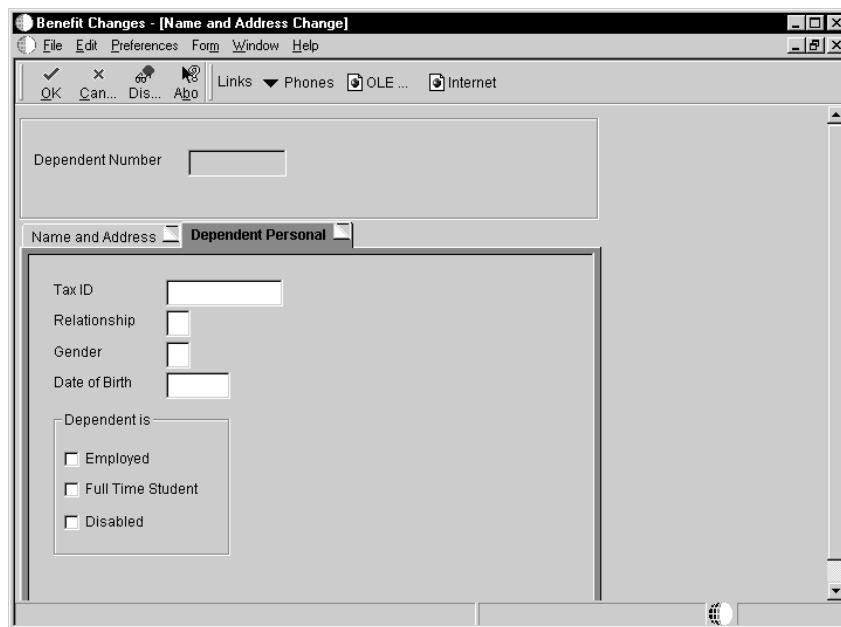
3. On Benefit Changes - Name and Address Change, on the Name and Address tab, click the option that specifies whether the dependent shares your address.

The system automatically supplies your address information.

4. If you need to enter an address different from your address, complete the following fields:

- First / Middle Initial / Last
- Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- City
- State
- Postal Code
- Country
- E-Mail Address

5. Click the Dependent Personal tab.



6. Complete the following fields:

- Relationship
- Gender
- Tax ID
- Date of Birth

7. Click one of the following fields as applicable, and then click OK:

- Employed

- Full Time Student
- Disabled

After you enter name and address changes, the system returns you to the General tab on the Benefits Changes - Dependents form. The revised information is automatically supplied in the detail area.

The screenshot shows a Windows application window titled "Benefit Changes - [Dependents - Marriage]". The menu bar includes File, Edit, Preferences, Form, Window, Help, Find, Can..., New..., Close, Dis..., Abo, Links, Close, OLE..., Internet. The toolbar has icons for Find, Can..., New..., Close, Dis..., Abo, Links, Close, OLE..., Internet. The main area displays employee information: Jessica Kilmer, Employee Number: 6015, Tax Id: 801580158, and an event date of 3/1/00. A message box says "Your Selected Plan: Medical Coverage - Employee and One Dependent". Below it are instructions: "START DEPENDENT COVERAGE: Type an 'X' by the dependent." and "STOP DEPENDENT COVERAGE: Delete the 'X' by the dependent." A table lists dependents:

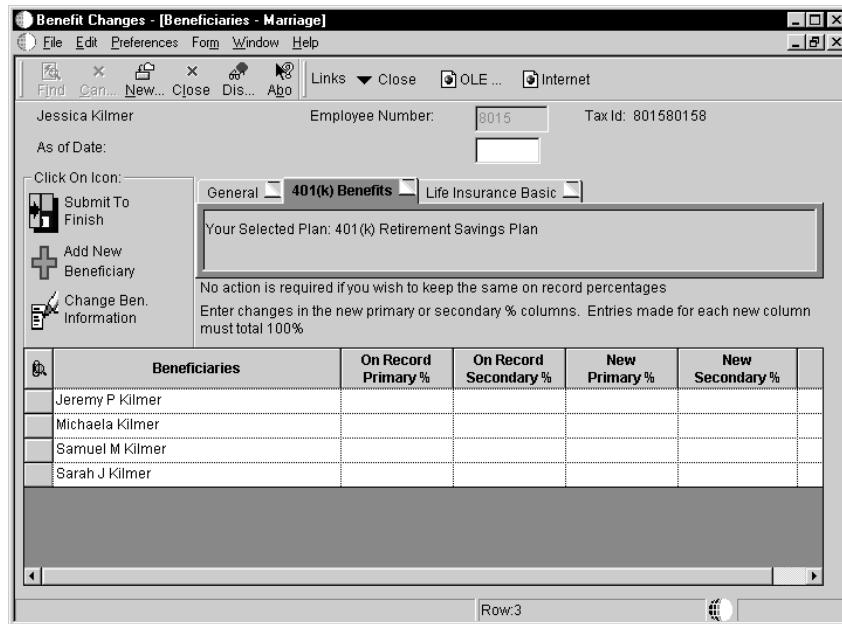
Cover X	Dependents	Dependent Coverage Det
X	Self	
X	Jeremy P Kilmer	Your last change was for Marriage 3/1/00

8. If the plan allows dependent coverage, click a benefit plan tab that might appear on the form.

Your dependent information is automatically supplied in the detail area.

9. Replace or remove the X in the Cover X field for each dependent.
10. If the benefit plan has been set up to include your doctor's information, complete the following field for each dependent:
  - Primary Care Physician Number
11. Repeat steps 8–10 for each benefit plan tab.
12. Review the information and click Submit To Finish.

If you selected a benefit plan that includes beneficiaries, the system will display the beneficiaries form.



13. On Benefit Changes - Beneficiaries, click a benefit category that might be present.
14. To add beneficiary information, click the Add New Beneficiary option.

To change beneficiary information, click the Change Beneficiary Information option.

15. On Benefit Changes - Name and Address Change, on the Name and Address tab, click the option that specifies whether the beneficiary shares your address.

The system automatically supplies your address information.

16. If you need to enter an address different from your address, complete the following fields:

- First / Middle Initial / Last
- Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- City
- State
- Postal Code
- Country
- E-Mail Address

17. Click the Dependent Personal tab.
18. Complete the following fields:
  - Relationship
  - Gender
  - Tax ID
  - Date of Birth
19. Click one of the following fields as applicable, and then click OK:
  - Employed
  - Full Time Student
  - Disabled

After you enter name and address changes, the system returns you to the General tab on the Benefits Changes - Beneficiaries form. The revised information is automatically supplied in the detail area.

20. Review the following fields:
  - Percentage – Beneficiary
  - Percentage – Secondary Beneficiary
21. Enter a percentage in the following field for each primary beneficiary that you change:
  - Percentage – Beneficiary
22. Enter a percentage in the following field for each secondary beneficiary that you change:
  - Percentage – Secondary Beneficiary
23. Repeat steps 20–22 for each benefit plan tab.
24. Click Submit To Finish.

---

Field	Explanation
Data – Effective	The effective date of your qualifying event. For example, this might be the date of your marriage, divorce, child's birth, or relocation.
On Record Primary %	<p>The percentage of any proceeds from the benefit that goes to the participant. For example, you can designate that as the primary beneficiary, the participant is to receive 90% of the proceeds from a life insurance policy.</p> <p>This figure must have a value between zero and 100.</p> <p>If you do not type a value in this field, the system inserts 100%.</p>

---

Field	Explanation
On Record Secondary %	<p>The percentage of any proceeds from the benefit that will go to the secondary beneficiary if the primary beneficiaries are no longer eligible.</p> <p>For example, the secondary beneficiary might be designated to receive 90% of the proceeds from a life insurance policy. If the participant wants to change this percentage, enter the new percentage.</p> <p>Enter the percentage as a whole number between zero and 100.</p>

## See Also

- *Enrolling In Benefit Plans* to enroll in benefit plans during open enrollment for the upcoming year.

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

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You enter automatic deposit information when you want all or part of your payment each pay period to be deposited directly into your bank account. You can choose to receive part of your payment in check form and the rest in automatic deposit form. You also can divide your payment among multiple accounts. Typically, the automatic deposit information that you enter is reviewed and approved by a payroll representative before the information takes effect. You will receive a message from the payroll representative that indicates whether the information that you entered has been approved.

You can also revise any existing automatic deposit information that you or a payroll representative entered previously.

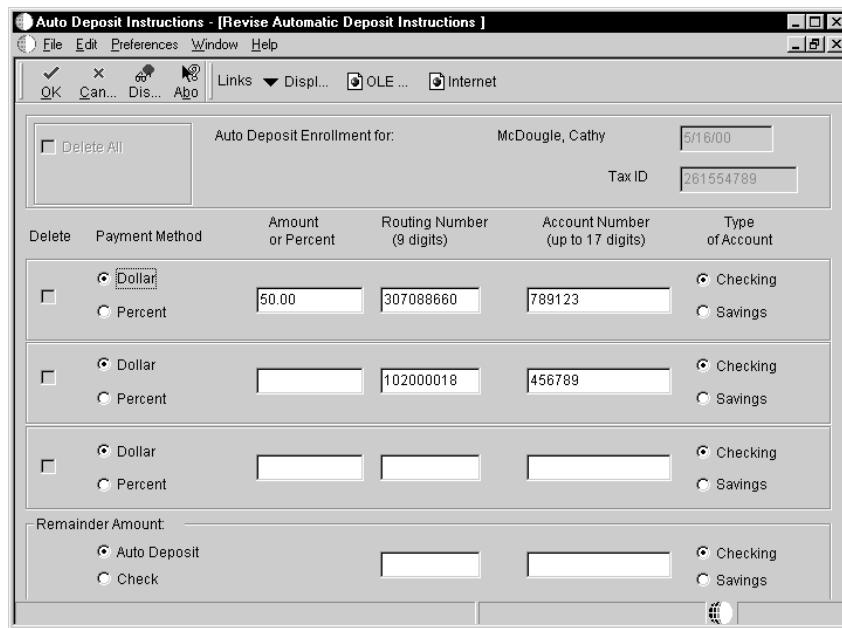
When you use self-service to enter or update automatic deposit information, the new deposit information is processed in the next payroll cycle, and the *pre-note test* is eliminated. A pre-note test is a method of testing automatic deposit information for one payroll cycle without actually processing a deposit.



### **To enter automatic deposit information using self-service**

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From the Employee Self-Service menu (G05BESS1), choose Auto Deposit Instructions.



1. On Revise Automatic Deposit Instructions, click one of the following options:
  - Dollar1
  - Percent1
2. Complete the following fields:
  - Amount or Percent
  - Routing Number
  - Account Number
3. To indicate the type of account, click one of the following options:
  - Checking1
  - Savings1
4. Repeat steps 1–3 for as many accounts as you want to have a portion of your payment deposited.
5. If, after completing steps 1–4, any additional portion of your payment is unallocated, click one of the following options:
  - Remainder Auto Deposit
  - Remainder Check
6. Complete the following fields in the Remainder Amount group box:
  - Routing Number
  - Account Number
7. Click one of the following options in the Remainder Amount group box:
  - RemChecking

- RemSavings
8. Click OK.

The system displays a message that indicates that the information you entered has been submitted to a payroll representative for approval.



# Working with Competency Information Using Self-Service

---

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. These qualifications, such as C programming skills, CPA license, and fluency in French, are called *competencies*.

Your organization uses competency management to track the competencies that you possess and to compare these competencies with those that are required for your job. Tracking your employee competencies helps managers and human resources representatives determine the competencies that you need in order to satisfy the requirements of your current job, as well as a job that you hope to obtain in the future. Competency management also helps you and your manager create clear career goals and performance objectives for you.

To simplify the process of maintaining competency information for employees, you can use self-service to enter and revise your own competency information. Working with competency information using self-service includes the following tasks:

- Entering competency information using self-service
- Revising competency information using self-service

## Entering Competency Information Using Self-Service

Because you typically know your professional background more thoroughly than anyone else in your organization knows it, you can enter your own competency information, and the system submits it to someone else, such as your manager or a member of the human resources department, for approval. For example, others might not be aware that you are working on an advanced degree or a professional certification that is not directly related to your current job. Self-service allows you to update your competency information as you acquire each competency. You can also revise your existing competency information.

After you enter competency information, the appropriate person receives a Workflow message that indicates that competency information is waiting for approval. That person must then review the information and enter your level of proficiency in each competency.

Entering competency information using self-service includes the following procedures:

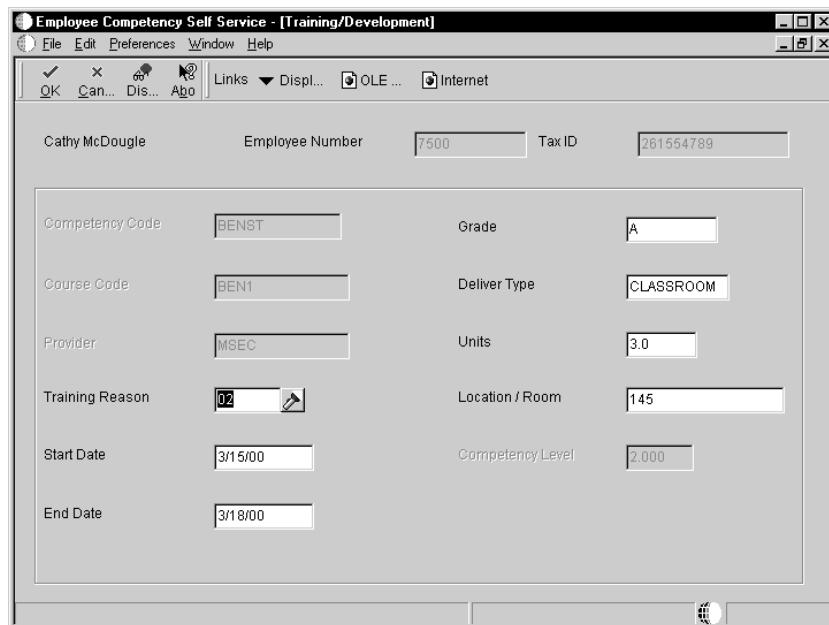
- Entering training competencies
- Entering skill competencies
- Entering accomplishment competencies
- Entering certification competencies
- Entering education competencies
- Entering language competencies

### ► To enter a training competency

---

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, click the following option and then click Add:
  - Training/Development



2. On Training/Development, complete the following fields and then click OK.
  - Competency Code
  - Course Code
  - Provider
  - Training Reason
  - Start Date

- End Date
  - Grade
  - Deliver Type
  - Units
  - Location / Room
3. Repeat step 2 for as many training competencies as you need to enter, and then click Cancel.

<b>Field</b>	<b>Explanation</b>
Competency Code	A code that specifies a competency within a competency type. For example, a competency for the competency type "Skill" might be "C programming" or "Driving a forklift."
Grade	The grade that the employee received for the course.
Course Code	A code that represents a training course.
Deliver Type	A code that specifies the way in which a course is delivered or presented. Examples of delivery type include classroom training and computer-based training.
Provider	A person or institution that provides training.
Units	A unit of measure for calculating student credits for training courses.
Training Reason	A user defined code (05/TN) that indicates the reason for the training.
Location / Room	The classroom or location where the training course is held.

### ► To enter a skill competency

---

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, click the following option and then click Add:
  - Skills
2. On Skills, complete the following fields and then click OK.
  - Competency Code
  - Skill Description
  - Date Acquired
  - Status

3. Repeat step 2 for as many skill competencies as you need to enter, and then click Cancel.

Field	Explanation
Date Acquired	The date on which the employee acquired the skill.
Status	A user defined code (05/CR) that indicates the progress that the employee has made toward a level of proficiency in a particular competency. For example, for certification competencies, you might define a status, Pending, to indicate that the employee has completed a certification test but has not yet received his or her test scores.

### ► To enter an accomplishment competency

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, click the following option and then click Add:
  - Accomplishments
2. On Accomplishments, complete the following fields and then click OK.
  - Competency Code
  - Accomplishment Type
  - Date Achieved
  - Awarding Organization
  - Date Awarded
  - Status
3. Repeat step 2 for as many accomplishment competencies as you need to enter, and then click Cancel.

Field	Explanation
Accomplishment Type	A user defined code (05/AT) that specifies a type of accomplishment. For example, you could define an accomplishment code for "Network Administration" as "Certification".
Awarding Organization	The name of the organization that awards the certification or other documentation for the competency.
Date Awarded	The date on which an accomplishment was formally recognized by the awarding organization.

### ► To enter a certification competency

---

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, click the following option and then click Add:
  - Certification
2. On Certifications, complete the following fields and then click OK.
  - Competency Code
  - Licensing Number
  - Licensing Body
  - Renewal Code
  - Score Rating
  - Status
  - Issue Date
  - Expiration Date
3. Repeat step 2 for as many certification competencies as you need to enter, and then click Cancel.

Field	Explanation
Licensing Number	The identification number of the employee's professional license.
Licensing Body	A user defined code (05/LB) that represents the name of the organization that grants the professional license or certification.
Renewal Code	A user defined code (05/RC) that indicates the requirements that the employee must complete to renew the license.
Expiration Date	The date on which the employee's professional license expires.

### ► To enter an education competency

---

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, click the following option and then click Add:

- Education
2. On Education, complete the following fields and then click OK.
- Competency Code
  - Institution Code
  - Location
  - Degree Date
  - GPA Rating
  - GradeBase
  - Honorary
3. Repeat step 2 for as many education competencies as you need to enter, and then click Cancel.

Field	Explanation
Institution Code	A user defined code (05/IC) that represents an educational institution from which employees obtained their degrees.
Location	The city or region where the educational institution is located.
Degree Date	The date on which the employee graduated and earned a degree.
GPA Rating	The overall grade or scale on which a student's grade point average is based.
GradeBase	The mathematical average of all of the grades that a student earns in a class.
Honorary	A value that indicates whether the student graduated with honors.

### **To enter a language competency**

---

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, click the following option and then click Add:
  - Language
2. On Language, complete the following fields and then click OK.
  - Competency Code
  - Status Date

- Status
3. Repeat step 2 for as many education competencies as you need to enter, and then click Cancel.

## Revising Competency Information Using Self-Service

After you enter competency information for yourself, you can review it to verify that it is correct. If you find an error or omission, you can revise the information to correct it. After you revise competency information, the appropriate person, such as your manager or a member of the human resources department, receives a Workflow message that indicates that the information is waiting for approval.

The process that you use to revise competency information is similar to the process that you use to enter this information, except that you must first search for the competency that you need to revise.



### To revise competency information using self-service

---

From the Employee Self-Service menu (G05BESS1), choose Employee Competency Self-Service.

1. On Competency Self-Service, click one or more of the the following options that correspond to the type of competency that you need to revise, and then click View:
  - Training/Development
  - Skills
  - Accomplishments
  - Certification
  - Education
  - Language
2. On Work with Training/Development, Work with Skills, Work with Accomplishments, Work with Certifications, Work with Education, or Work with Language, complete the following field:
  - Competency Code
3. To narrow your search, complete any of the other fields on the form, and then click Find.
4. Choose a record in the detail area, and then click Select.
5. On Training/Development, Skills, Accomplishments, Certifications, Education, or Language, make the necessary changes and then click OK.

## See Also

- *Entering Competency Information Using Self-Service* for more specific instructions for entering competency information

## Processing Options for Competency Self Service (P05130)

### Display Tab

#### 1. Display Manager Information

Use this processing option to specify whether the system will display the status, verification information, and competency level on the forms. Valid values are:

Blank Do not display the information.

1      Display the information.

## Manager Self-Service

Managers can accomplish many tasks with less effort and time by using self-service procedures. These procedures might be available through a company intranet site or from OneWorld menus for employees and managers. This approach reduces document handling between employees and the human resources department by allowing employees to access information, forms, and services using desktop computers.

Managers can use self-service and Manager's Workbench applications to perform a wide range of tasks for which they are responsible. These tasks include the following:

- Requesting employee status changes
- Running managerial reports
- Assigning delegates
- Generating a graphic organizational chart and reviewing the hierarchical structure of the jobs within an organization
- Reviewing jobs and job competencies in an organization
- Performing a gap analysis of employee and job competencies
- Entering employee competency information
- Reviewing employee profiles
- Reviewing employee information, such as name and address, time entry, emergency contacts, paid time off balances, and skill competencies.

Additional self-service programs are available for managers use that are not included in the Manager's Workbench. These programs, accessible from the Employee and Manager Self Service menus, are:

- Upcoming Reviews by Supervisor
- Managers Employee Setup
- Open Benefits Enrollment
- Auto Deposit Instructions
- Job Competencies

The type of information that is available on your self-service website is defined by your company. For example, your company might allow employees to make address changes but not benefits changes.



Many of the manager's self-service programs employ Enterprise Workflow Management. Workflow is an e-mail based system that automates tasks by using e-mail to reduce the processing time that it normally takes to complete a task. For example, managers can initiate an employee's promotion using Status Change from Manager's Workbench. When the process is initiated, a series of messages within Workflow are e-mailed to each manager who must be informed about the change and who must approve the change.

Using manager's self-service consists of the following tasks:

- Changing an employee's status
- Assigning delegates
- Reviewing upcoming employee reviews by supervisor
- Entering data for verification-of-employment letters
- Setting up information for new employees
- Approving information using manager self-service
- Managing self-service benefits

Only selected applications can be enabled on an intranet site. The preceding tasks are based on J.D. Edwards forms and data provided for self-service in a Windows environment. The navigations, forms, steps, and data shown in these tasks might not correspond to your customized, self-service intranet site. If you are using self-service from your self-service site, you must always log onto the site as the first step. When you log on, the system uses your employee number to retrieve your own information.

## Manager's Workbench

You can perform many common supervisory tasks from a centralized location using Manager's Workbench. From this location, your employees' information is at your fingertips, enabling you to analyze job and employee information, initiate changes, and save time when you need reports that can be processed as a list or on an individual basis. Your own personal employee information is also available from within this application.

Using the Manager's Workbench, you have quick, easy access to information that you can review and use for budgeting, planning, decision-making, and approving. This application uses the J.D. Edwards Enterprise Workflow Management system to save time communicating changes and obtaining required authorizations.

**Note:** The Manager's Workbench separates access to your personal information from access to your employees' information by the use of form and row menus.

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For example, when you choose options from the form menu, you will gain access to your own personal information and gain the opportunity to make a variety of changes. When you choose options from the row menu, the system displays your employees' information. A manager can view an employee's information, but generally cannot make changes directly to an employee's record.

The following table lists the options that are available in the Manager's Workbench:

<b>Self-Service</b>	<p>From the self-service menu, you can perform the following tasks:</p> <ul style="list-style-type: none"><li>• Changing or reviewing name and address information</li><li>• Reviewing time entry</li><li>• Reviewing paid time off</li><li>• Updating or reviewing emergency contacts</li><li>• Entering employee competency information</li></ul> <p>You can review employee data, analyze employee skills, and prepare for employee coaching sessions with these self-service options. See <i>Assigning Competencies to Employees</i> for more information about working with employee competencies.</p> <p>Using My Self-Service, you can review and change your own, personal information. See <i>Employee's Self-Service</i> for more information about making changes and the required procedures.</p>
<b>Status Change</b>	<p>Status Change includes the following preset options for changing an employee's status:</p> <ul style="list-style-type: none"><li>• Requesting a promotion</li><li>• Changing an employee's assigned location</li><li>• Changing an employee's department or supervisor</li><li>• Changing an employee's job status</li><li>• Requesting a leave of absence</li></ul> <p>This centralized approach to managing employee changes allows you to review, initiate, and approve changes for your employees. The User Defined status change category allows your HR Department to set up a new employee change category. For example, you might want to create a new category for Compensation Review. See <i>Changing an Employee's Status</i> for more information and procedures.</p>

### Reports

The following reports are available from the Manager's Workbench:

- Managers Reports
- Headcount
- Organization Chart
- Turnover Report
- Supplemental Data
- Phone List
- Time Entry

Managers Reports is a preset list of reports, defined by your Human Resources Department, that you can use to meet frequent reporting requirements. Your HR administrator can create multiple versions that include reports that you commonly use. Adding versions is an available option only in a windows environment. This feature cannot be used in a web environment.

The Organization Chart report prints a diagram of the organization, using your managerial position as the top level. This report requires Visio software to be resident on your computer.

The Supplemental Data report must be defined by your Human Resources department to include any selection of data from the Employee Master table.

Use these reports to help meet your need for organizational reporting, planning, review, and management of your employees. You can generate reports for the employee group below your job level, or you can select a subordinate management level and generate reports with that level at the top of the hierarchy.

### Jobs In An Organization

Use Jobs In An Organization to review how each job fits into the hierarchical levels of the organizational structure. You can use this information to plan for new jobs and to determine the competencies that are associated with each job. When you access this program from Managers Workbench, you can review information, but you cannot change it.

See *Attaching Jobs to Organizational Levels* for more information.

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<b>Compensation Review</b>	<p>Use this program to review compensation data for any of your employees. The program provides you with a workbench that provides exits for the following:</p> <ul style="list-style-type: none"> <li>• Viewing and changing salary recommendations</li> <li>• Viewing the salary budget allocation, budget spent, and budget remaining by increase types</li> <li>• Submitting salary recommendations up to the next level supervisor for approval</li> <li>• Returning salary recommendations down to the previous level supervisor for salary rework</li> <li>• Providing access for HR to view or change salary recommendations of a specified supervisor with the use of a processing option</li> </ul>
<b>Job Competencies In An Organization</b>	<p>Use Job Competencies In An Organization to see how job competencies are assigned to the hierarchical levels of the organizational structure. You can use this information to determine the competencies that apply to you and the employees who report to you.</p> <p><i>See Attaching Job Competencies to Organizational Levels</i> for more information.</p>
<b>Gap Analysis</b>	<p>Use Gap Analysis to help you compare the skill competencies required for a job and the current competencies of an employee. Often used in conjunction with Job Competencies In An Organization, these functions are useful for organizational planning and in preparation for employee performance reviews.</p> <p><i>See Reviewing Gap Analysis Online</i> for additional information and procedures.</p>
<b>Delegates</b>	<p>Use Delegates to set up subordinates to use Manager's Workbench in your absence or to enable others to perform managerial functions. After the initial setup, the delegates that you select can access Manager's Workbench at your organizational level and then perform functions at an authority level that you specify to help you review, change, and approve employee information.</p>

### **Employee Profile**

Use Employee Profile to review employee data obtained from the Employee Master table. You can also use this function to contact your HR Department about updates to an employee record.

See *Reviewing Employee Personal Profile Information* for additional information and procedures.

### **Attachments**

Attachments can be added as part of the setup function to provide information for all managers who use any of the Manager's Workbench applications. These can include instructions, reminders, or miscellaneous information.

You can also add attachments while using Manager's Workbench applications. For example, you might want to remind yourself about information that will help you plan for reviews or record action steps that you want to remember regarding specific employees. You can also attach graphic files. The attached files are linked to your address number and an employee address number so that if either position changes, the notes that you attach cannot be viewed by another manager.

## **Compensation Management Self-Service Considerations**

Your organization might have set up the Compensation Management system as a self-service application that allows you to manage the salary reviews of the employees who report to you. If you access the Compensation Management system from a self-service program, such as the Manager's Workbench, you can make salary recommendations within your own management hierarchy only. The supervisor field is disabled.

### **See Also**

- *Setting up Manager Self-Service* to specify processing options that automatically include a manager's address book number when you access Manager's Workbench and the linked programs

# Changing an Employee's Status

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Changing an Employee's Status, one of the applications within Manager's Workbench, provides a centralized approach to implementing common changes for employees who report to you or to one of your subordinate managers. Using this approach, you can manage some of the most common types of employee changes with a minimum of time and effort.

Using this approach, when you choose the type of change desired for a specified employee and implement a change, the system automatically notifies your HR department and any other managers who must approve the change. You will also be able to review the status of the approvals to stay current with the changes you have initiated.

You can perform any of the following, preset tasks:

- Promoting an employee
- Relocating an employee
- Changing an employee's department or supervisor
- Changing an employee's job status
- Managing an employee's leave of absence

In addition to the five preset tasks listed above, you have a sixth option that you define to meet your specific requirements. For example, you might define this option to change an employee's salary. Working with your HR administrator, you can set up similar tasks or change any of the existing, pre-set tasks to use any combination of the data in the Employee Master table (F060116).

Changing an employee's status includes the following tasks:

- Promoting an employee
- Reviewing a status change request

## Promoting an Employee

All of the options employ a similar approach. Although the following instructions apply specifically to promoting an employee, you can use the same steps to implement any of the options.

► **To promote an employee**

From the Manager Self-Service menu (G05BMSS1), choose Managers Workbench.

1. On Work With Managers Employees, click one of the following options and then click Find to display your subordinates.

- Active Employees

The Active option displays only employees with an active payroll status, including employees who are on a leave of absence.

- All Employees

The All Employees option displays all employees, including those with a terminated status.

2. Choose the desired subordinate's record from the table.

The first Employee's Name column displays the organizational structure that is subordinate to your position. You can click the plus sign to the left of a manager's name to display that manager's subordinates.

3. Choose Status Change Request from the Row menu.
4. Click the option beside the picture icon of the desired change type to display notes or instructions and start the change process. Then click OK.

Original Values	New Values
S	S
S4	S4
89,910.00	89,910.00
43.226	43.226
8.00	8.00
2080.00	2080.00
260.00	260.00
4.00	4.00

5. On Create Employee Status Change Request, complete the following fields:

- Change Reason

- Effective On
6. Read the comments that are below the Instructions tab and then click the next tab (after Instructions) to enter appropriate changes to the active fields. Fields that are not applicable to the type of change selected will not be available for changes.
  7. Click each of the remaining tabs and enter changes as appropriate. If more tabs exist that you need to access on a subsequent form, the Next option in the menu bar will be available.
  8. After you have reviewed the information for all tabs and completed the changes, perform one of the following:
    - Click OK to save, but not submit, the request. This option allows you to review the request at a later date and then submit it for approval.
    - Click Submit to save and submit the request for approval. After you submit a request it cannot be revised except to enter a new Change Reason or to change the Effective On date.

If you need to change a request after you have submitted it, but before it has been approved, cancel the request and create a new one.

The system will automatically generate workflow messages in the Employee Work Center for the appropriate managers. The Employee Master table is updated when the required approvals have been completed.

Field	Explanation
Change Reason	A user defined code (06/T) that indicates: <ul style="list-style-type: none"><li>• The reason that you are changing an active employee's record.</li><li>• The reason that you are terminating an employee.</li><li>• The reason that you are recommending the change in salary or rate. If you are reactivating an employee, you must change the code in this field to a numeric character.</li></ul> <p>Note: The default reason code for new hires is the default value for the Change Reason data item.</p>
Effective On	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.

## Processing Options for Managers Employee Status Change (P08720)

### Process Tab

These processing options specify the default settings for application processes.

#### 1. Mail Box Designator

Use this processing option to specify the name of the mail box in the Employee Work Center where your workflow notifications and approval messages are sent.

To create a new mail box, add a new record to the 02/MB UDC.

#### 2. Final Status

Use this processing option to specify the final status for the Employee Status Change records (F08720) when the process has been successfully completed.

#### 3. Allow Delegates

Use this processing option to specify whether you want to allow the use of delegates. If a manager has defined a delegate, this employee can perform certain tasks in behalf of the manager. Valid values are:

- |   |     |
|---|-----|
| 0 | No  |
| 1 | Yes |

#### 4. Perform Employee Master Field Edits

Use this processing option to specify whether you want the system to write information that you change in the Managers Employee Status Change application to the Employee Master table. Valid values are:

- |   |     |
|---|-----|
| 0 | No  |
| 1 | Yes |

### User Level Tab

This processing option specifies the position of the person who will be using the application.

#### 1. User Level

Use this processing option to specify whether the application will be used by a management employee or HR personnel. Valid values are:

Blank Manager

- 1 Manager or a manager's delegate
- 2 HR Personnel

### Defaults Tab

#### 1. Status Change Type 1

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

#### 2. Status Change Type 2

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

#### 3. Status Change Type 3

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

#### 4. Status Change Type 4

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

#### 5. Status Change Type 5

Use this processing option to specify a status change type that the system will use as one of the five default settings. The system will display the five default status change types on the Select Employee Status Change Request form.

#### 6. Job Information Change

Use this processing option to specify whether the system will automatically supply job information in the employee record when you change a job type for an existing employee. The system will automatically include pay frequency, union code, pay class, pay grade, overtime exempt, pay grade step, and benefit group. Valid values are:

- 0 Do not use default data
- 1 Use default data

## 7. Business Unit/Job ID

Use this processing option to determine whether the system will automatically include the business unit/job cross reference information in the employee record when you change a job type for an existing employee. The system will automatically use the union code, workers compensation, and benefit group from the F08005 table. Valid values are:

- 0     Do not use default data
- 1     Use default data

## Reviewing a Status Change Request

You can use Status Change Review to examine a request that you have previously submitted, review notes that relate to a request, or follow up on a request that has not been approved within a reasonable amount of time.

If a request has not been approved, you can use the escalation monitor to determine possible reasons for the delay and restart the process. Use one of the following options, depending on the apparent cause of the delay:

- Escalation monitor. Provides a report of all halted workflow processes and moves the requests to the next stage.
- Escalate. Moves a specific request to the next stage if it has been halted due to payroll lockout, effective date, or approval inactivity.
- Restart. Restarts a specific status change process, deleting any associated workflow messages.

### ► To review a status change request

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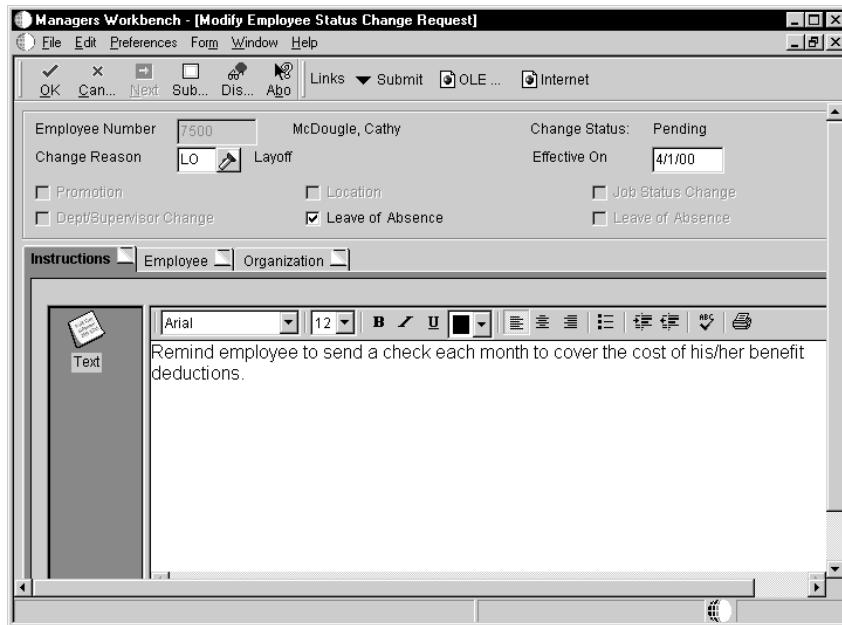
From the Manager Self-Service menu (G05BMSS1), choose Managers Workbench.

1. On Work with Managers Employees, click one of the following options depending on whether you want to see only active employees who work for you or you want to include employees whose employment has been terminated.
  - Active Employees
  - All Employees

**Note:** The Active option includes employees who are on a leave of absence.

2. Choose the desired subordinate's record from the table.
3. Choose Status Change Request and then Status Change Review from the Row menu.

4. On Work with Status Change, choose the desired employee's record and click Select.



5. On Modify Employee Status Change Request, review the information on each of the tabs and enter required changes. Fields that are not applicable to the type of change selected will not be available for changes. If more tabs exist that you need to access on a subsequent form, the Next option in the menu bar will be available.
6. After you have reviewed the information for all tabs and completed the changes, perform one of the following actions:
  - Click OK to save, but not submit, the request. This option allows you to review the request at a later date and then submit it for approval.
  - Click Submit to save and submit the request for approval. After you submit a request it cannot be revised except to enter a new Change Reason or to change the Effective On date.

If you need to make additional changes to a request after you have submitted it, but before it has been approved, cancel the request and create a new one.

The system will automatically generate workflow messages in the Employee Work Center for the appropriate managers. The Employee Master table is updated when the required approvals have been completed.

7. To restart a halted status change request, on Work with Status change, choose Escalate from the Row menu.

You can also restart halted workflow processes and generate a report that shows all halted workflow processes by choosing Escalation Monitor from the Form menu.

## **Processing Options for Managers Status Change Review (P087201)**

### **Processing Tab**

These processing options allow you to activate potential application activities that provide managers with a broader range of control over workflow and management options.

#### **1. Allow Delegates**

Use this processing option to specify whether you want to allow the use of delegates. If a manager has defined a delegate, this employee can perform certain tasks in behalf of the manager. Valid values are:

- |   |     |
|---|-----|
| 0 | No  |
| 1 | Yes |

#### **2. Allow Escalating Halted Activities**

Use this processing option to specify whether you want to allow the user to escalate halted workflow activities. The Status Change workflow stops the process during a Payroll Lockout or to wait for a specified effective date. If the process is waiting for an effective date, escalating will cause the changes to be committed to the database immediately instead of waiting for the effective date. Escalating a Payroll Lockout will re-verify the lockout status before allowing the process to continue. Valid values are:

- |   |     |
|---|-----|
| 0 | No  |
| 1 | Yes |

#### **3. Allow Restarting Active Processes**

Use this processing option to specify whether you want to allow the user to restart an active Status Change process. The Status Change workflow process might stop for any of the following reasons:

- Payroll Lockout
- Effective date
- Delay of management approval

When the workflow has stopped for any of these reasons, performing a restart will complete the active workflow activity and delete all approval messages, including messages that are waiting and those already approved, from the

Employee Work Center and the Approval History table. The status of the Status Change record will change to pending. The workflow process will be completed but not deleted. Valid values are:

- 0      No
- 1      Yes

### 4. Allow Aborting Active Processes

Use this processing option to specify whether you want to allow the user to abort an active Status Change process. When the Status Change workflow process stops for a payroll lockout, an effective date, or a management approval, aborting will update the status of the Status Change record to 07-Cancelled by User and complete the active workflow. Valid values are:

- 0      No
- 1      Yes

### 5. Employee Status Change (P08720) Version

Use this processing option to specify which version of the Employee Status Change application (P08720) you want to use. The version will control the workflow process, retrieving the correct processing options for mail box and the final status.

If no value is entered, version ZJDE0001 will be used.

## User Level Tab

These processing options specify the type of user who will be accessing the application.

### 1. User Level

Use this processing option to specify whether the application will be used by a management employee or HR personnel. Valid values are:

- Blank Manager  
1      Employee/Manager  
2      HR personnel



# Assigning Delegates

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You can delegate tasks and projects to other employees to assist with your work when you are away from your office or just when you need additional assistance. When work that you assign to others requires system access with an authority level comparable to a manager's level, you can assign delegate status to them up to your own level. When you designate an employee as a delegate for you, that employee can assist with routine tasks or projects from a predefined set of applications that will allow the use of delegates. For example, you might want a delegate to run a list of weekly reports or conduct a job analysis project. You can also delegate an employee to perform your supervisory functions for periods of time that you will be absent from work.

Assigning delegates permits you to designate another employee to access your J.D. Edwards software with system authorization at a level that you assign. You can assign an authority level up to, and including, your own. For example, you can designate an employee to perform many of the same functions that you would ordinarily perform by assigning appropriate authorization types. The system includes five preset authorization types and allows you to add customized authorization types.

## Before You Begin

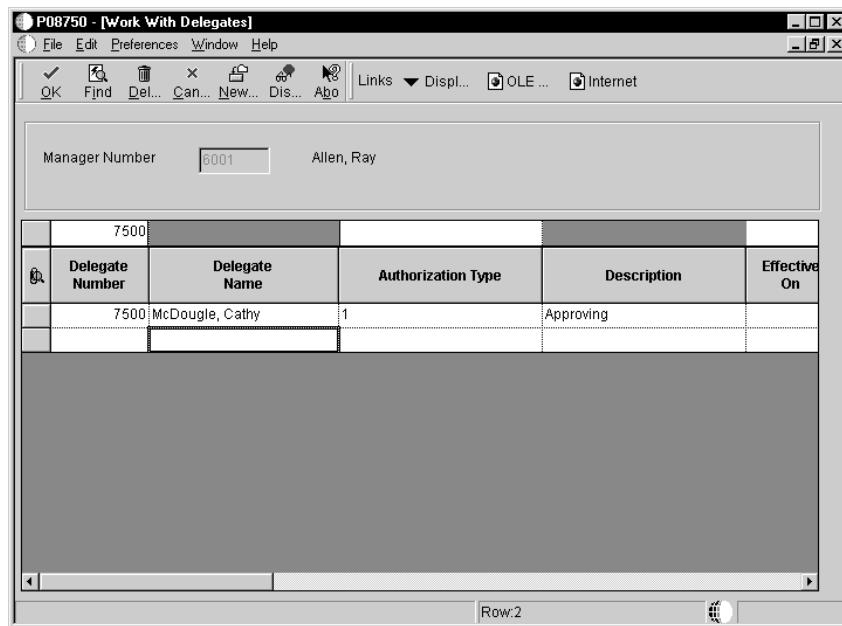
- Set up additional authorization types, if needed, in UDC 08/AY. See *Customizing User Defined Codes* in the *OneWorld Foundation Guide* for more information.

### ► To assign a delegate

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From the Manager Self-Service menu (G05BMSS1), choose Managers Workbench.

1. On Work With Managers Employees, click Find to display your organizational hierarchy and your employees' records.
2. Choose My Delegates from the Form menu.



3. On Work With Delegates, complete the following fields:
  - Delegate Number
  - Authorization Type
  - Effective On
  - Ending Date
  - Authorization Level
4. Repeat step 3 for the same employee as many times as needed, assigning an additional authorization type for each entry.
5. When you are finished assigning delegates, click OK.

The system displays your new delegate employee's record on the Work With Delegates form.

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Field	Explanation
Delegate Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members.
Authorization Type	A code that specifies the type of authorization given to a delegate.
Effective On	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.

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<b>Field</b>	<b>Explanation</b>
Ending Date	The date on which the item, transaction, or table becomes inactive or through which you want transactions to appear. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.
Authorization Level	The number of levels in the organizational structure below the delegate's manager that the delegate can review and make changes to employee records. For example, a value of 0 allows the delegate to access only employees that report directly to the delegate's manager. A value of 1 allows the delegate to access the records of employees that report to the manager's immediate subordinates.
Authorization Type	A code that specifies the type of authorization given to a delegate.
Effective On	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.
Ending Date	The date on which the item, transaction, or table becomes inactive or through which you want transactions to appear. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.
Authorization Level	The number of levels in the organizational structure below the delegate's manager that the delegate can review and make changes to employee records. For example, a value of 0 allows the delegate to access only employees that report directly to the delegate's manager. A value of 1 allows the delegate to access the records of employees that report to the manager's immediate subordinates.



## Reviewing Upcoming Employee Reviews by Supervisor

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Managers can log onto the self-service intranet site to search for all upcoming employee reviews. This process can occur in one of the following ways:

- You can log onto the self-service intranet site and search for upcoming employee reviews using the Upcoming Reviews By Supervisor program (P052200). You can search for employees based on the following fields: Business Unit, Pay Class, Type of Review, and all review dates and payroll status fields. The system automatically displays employees that report directly to you by your supervisor number.
- You can log onto the self-service intranet site and access the Upcoming Reviews By Supervisor program (P052200) after receiving an electronic message about your upcoming employee reviews. Instead of having to search for specific employees, the system automatically completes the grid with the employees that you are responsible for reviewing soon.

This process occurs after the system administrator runs the Upcoming Reviews report (R052202). If the processing options for Upcoming Reviews are set up correctly, the report initiates Enterprise Workflow Management, which notifies all supervisors about their upcoming reviews with an e-mail. A processing option is available that can be set to run the report automatically on a certain date when you also set up the report to run in the Scheduler Workbench. See *Scheduling a Recurring Job* in the *System Administration Guide*.

Different versions of the report can be run to report overdue reviews and reviews for all employees. In these cases, you would not receive e-mails. However, the system would still supply the Upcoming Reviews By Supervisor form (W052200B) with the employees that you are responsible for reviewing.

After the system displays your employees with upcoming reviews, you can choose an employee record and choose an option from the Row menu to review profile, supplemental, employment, or organizational data for the employee. You can access this information if your OneWorld security system is set up to allow you access.

### Before You Begin

- ❑ If the Upcoming Reviews by Supervisor report (R052202) has been run, you need to review only the information that appears when you log onto your self-service site. See *Running the Upcoming Employee Reviews by Supervisor Report* to further understand the procedure.

► **To review upcoming employee reviews by supervisor**

From the Manager Self Service menu (G05BMSS1), choose Upcoming Reviews By Supervisor.

Alpha Name	Next Review Date	Type Review	Type Review Description	Home Business Unit	Home Unit D
Ebby, Chester			None Assigned	9	Corporate
Edwards, Angela			None Assigned	9	Corporate
Ingram, Paul			None Assigned	9	Corporate
Kilmer, Jessica			None Assigned	9	Corporate
McLind, Rod			None Assigned	9	Corporate
Moralez, Jesus			None Assigned	9	Corporate
Walters, Annette			None Assigned	9	Corporate

1. On Work With Upcoming Reviews By Supervisor, complete any of the following fields:
  - Home Business Unit
  - Pay Class(H/S/P)
  - Type Review
2. Complete the following fields if you want to review employees who have upcoming reviews during a specific period of time:
  - From Review Date
  - Thru Review Date

If you complete the From Review Date field but leave the Thru Review Date field blank, the system displays all employees with reviews on or after the from review date.

If you complete only the Thru Review Date field, employees with no specific next review date and employees with a next review date equal to or prior to the through review date are displayed.

3. Click one of the following options and then click Find to display your subordinates.

- Active Payroll Status

The Active Payroll Status option displays only employees with an active payroll status, including employees who are on a leave of absence.

- All

The All option displays all employees, including those with a terminated status.

The All option includes employees on a leave of absence.

4. Review the displayed information.



# Entering Data for Verification-of-Employment Letters

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The Verification of Employment program (P05003) allows only human resource administrators or system administrators to enter employment data for verification-of-employment letters.

Entering the employment data is the second part of a two-step process for processing a verification-of-employment letter. The employee must first request a letter by entering personal information on the Request Information tab of the Verification of Employment Data form (W05003B). When an employee enters a request, the system copies the employee's job and compensation information from the Job Information table (F08001) to the Employment Data tab.

If Enterprise Workflow Management is enabled through your processing options, after receiving an e-mail that a verification-of-employment request is pending, you can inquire on the request, change the employee's employment data if necessary, and process the letter. You can also e-mail the completed letter to the contact person that the employee has requested.

## Before You Begin

- Have your human resources system administrator set the processing option for Verification of Employment to 3. This processing option allows you to change the job information fields on the Verification of Employment Data form (W05003B) if necessary.

## See Also

- *Requesting a Verification-of-Employment Letter* to better understand how an employee requests verification-of-employment letters
- For more information about setting up Workflow recipients and distribution lists, see *Working with Distribution Lists and Recipient Rules and Recipient Conditions* in the *Enterprise Workflow Management Guide*.

## ► **To enter employment data for verification-of-employment letters**

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From the Employee Self Service menu (G05BESS1), choose Verification of Employment.

1. On Work with Verification of Employment Requests, complete the following fields and click Find to locate an employee's request:

- Employee Identification
- Request Date

Address Number	Employee Name	Request Date	Company Name	Alpha Name	Prefix
8015	Kilmer, Jessica	3/12/99	Star Bank	Fred Lansing	303

2. If you need to delete a record, choose the record and click Delete.
3. Choose the employee's record and click Select.

The Verification of Employment Data form appears.

4. Click the Employment Data tab.

Date Started	2/1/98
Job Type/Step Description	Administrative Assistant
Continued Employment	<input type="radio"/> High <input type="radio"/> Bi-Weekly <input type="radio"/> Hourly
Pay Frequency	
Pay Class(H/S/P)	
Date Of Last Raise	
Date of Next Raise	
Comment	
Base	8,560.00
Overtime	
Commission	
Bonus	
Other	
Current Year	
One Year Prior	
Two Years Prior	

5. If your processing option is set to 3, choose one or more of the following options, depending on the contact method that the employee has checked:

- Print VOE Letter
- Save Document
- E-Mail VOE Letter

If you clicked the Save Document option, the letter will be saved to the C:\TEMP\ directory.

6. On the Employment Data tab, review and change the following fields if necessary:

- Date Started
- Description of Job Type/Step
- Continued Employment
- Pay Frequency
- Pay Class(H/S/P)
- Date Of Last Raise
- Amount Of Increase
- Date of Next Raise
- Pay Period Salary
- Comment

7. Review and change the following compensation fields if necessary:

- Current Year Base
- Current Year Overtime
- Current Year Commission
- Current Year Bonus
- Current Year Other
- One Year Prior Base
- One Year Prior Overtime
- One Year Prior Commission
- One Year Prior Bonus
- One Year Prior Other
- Two Years Prior Base
- Two Years Prior Overtime
- Two Years Prior Commission

- Two Years Prior Bonus
  - Amount – Other Pay Two Yrs Prior to Base
8. Click OK.
- The Verification-of-Employment letter appears.
9. Choose Print from the File menu.
  10. If you have clicked the option to e-mail the letter, click Yes or No on the form asking whether you want to e-mail the request.

<b>Field</b>	<b>Explanation</b>
Request Date	<p>The date that an item is to arrive or that an action is to be complete.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The date of the request. If you are adding a request for a verification of employment letter, enter today's date. If you are reviewing a request, enter the date on which you initially added the request.</p>
E-Mail VOE Letter	<p>An option that specifies whether the system e-mails the verification of employment letter to the requested e-mail address. Click the option to activate it.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The system e-mails the verification-of-employment letter when you click OK. This option is enabled only when you activate the Print Verification-of-Employment Letter option also.</p>
Save Document	<p>An option that specifies whether you want the system to save the letter when you print it. If you activate this option, the system only saves the verification-of-employment letter when you print it. Any changes made to the letter when it appears as a document on the screen, will not be saved.</p>
Print VOE Letter	<p>An option that specifies whether the system prints the verification of employment letter.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The system prints the verification of employment letter when you click OK.</p>

## Entering Data for Verification-of-Employment Letters

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<b>Field</b>	<b>Explanation</b>												
Date Started	<p>The date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. If no original hire date exists, the system uses the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker.</p> <p>For the calculation tables in the Payroll system and the eligibility tables and date codes in the Human Resources system, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.</p>												
Job Type/Step Description	<p>The description associated with the job type and job step. This description is stored in the Job Information table (F08001).</p>												
Continued Employment	<p>A field that indicates the employee's potential for continuing employment with the organization. Valid values are stored in the user defined code table 05/V3.</p>												
Pay Frequency	<p>A user defined code (07/PF) that indicates how often an employee is paid. Codes are:</p> <table style="margin-left: 20px;"> <tr><td>B</td><td>Biweekly</td></tr> <tr><td>W</td><td>Weekly</td></tr> <tr><td>S</td><td>Semimonthly</td></tr> <tr><td>M</td><td>Monthly</td></tr> <tr><td>A</td><td>Annually</td></tr> <tr><td>C</td><td>European Annualized</td></tr> </table> <p>The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee.</p>	B	Biweekly	W	Weekly	S	Semimonthly	M	Monthly	A	Annually	C	European Annualized
B	Biweekly												
W	Weekly												
S	Semimonthly												
M	Monthly												
A	Annually												
C	European Annualized												
Pay Class(H/S/P)	<p>A code that indicates how an employee is paid. Valid codes are:</p> <table style="margin-left: 20px;"> <tr><td>Blank</td><td></td></tr> <tr><td>H</td><td>Hourly</td></tr> <tr><td>S</td><td>Salaried</td></tr> <tr><td>P</td><td>Piecework</td></tr> </table>	Blank		H	Hourly	S	Salaried	P	Piecework				
Blank													
H	Hourly												
S	Salaried												
P	Piecework												
Date Of Last Raise	<p>The date of the employee's last raise. For the stand-alone HR system, this is the date when you update salary and wages. If you also have the Payroll system, this date is automatically updated when a payroll is run. You define pay effective dates using Pay Rate Information.</p>												
Amount Of Increase	<p>Amount of increase is the difference between two values. A negative value indicates a decrease.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>A monetary increase as a result of a raise occurring on the Date of Last Raise.</p>												

Field	Explanation
Date of Next Raise	The date that the hourly or annual pay rate for the employee increases. The new rate goes into effect after a payroll cycle completes with a pay period end date on or after the date of the next raise.
Pay Period Salary	Pay Period Salary is calculated by dividing the annual salary by the number of pay periods.
Comment	A comment, description or remark. This entry can be up to 40 characters in length.
Current Year Base	Amount paid from all pay types considered to be base salary for the current year.
Current Year Overtime	Amount paid from all pay types considered to be overtime pay for the current year.
Current Year Commission	Amount paid from all pay types considered to be commission pay for the current year.
Current Year Bonus	<p>The amount of bonus pay that the employee earned, year-to-date in the current year. The system calculates this amount by searching the employee's timecards for pay types that represent bonus pay. It then calculates the amount of the employee's earnings during the year that were attributed to the bonus pay types.</p> <p>Note: When you set up a pay type, you use the Pay Type Category field (PTCT) to identify it as part of a related group of pay types, such as regular pay, bonus pay, commissions, and so on. You define pay type categories in user defined code list 06/PC.</p>
Current Year Other	Amount paid from all pay types considered to be other pay for the current year. Other pay is anything other than base salary, overtime, commission, and bonus.
One Year Prior Base	The amount paid from all pay types considered to be base salary for the year prior to the current year.
One Year Prior Overtime	Amount paid from all pay types considered to be overtime pay for the year prior to the current year.
One Year Prior Commission	Amount paid from all pay types considered to be commission pay for the year prior to the current year.

<b>Field</b>	<b>Explanation</b>
One Year Prior Bonus	<p>The amount of bonus pay that the employee earned in the year prior to the current year. The system calculates this amount by searching the employee's timecards for pay types that represent bonus pay. It then calculates the amount of the employee's earnings during the year that were attributed to the bonus pay types.</p> <p>Note: When you set up a pay type, you use the Pay Type Category field (PTCT) to identify it as part of a related group of pay types, such as regular pay, bonus pay, commissions, and so on. You define pay type categories in user defined code list 06/PC.</p>
One Year Prior Other	Amount paid from all pay types considered to be other pay, for the year prior to the current year. Other pay is anything other than base salary, overtime, commission, and bonus.
Two Years Prior Base	Amount paid from all pay types considered to be base salary, for the year that is two years prior to the current year.
Two Years Prior Overtime	Amount paid from all pay types considered to be overtime pay, for the year that is two years prior to the current year.
Two Years Prior Commission	Amount paid from all pay types considered to be commission pay, for the year that is two years prior to the current year.
Two Years Prior Bonus	<p>The amount of bonus pay that the employee earned in the year that is two years prior to the current year. The system calculates this amount by searching the employee's timecards for pay types that represent bonus pay. It then calculates the amount of the employee's earnings during the year that were attributed to the bonus pay types.</p> <p>Note: When you set up a pay type, you use the Pay Type Category field (PTCT) to identify it as part of a related group of pay types, such as regular pay, bonus pay, commissions, and so on. You define pay type categories in user defined code list 06/PC.</p>
Two Years Prior Other	Amount paid from all pay types considered to be other pay, for the year two years prior to the current year. Other pay is anything other than base salary, overtime, commission, and bonus.

## Processing Options for Verification of Employment

### User Level

1 User Level: Enter ' ' or '1' if used by Employee '2' if used by HRM clerk '3' if used by HRM admin without sending request through Workflow Note: If this program is used by an employee or an HRM clerk, then the approval process will be routed through Workflow, where the "Workflow Setup" tab needs to be setup. employee or an HRM clerk, then the approval process will be routed through Workflow, where the "Workflow Setup" tab needs to be setup.

### User Level

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### Workflow Setup

1. Address Number of HRM person (or a Distribution List) who will process VOE requests
- 

## What You Should Know About Processing Options

The following list describes consequences and additional set-up issues that you should be aware of when you choose one of the three processing options:

### **1-Used by Employee**

Entering 1 instructs Workflow to notify the recipient of the pending request after the employee enters the request information. The recipient completes the verification-of-employment letter and can print the letter or e-mail it to the requested contact person. This value starts the process with the employee and finishes it with the Workflow recipient.

If you enter this value, you must set up your recipient in the processing option on the Workflow Setup tab.

**2-Used by HRM clerk**

Entering 2 instructs Workflow to notify the recipient of the completed letter after the human resource management clerk enters the request information. The recipient approves the letter and can print or e-mail the letter directly to the contact person that the employee requested. This value assumes that the process has already started with the employee. The HRM clerk does not receive a Workflow message but sends the completed letter through Workflow to a recipient for approval.

If you choose this value, you must set up your recipient in the processing option on the Workflow Setup tab.

**3-Used by HRM administrator**

Entering 3 deactivates Workflow in the Verification of Employment program. Because the human resources administrator starts and completes all requests, no need for Workflow exists. The HRM administrator can delete a request and also print the letter or e-mail it directly to the contact person that the employee requested.



## Setting Up Information for New Employees

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When you hire an individual, many administrative tasks must be completed before the employee starts working. The process of setting up a new employee can involve many different people, paper forms, and approvals, and equipment must be set up for the new employee. Delays in the paperwork or approvals sometimes impede preparation for the employee and contribute to lost productivity.

Managers Employee Setup automates most communication associated with preparation for a new employee's arrival. Using this automated approach, tasks can be set up and distributed, and approvals can be routed efficiently. Each process can be tracked to spot potential problems and avoid delays. Setup processes are enhanced by the Enterprise Workflow Management process. Workflow routes approval and notification messages to required people about tasks that need to be completed by a specific date. This process tracks critical dates and notifies the originator when delays occur.

Using Workflow to help complete the setup process for new employees reduces the risk of misplacing paper forms, informs appropriate personnel of tasks that should be completed by a certain date, and decreases time spent preparing for a new employee.

You can avoid lost productivity by reviewing each setup process to resolve possible delays and ensure that all preparation will be completed on time. When you need to reduce the setup interval, you don't have to wait until all the hiring processes are complete to start preparing for the new employee. As soon as the address book number has been entered into the system, you can create setup tasks to ensure that the new employee can start work on the first day of employment.

Setting up new employees consists of the following process:

1. Add an employee record to the database.
2. Create setup tasks to prepare for the new employee in Managers Employee Setup.
3. Initiate the employee setup process. When you initiate the process, Workflow sends a series of approvals according to the setup tasks that you entered. Each setup task can do one or more of the following activities: run a report, send an e-mail message, create a work order, or start a Workflow process.

When you add an employee record using the Employee Setup program (P08710), the system automatically adds an employee record to the Address Book table (F0101) and an employee setup record to the Employee Setup table (F08710).

Alternatively, you can add a new employee record using any of the following programs:

- Employee Information (P0801)
- Applicant Entry (P08401)
- Personic or any third-party software that updates the F060116Z table

**Note:** When you use one of these programs, the system does not automatically add an employee setup record to the Employee Setup table. To add a setup record after you add an employee record, you must access the Employee Setup program and initiate the process for employee setup.

Setting up new employees includes the following tasks:

- Adding an employee record using Employee Setup
- Initiating employee setup
- Completing employee setup using Workflow

## Adding an Employee Record Using Employee Setup

You must add an employee record to the database before you can initiate the employee setup process. If you have already added an employee record, proceed to the task *Initiating Employee Setup*.

If you are adding an employee record using any of the following programs, see the referenced information for adding an employee record, and then proceed to the task *Initiating Employee Setup*.

- Employee Information (P0801). See *Adding Employee Records One at a Time*.
- Applicant Information (P08401). See *Entering Applicant Information* in the *Human Resources Guide*.
- Personic or any third-party software that updates the F060116Z table. See *Appendix C: About Personic Workflow* in the *Human Resources Guide*.

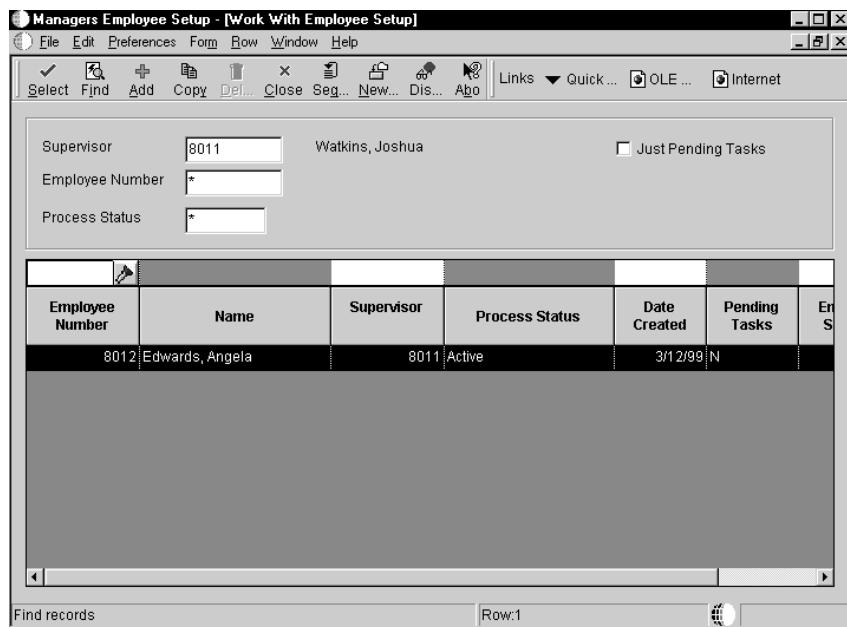
### Before You Begin

- Set the processing options for Employee Setup.

- ❑ Complete the setup tasks for the employee setup process. See *Setting Up the Employee Setup Process*.
- ❑ Set the processing options for Employee Quick Hire to activate the new hire process, which includes Employee Setup. You must also set these processing options to specify whether the system automatically updates the Employee Master table or the Unedited Quick Hire Transaction table when you add a record. For more information about these processing options, see *Adding Employee Records Using Employee Quick Hire*.

### ► To add an employee record using Employee Setup

From the Manager Self Service Setup menu (G05BMSS1), choose Managers Employee Setup. Or from the Employee Management menu (G05BE1), choose HRM Employee Setup.



1. On Work With Employee Setup, choose Quick Hire from the Form menu.
2. On Employee Quick Hire, add a new employee record.

See *Adding Employee Records for Applicants, Rehires, and New Hires*.

After you click OK on the Employee Quick Hire form, the system returns you to the Work With Employee Setup form and displays the employee with a Pending status. Proceed to the task *Initiating Employee Setup*.

## Processing Options for Managers Employee Setup (P08710)

### Processing Tab

These processing options specify the default values that the system will use to determine approval requirements and distribute workflow messages when managers or HR personnel perform employee setup functions.

#### 1. Require Process Approval

Use this processing option to specify whether to require a manager's approval for the employee setup process before the system processes any of the setup tasks.

This approval is for the entire setup process. To create additional security, you can set up a requirement for the system to send an approval message for each setup task.

#### 2. Allow Changing Process Approver

Use this processing option to specify whether to allow a manager the authority to change the individual who can approve the employee setup process. The default setting is the manager's supervisor. For cases in which the manager has no supervisor, and the first processing option is set to require process approval, the manager has the approval authority.

#### 3. Work Center Mail Box

Use this processing option to specify the mailbox number in the Employee Work Center of the individual to whom you want to send your notifications and approval messages.

To create a new mailbox number, you must add a record to UDC table 02/MB.

### User Level Tab

These processing options specify the organizational level of the user who will perform employee setup functions.

#### 1. User Level

Use this processing option to specify whether the application will be used by a manager (including a manager's delegate) or HR personnel. Valid values are:

Blank Manager

- 1 Manager or manager's delegate
- 2 HR Personnel

### Defaults Tab

#### 1. Ending Setup Status

Use this processing option to specify the status to which you want the employee setup process changed when the process completes successfully. The status codes are listed in UDC table 08/S1. Valid values are:

- 1 Completed
- 7 Archive
- 8 Purge

### Work Orders Tab

#### 1. Pending W.O. Status Code

Use this processing option to specify the status that the system will use to identify pending work orders. The system places a work order in pending status when the setup task has been initiated but is waiting for the user to enter an effective date or location information.

#### 2. Active W.O. Status Code

Use this processing option to specify the status that the system will use to identify active work orders. The system places a work order in active status when the setup task has been initiated, the effective date has been reached, and the user has entered the location information.

#### 3. Cancelled W.O. Status

Use this processing option to specify the status that the system will use to identify cancelled work orders. The system places a work order in cancelled status when the user ends the setup task.

#### 4. Record Type Used When Creating Work Order Instructions

Use this processing option to specify the record type that you want to use when you are writing instructions for a work order. The default value is A.

#### 5. Copy Task Description to Work Order

Use this processing option to specify whether the system will copy the description of the employee setup task contained in the F087102 table into the description field of the work order when you create a new work order. Valid values are:

- 1 Copy the description from the setup task record.

- 0 Use the description from the work order template.

## Initiating Employee Setup

After you add an employee record, you can assign setup tasks to the employee's setup record and then initiate the setup process.

Depending on how one of the processing options has been set, the entire employee setup process might require approval. Workflow will deliver an approval form for the process and wait for confirmation before it starts individual tasks that you have assigned to the employee record.

Most setup tasks are specific to the location where the employee will be working. You can choose tasks from a default task list that displays setup tasks for every employee by job type and job step. You can also choose tasks from a setup task list that includes all defined tasks. You can change tasks to customize the employee's setup. However, this could reinstate the process approval depending on the task specifications.

Each setup task can do one or more of the following activities, depending on how the tasks have been set up: run a report, send an e-mail message, create a work order, or start a Workflow process.

Information that you enter in the tabbed area of the Employee Entry Setup form updates the Employee Setup Master table (F08710). Information that you enter in the detail area of the form updates the Employee Setup Tasks table (F08711).

### Before You Begin

- Set the Employee Quick Hire processing options. See *Processing Options for Employee Quick Hire*.

#### ► **To initiate employee setup**

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If you added an employee record using a program other than the Employee Setup program, from the Manager Self Service menu (G05BMSS1), choose Managers Employee Setup. Or from the Employee Management menu (G05BE1), choose HRM Employee Setup. If you just added an employee record using the Employee Setup program, disregard this navigation and continue with the task.

1. On Work With Employee Setup, if you used the Employee Setup program to add an employee record, go to step 3.
2. If you added an employee record with a program other than Employee Setup, complete any of the following fields and click Find:
  - Supervisor

- Employee Number
  - Process Status

3. Choose the employee record and click Add.

4. If you added an employee record with a program other than Employee Setup, on Employee Setup Entry, complete the following fields on the Employee tab:

- Address Number
  - Setup Action

The system supplies the header fields.

5. To add default tasks, choose Add Default Tasks from the Form menu.

If default tasks are set up for the new employee's job type and step, the system supplies the default tasks on the Employee Setup Entry form.

6. To add or change the subclass for a task, review the following fields:

- Lock code
  - Ranking

If a value is in the Lock Code field, you can change the subclass only to a level that is equal to or less than the value in the Ranking field.

7. Complete the following field with a value that is equal to or less than the value in the Ranking field:

- Task Sub Class

8. Complete the following optional field:
  - UM
9. If the task is an equipment-setup task and you need more than one unit, complete the following field:
  - Units
10. Review the system-supplied information in the following grey fields:
  - Order Number
  - Task Recipient
  - Approved By
  - R F

You cannot change these fields.

11. Click the Location tab and review the following field to determine the number of Location Code fields that you need to complete for this task:
  - Required Fields
12. Complete as many of the following Location Code fields as are required. For example, if four fields are required, then complete Location Code 001 through 004.
  - Location Code 001
13. Complete the following optional field:
  - OfficeNumber
14. To assign an additional task, complete the following field and repeat steps 6–13:
  - Task Type

If you complete the process approval task, you do not need to repeat steps 6–13.

15. To copy tasks from another employee, complete the following field and click the Copy Employee's Tasks option on the Form menu.
  - Address Number

The system supplies the detail area with tasks from the specified employee. You can copy tasks only from employees who have the same Setup Action value as the employee that you are setting up.

16. When you finish entering all tasks for the employee's setup, click OK.

Your new employee record displays on Work With Employee Setup and shows Pending in the Process Status column.

The Activation Confirmation form appears asking whether you want to activate the employee setup process.

17. Choose Yes to begin the process. If you choose No, the system leaves the status of the process as Pending. You will need to come back to this form to activate the process. See *Completing Employee Setup Using Workflow*.

<b>Field</b>	<b>Explanation</b>
Setup Action	A code that represents the setup action to perform.
Arrival Date	The date the employee arrives at the employee's desk. Setup tasks for the employee setup can be based on this date or based on the start date contained in the Employee Master table.
Required Fields	<p>A value that represents the number of location category codes you need to know to accomplish the current setup task.</p> <p>For example, to install a telephone you might need to know the first four location codes (state, city, building, and office number). To set up a computer account, you might need to know only the first two location codes (state and city).</p>
Location Code 001	<p>A user defined category code (08/L1) that defines the location of an employee. You set up this code to meet the needs of your organization. For example, you can set up a category code to represent country, city, state, campus, building, office, or other location.</p> <p>The Human Resources system provides this code to allow you to define a custom setup process for new employees based on the location where the employee will work.</p>
Office Number	A field that uniquely identifies the physical location where an employee works. The system does not verify this information. You can enter any alphanumeric string.
Lock Code	<p>A code that specifies whether the hiring manager can change the selected default setup task. When you check this box, the following must be true:</p> <ul style="list-style-type: none"> <li>• Every employee who matches the current job type and step and location must have this default setup task.</li> <li>• Only a human resources administrator can change the task details.</li> </ul>
Ranking	A code that specifies the rank of tasks within a task type. You rank tasks to restrict users from changing the subclass of a task to a subclass with a higher rank.
Sub Class	A code that represents the classification of the current task. The system uses this code to further define the task.

Field	Explanation
Task Type	A user defined code (08/T1) that represents the primary category or classification of an employee setup task.
UM	A user defined code (00/UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.
Units	The quantity of something that is identified by a unit of measure. For example, it can be the number of barrels, boxes, cubic yards, gallons, hours, and so on.
Order Number	A number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.
Task Recipient	The address book number of the person who is assigned to the current employee setup task.
Approved By	The address book number of the person who approves any given work. The system verifies this number against the Address Book.

## Completing Employee Setup Using Workflow

After you initiate employee setup, Workflow completes one or both of the following procedures depending on how the processing options are set:

- Obtains a process approval
- Obtains a task approval for each employee setup task that includes an approval requirement

If the system requires a process approval, Workflow will not begin each employee setup task until it obtains the process approval.

Workflow can complete any or all of the following processes for each setup task:

- Create a work order
- Create a report
- Send an e-mail
- Start an additional Workflow process

When specified in the processing option, the system will require a process approval for the entire setup process. Examples of this approval are an acknowledgment from a supervisor in the new employee's department, or a salary approval before an individual is hired. When the system requires a process approval, it sets the task status to Pending (as defined in Setup Task Status list 08/S1) until the designated manager approves the task. When the

designated manager approves the task, the system resets the task status to Approved and starts each task within the process, except for tasks that include a future start date. The system starts tasks with a future Start Date on the appropriate date.

Individual tasks and changes to tasks might also require approval. For example, if the task for installing an employee telephone does not require an approval, Workflow will not send an e-mail approval form. However, you can set up this task to require an approval if a manager changes the task to install a phone with multiple features.

When a task requires approval, Workflow first verifies that the manager who entered the employee setup record also entered data in the required fields that identify the location of the new employee's workspace. If values are missing, Workflow delays the process and sends an e-mails message to the manager. When the manager enters the required data, Workflow sends an e-mail approval form to the approver who has been specified for the task. The system then sets the task status to Waiting (defined in Setup Task Status list 08/S2) until it is approved. When the designated manager approves the task, the system sets the task status to Approved and starts processing the task.

As part of each task, Workflow can send an e-mail message, run a customized report, create a work order, and start an additional Workflow process. An e-mail message can contain the employee's name and location information, the description of the task, a requested completion date, and an employee's comments about the task. You can send an e-mail message to notify a recipient that the system ran a report. You can also link a work order to the setup task.

Most setup tasks require data entry to move the status to Completed. When task recipients complete their work and enter the completion in the system, the system sets the task status to Completed.

You can review and revise the task status for the entire setup process and for individual tasks. You can delete a task if it is in the Pending status. You can cancel a task if it is in the Waiting, Approved, or Active status. If you do not activate the employee setup process when you add an employee setup record, you can activate the process after your review.

Completing the employee setup process using Workflow consists of the following procedures:

- Approving the process or task for employee setup
- Reviewing and revising the status

Managers who are responsible for approving the process for new employee setup or the individual tasks within the process should complete these procedures.

### Before You Begin

- Review the status codes from UDCs 08/S1 and 08/S2. See *User Defined Codes for HR and Payroll Foundation*.

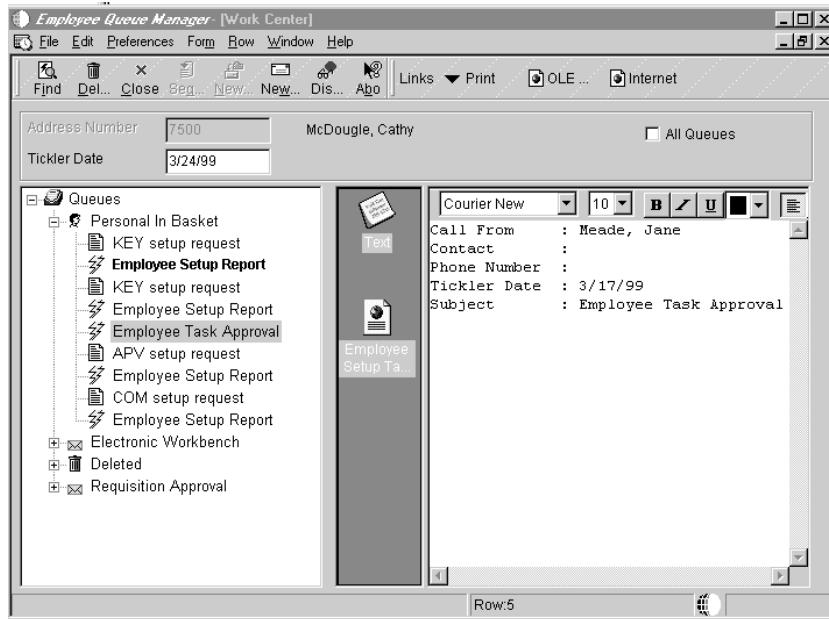
#### ► **To approve the process or task for employee setup**

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

1. On Work With Employee Queue Manager, verify that your name appears in the following field:
  - Skip To Name
2. Choose your record and click Select.
3. On Work Center Queue, click the icon in the left queue that receives Employee Setup messages.

All setup requests appear that are pending approval.



4. Click the message that you want to see.

The message appears in the right queue.

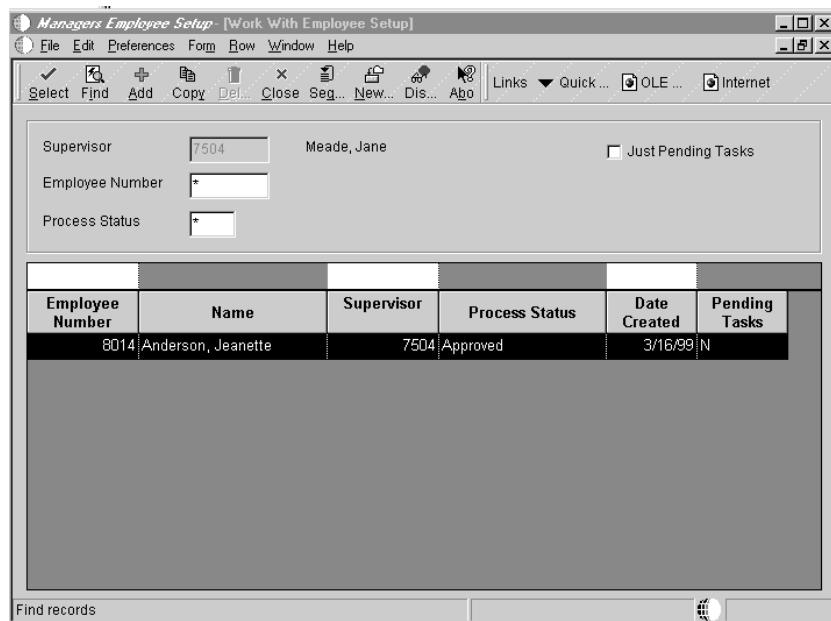
5. If the message allows you to complete a task, click the icon that describes the task in the middle of the form.
6. Click the icon in the right queue.

7. On To Approve or Reject a Request, choose one of the following options in the Actions area and click OK.
  - Approve
  - Reject
8. On Employee Queue Manager, click Close.

### ► To review and revise the status

From the Manager Self Service menu (G05BMSS1), choose Managers Employee Setup. Or from the Employment Management menu (G05BE1), choose HRM Employee Setup.

1. On Work With Employee Setup, complete the following fields and click Find:
  - Supervisor
  - Employee Number
  - Process Status



2. Choose a record.
3. To cancel the process, choose Cancel Process from the Row menu.

When you cancel a process, the task record remains in the system.

4. To delete the process, choose Delete from the Row menu.

You can delete a process or task only while it is in the pending status, before you submit it. When you delete a process, the task record is removed from the system.

5. To activate the process, choose Process Tasks from the Row menu.
6. Click Select to review the status for individual setup tasks.

Tasks with a Y in the Pending Tasks column are pending. Although you previously submitted tasks with an N, you can also review them to track their progress.

Task Type	Sub Class	Task Description	Task Status	Units	UM	Order Number
COM	COMDESH	Desktop Computer	Waiting for Approval	1.00		
BDG		Name Badge	Waiting for Approval	1.00		
PHN		Phone	Active	1.00		
KEY	KEYBLD	Building Key	Active	1.00		
KEY	KEYOFC	Office Key	Active	1.00		
APV		Approval	Active	1.00		

7. On Employee Setup Entry, review the Task Status field for each task in the detail area.

The Task Status field displays the status for an individual setup task. You can delete the task if the status is Pending. A task is pending only if you have not submitted it for processing. You can abort the task if the status is Waiting, Approved, or Active.

8. To cancel a task, choose the task, choose Abort Task from the Row menu, and then click OK.

When you cancel a task, the system sets the task status to Cancelled by User.

9. To complete a task in the system after the task recipient finishes the work, choose the task, click Complete Task, and then click OK.

When you complete a task, the system sets the task status to the value that you specified in the Final Task Status field on the Work With Setup Task Details form.

<b>Field</b>	<b>Explanation</b>
Process Status	A code that represents the status of the entire setup process. Changing the setup status triggers the specific event associated with the status.



## **Approving Information Using Manager Self-Service**

---

Employees can use self-service to enter and update some of their personal information, such as name and address, emergency contact, and so on. Some types of information that employees enter, such as automatic deposit information and competency information, must be reviewed and approved by someone else before the database is updated.

If you are a representative of your organization's payroll department, you might be responsible for approving the automatic deposit information that employees add or change. In some cases, the routing number for an employee's bank might not exist in the user defined code list for routing numbers (06/BC). You can use self-service to approve automatic deposit information and the addition of new routing numbers.

As a manager, you can use self-service to review competency information for your subordinates. You can also enter the level of proficiency that each employee demonstrates in these competencies.

Approving information using manager self-service includes the following tasks:

- Approving automatic deposit information
- Approving bank information for automatic deposits
- Approving competency information

### **Approving Automatic Deposit Information**

If you are a representative of the payroll department, you might be responsible for approving the automatic deposit information that employees enter through self-service. If Enterprise Workflow Management is enabled, you receive a message in the Employee Message Center when automatic deposit information is awaiting your approval. You must verify that the employee correctly completed all of the necessary information, and then approve or disapprove the request. If necessary, you can enter a response to the employee. Workflow includes your response in the e-mail message that notifies the employee of the status of the request.

► **To approve automatic deposit information**

---

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

1. On Work Center, choose the message that you need to view, and then complete the steps for reviewing messages.

See *Viewing Messages* in the *OneWorld Foundation Guide*.

2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Review/Validate Automatic Deposit Instructions, review the information in the following fields:
  - Payment Method
  - Amount
  - Dollars/Percent
  - Account Number
  - Routing Number
  - Type of Account

If the employee entered the incorrect routing number for the bank, you can correct it.

5. Complete the following optional field:
  - Payroll Clerk's Response
6. Choose one of the following options and click OK:
  - Approve
  - Disapprove

## Approving Bank Information for Automatic Deposits

Occasionally, when an employee enters automatic deposit information using self-service, the employee might discover that the routing number for the bank where the account resides is not one of the valid values in the Routing Number field. In this case, the employee can submit a request to have the bank's routing number added to the list of values. If you are a representative of the payroll department, you might be responsible for approving the employee's request before the system adds the new bank number to user defined code list 06/BC.

If Enterprise Workflow Management is enabled, you receive a message in the Employee Message Center when bank information is awaiting your approval. You must verify that the employee correctly completed all of the necessary

information, and then approve or disapprove the request. If necessary, you can enter a response to the employee. Workflow includes your response in the e-mail message that notifies the employee of the status of the request.

When you approve the employee's request, the system updates user defined code list 06/BC.



### To approve bank information for automatic deposits

---

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

1. On Work Center, choose the message that you need to view.

See *Viewing Messages* in the *OneWorld Foundation Guide*.

2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Add Bank Transit Number, review the information in the following fields and correct it, if necessary:
  - Bank Name
  - Bank Branch Number
5. Complete the following optional field:
  - Payroll Clerk's Response
6. Choose one of the following options and click OK:
  - Bank Added
  - Bank Not Added

## Approving Competency Information

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. These qualifications, such as knowledge, skills, and training, are called *competencies*.

Your organization uses competency management to track the competencies that each employee possesses and to compare these competencies with those that are required for the employee's job. Tracking employee competencies helps you create clear career goals and performance objectives for the employees who work for you.

To simplify the process of maintaining competency information, employees can use self-service to enter and revise their own competency information. You might be responsible for approving the information that employees enter and

entering the employee's level of proficiency in certain competencies. In this case, you receive a message in the Employee Message Center after an employee enters competency information. You must then review the information and enter a level of proficiency for each competency.

### ► **To approve competency information**

---

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

1. On Work Center, choose the message that you need to view.

See *Viewing Messages* in the *OneWorld Foundation Guide*.

2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Training/Development, Skills, Accomplishments, Certifications, Education, or Language, complete all of the following fields that apply, and then click OK:
  - Competency Level
  - Verified By
  - Verification Method

---

<b>Field</b>	<b>Explanation</b>
Competency Level	A code that refers to the level of proficiency that a person or asset has demonstrated for a specific competency type and competency code.
Verified By	The name or address book number of the person who verified that the employee is certified in the competency.
Verification Method	A user defined code (05/VM) that defines the methods that you use to verify employee competency levels.

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## Managing Self-Service Benefits

---

The tasks for managing self-service benefits should be performed by a human resource administrator or a system administrator.

Information related to an employee's current benefits enrollment is stored in multiple tables within the Human Resources - Benefits system, the Employee Master table, and employee DBA instruction tables. To improve performance and response time, OneWorld loads the appropriate information from these tables into workfiles. These workfiles are linked to the web pages on your company's intranet. When employees change their benefits elections and their dependents and beneficiaries through the intranet, their changes are recorded in the workfiles. The updated workfiles are then loaded into the appropriate live tables in OneWorld.

Before employees can change their benefits or their dependents and beneficiaries online, you need to build workfiles that contain a variety of benefits information. After employees change their benefits online, you then need to process the information to move it from the workfiles into the appropriate live tables in OneWorld.

You should build and process the workfiles regularly to keep current information in both the workfiles and the live tables.

Managing self-service benefits consists of the following tasks:

- Building the Available Plans workfile
- Building the Current Coverage workfile
- Building the Dependent and Beneficiary workfile
- Updating benefit information to live tables
- Revising benefits workfiles
- Reviewing the Dependent/Beneficiary Work File report
- Reviewing the Dependent/Beneficiary Work File report
- Clearing benefits workfiles
- Reviewing workfile reports

- Reviewing the open enrollment exception report

## Building the Available Plans Workfile

From the Employee Self Service Advanced/Technical Operation menu (G08BESS31), choose Build Available Plans Workfile.

When you build the Available Plans and Plan Options by Employee workfile, the system searches the Employee Master table for all the active plans and plan options that are being offered for each employee's benefit group. It also calculates the new cost, as of the effective date, for each plan and plan option. The system uses the employee's age and salary as of the point-in-time date to determine the cost. If the plan requires the employee to enter an amount or rate, the system calculates the costs or credits dynamically after the employee enters the amount and requests the calculation.

You can build the Available Plans and Plan Options by Employee workfile for either open enrollment or current enrollment. In open enrollment, available plans and plan options, as well as their costs, might change. In current enrollment, which is typically associated with new hire, rehire, life event, or special enrollment, the available plans and plan options remain the same. The effective date processing option is used to obtain the active plans and plan options, with their associated costs and credits, for the event type. If you do not set up an effective date in the processing options, the system will not build the workfiles.

You can build the workfile twice, once for open enrollment and once for current enrollment. The workfile stores the records for both types of enrollment at the same time.

If the workfile contains unprocessed records, the unprocessed records are printed to an exception report.

This program uses the following OneWorld tables:

- Employee Master (F060116)
- Benefit Categories by Benefit Group (F08350)
- Plans Within Categories (F08351)
- Plan Master (F08320)
- Plan Option (F083202)
- DBA Master (F069116)
- Calculation Table (F069026)
- Basis of Calculation (F069036)
- Generic Message Table (F00191)
- Date Sensitive Plan Rates (F083203)

- Plan Master Tag Table (F08320B)

## Before You Begin

- If your plan rates are changing during the open enrollment period, cross-reference the current year's DBAs to new rate DBAs. See *Setting Up New DBA Plan Rates*.

## Processing Options for Build Available Plans Workfile

Date \_\_\_\_\_

1. Effective Date:

Enter the effective date to determine the active plans and plan options with their associated costs and credits.

Event Type \_\_\_\_\_

1. Event Type:

Enter '1' to build available plans/plan options for Open Enrollment. Otherwise '2' to build available plans/plan options for Current Enrollment.

## What You Should Know About Processing Options

**Effective Date**

If the effective date is left blank, the system date is used.

## Building the Current Coverage Workfile

From the Employee Self Service Advanced/Technical Operation menu (G08BESS31), choose Build Current Coverage Workfile.

When you build the Current Coverage workfile, the system searches the Employee Master table and the Enrollment table. The system obtains each employee's current and pending elections as of the system date. It also precalculates the costs or credits associated with the elections.

This program uses the following OneWorld tables:

- Employee Master (F060116)
- Benefit Categories by Benefit Group (F08350)
- Plans Within Categories (F08351)
- Plan Master (F08320)

- Plan Option (F083202)
- DBA Master (F069116)
- Calculation Table (F069026)
- Basis of Calculation (F069036)
- Date Sensitive Plan Rates (F083203)
- Enrollment Table (F08330)
- Employee DBA Instructions (F06106)

## **Building the Dependent and Beneficiary Workfile**

From the Employee Self Service Advanced/Technical Operation menu (G08BESS31), choose Build Dep/Ben Workfile.

When you build the Dependent and Beneficiary Workfile, the system searches the Employee Master table (F060116) and the Dependent/Beneficiary Cross-Reference workfile (F08336) first. The system also searches the Primary Care Physician table (F08338), the Dependent/Beneficiary Cross-Reference Tag table (F08336B), and the Plan/Plan By Option table (F08320B). The system obtains each employee's dependents and beneficiaries records that are associated with plans, and records that are not associated with plans.

You can build the work table for open enrollment or for a nonenrollment event type. The work table stores the records for both types of events. The web application maintains the dependent and beneficiary records separately for each event type.

Before building the work table, if the system finds unprocessed dependent or beneficiary records for an employee, the system prints the employee on an exception report without processing the employee and proceeds to the next employee. The system does not include participants who have passed away.

## **Updating Benefit Information to Live Tables**

From the Employee Self Service Advanced/Technical Operation menu (G08BESS31), choose Process Benefit Elections to Live Tables.

You can update selected enrollment records in the Available Plans and Plan Options by Employee workfile, and you can update changed dependent and beneficiary records. The system tests the eligibility of each selected record and then updates the Enrollment Table, the Employee DBA Instruction table, and the Dependent/Beneficiary Cross-Reference work table (F08336).

If an employee is locked in a payroll run, that employee's record will not be processed. The employee's record will be written to an exception report and will remain in the workfile.

You can update benefit information for either open enrollment or current enrollment. If you update benefit elections for open enrollment before the end of open enrollment, any employee records that contain open enrollment changes will be written to an exception report and will remain in the workfile. You will need to update benefit elections following the end of the open enrollment period.

You can run this program in proof mode to review the changes that will be made to the live tables before they are actually made.

## Processing Options for Update Benefits Information to Live Tables

### Process

- |                        |       |
|------------------------|-------|
| 1. Event Type:         | _____ |
| 1 = Open Enrollment    | _____ |
| 2 = Current Enrollment | _____ |
| 2. Mode:               | _____ |
| 0 = Proof              | _____ |
| 1 = Final              | _____ |

### Defaults

- |   |       |
|---|-------|
| 1. End Enrollment Status<br>A valid code                                | _____ |
| 2. End Enrollment Status based on<br>Plan End Date(s).<br>A valid code. | _____ |

## Revising Benefits Workfiles

From the Employee Self Service Advanced/Technical Operation menu (G08BESS31), choose Current Coverage Workfile Revisions, Available Plans Workfile Revisions, or Dependent/Beneficiary Coverage Revision.

If you have updated the work tables to live tables before revising them, you should update again after you revise so that the most current revisions are reflected in the live tables.

**Caution:** Revising these work tables might compromise the integrity of the workfiles, making the data incompatible with the live tables. Use extreme caution if you find that you need to edit these files. Also, you should assign security to these programs to prevent unauthorized access of them.

## Reviewing the Dependent/Beneficiary Work File Report

From the Employee Self Service Adv/Tech Operation menu (G08BESS31), choose Dependent/Beneficiary Work File Report.

To review information in dependent and beneficiary records, and to review which employee records those records are linked to, print the Dependent/Beneficiary Work File report.

### See Also

- R08336, *Dependent/Beneficiary Work File report* in the *Reports Guide* for a report sample

## Clearing Benefits Workfiles

From the Employee Self Service Advanced/Technical Operation menu (G08BESS31), choose Current Coverage Workfile Clear, Available Plans Workfile Clear, or Clear Dependent/Beneficiary X-Ref Work Table.

Use Current Coverage Workfile Clear or Available Plans Workfile Clear to delete all records from the Current Coverage and Available Plans workfiles. Use the Clear Dependent/Beneficiary X-Ref Work Table to delete all records in the Dependent/ Beneficiary Cross Reference work table (F08336WF). You should move the benefit elections to live tables before clearing the work tables so that data is not lost.

## Reviewing Workfile Reports

From the Employee Self Service Advanced/Technical Operation menu (G08BESS31), choose the Current Coverage or Available Plans Work File Management menu. On the Current Coverage or Available Plans Workfile Management menu, chose the Current Coverage Work File report or the Available Plans Workfile report respectively.

These reports list all of the records in the Current Coverage and Available Plans workfiles.

## Reviewing the Open Enrollment Exception Report

From the Employee Self Service Advanced/Technical Operation menu (G08BESS31), choose Open Enrollment Exception Report.

To print a list of employees who did not enroll during the open enrollment period, print the Open Enrollment Exception Report. You can then notify these employees that they need to enroll, or you can enroll them in default plans.

## Self-Service Setup

Setting up self-service is a task that should be performed by the system administrator.

Employees access self-service through a series of web pages on your company's intranet site that allow them to complete such tasks as requesting a verification-of-employment letter or changing name, address, and emergency contact information. In addition to employee functions, managers can also use the Manager's Workbench as a centralized location from which they can perform such tasks as employee status changes, the manager's personal self-service functions, creation of delegates, and various reviews. These web pages correspond to self-service programs in OneWorld.

OneWorld provides web pages for all self-service programs, as well as a logon page and a menu page. These pages are fully functional and you can use them without modification. You can also create customized self-service web pages. For example, if you want to put your own company's logo on the web pages, you need to create customized web pages.

See *OneWorld Web-Based Solutions Overview* in the *Web-Based Solutions Guide* for information about using the HTML generator to create web pages for self-service.

The following tasks describe the self-service programs and the set up procedures for customizing a self-service site:

- Setting up employee self-service
- Setting up self-service for benefits enrollment
- Setting up manager self-service





# Setting Up Employee Self-Service

---

Use Manager Self-Service to set up and customize employee self-service programs on a self-service site.

Setting up Employee Self-Service includes the following tasks:

- Setting up verification of employment
- Setting up name and address change
- Setting up emergency contacts and phones
- Setting up paid time-off inquiry
- Setting up time entry for self-service

## Setting Up Verification of Employment

The Review Requests for Verification of Employment program (P05003) uses a review form and an entry form. The review form is the entry point to Verification of Employment. The entry form has two tabs, Request Information and Employment Data. Employees use the Request Information tab to request that a verification of employment letter be sent to a specific individual or company, such as a creditor or loan officer. On the Employment Data tab, a Human Resources administrator or system administrator can enter information pertaining to the employee, such as the date that employment began. The system calculates and supplies the employee's earnings based on the Pay Type by Category table (F05002). Only the system administrator can change the employee's earnings fields on the Employment Data tab. The administrator can also e-mail the completed letter directly to the contact whom the employee requested.

The fields on the Employment Data tab are active only when an administrator is logged on to the self-service system. When an employee is logged on, the information on the Employment Data tab is visible. However, the employee cannot change that information.

Information entered on the Review Requests for Verification of Employment program (P05003) updates the Verification of Employment Data table (F05003).

For the system to accurately report pay information on verification-of-employment letters, you must add certain pay types to the pay categories that you define in user defined code list 05/V1. For example, you

might link a holiday bonus pay type and an annual bonus pay type to the bonus category.

When you set up verification of employment, you update the Pay Type By Category table (F05002).

**Note:** The task for requesting a verification of employment letter can include the Enterprise Workflow Management system. If your processing options are set up appropriately, Workflow notifies the individual responsible for processing the request after the request information is entered.

## Before You Begin

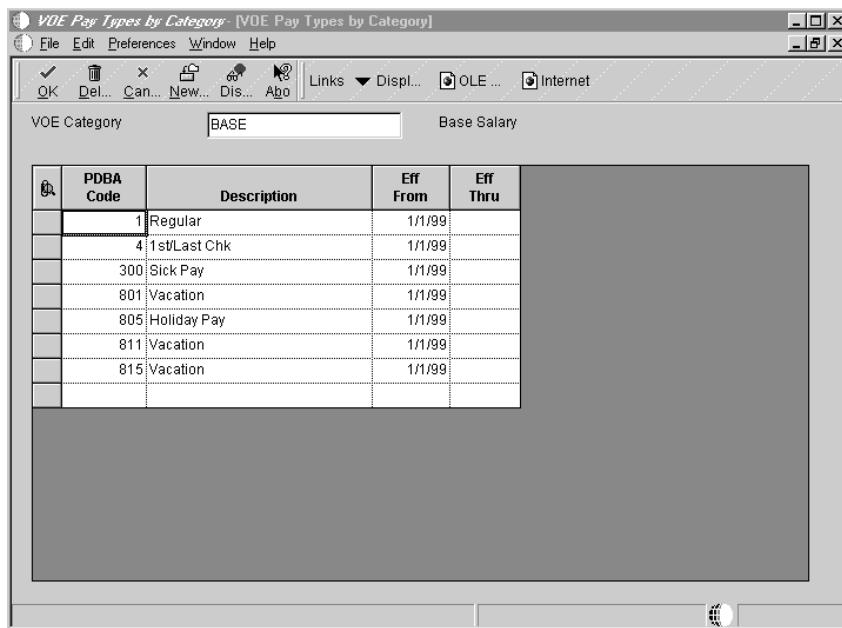
- Verify that your verification-of-employment letter is complete. Select and review the VOEREQUEST in the MailMerge WorkBench Setup P980014. You must also hard code a company signature and phone number on the letter. See *Changing Mailmerge Documents* in the *OneWorld Foundation Guide*.
- Set up verification of employment categories for pay information in user defined code list 05/V1. See *Understanding User Defined Codes* in this guide and *Changing a User Defined Code* in the *HR Foundation Guide*.
- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.
- Set up the processing options for verification of employment. See *Entering Data for Verification-of-Employment Letters*.

### ► **To set up verification of employment**

---

From the Employee Self Service Setup menu (G05BESS4), choose VOE Pay Types By Category.

1. On Work With Verification of Employment Categories, click Add.



2. On VOE Pay Types by Category, complete the following fields and click OK:

- VOE Category
- PDBA Code
- Eff From

---

VOE Category	This field is used to categorize pay types, such as those for base, overtime, commission, bonus, and other pay.
PDBA Code	A code that defines the type of pay, deduction, benefit, or accrual.  Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

---

## Setting Up Name and Address Change

The Employee Name and Address Change form displays the employee's current name and address and allows the employee to enter a new name and address. You can attach a personal photo of the employee as a media object to the Personal tab of the Name and Address Change form.

Information entered in Employee Name and Address Change program (P05101) updates the Address Book table (F0101).

When the employee enters a city, state, or postal code change, Workflow can notify a human resource administrator about the change so that payroll files can

be updated manually. For example, a human resource administrator should update any employee's change of resident tax areas. Make sure you set your processing option with the address number of the employee who is to receive these notifications.

### **Before You Begin**

- To attach personal photos to the Personal tabs on Name and Address forms, see *Attaching Media Objects* in the *OneWorld Common Foundation Guide*.
- Set up the processing options for Employee Name and Address Change. See *Changing Name and Address Information*.

## **Setting Up Emergency Contacts and Phones**

The Emergency Contacts and Phones program (P053010) lets employees enter the names and phone numbers of individuals that should be contacted in the event of an emergency. Information entered on the Emergency Contact and Phones form updates the Address Book-Contact Phone Numbers table (F0115).

### **Before You Begin**

- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.

## **Setting Up Paid Time-Off Inquiry**

The Paid Time Off Inquiry program (P053020) shows an employee's paid time-off accruals, deductions, and balances. The system lists the number of hours available at the beginning of the year, the number of hours that have accrued since then, the number of hours taken, and the balance of hours currently available.

### **Before You Begin**

- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.

## **Setting Up Time Entry for Self-Service**

The Time Entry Floods program (P051191) for self-service allows employees to enter timecards using either the Daily Time Entry program (P051141) or the Time Entry by Line Detail program (P051131). The Daily Time Entry program might be

preferable for employees who need to report their time every day. This program reduces typing time because the form includes the days of the week on the entry grid. Employees can access either program from the Time Entry-Web Self Service form (W051191F).

Employees can use the Time Entry-Web Self Service form to review past check stubs.

Information entered on the Self Service Time Entry form updates the Employee Transaction Detail File table (F06116).

### Before You Begin

- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.

You can access the following processing options for daily time entry with the Interactive Versions program (P983051). You must inquire on P051141. You can access the processing options for Time Entry Per Pay Period from P051131.

### Processing Options for Daily Time Entry

#### Time Entry

1. Enter the beginning day of the week.

Time Entry Week Begin Day \_\_\_\_\_

2. Enter a '1' to prevent changes and deletes to records locked to another user.

Time Entry Changes Flag \_\_\_\_\_

2. Enter the Version of the Time Entry Master Business Function you wish to run.

Version for Master Buisness Function application.  
(P0500002A) \_\_\_\_\_

#### Tabs

1. Enter a '1' to display or a '0' to hide the specific tabs.

Category Codes Tab  
Organization Tab  
Subledger Tab \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## What You Should Know About Processing Options

### Accessing the processing options

You can access the processing options for Daily Time Entry with the Interactive Versions program (P983051). You must inquire on P051141.

## Processing Options for Time Entry Per Pay Period

### Time Entry

1. Enter '1' to display batch statistics on request.

Batch Statistics Flag (Future Option) \_\_\_\_\_

2. Enter '1' to prevent changes and deletes to records locked to another user.

Time Entry Changes Flag \_\_\_\_\_

3. Enter Time Entry version.

Version - Time Entry \_\_\_\_\_

### Tabs

1. Enter a '1' to display or a '0' to hide the specific tabs.

Category Codes Tab \_\_\_\_\_  
Organization Tab \_\_\_\_\_  
Subledger Tab \_\_\_\_\_

## What You Should Know About Processing Options

### Accessing the processing options

You can access the processing options for Time Entry Per Pay Period with the Interactive Versions program (P983051). You must inquire on P051131.

## Setting Up Self-Service for Benefits Enrollment

---

Employees can enroll in or change their benefits plans online through a series of web pages. Open Benefits Enrollment (P08530) allows employees to review current enrollment information, review the new year's benefit plan offerings and calculate total pay period costs for new benefit selections, and repeatedly change open enrollment choices prior to the closing of the open enrollment period.

You can organize your web-based benefits enrollment program under a menu structure based on employment events, such as new hire and rehire, and life events, such as children or marriage. You might create a menu from which the employee selects the event or reason for changing enrollment. If the employee selects marriage, for example, the version of the web page that allows changes associated with marriage will be used.

You can use the processing options to set up different versions of the application. For example, you might set up the following versions for the allowable enrollment event codes:

**New Hire Enrollment**      NHR (New Hire)

**Rehire Enrollment**      RHR (Rehire)

**Marriage**      MAR (Marriage)

**Divorce**      DIV (Divorce)

**Children**      CHD (Children)

**Open Enrollment**      OPN (Open Enrollment)

To set up benefits enrollment, you need to complete the following tasks:

- Setting up categories by enrollment event
- Setting up benefit enrollment events
- Setting up new DBA plan rates
- Setting up dependent and beneficiary changes

Each of the following three web pages corresponds to a self-service benefits form in OneWorld:

### **View Current Elections Form**

The View Current Elections form (W08530A) is the entry point to self-service benefits enrollment. It displays an employee's current benefit elections and calculates running totals for the employee's cost. It reads from the Current Coverage workfile (F08330WF).

The push button on this form accesses the Benefits Coverage Summary form (W08532A). You can define the text that appears on the push button in the processing options. The push button will be hidden if none of the enrollment events listed in the processing options are currently open for online enrollment.

### **Processing Options for Open Benefits Enrollment**

#### **Event**

- 1) Enter the allowable enrollment event code \_\_\_\_\_
- 2) Enter a general text to describe the enrollment event indicated above. The general text will be used to title the forms. \_\_\_\_\_

#### **Display**

- 1) Enter a '1' to display a window with the following message after submit is clicked on the Benefit Summary form. A blank will not display the window.  
This window's message can be used to inform the employee of the possibility that they have automatically been enrolled in mandatory and/or default plans. \_\_\_\_\_
- 2) Enter the message that is to appear in the window described above. \_\_\_\_\_
- 3) Enter the URL for your company benefits guide. \_\_\_\_\_

#### **Versions**

- 1) Enter the Version of the Employee Name and Address Change application to use. If left blank, ZJDE0001 is used. \_\_\_\_\_

### **Benefits Coverage Summary Form**

An employee accesses the Benefits Coverage Summary form (W08532A) by clicking the push button on the View Current Elections form. This form gives

employees a summary of their benefit elections by benefit categories. It reads from the Benefit Categories by Benefit Group table (F08350).

When an employee accesses this form for the first time, the new benefit elections category will be empty unless you have set up your benefit categories to be supplied from current enrollment. See *Setting Up Categories by Enrollment Event*.

The general message text for the employee's benefit group appears at the top of the form. The text comes from the General Message table (F00191), the Current Coverage workfile (F08330WF), and the Available Plans workfile (F08320WF).

Employees can initiate a benefit change and then select the benefit category to make changes. After making changes, they return to Benefits Coverage Summary, where they can review the cost and credits of their changes.

When the employee clicks Submit, the program can verify the changes with the employee with a small form before adding the record to the Available Plans and Plan Options by Employee workfile (F08320Z1). You can set up a processing option to have the text appear on this verification form. For example, you might want to use this window to notify the employee that he or she might have been enrolled in mandatory or default plans.

### Benefit Category Election Form

The Benefit Category Election form (W08534) appears when an employee chooses a benefit category to change and clicks Enroll on the Benefits Coverage Summary form. The general message text for that category appears at the top of the form. The text comes from the General Message table (F00191).

This form displays the active plans, plan options, and associated costs that are available for enrollment within the benefit category that the employee has selected. The employee can enter an amount or rate if the plan requires it, and then the system calculates the cost for the employee. When employees are finished changing plan elections, they return to the Benefit Coverage Summary form, where they submit their changes. If the plans are associated with dependents and beneficiaries, as set up in the processing options for Benefits Enrollment (P08530), the employee is prompted to enter dependents and then beneficiaries.

This program reads from the Available Plans workfile (F08320WF).

### Before You Begin

- Set up benefit enrollment event codes in user defined code list 08/BE to define the different employment or life events during which benefit enrollment changes can take place. These events could be open enrollment, new hire or rehire enrollment, and so on. If the event is an open enrollment or other enrollment with a defined update period such as

quarterly retirement plan changes, enter 1 in the Special Handling Code field so that the system will maintain both future enrollment information and changes to current enrollment information. See *Working With User Defined Codes* in the *OneWorld Foundation Guide* for more information.

- Set up benefit plans and enable each plan for self-service. See *Setting Up Benefit Plans* in the *Human Resources Benefits Guide*.
- Create an employee record for each employee whom you need to enroll in benefits. See *Adding Employee Records One at a Time*.
- If you need to enter or change the benefit group selection for a group of employees before you enroll them in benefit plans, see *Processing Mass Changes*.
- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.

### Setting Up Categories by Enrollment Event

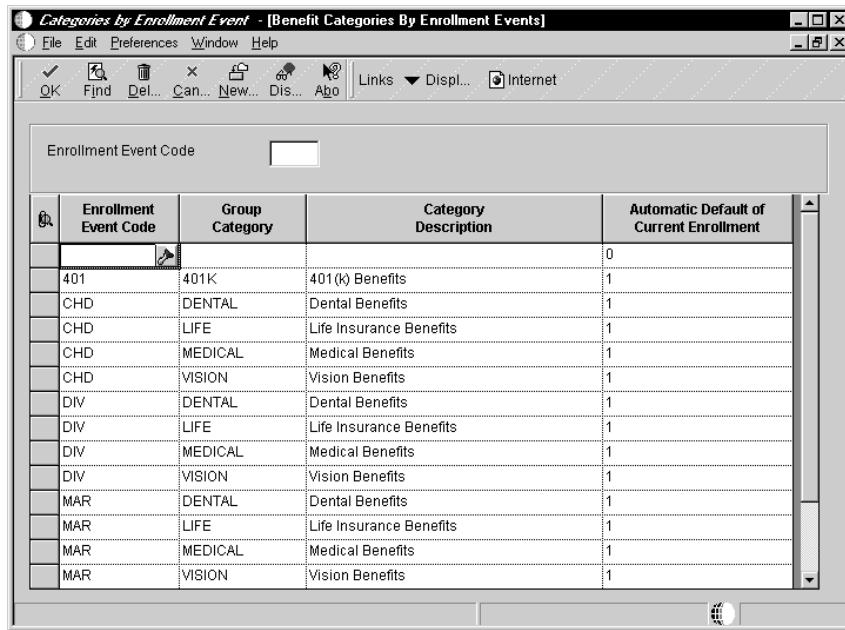
After you have set up the enrollment event codes, you need to define which benefit categories can be changed or enrolled in during each enrollment event. For example, you might allow all benefit categories (medical, dental, disability, life, and so on) to be changed during open enrollment, but only selected categories (such as medical, dental, and vision) to be changed for an event such as marriage.

If you do not set up categories for a specific enrollment event, the system assumes that no changes or enrollments are allowed for that event.

#### **To set up categories by enrollment event**

---

From the Employee Self Service Setup menu (G05BESS4), choose Categories by Enrollment Event.



1. On Benefit Categories by Enrollment Event, complete the following fields in the detail area:

- Enrollment Event Code
- Group Category
- Automatic Default of Current Enrollment

If the benefit plans are the same, the system supplies the current enrollment as the default enrollment. However, if a current plan is no longer available (for example, if you are changing insurance carriers), you should not accept the default.

2. Repeat step 1 for every available benefit category for each enrollment event, and then click OK to save your changes.

---

<b>Field</b>	<b>Explanation</b>
Enrollment Event Code	The user defined code that you use to denote an enrollment event such as marriage.

---

Field	Explanation				
Group Category	<p>The category of a benefit group. The category is used to group benefit plans according to the type and rule. For example:</p> <ul style="list-style-type: none"> <li>Medical - Required Medical Selections</li> <li>Dental - Optional Dental Selections</li> <li>Life - Required Life Insurance Selections</li> </ul> <p>Valid categories are set up in the Generic Rate and Message table (F00191) for user defined code list 08/SG. Associated text for categories is stored in the General Message Detail table (F00192). For more information, see program P00191.</p>				
Automatic Default of Current Enrollment	<p>Use this field to specify whether the system should automatically default to the current enrollment. Valid values are:</p> <table> <tr> <td>0</td> <td>Do not allow previous coverage to default as the new coverage</td> </tr> <tr> <td>1</td> <td>Allow previous coverage to default as the new coverage</td> </tr> </table>	0	Do not allow previous coverage to default as the new coverage	1	Allow previous coverage to default as the new coverage
0	Do not allow previous coverage to default as the new coverage				
1	Allow previous coverage to default as the new coverage				

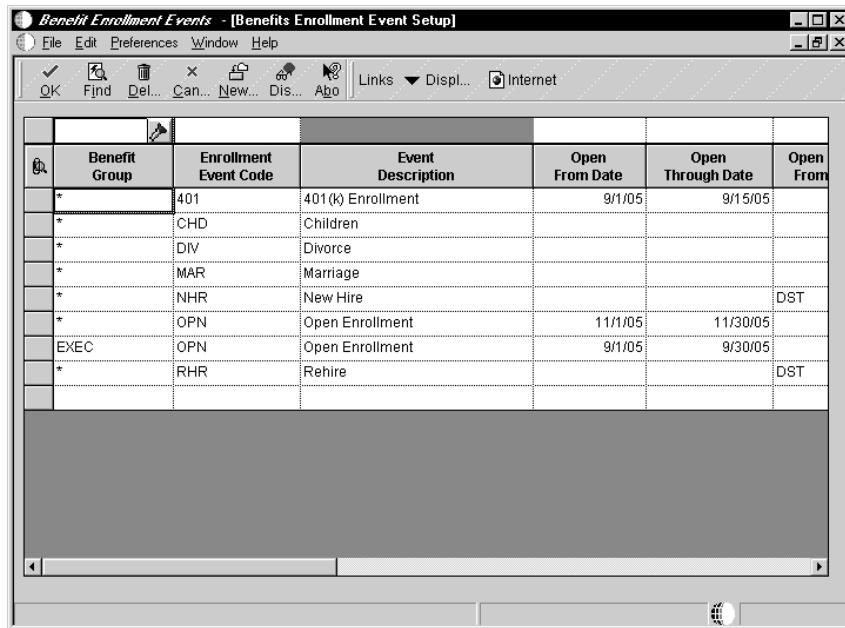
## Setting Up Benefit Enrollment Events

When you set up benefit enrollment events, you define the time period during which the event is open for online changes or enrollments. For example, open enrollment events allow changes from a specific date until another specific date. Other types of events, such as new hire enrollment events, allow changes starting on a variable date, such as the date of hire, and extending for a certain number of days following that date.

You can set up different time periods for the same enrollment event for different benefit groups. For example, open enrollment for salaried employees might be at a different time than open enrollment for executives.

### ► To set up benefit enrollment events

From the Employee Self Service Setup menu (G05BESS4), choose Benefit Enrollment Events.



1. On Benefits Enrollment Event Setup, complete the following fields:

- Benefit Group
- Enrollment Event Code

You can indicate that an event is open for all benefit groups by typing \* in the Benefit Group field.

2. If the enrollment event will allow changes between specific dates, complete the following fields:
  - Open From Date
  - Open Through Date
3. If the enrollment event will allow changes for a certain number of days following a specific or variable date, complete the following fields:
  - Open Based From Date
  - Number of Calendar Days Elapsed

You can enter a data item, such as the data item that indicates the employee's start date, in the Open Based From Date field.

4. Complete the following field:
  - Enrollment Effective Date
5. Repeat steps 1 through 4 for every available enrollment event, and then click OK to save your changes.

If you do not define a time period for an enrollment event, the system assumes that the event is open all year.

Field	Explanation
Benefit Group	The benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.
Open From Date	The effective date is used generically. It can be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.
Open Through Date	The date on which the item, transaction, or table becomes inactive or through which you want transactions to appear. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.
Number of Calendar Days Elapsed	The number of days that must pass after an employee's start date before the employee can enroll in the plan.
Enrollment Effective Date	The date on which an enrollment in a plan takes effect.

## Setting Up New DBA Plan Rates

If any of your benefit plans are changing rates during the open enrollment period, you can cross-reference the current year's DBAs (deductions, benefits, and accruals) with the current rates to the DBAs that reference the new rates. This cross-reference lets you effectively change the rates that appear for the enrollment period without changing the rates for the current DBAs.

You need to cross-reference DBAs only for benefit calculations that are table based or if the DBA is changing radically (for example, from a flat dollar amount to a percentage). If you do not set up a cross-reference, the system retrieves new rates from the Plan Master Rate table. If you set up both the Plan Master Rate table and the DBA cross-reference, the system uses the DBA cross-reference.

You need to set up the DBA cross-reference before you build the workfiles for open enrollment.

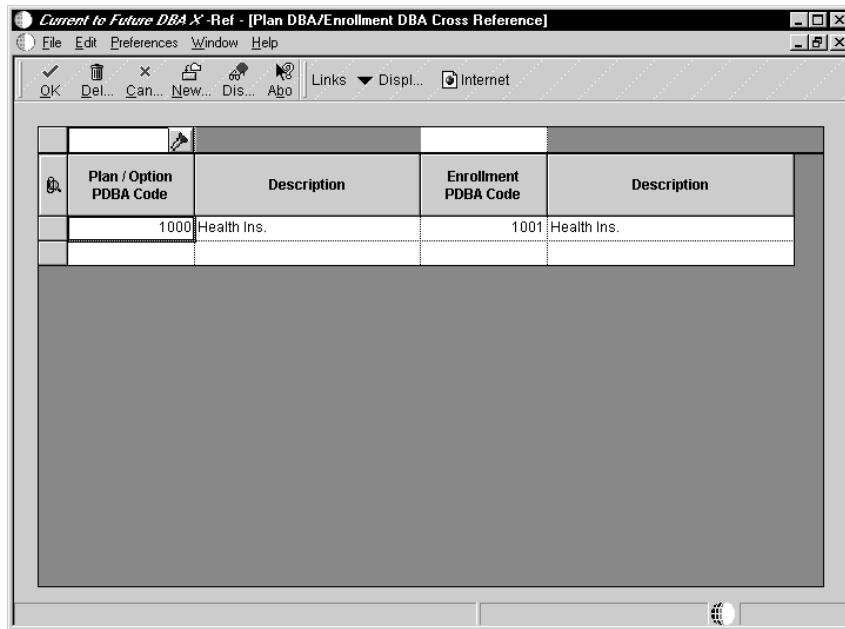
## Before You Begin

- Set up the DBAs for the new rates. See *Setting Up Deductions, Benefits, and Accruals*.

► **To set up new DBA plan rates**

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From the Employee Self Service Setup menu (G05BESS4), choose Current to Future DBA X-Ref.



1. On Plan DBA/Enrollment DBA Cross Reference, enter the current year's DBA in the following field:
  - Plan / Option PDBA Code
2. Enter the corresponding DBA for the new rate in the following field:
  - Enrollment PDBA Code
3. Repeat steps 1 and 2 for all the rates that are changing, and then click OK to save your changes.

You still need to change your enrollment plan's DBA amounts to the new rates prior to the period in which they will be effective.

---

Field	Explanation
Plan / Option PDBA Code	A code that defines the type of pay, deduction, benefit, or accrual.  Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.
Enrollment PDBA Code	The code associated with a deduction, benefit, or accrual (DBA) that was used to calculate the employee's net payment. This code prints on the right side of the payment stub.

---

## Setting Up Dependent and Beneficiary Changes

Employees can change their dependents and beneficiaries for benefit plans online. After an employee submits changes to benefit plans from the Benefit Coverage Summary form (W08532A), and if the plans required a dependent or a beneficiary, the system displays the Benefits Changes-Dependents form (W08538A). After you complete the form, the system displays the Benefits Changes-Beneficiaries form (W08538A) if the plans are associated with dependents and beneficiaries as set up in the processing options for Benefits Enrollment.

Information entered on the Benefits Changes-Dependents or Benefits Changes-Beneficiaries forms updates the Dependents/Beneficiary Cross Reference Work table (F08336WF) and enables a tab on the Name and Address form (W05101A) in the self-service Name and Address Change program (P05101). The tab allows the employee to enter a change of address for the dependent or beneficiary. If the employee changes a dependent, the tab on the Name and Address form appears as Dependent Personal. If the employee changes a beneficiary, the tab on the Name and Address form appears as Beneficiary Personal.

You can set up benefit enrollment self-service to list dependents and beneficiaries in the system, or you can also associate them with specific plans and benefits. The default is to associate dependents and beneficiaries. You use Work With HRM Common Display Settings (P05004) to disable this feature.

Setting up dependent and beneficiary changes includes setting up user defined code lists. You set up the dependent or beneficiary type in user defined code list 08/DB. You set up the relationships that might exist between employees and their dependents or beneficiaries in user defined code list 08/RL. You must enter this relationship when you link a dependent or beneficiary record to an employee.

The special handling field in the relationship user defined code list (08/RL) is used to limit a relationship to be qualified as a dependent only, a beneficiary only, or both. For example, a spouse relationship qualifies the spouse to be a dependent and a beneficiary. However, a friend relationship might only qualify a friend to be a beneficiary.

### See Also

- *Changing Name and Address Information* for information about changing dependent and beneficiary information.
- *Setting Up Common Settings for Human Resources* for information about changing the association of dependents and beneficiaries with plans and benefits.

- *Understanding User Defined Codes* in this guide and *Adding a User Defined Code* in the *HR Foundation Guide* for information about setting up UDCs 08/DB and 08/RL.



# Setting Up Manager Self-Service

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You can set up self-service programs that will assist supervisors in managing the hiring and reviews of employees.

Setting up manager self-service includes the following tasks:

- Setting up upcoming reviews by supervisor
- Setting up the employee setup process
- Setting up employee status change
- Setting up manager's reports

## Setting Up Upcoming Reviews by Supervisor

The Upcoming Reviews by Supervisor program (P052200) can be used by employees in a managerial or supervisory position. Supervisors can log onto the self-service site to see all employees whom they are responsible to review soon.

The Upcoming Reviews By Supervisor report (R052200) can be run to report employees with upcoming reviews by supervisor and to add Enterprise Workflow Management functionality to the process. If the processing options for this report are set up correctly, the system automatically reports employees with upcoming reviews, reminds each supervisor of upcoming reviews by sending an e-mail, and automatically updates the Upcoming Reviews By Supervisor program (P052200).

When a supervisor logs onto the program, the system recognizes the supervisor's employee number and displays the supervisor's employees who have upcoming reviews. You can set up processing options so that supervisors can choose options from the row menu to view an employee's information on the following forms: Employee Organizational Assignments (W0801ORG), Personal (W0801EMP), Employee Basic Compensation (W0801CMP), and Supplemental Data Inquiry (W050200). You can choose whether you want to set up security to permit access to these forms by certain individuals only. See *Working With Security Workbench* in the *System Administration Guide*.

This program updates supervisors and eliminates the time that they would spend researching upcoming reviews for their employees.

You can also set a processing option to have the report run automatically on a certain date. See *Scheduling a Recurring Job* in the *System Administration Guide*.

Processing options are also available to run versions that report past due reviews and reviews for all employees without specified dates. Neither of these versions include Workflow.

Upcoming Reviews By Supervisor (P052200) is an inquiry-only program. The information presented by the program is from the Employee Master table (F060116).

### Before You Begin

- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.

### See Also

- *Running the Upcoming Employee Reviews by Supervisor Report*

## Processing Options for Upcoming Reviews by Supervisor (P052200)

### Process Tab

Use these processing options to define the defaults that will determine the options available when using this program.

#### 1. Enable Select Button To Basic Compensation

Use this processing option to enable the row exit to Basic Compensation. Valid values are:

Blank Disable row exit.  
1 Enable row exit.

#### 2. Enable Organizational Assignment Row Exit

Use this processing option to enable the row exit to Organizational Assignment. Valid values are:

Blank Disable row exit.  
1 Enable row exit.

### **3. Enable Employment Information Row Exit**

Use this processing option to enable the row exit to Employee Information. Valid values are:

Blank Disable row exit.

- 1      Enable row exit.

### **4. Enable Employee Profile Row Exit**

Use this processing option to enable the row exit to Employee Profile. Valid values are:

Blank Disable row exit.

- 1      Enable row exit.

### **5. Enable Supplemental Data Row Exit**

Use this processing option to enable the row exit to Supplemental Data. Valid values are:

Blank Disable row exit.

- 1      Enable row exit.

## **Defaults Tab**

Use this processing option to define whether the program will provide the opportunity to enter a supervisor data item.

### **1. Enable Supervisor Number Entry**

Use this processing option to enable a supervisor data item to be entered. Valid values are:

- 1      Enable supervisor data item to be entered.
- 0      Disable data item. The supervisor data item will be either passed to the application or supplied from the user address book number.

## **Version Tab**

Use these processing options to define the defaults that will determine the options available when using this program.

### **1. Employee Compensation**

Use this processing option to specify the version for Employee Compensation. The default version is ZJDE0001.

## **2. Employee Organizational Assignment**

Use this processing option to specify the version for Organizational Assignment. The default version is ZJDE0001.

## **Setting Up the Employee Setup Process**

After hiring an employee, a manager can use self-service to add an employee record and initiate an employee setup process. Workflow then sends task approval messages and reminders about equipment setup to certain people.

You can set up tasks for the new employee that are default tasks. Default tasks can be tasks that every new employee needs. For example, if your company provides a phone for most employees, you might want to set up a default task for installing a phone. Managers can change these tasks unless you enter a lock code for the task when you set it up. When you set up a default task, always associate it with a job type and step. Information entered as a default task updates the Default Setup Tasks table (F087101).

You also set up a task list by location. You enter every possible setup task for every location. For every task in the task list, you can specify an approver, a task recipient, and other task details. Managers can choose tasks from the task list and assign them to a new employee's setup record.

Setting up the employee setup process includes the following procedures:

- Setting up default tasks
- Setting up tasks by location

You can set up each task to do one or more of the following activities: run a report, send an e-mail message, create a work order, or start a Workflow process. You must first customize a report, set up a work order, or set up an additional Workflow process if you are planning to attach these activities to a task.

You can also require an approval for each task that you set up. If you require an approval, Workflow sends an e-mail approval form to the address book number of the person that you designated in the Approver field. You must also set your processing options to determine whether Workflow should obtain a process approval for the entire employee setup process for every new employee record.

The system determines the date to begin the approval process from the values that you enter in the following three fields on the Work With Setup Task Details form:

- Based On Date
- Duration

- Offset Days

To determine the date to begin each task, the system performs the following:

- 1 Retrieves the date from the Based On Date field (for instance, the arrival date of the employee)
- 2 Adds the number of days from the Duration field (the number of days needed to complete the task)
- 3 Adds the number of days from the Offset Days field (the number of days, when added to the Duration values, that determine the day by which the task must be completed)

The information that you enter in the header area of the setup forms updates the Setup Task List table (F087102). The information that you enter in the detail area of the setup forms updates the Setup Task Details table (F087103).

## Before You Begin

- You must set up numerous user defined codes for the employee setup process, including location codes 08/L1 through 08/L0. See *Understanding User Defined Codes* in this guide and *Adding a User Defined Code* in the *HR Foundation Guide*.
- Set up the common settings for self-service. See *Setting Up Common Settings for Human Resources*.
- Set up your processing options to require a process approval and to specify an ending status for the process approval.
- Verify that the following Workflow processes are activated in the Process Master (P98800):

### **EESETUP01-Employee Setup Approval**

The Workflow process that e-mails an approval form for the entire employee setup process to the address book number of the approver. After Workflow obtains an approval, it e-mails approval forms for each setup task that requires an approval. If you want your system to obtain an approval for this process, you must set a processing option. You must also set up this task on any task setup form. See *Processing Options for Managers Employee Setup*.

### **EESUTSK03-Get Task Approval**

The Workflow process that e-mails an approval form to the address book number of the approver for an individual employee setup task that requires an approval. After Workflow obtains an approval, it begins the task.

**EESUTSK01-Employee  
Task Setup**

The Workflow process that begins the employee setup task after obtaining approval. Depending on how this task is set up, this task might include running a report, sending an additional e-mail, creating a work order, or starting an additional Workflow process.

**► To set up default tasks**

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From the Manager's Employee Setup Options menu (G05BMSS4), choose Default Setup Tasks.

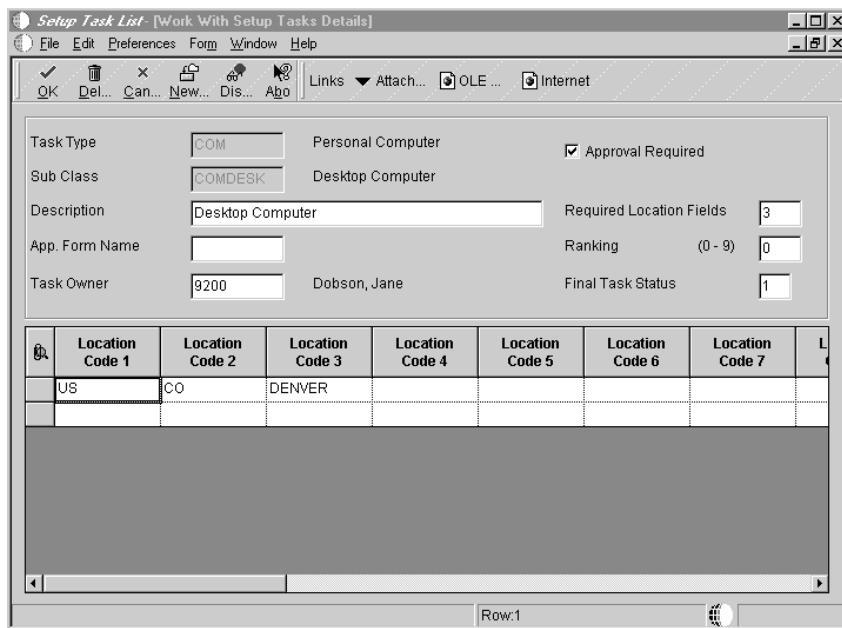
1. On Work With Default Setup Tasks, click Add.
2. On Edit Default Setup Tasks, complete the following fields:
  - Job Type
  - Job Step
  - Task Type
3. Complete the following optional fields and click OK:
  - Task Sub Class
  - Lock code

**► To set up tasks by location**

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From the Manager's Employee Setup Options menu (G05BMSS4), choose Setup Task List.

1. On Work With Setup Tasks, click Add.



2. On Work With Setup Tasks Details, complete the following fields in the header area:
  - Task Type
  - Task Sub Class
  - Description
  - Approval Required
  - Required Location Fields
  - Ranking
  - Final Task Status
3. Enter your address book number or the address book number of the person responsible for monitoring this task in the following field:
  - Task Owner
4. Complete the following optional field if you have an additional form set up to enter additional task information:
  - App. Form Name
5. Complete the following field in the detail area:
  - Task Recipient

The task recipient receives any e-mail, work order, or report that you attach to this task.
6. To identify the employee's workspace, complete as many of the Location Code fields that are required.

To determine the required number of fields, refer to the value in the Required Location Fields field.

7. If you entered the Approval Required option, complete the following field:
  - Approver
8. If you set up a customized report for this task, complete the following fields:
  - Report Name
  - Version
9. If you set up an additional workflow process for this task, complete the following field:
  - Process ID

If you set up the process approval task, enter EESETUP01 in the Process ID field.

10. To send an e-mail message to the task recipient, complete the following field:
  - Send E-Mail
11. To create a work order for this task, choose Work Order Entry from the Form menu and proceed to the task *Creating Work Orders* in the *Work Orders Guide*.
12. If you create a work order, complete the following field:
  - Order Number
13. Complete the following fields so that the system can determine the start date of the task:
  - Completion Offset Days
  - Duration
  - Based on Date

If you are setting up the process approval task, you must enter the creation date as the value in the Based on Date field. The Completion Offset Days and Duration fields must be set to 0.

14. Repeat steps 2–13 to enter different locations for the task.
15. When you are finished, click OK.

---

<b>Field</b>	<b>Explanation</b>
Task Type	A user defined code (08/T1) that represents the primary category or classification of an employee setup task.

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Field	Explanation				
Task Sub Class	A code that represents the classification of the current task. The system uses this code to further define the task.				
Lock code	<p>A code that specifies whether the hiring manager can change the selected default setup task. When you check this box, the following must be true:</p> <ul style="list-style-type: none"> <li>• Every employee who matches the current job type and step and location must have this default setup task.</li> <li>• Only a human resources administrator can change the task details.</li> </ul>				
Description	An alphanumeric description of the employee setup task.				
Approval Required	<p>A code that specifies whether an approval is required for a task.</p> <p>Valid values are:</p> <table> <tr> <td data-bbox="780 762 801 789">Y</td><td data-bbox="850 762 1192 789">Yes, an approver is required.</td></tr> <tr> <td data-bbox="780 796 801 823">N</td><td data-bbox="850 796 1192 823">No, no approver is required.</td></tr> </table>	Y	Yes, an approver is required.	N	No, no approver is required.
Y	Yes, an approver is required.				
N	No, no approver is required.				
Required Location Fields	<p>A value that represents the number of location category codes you need to know to accomplish the current setup task.</p> <p>For example, to install a telephone you might need to know the first four location codes (state, city, building, and office number). To set up a computer account, you might need to know only the first two location codes (state and city).</p>				
Ranking	<p>A code that specifies the rank of tasks within a task type. You rank tasks to restrict users from changing the subclass of a task to a subclass with a higher rank.</p>				
Final Task Status	<p>A code that represents the current status of the employee setup process. Several of the statuses are hard coded. Changing hard-coded statuses typically triggers a specific event.</p>				
Task Recipient	<p>The address book number of the person who is assigned to the current employee setup task.</p>				
Task Owner	<p>The address book number of the owner of the setup task. The owner is responsible for the task and will receive approval messages if a task approver has not been entered on a task that requires an approval or the task approver has not responded to an approval request.</p>				
Application Name	<p>The name of the application associated with a task. This application will provide a place for the user to enter specific information necessary to complete the setup task.</p>				
Approver	<p>The address book number of the person who approves any given work. The system verifies this number against the Address Book.</p>				

<b>Field</b>	<b>Explanation</b>
Send E-Mail	<p>A code that specifies whether the workflow process sends an e-mail message when processing the task. The workflow process creates the e-mail message by combining the media object associated with the setup task and the comments associated with the employee's actual task. Valid values are:</p> <ul style="list-style-type: none"> <li>T True. Send an e-mail message.</li> <li>F False. Do not send an e-mail message.</li> </ul>
Report Name	<p>The OneWorld architecture is object-based. This means that discrete software objects are the building blocks for all applications, and that developers can reuse the objects in multiple applications. Each object is tracked by the Object Librarian. Examples of OneWorld objects include:</p> <ul style="list-style-type: none"> <li>• Batch Applications (such as reports)</li> <li>• Interactive Applications</li> <li>• Business Views</li> <li>• Business Functions</li> <li>• Business Functions Data Structures</li> <li>• Event Rules</li> <li>• Media Object Data Structures</li> </ul>
Version	<p>A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.</p>
Process ID	<p>The unique identifier for a process. If no value is entered, a next number is assigned. Once assigned, the value cannot be changed.</p>
Order Number	<p>A number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.</p>
Completion Offset Days	<p>The date that the setup task must be completed. The system uses this date as an offset to the date referenced by the task control date. This date might be the date that the setup task was processed, the date that the setup task was created, the employee start date, or the date that the employee arrives.</p>
Duration	<p>A value that specifies how long the setup task will take. The system also uses this value to calculate the task start date.</p>
Based on Date	<p>A user defined code (08/BO) that will specify which date you use to calculate the completion date of the setup task.</p>

## Setting Up Employee Status Change

Employee Status Change (P08740) is one of the suite of applications that a manager can use from Manager's Workbench (P08712). Managers can use Employee Status Change to perform any of the following changes:

- Promotion
- Job status
- Location
- Leave of absence
- Department or supervisor

Managers can save time and effort by using the five default tasks above to perform the most frequent types of employee changes. For example, when an employee changes jobs, the employee's supervisor can initiate the change using the Manager's Workbench. Workflow can route the status change to human resources for the appropriate approvals. Once the change request has been approved, the change will automatically be updated in the system.

Your software has been supplied with a default version that contains options, approval requirements, and data items that are common to a large cross-section of organizations. As a result, little or no change might be required for this application to meet your needs. If you want to add data items to any of the existing change forms, you will find that the majority of the fields from the Employee Master table are currently available.

If you want to change the default settings, the best approach is to make a copy of the existing version, rename the new version appropriately, and make changes only to the new version. Because any new version must maintain the same data structure (input parameters), this approach will result in less effort and fewer errors.

An additional setup option exists, within the Manager's Employee Status Change application, to define a sixth type of change that can be either a combination of existing change types or a selection of any of the fields in the Employee Master table (F060116). You can accomplish this addition in Employee Status Change Setup.

Normally, you will use the existing processing option settings for Employee Status Change Setup. These settings are:

- Report Name
- Report Version

The default report name and version include the options, approval requirements, and data items mentioned above. You should alter these settings only when you

have created a new version and want managers to use your customized change options.

### Before You Begin

- ❑ Verify that Workflow process EESTSCHG-Employee Status Change is activated in the Process Master (P98800). See *Activating a Workflow Process* in *Enterprise Workflow Management*.

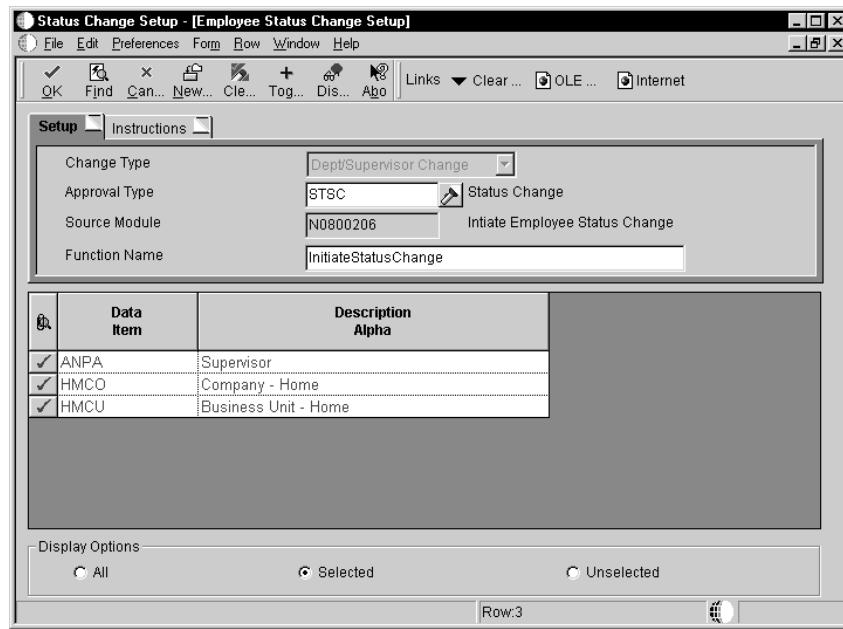
### ► To set up employee status change

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From the Self-Service Setup menu (G05BESS4), choose Status Change Setup.

1. On Work With Status Change Setup, click Find.
2. Choose a Status Change Type and then click Select.

The system automatically displays the data items that are currently selected. A check mark in the row header indicates that the data item is selected and appears as an available field on Create Employee Status Change Request. If a lightening bolt symbol appears in the row header, the field is a required field and will be marked with an asterisk on Create Employee Status Change Request.



3. To change the status of a selected field to a required field, double-click the row-header (the field with the check mark) so that the lightening bolt symbol appears.

4. To completely deselect a field, double-click the row-header again so that no symbol appears.
5. To add a new field, click All from the Display Options. This will display all the enabled data items from the Employee Master table from which you can select.
6. Double-click the row-header of the data item that you want to add and then click OK.
7. If you want to add notes for managers to review when requesting a change, click the Instructions tab and enter notes as appropriate. Then click OK.

## Processing Options for Setting Up Employee Status Change (P08730)

### Defaults Tab

These processing options specify the defaults that the system will apply when you initiate the status change process.

#### 1. Business Function Name

Use this processing option to specify the business function you want to use to initiate the status change workflow process. This business function must also handle the other workflow processes such as aborting, escalating, restarting, and approving.

The default function is Initiate Status Change. The source module is N0800206.

#### 2. Hide Status Change Initialization Business Function

Use this processing option to specify whether you want to allow the user to see the Status Change business function driver used to initiate the Status Change process. It is recommended that you set this value to 1. Valid values are:

0	No
1	Yes

## Setting Up Manager Reports

Reports, from the Manager's Workbench, is one of the applications that a manager can use to automate required reporting procedures and save time. Managers can select reports from a preset list to meet frequent reporting requirements. Two report options are available:

- Individual reports

- Managers reports

Managers can select and print any of the individual reports, such as Headcount or Phone List, by clicking the report name, reviewing the print destination on the Printer Selection form, and then clicking OK.

The Managers Reports option includes a customized list of reports that can save you time. For example, if a manager needs to review his employees' time reports at the end of each time reporting cycle, the Time Entry report can be selected and printed out for each employee. After these report lists have been set up in Managers Reports Setup, individual managers can select reports within a list and specify the order in which they will print to meet specific requirements.

The Organization Chart report will print a picture of the organization, starting at the requesting manager's level. This report requires Visio software installed on the manager's computer.

The Supplemental Data report produces information from the Supplemental Data table, linked to the Employee Master table. For example, you might want to print a report on skills or competencies for an employee. You can review the supplemental information that is available for this report in Employee Supplemental Data Inquiry (P0801).

When you create custom reports and want to add them to a report list in Managers Reports, you might need to alter one or more of the data items that you have included in the report's data structure to successfully run the report. To accomplish this mapping, use Work With Data Structure Mapping (P08770), which is available by selecting the Set Parameters row menu option in Managers Report Setup.

### Before You Begin

- To set up new category codes to which you can assign a new selection of reports, before starting the following process, see *Understanding User Defined Codes* in this guide and *Adding a User Defined Code* in the *HR Foundation Guide* to create a user defined code. To create a new category for human resources reports, use 08 in the Product Code field and RP in the User Defined Codes field.

### ► **To set up manager reports**

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From the Self-Service Setup menu (G05BESS4), choose Managers Report Setup.

1. On Manager's Report Setup, complete the following field and then click Find to display the report names that are currently assigned:
  - Category

Click the search button to display the existing report categories, each of which includes a selection of reports.

2. To assign reports to a category, enter the new code in the following field and then click Find:
  - Category
3. Click in the first cell and click the search button. Then click Find to display all available reports.

**Note:** You can use search parameters to limit your search for a type of report. For example, you can enter R08\* in the Application column header and click Find to locate the human resources reports.

4. Choose the row header for a desired report and then click Select.
5. On Work With Versions, click Select.
6. To select additional reports, choose the next available cell in the Report ID column and repeat steps 1–5 until you have added all reports that you need. Then click Save.

Field	Explanation
Category	The name of a report category. Each report is associated with a category to make creating and maintaining lists of reports easier and to allow you to view or submit just the reports that belong to a particular category.



# **Employee History and Turnover**



## Employee History and Turnover

Within any organization, employees continually change jobs, receive raises and promotions, or change marital status. You can set up your system to store historical records of employee information. This means that when you enter or update employee information, the system creates a historical record of the new information. You can also set up your system to store turnover records. Turnover records show employee movement within your organization, such as when an employee changes jobs, as well as movement resulting from new hires and terminations.

Working with employee history and turnover information includes the following tasks:

- Working with employee history records
- Correcting turnover records
- Running history and turnover reports

You can track employee history and turnover for any of the information stored in the Employee Master table (F060116). You can use history and turnover information to do the following:

- Review an employee's job progression
- Review salary increases given at the same time a job change was made
- Analyze historical changes to employee information
- Consider an employee for a promotion
- Consider an employee for another position
- Monitor employee movement within your company

For more information about employee history, review the following topics:

- How the system stores Employee Master history and turnover
- Importance of the change reason code
- Where the system stores history and turnover records

## How the System Stores Employee Master History and Turnover

Employee master history includes the history records that the system creates when you change information on the employee entry forms.



You must choose the data items (such as home company, tax ID number, and so on) for which you want to track history and turnover.

These data items must exist in the Employee Master table. Whenever you change employee information, the system creates a separate history record for each data item for which you are tracking history.

The history records include the following information:

- The specific change
- The reason for the change (known as the change reason code)
- The date that the change became effective or the date that the change will become effective
- The system date when the change was made
- The user ID of the person who made the change
- The program ID that identifies where the change was made

## Importance of the Change Reason Code

When you revise employee information, the system prompts you for a change reason code. If you enter a change reason code, the system creates a turnover record with a history record. If you do not enter a change reason code, the system creates only a history record.

You define change reason codes in user defined code list 06/T. When you define change reason codes, remember that alphabetic codes indicate a negative effect on turnover. For example, you use an alphabetic code to indicate that a person has resigned. Numeric codes indicate either a positive or a neutral effect on turnover. For example, when you hire an applicant from outside of your organization, the change has a positive effect on turnover. When a person changes departments within your organization, the change has a neutral effect on turnover because it negatively affects turnover for the department that the employee leaves and positively affects turnover for the department that the employee enters.

## Where the System Stores History and Turnover Records

The system stores history and turnover records in the following tables:

- Employee master history is in the HR History table (F08042)
- Employee turnover information is in the Employee Turnover Analysis table (F08045)

## Working with Employee History Records

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When current employee information changes, such as when an employee receives a promotion or changes marital status, you must update the employee's record to reflect the change. You can set up your system options so that the system creates history records for employees whenever you change employee information.

Working with employee history records consists of the following tasks:

- Reviewing complete history for an employee
- Reviewing employee history for a specific date
- Reviewing history for a specific field
- Correcting employee history

You can review historical information from the date that you began tracking history. This allows you to analyze an employee's qualifications and work record. For example, you can do the following:

- Review an employee's job progression
- Review salary increases given at the same time that a job change was made
- Analyze historical changes to employee information
- Analyze an employee's job history to determine whether the employee is ready for a promotion

You can review an employee's history record for information as it was on a specific date. For example, a supervisor might need to know the annual salary that an employee was earning on January 1, 1995.

When you enter, revise, or review employee information, you can easily access history for a particular field. For example, you can review past changes to an employee's salary or position ID.

If you make a mistake and do not want to maintain the record in history, you can delete the history record from the history table.

## Before You Begin

- Choose the employee data items for which you want to track history. See *Choosing Data for History Tracking Purposes*.
- Verify that the Human Resources options are set up to track employee history. See *Setting Up System Options*.

## Reviewing Complete History for an Employee

You can set up your system options so that the system creates history records for employees whenever you change employee information. You might want to review this history to do the following:

- Analyze historical changes to employee information
- Consider an employee's work record for promotions or raises
- Consider an employee's work record for another position

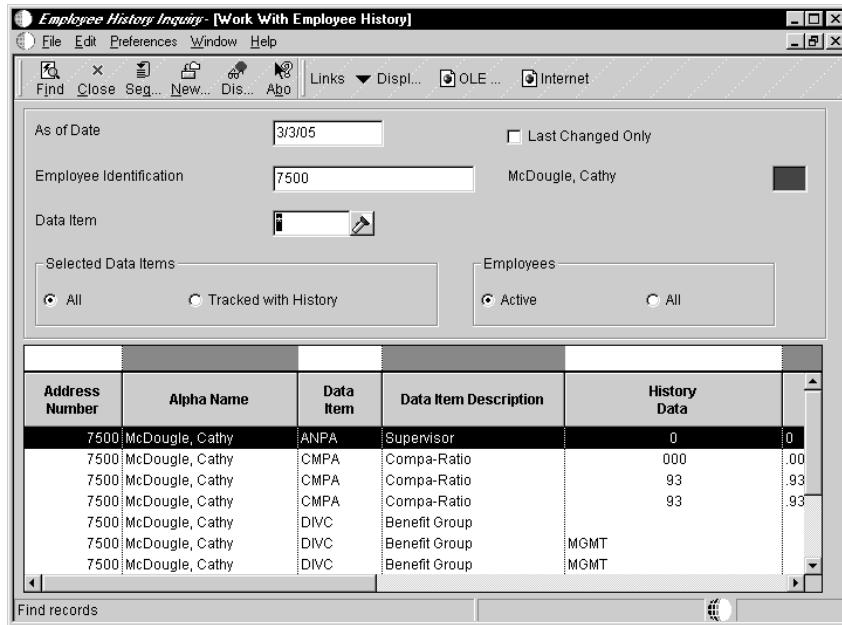
To review the complete history records for an individual, from the oldest entry through the most recent entry, you can use Employee History Inquiry.

### ► To review complete history for an employee

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From the Employee History menu (G05BH1), choose Employee History Inquiry.

1. On Work With Employee History, complete the following field:
  - Employee Identification
2. To narrow your search, complete one of the following optional fields:
  - Effective On
  - Last Changed Only
3. Complete the following field if you are tracking history for a specific item:
  - Data Item
4. Choose an option under the Selected Data Items and Employees headings and click Find.
5. To display all employees who are not terminated or in a leave of absence, click the Active option.



6. Click the Tracked with History option to display all data items that you selected for tracking during setup and which have history records attached. Click the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.
7. Review the information.

Field	Explanation
Employee Identification	This field may hold the employee number, TAX ID or Alternate number. The value this field holds, depends on the employee number mode setup in the Payroll Constants for Company 00000.
Effective On	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.
Last Changed Only	<p>A code that defines whether the form displays only employee history changes made through the date you indicate in the As of Date field. Valid values are:</p> <p style="margin-left: 20px;">Y Yes, display only the history changes in effect through the As of Date.</p> <p style="margin-left: 20px;">N No, display all changes.</p> <p style="margin-left: 20px;">Blank No, display all changes.</p> <p>Note: Since changes are based on the effective date, if two changes were made on the same date, the form shows both changes.</p>

Field	Explanation
Data Item	<p>For Work, the RPG data name. This data field has been set up as a 10-byte field for future use. Currently, it is restricted to 4 bytes so that, when preceded by a 2-byte table prefix, the RPG data name will not exceed 6 bytes.</p> <p>Within the Data Dictionary, all data items are referenced by this 4-byte data name. As they are used in database tables, a 2-character prefix is added to create unique data names in each table specification (DDS). If you are adding an error message, this field must be left blank. The system assigns the error message number using next numbers. The name appears on a successful add. You should assign error message numbers greater than 5000. Special characters are not allowed as part of the data item name, with the exception of #, @, \$.</p> <p>You can create protected data names by using \$xxx and @xxx, where you define xxx.</p> <p>For OneWorld, a code that identifies and defines a unit of information. It is an 8-character, alphabetical code that does not allow blanks or special characters such as: % &amp; , . +.</p> <p>Create new data items using system codes 55-59.</p> <p>The alias cannot be changed.</p>

## Reviewing Employee History for a Specific Date

To review employee history for a specific date, you can use Employee History Snapshot. For the date that you enter, the system displays history information for the fields for which you are tracking history. You define the fields for which you want to track history when you set up your system.

### ► To review employee history for a specific date

From the Employee History menu (G05BH1), choose Employee History Snapshot.

1. On Work With Employee History Snapshot, complete the following fields:
  - Employee Number
  - Effective Date
2. Click one of the options in the Employees area and click Find.

## Working with Employee History Records

The screenshot shows the 'Employee History Snapshot' application window. At the top, there's a menu bar with File, Edit, Preferences, Window, and Help. Below the menu is a toolbar with icons for Select, Find, Close, Seg..., New..., Dis..., Abo, Links, Disp..., OLE..., and Internet. The main area has fields for Effective Date (3/5/05) and Employee No. (2275), with a note 'Nguyen, Daniel'. Below these are buttons for Employees (radio buttons for Active, Terminated, All), a table grid showing employee details (Employee Number, Alpha Name, Employee Tax ID, Alternate Employee No), and a scroll bar. At the bottom are buttons for Find records and Row:1.

3. To view the information for a different date, change the value in the following field and click Find:
  - Effective Date
4. Choose the record that you want to review and click Select.

The screenshot shows the 'Employee History Snapshot' application window displaying detailed employee information for Employee No. 2275, Nguyen, Daniel, with an Effective Date of 3/5/05. The form includes fields for Date Started (blank), Change Reason (001 New Hire), Original Hire Date (2/28/99), Home Company (00200 Manufacturing/Distribution Co.), Date Pay Starts (2/28/99), Home Business Unit (D30 EPS Distribution Center), Sal Forecast Chg Dt (blank), Pay Status (0 Active), Salary (\$33,175.00), Employment Status (Full-time Regular), Hourly Rate (\$15.950), Job Type/Step (M200 Manager), FLSA Exempt Y/N (Y), Pay Freq/Class (Semi-Monthly), Pay Grade/Step (S4), Workers Comp (8810 Administrative), Benefit Group (blank), EEO Job Cat (001 Officials and Managers), and Union Code (blank). At the bottom are buttons for Close form and a scroll bar.

5. On Employee History Snapshot, review the information.

Field	Explanation
Employee Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members.
Effective Date	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.
Active Terminated All	Employee Active/Terminated/All Flag. This flag is used for OneWorld to select and sort employees depending on their status.

## Reviewing History for a Specific Field

When you enter, revise, or review employee information, you might need to review history for a specific type of information only. For example, when you enter a job change for an employee, you might need to review all of the previous jobs in which the employee has worked.

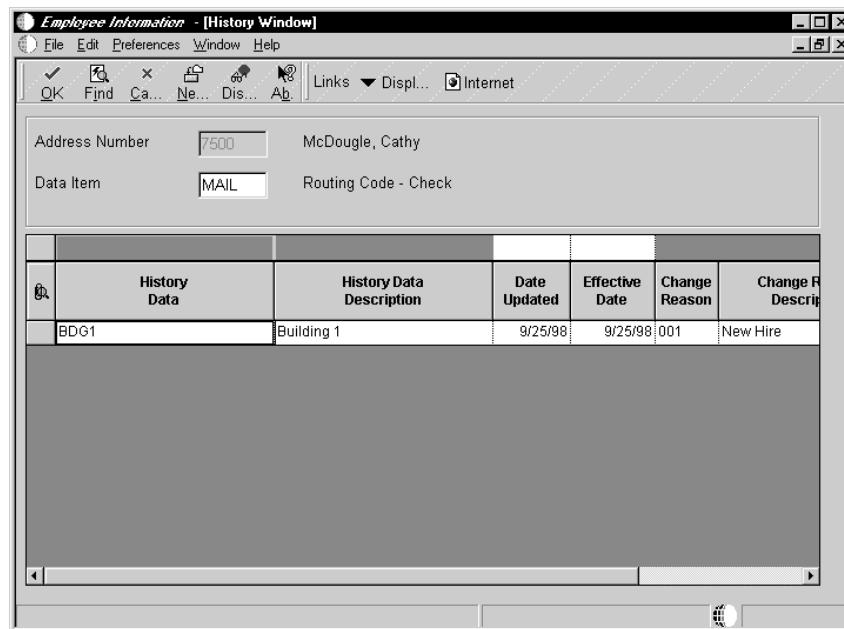
The History Window provides quick and efficient access to field-specific history for an employee. You can access the History Window for any forms that have data items from the Employee Master table (F060116). For example, you can access history for a specific field from any of the following employee entry forms:

- Employee
- Personal
- Organizational Assignment
- Basic Compensation
- National and Fiscal Data
- User Def. Dates
- User Def. Category Codes
- Eligibility/NDT/Participation
- Employee Payroll Revisions

### ► To review history for a specific field

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

1. On Work with Employee Information, to locate the employee record for which you need to review history, complete any of the following fields:
  - Home Business Unit
  - Home Company
2. Click Active, Terminated, or All and click Find.
3. Choose the employee record and, from the Row menu, choose the form that contains the information for which you need to review history.
4. On the appropriate form, move the cursor to the field for which you need to review history and choose History Tracking from the Form menu.



5. On History Window, review the information.

<b>Field</b>	<b>Explanation</b>
Home Business Unit	The number of the business unit in which the employee generally resides.
Home Company	The company to which the employee is assigned. This code is used to store historical payroll information and to determine accounts for some journal entries.

## Correcting Employee History

Each time you make an entry in an employee record, the system creates a record in the corresponding history table. If you make a mistake when you enter employee information and then correct the error, you must delete the incorrect

record from the corresponding history table to maintain an accurate history trail. When you delete a record in the history table, you do not affect the information in the Employee Master table.

If the only information that you entered incorrectly was the change reason or the effective date, you can correct that information in the history table. You do not need to delete the entire record to correct those two fields.

Correcting the error in the history table allows you to maintain accurate history records. If the history record that you correct has a change reason, you must also correct the corresponding turnover record.

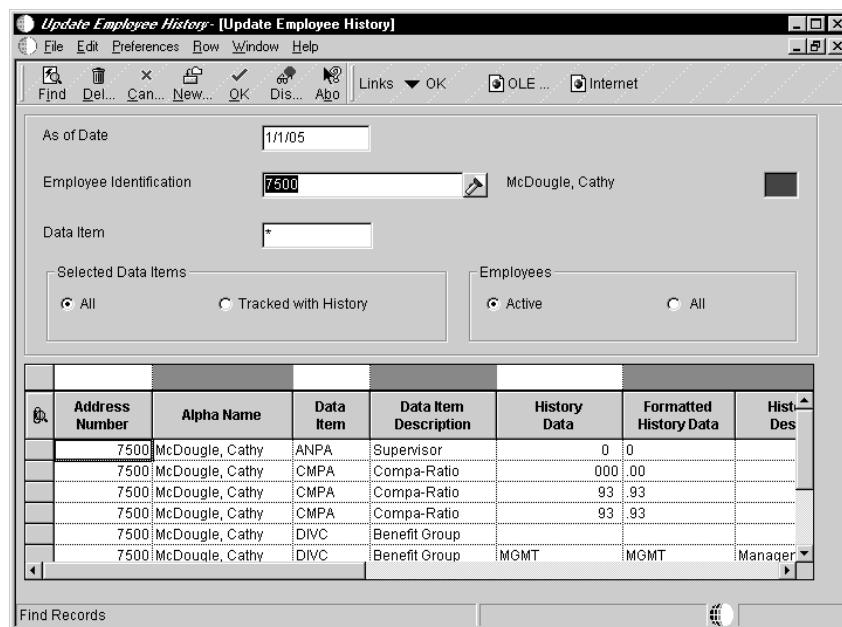
Correcting employee history includes the following procedures:

- Deleting an incorrect history record
- Correcting the change reason or effective date for a history record

### ► To delete an incorrect history record

---

From the EE History/Turnover Advanced and Technical Operations menu (G05BH3), choose Update Employee History.



1. On Update Employee History, to locate the record, complete one or both of the following fields:
  - Employee Identification
  - Data Item

2. To narrow your search, click an option under the Selected Data Items and Employees headings and click Find.
3. To display all employees who are not terminated or in a leave of absence, click the Active option.
4. Click the Tracked with History option to display all data items that you selected for tracking during setup and which have history records attached. Click the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.
5. Choose the incorrect record and click Delete.
6. If the record that you deleted was a duplicate for the same data item on the same date, enter the correct sequence number for the remaining record in the following field:
  - Sequence Number
7. Click OK.

---

Field	Explanation
Sequence Number	A number used to sequence information for review purposes only.

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#### ► **To correct the change reason or effective date for a history record**

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From the EE History/Turnover Advanced and Technical Operations menu (G05BH3), choose Update Employee History.

1. On Update Employee History, to locate the record, complete one or both of the following fields:
  - Employee Identification
  - Data Item
2. To narrow your search, click an option under the Selected Data Items and Employees headings and click Find.
3. To display all employees who are not terminated or in a leave of absence, click the Active option.
4. Click the Tracked with History option to display all data items that you selected for tracking during setup and which have history records attached. Click the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.
5. Change the value in either of the following fields and click OK:
  - Eff On

- OW Chg Rsn

Field	Explanation
Eff On	A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.
OW Chg Rsn	A user defined code (06/T) that indicates the reason an employee's record changed. For example, you can enter the reason you are recommending a salary or rate change.  Note: If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item.

## See Also

- *Correcting Turnover Records*

## Correcting Turnover Records

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When employee assignment information changes (such as when an employee changes jobs or moves to a new business unit within your organization), you must update the employee's record to reflect the change. You can set up your system to create turnover records of the information that you change when you update employee records. Turnover records also show employee movement that results from new hires and terminations.

If you enter incorrect employee assignment information, you must reenter the correct information. You should also correct the turnover record so that you can accurately analyze turnover information.

To track turnover for a change, you must enter a change reason and an effective date. The system does not create a turnover record unless you enter a change reason code. You can review turnover records to verify that no duplicate records, incorrect change reason codes, or incorrect effective dates exist.

You can correct only the effective date in the turnover data. If any other information in the turnover record is incorrect, you should delete the entire record. When you correct the information in employee information, the system creates the correct turnover record.

When you enter information for which you are tracking turnover, the system creates a turnover record for each of the following data items:

- Home company (HMCO)
- Home business unit (HMCU)
- Job number (JBCD)
- Check route (MAIL)

When you correct turnover, you must correct the turnover records for each of these data items.

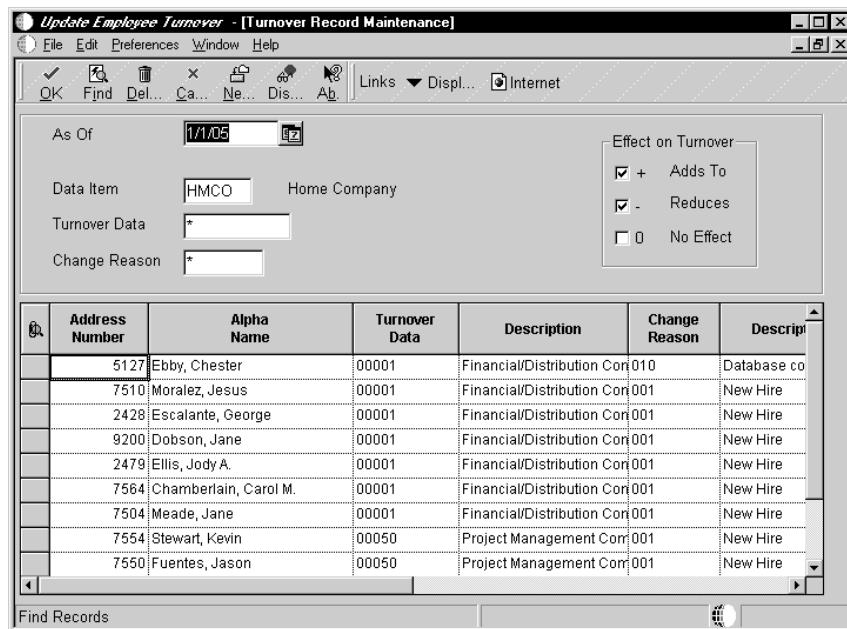
To maintain the accuracy of your historical information, you should correct the corresponding employee history record when you correct turnover records.

### Before You Begin

- See *Initializing History and Turnover Tracking* for information about setting up turnover records.

## ► To correct turnover records

From the EE History/Turnover Advanced and Technical Operations menu (G05BH3), choose Update Employee Turnover.



1. On Turnover Record Maintenance, to locate the incorrect record, enter HMCO (Home Company) in the following field:
  - Data Item
2. To narrow your search, complete any of the following optional fields:
  - Turnover Data
  - Change Reason
3. To further narrow your search, click any of the following options and click Find:
  - Adds To
  - Reduces
  - No Effect
4. For a record that is correct except for the change reason or effective date, change the information in one or both of the following fields in the detail area:
  - Change Reason
  - Effective Date
5. For any record that contains incorrect information (other than the effective date), choose the record and click Delete.

- 
6. Repeat steps 1 through 5 for each of the remaining data items: Home Business Unit (HMCU), Check Route Code (MAIL), and Job Code (JBCD).

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<b>Field</b>	<b>Explanation</b>
Data Item	<p>For World, the RPG data name. This data field has been set up as a 10-byte field for future use. Currently, it is restricted to 4 bytes so that, when preceded by a 2-byte table prefix, the RPG data name will not exceed 6 bytes.</p> <p>Within the Data Dictionary, all data items are referenced by this 4-byte data name. As they are used in database tables, a 2-character prefix is added to create unique data names in each table specification (DDS). If you are adding an error message, this field must be left blank. The system assigns the error message number using next numbers. The name appears on a successful add. You should assign error message numbers greater than 5000. Special characters are not allowed as part of the data item name, with the exception of #, @, \$.</p> <p>You can create protected data names by using \$xxx and @xxx, where you define xxx.</p> <p>For OneWorld, a code that identifies and defines a unit of information. It is an 8-character, alphabetical code that does not allow blanks or special characters such as: % &amp; , . +.</p> <p>Create new data items using system codes 55-59.</p> <p>The alias cannot be changed.</p>
Turnover Data	<p>The value you enter in this field is specific to the data item you enter in the Data Item field.</p> <p>If you enter Home Business Unit (data item HMCU) in the Data Item field, enter an individual business unit. If you enter Home Company (data item HMCO) in the Data Item field, enter a specific company. If you enter Job ID (data item JBCD) in the Data Item field, enter a job type. If you enter Check Route Codes (data item MAIL) in the Data Item field, simply enter the correct check route code.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>This field is optional. You can use it to limit the information that appears on the form. If you do not put a code in this field, all turnover information for the data item appears.</p>

---

<b>Field</b>	<b>Explanation</b>
Change Reason	<p>A user defined code (06/T) that indicates:</p> <ul style="list-style-type: none"> <li>• The reason that you are changing an active employee's record.</li> <li>• The reason that you are terminating an employee.</li> <li>• The reason that you are recommending the change in salary or rate. If you are reactivating an employee, you must change the code in this field to a numeric character.</li> </ul> <p>Note: The default reason code for new hires is the default value for the Change Reason data item.</p>
As Of	<p>A future date that you want all changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The specific date you are inquiring on.</p>

## See Also

- *Correcting Employee History*

## Running History and Turnover Reports

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You can run history reports to review the most recent changes made to your employee history records. Turnover reporting identifies changes in jobs and terminations. You define the columns that you want to use to analyze turnover. For example, you might want to report on terminations with and without cause. To do this, you would set up a column to compile the specific data types associated with termination.

Running history and turnover reports consists of the following tasks:

- Running the Employee History Log
- Running the Employee Salary History Analysis report
- Working with the Employee Turnover report
- Running the Employee Activity Analysis report

### Running the Employee History Log

From the Employee History menu (G05BH1), choose Employee History Log.

Run the Employee History Log report to review history for either a single data item or for all data items that you are tracking for each employee. The information that prints on this report is the same information that you can review on the Employee History Inquiry form (P050242).

This report locates information from the Employee Master table (F060116) and the HR History table (F08042).

#### See Also

- R080423, *Employee History Log* in the *Reports Guide* for a report sample

## Processing Options for Employee History Log

### Narrative

1. Enter a '0' or blank to see just Active employees. Enter a '1' to see just inactive employees.  
Enter a '2' to see both Active and Inactive employees.
2. Enter Beginning Effective On Date.
3. Enter Ending Effective On Date.
4. Enter the Data Item you wish to view. Blanks will display all data items being tracked.

## Running the Employee Salary History Analysis Report

From the Employee History menu (G05BH1), choose Employee Salary History Report.

Run the Employee Salary History Analysis report to review changes to the primary job salary within the date range that you define.

The system selects a salary record and an hourly record for each employee. It then compares the effective dates of the two records and chooses the earlier date to identify the pay class linked to the employee.

If the pay class is S (Salary), the system prints the employee's information based on salary information. If the pay class is H (Hourly), the system prints the employee's information based on hourly rate information.

### See Also

- R080424A, *Employee Salary History Analysis* in the *Reports Guide* for a report sample

## Working with the Employee Turnover Report

You can define turnover columns to organize the turnover information that prints on the report. Working with the employee turnover report consists of the following tasks:

- Defining turnover columns
- Running the Employee Turnover report

## Defining Turnover Columns

Before running an employee report, you define turnover columns to organize the turnover information that prints on the report.

### ► To define turnover columns

From the Employee History Setup menu (G05BH4), choose Define Turnover Columns.

1. On Work With Turnover Columns, click Add.
2. On Define Turnover Report Columns, complete the following required fields:
  - Turnover Column Group
  - Turnover Column
  - Column Heading 01
3. Complete the following field as needed:
  - Column Heading 02
4. Complete the following field and click OK:
  - Chg Rsn

After defining the turnover columns, you can run your employee turnover report.

Field	Explanation
Turnover Column Group	You can define up to 999 sets of column headings for your turnover analysis reports. Use the Turnover Column Group field to number each set of column headings.  For example, the first group of column headings might be Turnover Column Group 000. To define an additional set of column headings, enter 001 in this field and then define as many of the seven available column headings as you need.
Turnover Column	The number of a column to define for your employee turnover analysis reports. You can define up to seven columns. The columns are numbered from left to right.

<b>Field</b>	<b>Explanation</b>
Column Heading 01	<p>This field, in conjunction with the second Column Heading field (data item TCH2), allows you to specify the title of one of the seven columns available on the employee turnover analysis reports. You use this first field to either enter the first word or an abbreviation of the column heading. You can enter a maximum of seven characters in this field.</p> <p>For example, to title a column New Hire, enter the word New in this field and enter Hire in the field below this one. On the reports, this column title would look like this:</p> <pre style="margin-left: 40px;">New Hire</pre> <p>You do not have to define all seven available column headings.</p>
Column Heading 02	<p>This field, in conjunction with the first Column Heading field (data item TCH1), allows you to specify a title for one of the seven available columns on the employee turnover analysis reports. When the title that you want to enter is longer than 7 characters, use this field to enter a second word or an abbreviation. You can enter a maximum of seven characters in this field.</p> <p>For example, to title a column New Hire, enter the word Hire in this field and enter New in the field above this one. On the reports, the column title would look like this:</p> <pre style="margin-left: 40px;">New Hire</pre> <p>You do not need to define all seven available column headings.</p>
Chg Rsn	<p>A user defined code (06/T) that indicates:</p> <ul style="list-style-type: none"> <li>• The reason that you are changing an active employee's record.</li> <li>• The reason that you are terminating an employee.</li> <li>• The reason that you are recommending the change in salary or rate. If you are reactivating an employee, you must change the code in this field to a numeric character.</li> </ul> <p>Note: The default reason code for new hires is the default value for the Change Reason data item.</p>

## Running the Employee Turnover Report

From the Employee History menu (G05BH1), choose Employee Turnover Report.

After you define the turnover columns, you can run the employee turnover report. You can create turnover reports based on Company, Business Unit, Check Route code, and Job Type.

## See Also

- R080430, *Employee Turnover* in the *Reports Guide* for a report sample

## Processing Options for Employee Turnover

### Process

1. Enter the From Date to begin tracking turnover. \_\_\_\_\_
2. Enter the Thru Date when calculations are to cease. \_\_\_\_\_  
Default of blank will calculate through today.
3. Enter the Turnover Column Group which contains the column headings you wish to have displayed on the report. \_\_\_\_\_

## Running the Employee Activity Analysis Report

From the Employee History menu (G05BH1), choose Employee Activity Analysis.

Run the Employee Activity Analysis report to review employee turnover by the dates and the data item that you define in your processing options. You can also set up your processing options to segment the date that you entered in the From Date and Thru Date fields into six segments, such as months or years.

## Processing Options for Employee Activity Analysis

### Setup

- 1) From Date \_\_\_\_\_
- 2) Thru Date \_\_\_\_\_
- 3) Turnover Column Group \_\_\_\_\_
- 4) Data Item \_\_\_\_\_

### Segments

- 1) Date 1 \_\_\_\_\_
- 2) Date 2 \_\_\_\_\_
- 3) Date 3 \_\_\_\_\_
- 4) Date 4 \_\_\_\_\_
- 5) Date 5 \_\_\_\_\_
- 6) Date 6 \_\_\_\_\_



# **Job Information**



## Job Information

You can track detailed information about the jobs within your organization. You can use this information to do the following:

- Track pay and other types of information about jobs
- Simplify the process of entering employee information

You define jobs so that you can track pay and detailed information about the jobs within your organization. After you define a job, you can assign it to one or more employees.

You can review job information and the employees who are assigned to a particular job.

Periodically, you might need to update job information. For example, when management negotiates a new contract with a union, you typically need to update the pay rates for the pay grade steps associated with the union members' jobs. When you change information for a job, you can globally apply the changes for all of the employees who are assigned to that job.

Working with job information includes the following tasks:

- Defining jobs
- Reviewing jobs
- Updating pay rates for pay-grade steps
- Updating jobs globally
- Updating the compa-ratio for an employee
- Working with obsolete jobs
- Reviewing jobs with job reports





## Defining Jobs

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You define jobs so that you can track pay and other types of information about the jobs within your organization. After you define a job, you can assign it to employees.

To help you determine equitable pay ranges for a job, you can evaluate each job by degrees or points, depending on the evaluation method that you link to each job.

When you define a job, you can track additional information that is unique to your organization or your industry. For example, if a senior consultant job requires fluency in Spanish, you can track the language skills required for the job.

Job information is stored in the Job Information table (F08001).

Defining jobs consists of the following tasks:

- Entering job information
- Entering job evaluation information
- Entering supplemental data for jobs

### Entering Job Information

You enter job information to identify and define the jobs within your organization. You must define and identify a job before you can enter supplemental data for it. When you enter a new job, you can review an existing job first, and copy information from it, if applicable.

Initial job information includes information such as the following:

- Job identifiers
- Job titles
- Reporting information
- Pay information
- Union codes
- Hourly or salary classification

You must set up your processing options for Job Entry and Evaluation to allow a legislative form to appear after you enter job information. The legislative form allows you to enter job information specific to your country.

Entering this information at the job level simplifies the process of entering employee information because it eliminates the need to enter that information for each employee in that job. When you assign a job to an employee, you can have the system automatically assign all the associated job information to the employee. You can override this default job information for individual employees, if necessary.

After entering initial job information, you can evaluate a job to determine a salary for the position. Job evaluation is a method of comparing jobs and establishing equitable salaries for all positions relative to their importance and value to your company. You might evaluate jobs when you add new positions to your company or when you determine a salary increase for all positions in a certain job group to stay competitive with comparative salaries in the industry.

Depending on how your processing options are set up, you can access the Job Evaluation form following your entry of job information, or you can access the form from the menu.

You choose a job evaluation method to evaluate your jobs, and then rate the job using the evaluation factors that you defined for that method. Typical evaluation factors include:

- Problem-solving abilities
- Technical skills
- Working conditions
- Leadership qualities

For each job, you assign values (degrees or points, depending on your evaluation method) to each of the evaluation factors. The system then automatically calculates the total evaluation degrees or points for the job.

You can use job evaluation information to compare job requirements and compensation with other jobs within your organization and to similar jobs within your industry.

## Before You Begin

- Set up the pay grades and pay grade steps for jobs. See *Setting Up Job Information*.
- Set up your processing options for Job Entry and Evaluation to specify whether the Job Evaluation form and a country-specific legislative form appear after you enter a job.

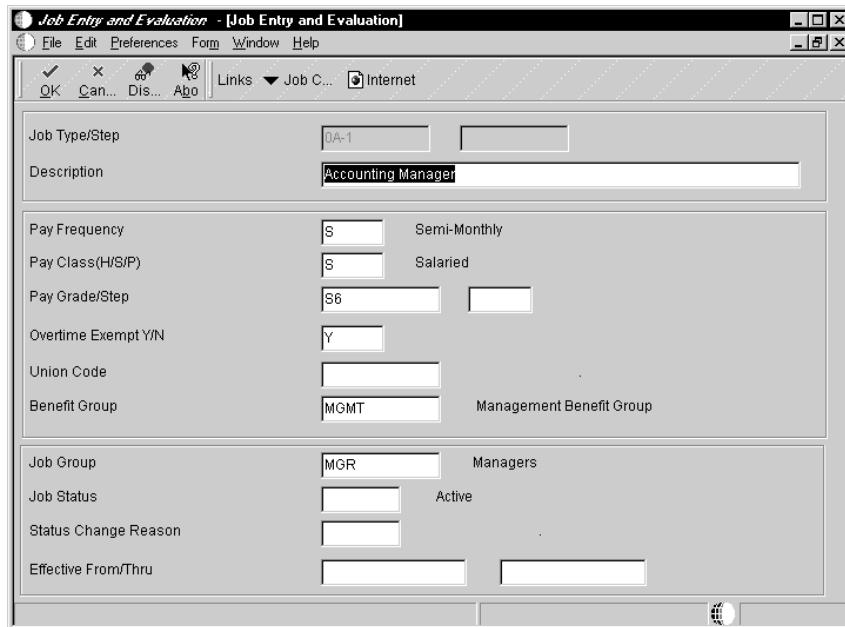
## See Also

- *Adding Employee Records One at a Time* for information about assigning a job to an employee
- *Updating Jobs Globally* for information about changing the job specifications for one or more jobs in your organization

### ► To enter job information

From the Job Specifications menu (G05BJ1), choose Job Entry and Evaluation.

1. On Work With Job Entry and Evaluation, click Add.



2. On Job Entry and Evaluation, complete the following fields:
  - Job Type/Step
  - Description
  - FLSA Exempt Y/N
3. To enter pay information, complete the following fields:
  - Pay Frequency
  - Pay Class (H/S/P)
  - Pay Grade/Step
4. Complete the following optional fields:
  - Union Code

- Benefit Group
  - Job Group
  - Job Status
  - Status Change Reason
  - Effective From/Thru
5. Click OK.
- If your processing options are set up appropriately, a legislative form appears.
6. Enter the job information specific to your country and click OK.
- Caution:** You must click OK for your changes to be accepted. If you enter job information and perform the next step without clicking OK, your changes will be lost.
7. If your processing options are set to enable the Job Evaluation form, choose Job Evaluation from the Form menu, and continue to the next task.

## See Also

- *Entering Job Evaluation Information*

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Job Type/Step	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
Overtime Exempt Y/N	A code that indicates whether the employee fits the rules of the Fair Labor Standards Act (FLSA) and thus does not have to be paid for working overtime. Valid codes are: Y Yes, the employee fits the rules and does not have to be paid for working overtime. N No, the employee does not fit the rules and is to be paid for working overtime.

Field	Explanation
Pay Frequency	<p>A user defined code (07/PF) that indicates how often an employee is paid. Codes are:</p> <ul style="list-style-type: none"> <li>B Biweekly</li> <li>W Weekly</li> <li>S Semimonthly</li> <li>M Monthly</li> <li>A Annually</li> <li>C European Annualized</li> </ul>
	<p>The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee.</p> <p>..... <i>Form-specific information</i> .....</p>
Pay Class (H/S/P)	<p>You can leave this field blank and enter a pay frequency at the employee level. A blank value in this field at the job level does not override any value that you enter at the employee level.</p>
Pay Grade	<p>A code that indicates how an employee is paid. Valid codes are:</p> <ul style="list-style-type: none"> <li>Blank</li> <li>H Hourly</li> <li>S Salaried</li> <li>P Piecework</li> </ul>
	<p>A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.</p>
	<p>To set up pay grades, use Pay Grades by Class (P082001). If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p>
	<ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>

<b>Field</b>	<b>Explanation</b>
Pay Grade Step	<p>A code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate.</p> <p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
Job Step	<p>A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.</p>
Union Code	<p>A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.</p>
Benefit Group	<p>The benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.</p>
Job Group	<p>A grouping of similar jobs that are associated as a unit. Similarities can be functions within the organization, job duties, tasks and responsibilities, job evaluation methods to be used, or similarity in pay philosophy. Typical job units are clerical/administrative, technical, engineering, scientific and professional, factory jobs, middle-management, and executive.</p>
	<p>Consider breaking up groups into separate populations based on the differences between exempt and non-exempt employees according to the rules and regulations of the Fair Labor Standards Act (FLSA). For example, consider assigning all your managers to the Managers job group.</p>
	<p>You can define job group codes using user defined code table 08/JG.</p>
Job Status	<p>A code that indicates whether a job is currently active or inactive. You can define codes using user defined code table system 08, type JS.</p>
Status Change Reason	<p>A user defined code (08/JC) that indicates why you changed the status of a job.</p>

Field	Explanation
Effective From/Thru	The date on which the record, transaction, or table becomes active or the date from which you want information to appear.

## Related Tasks

**Entering additional job information** You might need to track specific job information that is unique to your organization or your industry. J.D. Edwards software includes category codes and user defined fields that you can customize to track specific information.

See *Entering User Defined Information for Employees*.

**Deleting jobs** The system displays a warning message when you attempt to delete a job that has employee records associated with it. When you delete a job ID, you must enter a new job ID for each employee record associated with the deleted job ID.

See *Working with Obsolete Jobs*.

## Processing Options for Job Entry

### Auto Call

1. Enter a '1' to automatically call the Category Code window when adding a job. Default of blank will not call the Window.
2. Enter the country whose legislative/regulatory window is to be called when adding a job. A blank will call the form which applies to the country of the default company 00000.
3. Enter a '1' to automatically call the Job Evaluation window when adding a job. Default of blank will not call the Window.

### Exits

1. Enter a 'Select' button exit of a '1' for Job Entry and Evaluation (default), or '2' for Job Supplemental Data Inquiry.

## Entering Job Evaluation Information

Job evaluation is a method of comparing jobs and establishing equitable salaries for all positions relative to their importance and value to your company. You might evaluate jobs when you add new positions to your company.

Evaluating jobs is also helpful for comparing how salaries in your company compare with other salaries for the same positions within the industry.

To evaluate jobs, you need to choose a method of evaluation and then define evaluation factors for rating the job. You can choose an industry method like the Hay method, or you can define your own method of evaluation.

### Before You Begin

- Use the Evaluation Factors Tables to define a table for each evaluation method that you want to use. See *Defining Job Evaluation Factors*.

#### ► To enter job evaluation information

From the Job Specifications menu (G05BJ1), choose Job Evaluation Degree. Or disregard this navigation and continue with the task if the system displays the Job Evaluation form after you enter job information.

The screenshot shows a Windows application window titled "Job Evaluation Degree - Job Evaluation". The menu bar includes File, Edit, Preferences, Window, and Help. The toolbar contains icons for OK, Find, Can..., New..., Dis..., Abo, Links, Disp..., and Internet. The main area has fields for "Job Type/Step" (0A-1) and "Job Evaluation Method" (Factor Comparison Method). Below these are fields for "Job Evaluation Date" and "Accounting Manager". A large table lists evaluation factors with columns for Description, Degree, Job Points, Maximum Points, Evaluation Memo Code, and Weight %. The table data is as follows:

Description	Degree	Job Points	Maximum Points	Evaluation Memo Code	Weight %
Profit and Loss Responsibility		225	300		
Number of Subordinates		225	250		
Technical Skills		125	200		
Education		100	100		
$\Sigma$		675	850		1

At the bottom, there are buttons for Find Records and Row:5, along with a toolbar with various icons.

1. On Job Evaluation, complete the following fields and click Find:
  - Job Type/Step
  - Job Evaluation Method
  - Job Evaluation Date
2. Complete the following fields that apply to the evaluation method that you entered:
  - Degree
  - Job Points
3. Complete any of the following optional fields and click OK:
  - Evaluation Memo Code
  - Weight %

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

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Field	Explanation
Job Evaluation Date	The last date you evaluated the job.
Job Evaluation Method	<p>A user defined code (08/EM) that specifies the method or grouping that you use to evaluate the jobs within your organization.</p> <p>Suggested values are:</p> <ul style="list-style-type: none"> <li>blank Simple Subjective Point System</li> <li>E Evalucomp Method</li> <li>F Factor Comparison Method</li> <li>P Point Factor Method</li> <li>H Hay Method</li> </ul>
Degree	<p>The degree (level of difficulty) awarded to the first factor associated with this job evaluation method. For example, you might have an evaluation method called the degree method that includes the following factors:</p> <ul style="list-style-type: none"> <li>• Know how</li> <li>• Problem-solving skills</li> <li>• Accountability</li> </ul> <p>You could assign the know how factor a degree of 10, the problem-solving skills factor a degree of 9, and the accountability factor a degree of 8.</p>

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<b>Field</b>	<b>Explanation</b>
Job Points	<p>The points assigned to the first evaluation factor (or evaluation degree) within a job. After you enter the applicable number of points, the points calculation program automatically totals all points entered, and updates the Job Information table (F08001).</p>
	<p>Total points display for the point method (type 1) or the degree method (type 2) of job evaluation.</p>
Maximum Points	<p>The number of points calculated for a specific job using any job evaluation method. A job is defined as the combination of job type and job step.</p> <p>You can calculate the points manually and enter them at the Job Master Information level, or you can assign points to each individual factor that has been defined within the evaluation method.</p>
Evaluation Memo Code	<p>A field that indicates why a certain point value was assigned to the first job evaluation factor. For example, this field might contain the row and column numbers from a Hay evaluation chart where the particular point value resides.</p> <p>The value in this field is informational only. It does not affect the total evaluation points.</p>
Weight %	<p>A field that indicates the relative importance of the points assigned to the first job evaluation factor versus the other factors. The weight percent allows you to recognize that certain job evaluation factors are more important than other factors. This field is for information only. It does not affect the total evaluation points.</p> <p>The system recalculates the weight % each time you change the corresponding job points. When you change the job points for a job evaluation factor, the system first recalculates the total job points. Then, it uses the following formula to recalculate the weight percent for each evaluation factor:</p> $\text{Weight percent} = \frac{\text{job points for the current evaluation factor}}{\text{total job points}} \times 100$ <p>When the system calculates the weight percent for an evaluation factor, it rounds the percentage to the nearest whole number. The system summarizes rounding errors on the last evaluation factor so that the total weight percent is 100.</p> <p>You can override the weight percent for an evaluation factor, but the total weight percent must equal either 0 percent or 100 percent.</p>

## Processing Options for Job Evaluation

### Edits

1. Enter a '1' to clear the Evaluation Points and Degrees when the Evaluation Method is changed.
- Enter a '2' to clear the Evaluation Points, Degrees, Memo and Weight when the Evaluation Method is changed. Blank will not clear any of the Evaluation Data.

## Entering Supplemental Data for Jobs

From the Job Supplemental Data menu (G05BSDJ1), choose Job Supplemental Data Entry.

Supplemental data is any type of information that you want to track that is not already provided for by the system. You can track supplemental data for the following databases:

- Employees
- Jobs
- Applicants
- Requisitions

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

For jobs, typical types of supplemental data might include the following:

- Job descriptions
- Major responsibilities
- Authority level
- Job reporting relationships
- Education required
- Experience required
- Skills required
- Job progression patterns
- Hazardous materials handling
- Succession candidates

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

### **See Also**

- *Working with Supplemental Data* for information about entering, reviewing, and copying supplemental data

## Reviewing Jobs

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After you define and evaluate jobs for your organization, you can review job information to verify that it is correct. To ensure that you entered the correct job for each employee, you can review a list of employees who have been assigned to a particular job.

If your company posts job openings internally, your employees can review job descriptions online to determine whether they qualify for job openings. You can also print job descriptions and post them on company bulletin boards.

After you evaluate your jobs, you can review the evaluations for each job to verify that your evaluations are equitable. For example, you might compare the job evaluations for the following jobs to ensure that they received equal evaluation points for accountability:

- Manager of Information Services
- Manager of Documentation
- Manager of Software Development

You can also review the pay ranges for the jobs and pay grades within your organization. You can use this information to verify that these ranges are equitable and appropriate for the job duties and the geographic location where each job is performed.

Reviewing jobs consists of the following tasks:

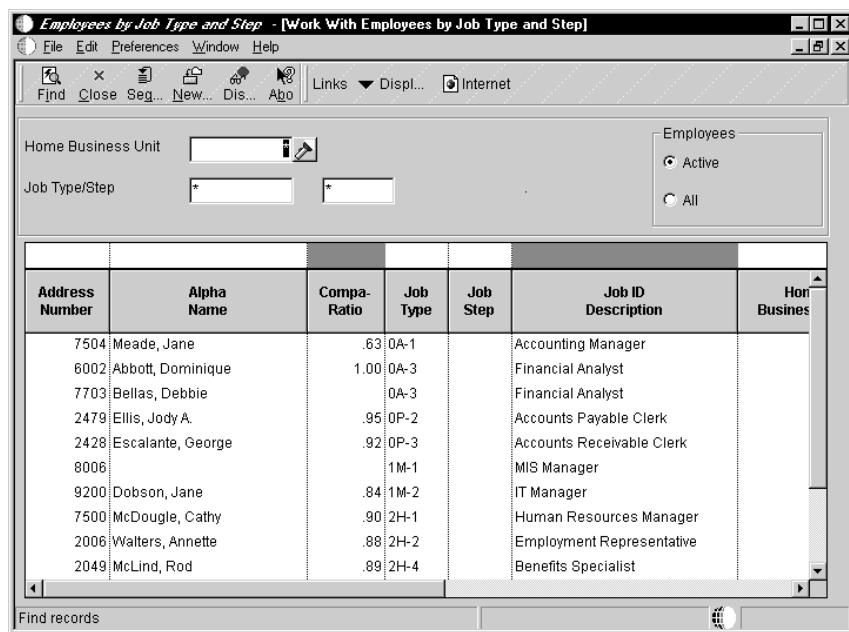
- Reviewing employees by job type and step
- Reviewing job comparisons by factor
- Reviewing and ranking jobs by factor
- Reviewing pay ranges for jobs
- Reviewing pay ranges for pay grades

## Reviewing Employees by Job Type and Step

After you define jobs and enter employee information, you can review jobs by employee to verify that you entered the correct job information for each employee. You can also review a list of employees who are in different job types or job steps to determine whether their compa-ratios are equitable.

### ► To review employees by job type and step

From the Job Specifications menu (G05BJ1), choose Employees by Job Type and Step.



1. On Work With Employees by Job Type and Step, complete any of the following fields:
  - Home Business Unit
  - Job Type/Step
2. To narrow your search, choose one of the options in the Employees area and click Find.
3. When you finish reviewing information, click Close.

## Reviewing Job Comparisons by Factor

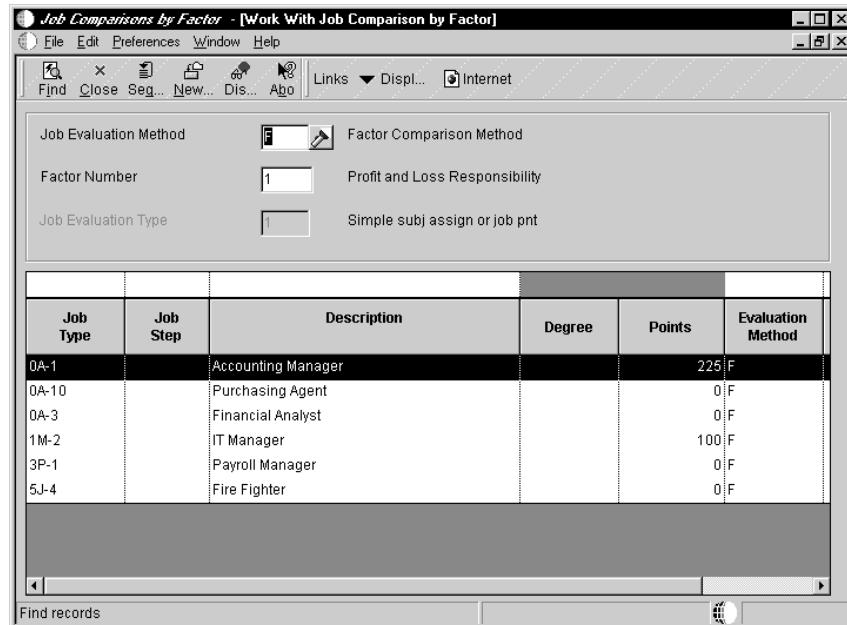
You evaluate jobs to determine an equitable salary range for each job within your organization. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Typical evaluation methods include the following:

- Degree method
- Hay method
- Factor comparison method

After you define and evaluate jobs, you can review evaluation information for all the jobs that use a specific evaluation method. You can use this information to verify that you evaluated each job equitably.

### ► To review job comparisons by factor

From the Job Specifications menu (G05BJ1), choose Job Comparisons by Factor.



1. On Work With Job Comparison by Factor complete the following field and click Find:
  - Job Evaluation Method
2. Review the information in the following fields:
  - Factor Number
  - Job Evaluation Type

- Job Type
- Job Step
- Degree
- Points

<b>Field</b>	<b>Explanation</b>										
Job Evaluation Method	<p>A user defined code (08/EM) that specifies the method or grouping that you use to evaluate the jobs within your organization.</p> <p>Suggested values are:</p> <table style="margin-left: 20px;"> <tr><td>blank</td><td>Simple Subjective Point System</td></tr> <tr><td>E</td><td>Evalucomp Method</td></tr> <tr><td>F</td><td>Factor Comparison Method</td></tr> <tr><td>P</td><td>Point Factor Method</td></tr> <tr><td>H</td><td>Hay Method</td></tr> </table>	blank	Simple Subjective Point System	E	Evalucomp Method	F	Factor Comparison Method	P	Point Factor Method	H	Hay Method
blank	Simple Subjective Point System										
E	Evalucomp Method										
F	Factor Comparison Method										
P	Point Factor Method										
H	Hay Method										
Factor Number	<p>A sequential number that identifies each job evaluation factor. Each job evaluation factor should:</p> <ul style="list-style-type: none"> <li>• Distinguish differences between jobs.</li> <li>• Be common to most of the jobs that you are rating. A factor should exist in greater to lesser amounts so that it is easier to measure factors within a job.</li> <li>• Have a maximum allowable number of points for each of the 10 levels of degree.</li> <li>• Not overlap any other factor.</li> <li>• Be accepted by employees and managers.</li> <li>• Be clearly and objectively defined so that all of the people who rate jobs interpret the factor in the same way.</li> </ul> <p>For each job evaluation method, define enough factors to ensure that a person can adequately rate the job without being overwhelmed by a large number choices. For example, you might set up the following job evaluation factors for the method, Degree:</p> <ul style="list-style-type: none"> <li>• Experience</li> <li>• Problem solving</li> <li>• Accountability</li> </ul>										
Job Evaluation Type	<p>A numeric code that determines whether job information is recorded using degrees or points.</p> <p>Valid codes are:</p> <table style="margin-left: 20px;"> <tr><td>1</td><td>Simple, subjective assignment of job points by each of the ten user defined evaluation factors.</td></tr> <tr><td>2</td><td>Detailed specifications of degree of difficulty or value to each of ten evaluation factors.</td></tr> </table>	1	Simple, subjective assignment of job points by each of the ten user defined evaluation factors.	2	Detailed specifications of degree of difficulty or value to each of ten evaluation factors.						
1	Simple, subjective assignment of job points by each of the ten user defined evaluation factors.										
2	Detailed specifications of degree of difficulty or value to each of ten evaluation factors.										

## Reviewing and Ranking Jobs by Factor

In addition to reviewing jobs by method, you can also review and rank jobs using additional criteria to ensure the accuracy of data entry and equitable salary ranges in your organization. Although you can select a report option to produce similar results, reviewing and ranking jobs by factor provides a greater range of options for sorting and reviewing. A sample group of criteria might include:

- Job Group
- Job Type/Step
- Job Evaluation Method

Use the search button to display the five options that you can use to rank the jobs that you select. The ranking method that you choose provides criteria that weight different aspects of a job to apply in your selection process.

- Pay Grade/Step
- Job Effective Date

You accomplish the task of ranking jobs when you apply one of the job evaluation methods. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Evaluation options include the following:

- Degree Method
- Evalucomp Method
- Factor Comparison Method
- Hay Method
- Point Factor Method

You can also use any of the fields in the Query By Example row to sort, rank, and compare job data. If you wish, you can use the job effective date on each of the forms to limit your search to a desired span of time.

### See Also

- *Running the Job Evaluation Factor Data Report* for information about evaluating jobs and printing reports

### ► To review and rank jobs by factor

From the Job Specifications menu (G05BJ1), choose Review and Rank Jobs by Factor.

1. On Work With Jobs By Factor, complete any of the following fields and click Find:

- Job Group
- Job Type/Step
- Job Evaluation Method

The various methods offer different types of weighting and value considerations that can be used for ranking in your job evaluation.

- Pay Grade/Step
- Job Effective Date

2. Review the information in all fields, based on the selection criteria that you have specified.

## Reviewing Pay Ranges for Jobs

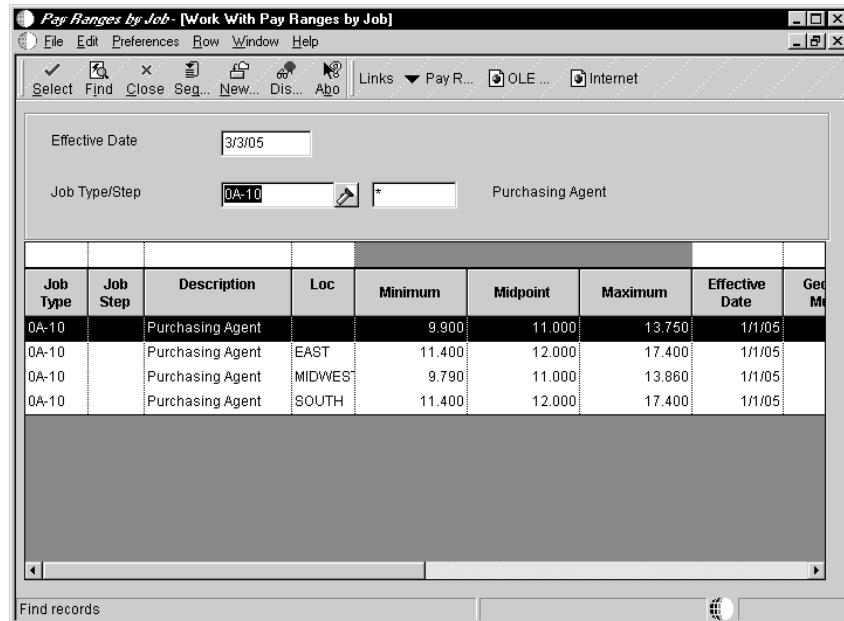
After you define and evaluate the jobs for your organization, the system automatically creates a pay range (minimum, midpoint, and maximum rate) for each job, based on the job evaluation points and the pay range formulas. To verify that the pay ranges for your jobs are equitable and appropriate for the job duties and the geographic location where each job is performed, you can review pay ranges for jobs.

### Before You Begin

- Evaluate the job and verify that it is not associated with a pay grade step. See *Entering Job Evaluation Information*.
- Verify that the job has a pay class. (The pay class defines the way in which an employee who works in the job is paid. Valid pay classes include salary, hourly, and piecework.) See *Entering Job Information*.
- Set up the formulas that the system uses to calculate pay ranges. See *Setting Up Pay-Range Formulas*.

## ► To review pay ranges for jobs

From the Job Specifications menu (G05BJ1), choose Pay Ranges by Job.



1. On Work With Pay Ranges by Job, complete the following field:
  - Job Type/Step
2. To limit the pay ranges that appear, complete the following optional field and click Find:
  - Effective Date
3. To review additional information about a pay range, choose a record and click Select.
4. On Pay Range Formulas, review the information.
5. Click Cancel and then click Close.

### See Also

- *Reviewing Pay Ranges for Pay Grades* for information about reviewing pay ranges for jobs that are associated with pay grades

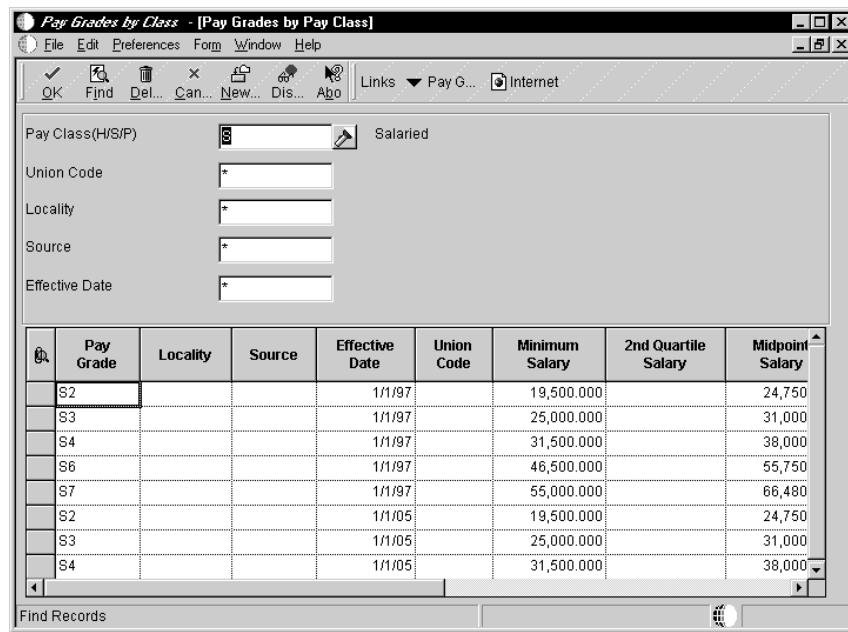
## Reviewing Pay Ranges for Pay Grades

When you define a job, you can enter a pay grade for it. The pay grade defines the pay range (minimum, midpoint, and maximum rate) for the job. To verify that the pay ranges for your pay grades are equitable and appropriate for each

job to which these grades are assigned and for the geographic location where each job is performed, you can review the pay ranges for pay grades.

### ► To review pay ranges for pay grades

From the Job Specifications Setup menu (G05BJ4), choose Pay Grades by Class.



1. On Pay Grades by Pay Class, complete the following field:
  - Pay Class (H/S/P)
2. Complete any of the following optional fields and click Find:
  - Union Code
  - Salary Data Locality
  - Source – Salary Data
  - Date – Effective
3. Review the information and then click Close.

Field	Explanation
Pay Class(H/S/P)	A code that indicates how an employee is paid. Valid codes are: Blank H      Hourly S      Salaried P      Piecework

Field	Explanation
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.
Source	A user defined code (08/SS) that identifies the source of the salary information. To display all pay grades regardless of the source, place an asterisk (*) in this field.



## Updating Pay Rates for Pay-Grade Steps

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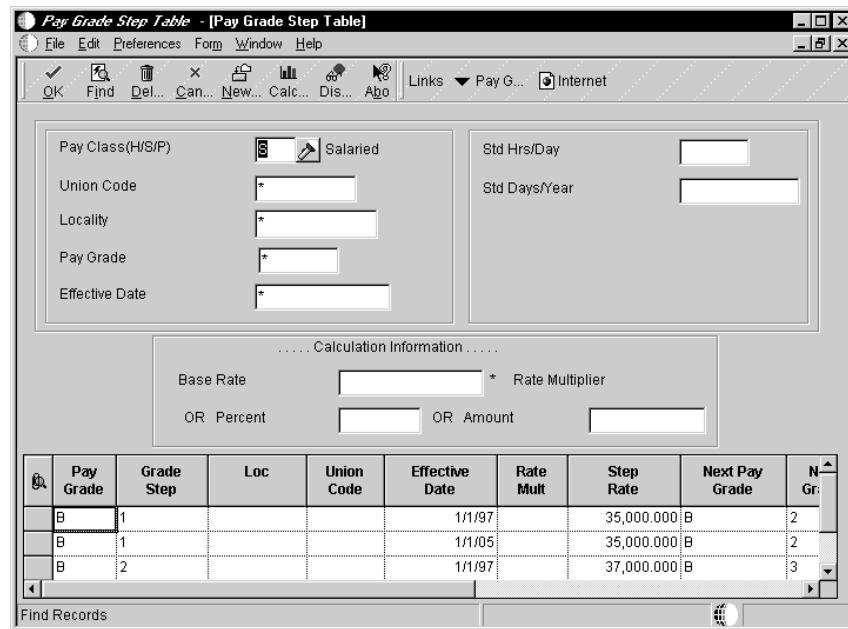
Periodically you might need to adjust the pay rates for your pay grade steps. For example, you might need to enter a cost-of-living increase for certain pay grade steps. Updating the Pay Grade Step Table automatically applies a cost-of-living increase to one or multiple pay grade steps. Therefore, employees in these pay grade steps receive the specified increase.

You can enter a new amount or a percentage change once, and the system automatically applies the change to the specified pay grade steps.

### ► To update pay rates for pay-grade steps

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From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.



1. On Pay Grade Step Table, to locate the pay grade steps that you need to update, complete any of the following fields and click Find:
  - Pay Class (H/S/P)
  - Union Code
  - Locality
  - Pay Grade

- Effective Date
2. Complete either of the following fields:
- Percent
  - Amount of Increase
3. To cause the system to calculate the new pay rate for each pay grade step, choose Calculation from the Form menu.
4. Click OK.

<b>Field</b>	<b>Explanation</b>
Percent	An abbreviation for percentage. ..... <i>Form-specific information</i> .....
Amount of Increase	Enter a percentage change for the pay-grade levels that appear on the form. Enter the percentage as a whole number, not a decimal. For example, enter 5 to indicate 5 percent. A value that represents a monetary amount increase that the system will apply to the selections on the form. ..... <i>Form-specific information</i> .....

# Updating Jobs Globally

---

From the Job Specifications Advanced Operations menu (G05BJ3), choose Update Job Information to EE Master.

When you change job specifications for one or more jobs in your organization, you can automatically update job information for employees that are assigned to those jobs. For example, if you change the pay grade for the job named Accountant, you do not need to individually change the pay grades for all the accountants in your organization. Instead, you can run a program that globally updates pay grades for employees affected by the pay grade change.

When you run this program, the system updates job information on an employee's record to match the information in the Job Master table and generates a list of employee records that are affected by the update.

## Before You Begin

- Make any changes to job information that you want reflected in employee records. See *Entering Job Information*.

## Processing Options for Update Job Information to Employee Master (R08801)

### Process Tab

Use these processing options to select the mode in which you want to run the Update Job Information to Employee Master report, to choose whether category codes from the Job Master table will override category codes in the Employee Master table, and to select the change reason and the effective date that will be assigned to any changes made to the Employee Master table.

#### 1. Processing Mode

Use this processing option to specify whether you want to process the report in proof mode or update mode. Valid values are:

- 0 Proof mode. Use this processing mode to print a report of all changes that will be updated to the Employee Master table when the report is run in update mode. Running this report in proof mode does not update the Employee Master table.

- 1 Update mode. Use this processing mode to update the Employee Master table with updated information from the Job Master table and to print a report of all changes made.

Caution: Once you run this report in update mode, any corrections to updated data in the Employee Master table will need to be done manually. You should run this report in proof mode and verify all information before running in update mode.

## **2. Category Codes**

Help: Use this processing option to specify whether the category codes from the Job Master table will override existing category codes in the Employee Master table. Valid values are:

- 0 Do not copy category codes from the Job Master table. Use this option if you do not want to change category code information in the Employee Master table to match category code information in the Job Master table.
- 1 Copy all category codes from the Job Master table. Use this option to change all category codes in the Employee Master table to match the category codes in the Job Master table.

## **3. Change Reason**

Use this processing option to identify the reason for any changes made to the Employee Master table. You are required to enter a change reason when processing this report in update mode. All updates to the Employee Master table will be made with the change reason entered here. To enter different change reasons for different jobs, you must run this report separately for each job by specifying the job in the data selection of this report. For a list of valid change reasons, see UDC list 06/T.

## **4. Effective Date**

Enter the effective date for all updates made to the Employee Master table. To enter different effective dates for different jobs, you must run this report separately for each job by specifying the job in the data selection of this report. If you do not enter an effective date, the system date is used.

## **Updating the Compa-Ratio for an Employee**

---

From the Employee Advanced and Technical Operations menu (G05BE3), choose Compa-Ratio Batch Calculation.

A company can use a compa-ratio to assess how they are paying employees in relation to the midpoint of the employee's pay range. Compa-ratios can be used to compare employee salaries against a company's intended pay policy. Generally, a compa-ratio of 1.0 means that the employee's current salary falls within close parameters of the company's pay policy.

The compa-ratio is an employee's salary divided by the mid-point amount of the employee's pay grade. For example, if an employee in pay grade X has a salary of 35,000, and the midpoint of pay grade X is 38,000, the employee's compa-ratio is .921. This means that the employee is making 92.1 percent of the midpoint of his or her pay grade. Compa-ratios above or below 1.0 might be for a number of reasons. For example, a new hire typically has a compa-ratio under 1.0. A compa-ratio over 1.0 could mean that the employee has high seniority or performs well.

When calculating the new compa-ratio, the system uses the midpoint of the pay grades that you defined in the Pay Grades by Class table (F082001). The system also uses the midpoint amount that is effective for the effective date.

If any of the information that the system uses to calculate compa-ratio changes, you must run a batch program to update employees compa-ratios. For example, when you change the mid-point amount for a pay grade, you must update the compa-ratio for all of the employees assigned to those salary ranges. You can update compa-ratio for one employee or all employees.

You must update employee compa-ratios if you have run the global mass update program for pay grades, rates, or jobs and their salary ranges. You can run this program in either proof or update mode. You can also have the system print a report that lists the updated information.

If the new compa-ratio differs from the existing compa-ratio, and your system is set up to track employee history, the program creates a history record.

## **Processing Options for Compa-Ratio Batch Calculation**

### **Report**

1. Should the file be updated?  
(1-Yes, 0-No). Default is '0' \_\_\_\_\_
2. Would you like a report?  
(1-Yes, 0-No). Default is '1' \_\_\_\_\_

### **Employee**

1. Enter a valid change reason code for all new records. \_\_\_\_\_
2. Enter the effective date.  
Blank will default to the system date. \_\_\_\_\_

### **Pay Range**

1. Enter the effective date for the Pay Range. Blank will default to the system date. \_\_\_\_\_

## Working with Obsolete Jobs

---

Occasionally, a job that you have defined becomes obsolete. When a job becomes obsolete, you can do one of the following:

- Delete the job from the Job Master table
- Change the status of the job to indicate that it is inactive

Deleting the job from the Job Master table conserves computer disk space and eliminates obsolete information. However, after you delete a job, you cannot use it for review or for historical reporting purposes.

To track historical records of all the jobs within your organization, you can change the status of obsolete jobs rather than delete them. After you change a job status to indicate that it is inactive, you should no longer assign that job to active employees. The inactive job remains in the Job Master table.

After you delete a job from the Job Master table or change a job status to inactive, you must change the employee records of each active employee who is assigned to the deleted or inactive job. When you change these employee records, you manually replace the obsolete job ID with a valid job ID.

To identify the employees assigned to obsolete jobs, you can print the Invalid Job IDs in Employee Master report.

Working with obsolete jobs includes the following tasks:

- Changing the status of a job
- Identifying employees assigned to obsolete job IDs

### Changing the Status of a Job

If your organization needs to keep historical records of obsolete jobs, you can change the status of obsolete jobs rather than delete them. When you change a job status to inactive, you indicate that it is historical. You should not assign inactive jobs to active employees.

 **To change the status of a job**

From the Job Specifications menu (G05BJ1), choose Job Entry and Evaluation.

1. On Work With Job Entry and Evaluation, to locate the obsolete job, complete the following field and click Find:
  - Job Type/Step
2. Choose the obsolete job in the detail area, and then click Select.
3. On Job Entry and Evaluation, change the value in the following field and click OK:
  - Job Status

Field	Explanation
Job Status	A code that indicates whether a job is currently active or inactive. You can define codes using user defined code table system 08, type JS.

## Identifying Employees Assigned to Obsolete Job IDs

From the Job Specifications Advanced Operations menu (G05BJ3), choose Invalid Job IDs in EE Master.

Occasionally, a job you have defined becomes obsolete. A job can become obsolete for many reasons, such as the following:

- Your organization undergoes a restructuring and eliminates one or more jobs
- You restructure the naming conventions for your jobs

When a job becomes obsolete, you can delete it from the Job Master table. Then, for each employee who is assigned to the obsolete job, you must manually replace the obsolete job ID with a valid job ID. To identify the employees who are currently assigned to obsolete jobs, review the Invalid Job IDs in Employee Master report.

When you replace an obsolete job ID in an employee's record, verify that additional job-related information for the employee, such as the pay frequency, pay class, and pay grade step, are appropriate for the new job.

## Reviewing Jobs with Job Reports

---

To review or compare all the information that you entered for jobs, you should complete one or more of the following tasks:

- Running job evaluation reports
- Running compensation reports
- Running job supplemental data reports

### Running Job Evaluation Reports

Complete any of the following tasks to review job evaluation information:

- Running the Job Evaluation Factor Data report
- Running the Job Data and Evaluation Points report
- Running the Job Evaluation Factors report

#### Running the Job Evaluation Factor Data Report

From the Job Specifications menu (G05BJ1), choose Job Evaluation Factor Data.

After you evaluate jobs, you can run the Job Evaluation Factor Data report to review the evaluation method, factors, points, and degrees assigned to each job. Use this information to compare the job evaluations for similar jobs and to determine whether the reporting structure of the jobs accurately reflects their evaluations.

#### See Also

- R051450, *Job Evaluation Factor Data* in the *Reports Guide* for a report sample

#### Running the Job Data and Evaluation Points Report

From the Job Specifications menu (G05BJ1), choose Job Data & Evaluation Points.

You should run the Job Data and Evaluation Points report to review job information with evaluation information such as evaluation method, evaluation date, and evaluation points.

### See Also

- R08001, *Job Data and Evaluation Points* in the *Reports Guide* for a report sample

### Running the Job Evaluation Factors Report

From the Job Specifications Setup menu (G05BJ4), choose Job Evaluation Factors Report.

After you set up your evaluation methods for evaluating jobs, you can run the Job Evaluation Factors Report to review the evaluation methods that you defined. The information printed on the report is identical to the information in the Evaluation Factors table (F08011).

### See Also

- R080012, *Job Evaluation Factors* in the *Reports Guide* for a report sample

### Running Compensation Reports

Complete any of the following tasks to review compensation information:

- Running the Pay Ranges By Job report
- Running the Employees Above/Below Pay Grade report
- Running the Upcoming Employee Reviews by Supervisor report

### Running the Pay Ranges By Job Report

From the Job Specifications menu (G05BJ1), choose Pay Ranges by Job Report.

You can run the Pay Ranges by Job report to review the pay ranges defined for each job. The information that prints is the same information that you review on the Work With Pay Ranges By Job form (P052002).

### See Also

- R052450, *Pay Ranges by Job* in the *Reports Guide* for a report sample

## Processing Options for Pay Ranges By Job

### Defaults

1. Enter a Pay Range – As of \_\_\_\_\_  
Date. Blank will use the system date.

## Running the Employees Above/Below Pay Grade Report

From the Job Specifications menu (G05BJ1), choose Employees Above/Below Pay Grade.

Run the Employees Above/Below Pay Grade report to review employees paid above the maximum amount for their pay grade or below the minimum amount for their pay grade.

### See Also

- R052001, *Employees Above Pay Grade* in the *Reports Guide* for a report sample

## Processing Options for Employees Above/Below Pay Grade

### Title Display

- 1) Report Title Display:  
Blank = Employees Above Pay Grade  
Maximum                  1 = Employees  
Below Pay Grade Minimum

## Running the Upcoming Employee Reviews by Supervisor Report

From the Periodic Processing menu (G05B2O), choose Upcoming Reviews.

This is a batch process to report employees who have upcoming reviews by supervisor. Each employee is displayed with the Dates of Next Review and Type of Review. You can set up processing options to determine whether this report runs automatically on a specified date, to activate Enterprise Workflow Management, and to allow the system to update the Upcoming Reviews By Supervisor program (P052200) on the self-service website. If Workflow is activated, the system sends reminder messages to each supervisor about pending reviews.

You also set a processing option to determine which of the three versions you want to run. A version exists that reports on overdue reviews and a version that reports on all employees with upcoming reviews without specified review dates. Neither of these versions starts Workflow.

## See Also

- *Reviewing Upcoming Employee Reviews By Supervisor* and *Setting Up Upcoming Reviews By Supervisor* for more information

# Processing Options for Upcoming Employee Reviews by Supervisor Report

## Defaults Tab

Use these processing options to select an employee for this report and to include the Uniform Resource Locator for supervisory review instructions.

### 1. Employee Number Display

Use this processing option to specify the employee number that you want to print on the report. Valid values are:

- A Address book number
- S Employee tax identification number
- O Other number

### 2. URL for Supervisor Review Instructions

Use this processing option to specify the uniform resource locator for the supervisor review instructions.

## Process Tab

Use these processing options to specify whether to run the Workflow Reminder Process and to define defaults that limit the report to specific parameters.

### 1. Workflow Reminder Process

Use this processing option to specify whether to run the workflow reminder process. Valid values are:

- 1 Run the workflow process.
- 0 Do not run the workflow process.

### 2. From Date

Use this processing option to limit reviews. The review date must be greater than or equal to the from date.

### 3. Thru Date

Use this processing option to limit reviews processed. The review date must be less than or equal to the Thru date.

### 4. Days From Today

Use this processing option to limit reviews processed. Enter Days From Today to process all new review dates that are less than or equal to the system date and the number of days entered into the processing option. Enter Date of Thru Date to ignore this option.

## Running Job Supplemental Data Reports

Complete the following tasks to review supplemental data for jobs:

- Running the Job Supplemental Data report
- Running the Job Data by Data Type report

### Running the Job Supplemental Data Report

From the Job Supplemental Data menu (G05BSDJ1), choose Job Supplemental Data Report.

This report helps you to review all jobs that have information for all data items.

### See Also

- R080412, *Job Supplemental Data* in the *Reports Guide* for a report sample

### Processing Options for Job Supplemental Data Report

#### Narrative

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

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### Running the Job Data by Data Type Report

From the Job Supplemental Data menu (G05BSJD1), choose Job Data by Data Type Report.

Run the Job Data by Data Type Report to review all jobs by a specified data item. For example, you can inquire on the Hazardous Materials Handling data item to identify all jobs that have this training as a requirement.

**See Also**

- R0804702, *Job Data by Data Type* in the *Reports Guide* for a report sample

# Competency Management

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. These qualifications, such as C programming skills, CPA license, and fluency in French, are called *competencies*. You can use competency management to identify both employee competencies (the competencies that employees possess) and job competencies (the competencies that are required to perform a specific job within the organization). You might want to track competencies for employees but not for jobs. However, if you want to track competencies for jobs, you must also track competencies for employees.

Working with competency management includes the following tasks:

- Defining organizational structures for job competencies
- Working with job competency information
- Working with competencies in organizational structures
- Working with employee competencies
- Working with gap analysis

**Caution:** When you enter and review information for competency management, use the OneWorld menus, not the fast path, to access the forms. Accessing forms from the fast path might produce unexpected results.

## Advantages of Competency Management

Employees use their competencies to help the organization achieve its goals and objectives. By linking the competencies of an organization with employee jobs, you can determine how employees can best help the organization meet its goals and objectives, thereby giving employees competency-based job descriptions that provide clear, detailed expectations and illustrate the way in which each employee fits into the whole organization.

Some types of competencies, such as education and training, are relatively simple to track and quantify, while more intangible skills, such as negotiation skills or knowledge of pricing strategies, are more difficult to quantify. Categorizing and quantifying competencies allows you to create a searchable database that you can use to locate employees who possess specific competencies, thereby giving you the ability to efficiently reallocate employees



in response to market or organizational changes. Such reallocation can help your organization reduce operating costs and make employees more productive.

Effectively managing competencies can also help your organization train and retain competent employees. The organization benefits by having more productive employees and less employee turnover, which results in a lower operating cost. Employees benefit by having a set of goals and expectations to do their job and improve in their careers. The challenge for human resource specialists is to align and link the goals and objectives of the corporation with the valuable human assets within the organization.

## Core Competencies

Core competencies are competencies that help employees meet the high-level goals and objectives of the organization. All of the employees in the organization should be proficient in these core competencies. You can track core competencies only if you are tracking competencies for both jobs and employees.

## Inherited Competencies

To simplify the tracking of job competencies, you can attach individual competencies to each level in the organizational structure, and then attach jobs to those levels. *Inheritance* is the process of attaching job competencies to high levels in the organizational structure so that they filter down to the lower levels. Inheritance means that, when you attach a competency to a business unit that is at a high level in the organizational structure, that competency applies to the jobs in that business unit, as well as all of the jobs that are in lower-level business units. You can further take advantage of inheritance by assigning competencies at the company or job-group level. For example, you might define Commitment to Quality as a core competency and attach it to the company level of the organizational structure so that all of the jobs in the company will inherit that competency. For jobs that are at lower levels of the organizational structure, you can attach additional, more specific competencies and override the inherited competencies, if necessary.

Employees are expected to be proficient in the competencies required for their jobs, as well as in any inherited competencies. The following are advantages of inherited competencies:

- You can reduce data entry tasks by defining and attaching a competency in one place only.
- When you change a competency, you make changes in one place and all jobs that inherit that competency automatically inherit the changes.
- You can attach one competency to many jobs.

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## Gap Analysis

Competency management gives employees and managers a clear, quantifiable measurement of the current and future needs of the organization and the abilities of the employees. When you track both employee competencies and job competencies, you can easily identify discrepancies between the competencies that an employee possesses and the competencies that are required for the employee's current job, or for a job to which the employee aspires. The process of identifying and analyzing such discrepancies is called *gap analysis*. Employees and managers can use self-service applications to review gap analysis information. You can use gap analysis to review career paths for employees who want to examine the possible career opportunities within the organization.



## Defining Organizational Structures for Job Competencies

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Before you can assign jobs and job competencies to the hierarchical levels in your organizational structure, you must define the organizational structure that you will use to track competency information. Although you can use the financials organizational structure to track competency information, J.D. Edwards recommends that you create a separate structure. You can also create new business units for job competencies so that you are not using the business units that your organization uses for financial reporting purposes. By maintaining the competency organizational structure and business units separately from the financials structure, the human resources department can revise the competency structure without affecting the structure that the accounting department uses to make financial decisions. Likewise, when the accounting department needs to revise the financials organization structure, the competency structure will not be affected.

Defining organizational structures for job competencies includes the following tasks:

- Creating new organizational structures for job competencies
- Copying existing organizational structures
- Changing the default organizational structure
- Updating date-effective information for organizational structures

When you define a separate organizational structure for job competencies, you can either create a new structure or copy and modify an existing structure, such as the financials structure. In most cases, it is probably more efficient to copy an existing structure; however, if the existing structures are very different from the one that you intend to create, you might choose to create a new organizational structure.

To help you explore a variety of scenarios, you might create several draft versions of the organizational structure. When you have decided which draft you want to use, you can activate that draft and define it as the default organizational structure. When an organizational structure becomes obsolete, you can update date-effective information to indicate that it is no longer the current structure.

## Creating New Organizational Structures for Job Competencies

From the Advanced Organization Setup menu (G094111), choose Organization Structure Definition.

To associate jobs and job competencies with the hierarchical levels in your organization, you can create an organizational structure that is specific to job competencies. In many cases, you can base the competency organizational structure on the structure that the accounting department uses for financial reporting (the financial organizational structure). If the financial organizational structure is much different from the organizational structure that you need to create for competencies, creating a new structure is probably more efficient than copying and modifying an existing structure.

To give the human resources department more flexibility in attaching competencies, you might also create new business units for the competency organizational structure. When you create a new business unit for job competencies, enter 1 in the Subledger Inactive field so that no activity regarding the business unit will be reflected in the business units and organizational structure that your organization uses to track financial information.

To create a new organizational structure, use the Business Unit Structure Definition program (P0050B). To create new business units, use the Business Units program (P0006). You complete the same steps to create the new organizational structure and business units for job competencies as you would to create them for financials. When you create the structure for job competencies, you do not need to run the Business Unit Structure Build program (R10450).

The new structure that you create is an inactive, or draft, structure that contains no effective dates. You can modify the draft as many times as necessary. When you are ready to begin using this organizational structure, run the Activate Job Competencies report (R080014) to activate the draft structure and set it up as the default structure for job competencies. This program also enters an ending date for the organizational structure that was previously the default structure, if one exists.

### See Also

- *Defining Organization Report Structures* in the *General Accounting Guide* for step-by-step instructions for creating a new organizational structure
- *Setting Up Business Units* in the *General Accounting Guide* for step-by-step instructions for creating a new business unit
- *Updating Date-Effective Information for Organizational Structures* for more information about the Activate Job Competencies report
- *Copying Existing Organizational Structures* for information about an alternative to creating a new organizational structure

### Copying Existing Organizational Structures

To associate jobs and job competencies with the hierarchical levels in your organization, you can create an organizational structure that is specific to job competencies. In many cases, you can save time by copying the existing organizational structure for financials and then modifying it so that it is appropriate for tracking job competencies. The business units for the new organizational structure will be the same as those that are in the organizational structure that you copied; however, in the new structure, you can change the arrangement of the business units, if necessary.

When you copy an existing structure, the system creates a draft structure that contains no effective dates. You can modify the draft as many times as necessary. When you are ready to begin using this organizational structure, run the Activate Job Competencies report (R080014) to activate the draft structure and set it up as the default structure for job competencies. This program also enters an ending date for the organizational structure that was previously the default structure, if one exists.

You can also copy job competency information from an existing organizational structure to a new organizational structure that does not yet have job competency information associated with it.

The copy program includes both a form where you specify the information that you want to copy and a batch process. When you click OK on the form, the system automatically runs the batch process and prints a report that lists the information that you want to copy. You can run the batch process in proof mode, which allows you to verify the information before the system updates the database. You must run the copy program from a client workstation (NT), not from an internet or intranet site. Internet and intranet servers do not have the specific application program interfaces (APIs) that the system needs to perform the copy.

#### Before You Begin

- Set up the program to run on your local workstation. See *Mapping Objects* in the *Configurable Network Computing Implementation Guide*.
- Enter a code for the new organizational structure in UDC 00/TS.

#### **To copy an existing organizational structure**

---

From the Competency Management Advanced and Technical menu (G05BC3), choose Copy Job Competency. Alternatively, from the Competency Management Periodic Processing menu (G05BC2), choose either Jobs in an Organization or Job Competencies in an Organization, and then choose Create Draft from the Report menu.

1. On Copy Job Competencies, complete the following fields:
  - From Type Structure
  - To Type Structure
  - Proof Mode
  - Show Report Details
2. If the From Type Structure has job competency information associated with it, complete any of the following optional fields:
  - Copy Job Competencies
  - Copy Job Competency Descriptions
  - All Translations
3. If you choose to copy competency descriptions, choose one or more of the options in the following group:
  - Copy Specific Descriptions
4. Click Submit.

The system prints a report that lists the information that will be copied. If you did not turn the Proof Mode option on, the system also runs a batch process that updates the database with the copied information.

<b>Field</b>	<b>Explanation</b>
From Type Structure	A user defined code (00/TS) that identifies the type of organizational structure, such as financial or responsibility. Each type of structure can have a different hierarchy.
Proof Mode	Check this box to view a report of the job competencies and/or job competency descriptions to be copied. The copy is not actually done if this box is checked.
Show Report Details	Check this box to have the details of the copy show up on the report.
Copy Job Competencies	Check this box to copy job competencies associated with a structure type.
Copy Job Competency Descriptions	Check this box to copy job competency descriptions.
All Translations	Check this box to copy all the translations of the job competency descriptions. If this check box is not checked, only the domestic (blank) language is copied.

## Processing Options for Copy Job Competencies (P080020)

### Version Tab

#### 1. Copy Job Competencies Report Version

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

#### 2. Job Competencies in an Organization Version

Use this processing option to specify the version of the Copy Job Competency Report (R080015) to use when exiting to the program. Blank will use version XJDE0001.

## Changing the Default Organizational Structure

As you work with job competency information, you might create several organizational structures for job competencies. Some of these structures might be draft structures that you have either decided not to use or are planning to use at some time in the future. For example, if your organization is planning to acquire an additional company, you might create a draft structure that you use to incorporate jobs from the new company into your existing organizational structure. You might also have some historical organizational structures. Historical structures are those which your organization used at one time but is no longer using. A historical structure remains active, but it cannot be used as the default structure.

The default organizational structure is the structure that your organization is currently using to track job competency information. When managers and employees use self-service to review job competency information, they can access only the information for the default structure. For security purposes, only human resources administrators can access draft and inactive structures.

Occasionally, you might need to change the default organizational structure for job competencies. For example, you might have mistakenly activated a draft structure that should not have been activated for another month.

### ► To change the default organizational structure

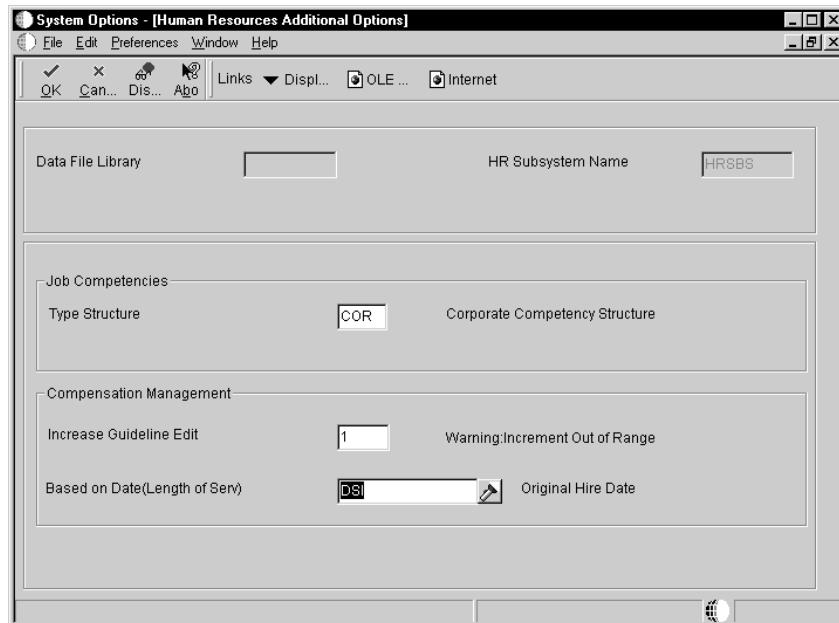
---

From the HRM Setup menu (G05B4), choose System Option.

1. On Work with HRM Foundation System Options, choose HR Addl. Options from the Row menu.

2. On Human Resources Additional Options, complete the following fields, and then click OK:

- Type Structure
- Based on Date(Length of Serv)



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Field	Explanation
Type Structure	A user defined code (00/TS) that identifies the type of organizational structure, such as financial or responsibility. Each type of structure can have a different hierarchy.

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## Updating Date-Effective Information for Organizational Structures

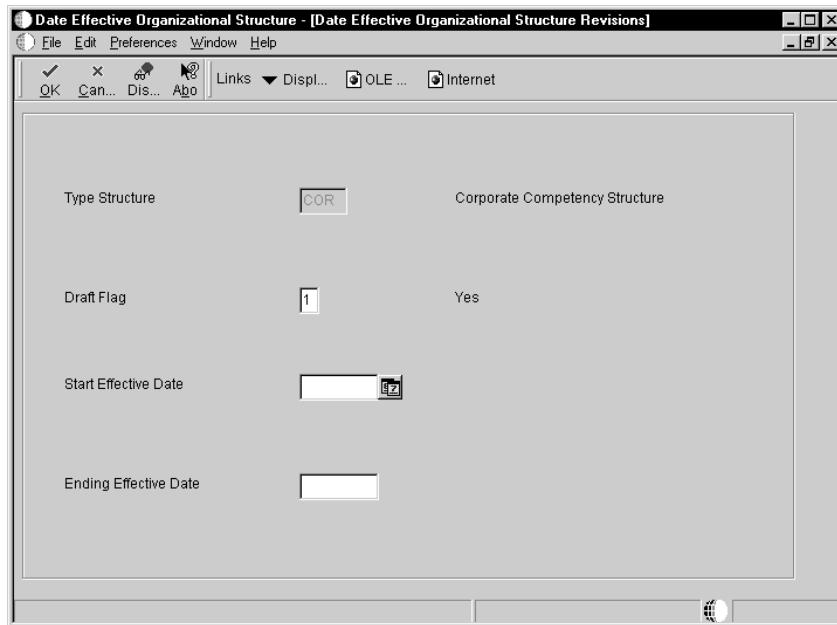
When you create a new organizational structure for job competencies using the Organizational Structures Revision program (P0050), the system does not recognize the structure as a valid structure for job competencies. To make the structure valid for job competencies, you must update its date-effective information. You do not need to enter this information if you used the Copy Job Competency program (P080020) to create the organizational structure for job competencies.

This program updates the Date-Effective Organizational Structure table (F0800608).

### ► To update date-effective information for an organizational structure

From the Competency Setup menu (G05BC4), choose Date Effective Organizational Structure.

1. On Work with Date Effective Organizational Structures, complete the following field and click Find:
  - Organizational Structure
2. Choose a record in the detail area and click Select.



3. On Date Effective Organizational Structure Revisions, complete the following fields:
  - Draft Flag
  - Start Effective Date
4. Complete the following optional field:
  - Ending Effective Date
5. Click OK.

After you complete this task, you must run the Activate Job Competencies report (R080014) to complete the process of activating the draft structure. See *Activating Draft Organizational Structures*.

<b>Field</b>	<b>Explanation</b>				
Draft Flag	<p>A code that indicates whether an organizational structure is in draft mode and has not yet been activated. Valid values are:</p> <table style="margin-left: auto; margin-right: auto;"><tr><td style="text-align: center;">1</td><td style="text-align: center;">Yes</td></tr><tr><td style="text-align: center;">0</td><td style="text-align: center;">No</td></tr></table>	1	Yes	0	No
1	Yes				
0	No				

## **Working with Job Competency Information**

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You use competency management to track the competencies that employees possess and to compare these competencies with those that are required for the employees' jobs. You define job competencies to establish the criteria required for each job in your organization. You can make job competencies as specific or general as you choose. The competencies that you define for jobs do not need to correspond directly to the competencies that you define for employees. To ensure that job competencies apply to a variety of employees in many different jobs, you might choose to define job competencies more broadly than employee competencies.

Working with job competency information includes the following tasks:

- Defining job competencies and descriptions
- Defining job competency options
- Reviewing the Job Profile report

When you define job competencies, you can enter detailed descriptions for them. These descriptions are electronic attachments to the form. Then, use competency options to indicate the employee competencies that fulfill a particular job competency. To review a written summary of all of the competency descriptions associated with a particular job, print the Job Profile report.

### **Defining Job Competencies and Descriptions**

Before you assign job competencies to jobs and business units, you must define job competencies and enter descriptions of them. You can enter detailed descriptions for job competencies that explain the criteria on which each competency is based. These descriptions simplify the process of differentiating between similar job competencies. You can create multiple competency descriptions for each job competency and customize each description to a specific audience.

For example, you might define the following descriptions and audiences for the Negotiation Skills competency:

<b>Human resources administrator</b>	Those who possess negotiation skills are able to work with other parties to obtain mutually beneficial objectives. Negotiation requires assertiveness to achieve one's own goals while considering the concerns of the other party.
<b>Managers</b>	Employees who have good negotiation skills show a willingness to work with others to obtain a desired objective.
<b>Employees</b>	When demonstrating negotiation skills, you remain focused on the desired result and recognize when the process is moving in an appropriate direction. You are able to appreciate the needs of others and assume that the negotiation will end in a decision that is agreeable to all of the parties involved.

To simplify the process of locating and comparing job competencies, you can use category codes to group descriptions for similar job competencies. For example, you might set up a category code called Technical that you would use to group all job competencies that apply to the technical jobs within your organization.

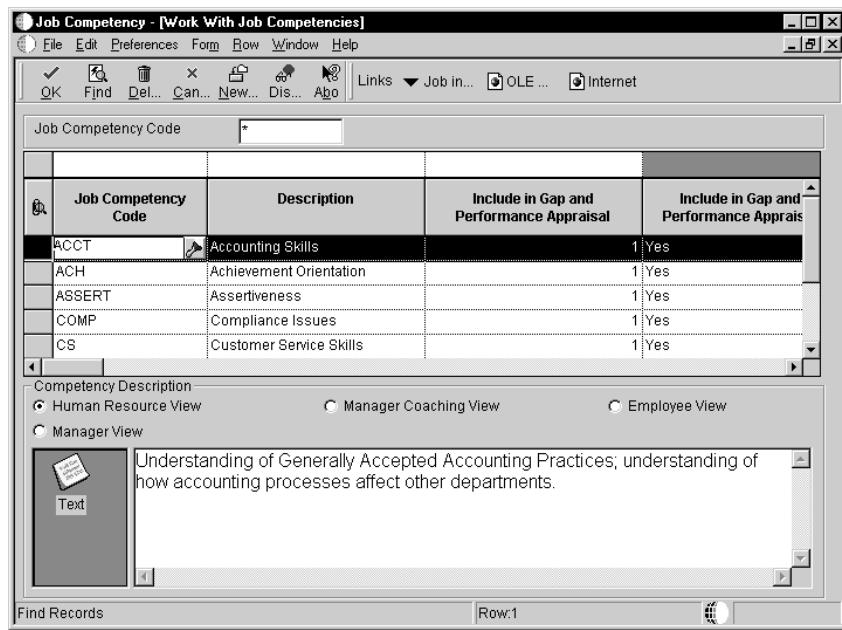
## **Before You Begin**

- Set up the category codes for job competencies (UDC 08/C0 through 08/C9). See *Defining Category Codes*.
- Set up processing options for the codes for Job Competencies in an Organization (P08006). These options determine the types of views for which you will be creating job competency descriptions. For example, you might have an HR view and a Manager view. If you need to add or change the existing views, you can add codes to user defined code list 08/UD. See *Customizing User Defined Codes* in the *OneWorld Foundation Guide*.

### **To define job competencies and descriptions**

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From the Competency Management Periodic Processing menu (G05BC2), choose Job Competency.



1. On Work with Job Competencies, click Find to review any existing job competencies.
2. Move the cursor to the first blank row in the detail area and then complete the following fields:
  - Job Competency Code
  - Description
  - Include in Gap and Performance Appraisal
3. Complete any of the following fields that apply to your organization:
  - Job Competency Category Code 001
  - Job Competency Category Code 002
  - Job Competency Category Code 003
  - Job Competency Category Code 004
  - Job Competency Category Code 005
  - Job Competency Category Code 006
  - Job Competency Category Code 007
  - Job Competency Category Code 008
  - Job Competency Category Code 009
  - Job Competency Category Code 010
4. To indicate the audience for this job competency description, click an option that corresponds to a type of view, such as one of the following:
  - Human Resource View

- Manager Coaching View
- Employee View
- Manager View

You define these views in the processing options for Job Competencies in an Organization (P08006).

5. Choose Edit Description from the Row menu.
6. On Job Competency Description Maintenance, enter a text description in the media attachment area at the bottom of the form.
7. To attach other types of electronic attachments, such as pictures and links to Internet pages, right-click in the exit bar to the left of the media object, choose New from the menu, and then choose the type of object that you want to attach.
8. When you have finished entering attachments, click OK.
9. To enter another job competency and description, repeat steps 1 through 8.

Repeat these steps until you have entered a description for each of the audiences.

<b>Field</b>	<b>Explanation</b>
Job Competency Code	Used to uniquely identify each job competency. Competencies are high-level human attributes that are directly related to facilitating the achievement of a company's goals and objectives. These competencies are also the foundation for an employee's job and job description.
Include in Gap and Performance Appraisal	A flag to specify whether a competency will be included in a Gap Analysis evaluation. A Gap Analysis measures how an employee's competencies compare with the competencies required by a particular job. If INCLG is equal to a 1, the job competency code will be included in the Gap Analysis evaluation. If INCLG is equal to a 0, the job competency code will not be included in the Gap Analysis evaluation.

<b>Field</b>	<b>Explanation</b>
Job Competency Category Code 001	<p>You can use these user defined codes (codes 01 through 10) to define categories and groupings of skills or knowledge that are related to the job competency and that suit your company's needs. A limited sample of groups for which you might want to define job competency category codes could include:</p> <ul style="list-style-type: none"> <li>• Technical (discipline example)</li> <li>• Marketing (departmental example)</li> <li>• Western Europe (regional example)</li> <li>• Medical (industry example)</li> </ul> <p>For example, if you assign Technical to Category Code 001, then Technical will replace Category 01 as the field name. After assigning a category name, you may then set up a list of valid values for the category. Samples of valid values for Technical might include the following:</p> <ul style="list-style-type: none"> <li>• Hardware</li> <li>• Software</li> <li>• C programming (programming language example)</li> <li>• Unix (operating system example)</li> </ul> <p>Job competency category codes were not designed to track levels of proficiency, skill, or expertise demonstrated or required for a competency. Those levels required for a competency are attributes of Competency Rules.</p>

## Processing Options for Job Competency (P08009)

### Version Tab

#### 1. Job Competencies in an Organization Version

Use this processing option to specify the version of the Job Competencies in an Organization program (P08006) to use. The default is ZJDE0001.

#### 2. Jobs in an Organization Version

Use this processing option to specify the version of the Jobs in an Organization program (P08007) to use. The default is ZJDE0001.

#### 3. Copy Job Competencies

Use this processing option to specify the version of the Copy Job Competencies program (P080020) to use. The default is ZJDE0001.

## Defining Job Competency Options

Typically, job competencies represent broad categories of knowledge or experience, while employee competencies represent measurable and observable traits and behaviors that demonstrate proficiency in one or more job competencies. While employee competencies are usually closely related to job competencies, they might not correspond exactly. In many cases, two or more employee competencies combine to satisfy a job competency, and a single employee competency can fulfill multiple job competencies. For example, the job competency Negotiation Skills might require that employees be proficient in the employee competencies Communication Skills and Conflict Management Skills. The employee competency Communication Skills might also apply to other job competencies, such as Management Skills and Teamwork.

To associate employee competencies with the job competencies that they fulfill, you enter options for job competencies. A job competency option represents a group of employee competencies that can be combined to fulfill a job competency. If more than one combination of employee competencies can be used to fulfill a job competency, you can create multiple options for that job competency. For a job competency that has multiple options, you can indicate which option is the preferred option.

### Before You Begin

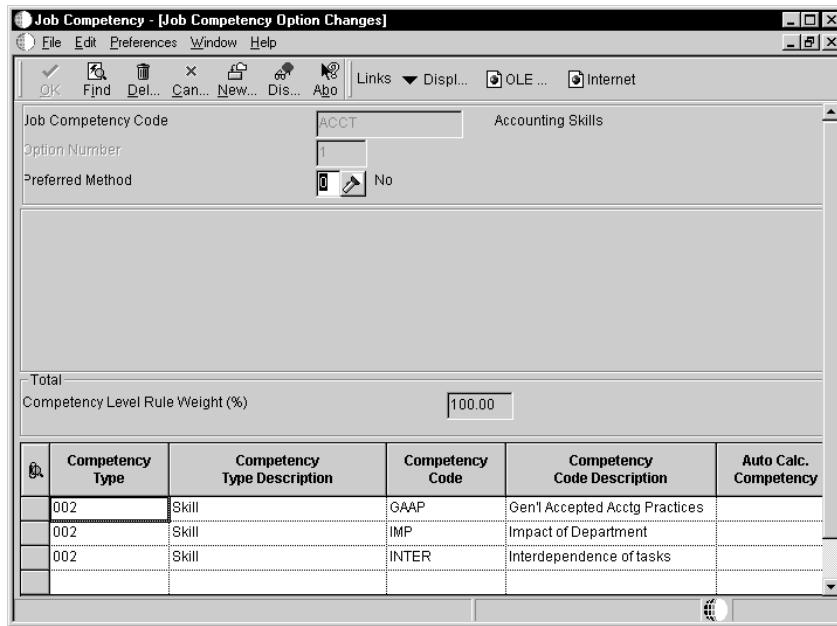
- Define job competencies and descriptions. See *Defining Job Competencies and Descriptions*.
- Define employee competencies. See *Defining Employee Competencies*.

#### ► To define job competency options

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From the Competency Management Periodic Processing menu (G05BC2), choose Job Competency.

1. On Work with Job Competencies, click Find to review the existing job competencies.
2. Choose a record in the detail area and then choose Competency Options from the Row menu.
3. On Work with Job Competency Options, click Add.



4. On Job Competency Option Changes, complete the following fields:
  - Option Number
  - Preferred Method
5. Complete the following fields in the detail area:
  - Competency Type
  - Competency Code
  - Auto Calc Competency
  - Required Competency Level
  - Competency Level Acceptable Low
  - Competency Level Acceptable High
  - Competency Level Rule Weight
6. To add additional employee competencies to this job competency option, repeat step 5.
7. When you have finished adding competencies for this option, click OK.
8. To add another option for this job competency, repeat steps 3 through 6.
9. When you have finished adding job competency options, click OK.

Field	Explanation
Option Number	A number that represents a user defined approach that an employee can use to demonstrate proficiency in a particular job competency. There can be more than one option for a job competency.
Preferred Method	This flag indicates what option in the Competency Options table is the preferred option. It is for informational purposes only.
Competency Type	<p>A user defined code (05/CY) that represents a competency table, or category, for which you can track employee competencies. Valid values are:</p> <ul style="list-style-type: none"> <li>01 Training</li> <li>02 Skill</li> <li>03 Accomplishment</li> <li>04 Certification</li> <li>05 Degree</li> <li>06 Language</li> </ul>
	The values in this user defined code list are hard-coded and cannot be changed. Therefore, each of the competencies that you track must pertain to one of these competency types. Adding additional values to this list requires system customizations.
Competency Code	A code that specifies a competency within a competency type. For example, a competency for the competency type "Skill" might be "C programming" or "Driving a forklift."
Required Competency Level	Required Level indicates the required competency level for a particular job.
Competency Level Acceptable Low	Expected Low Competency Level represents the low point in a range for a particular job competency. For example, if an employee's competency level falls above the low competency level and below the high competency level, the employee's job competency level is sufficient for a given job competency.
Competency Level Acceptable High	Represents the high point in a range for a particular job competency. For example, if an employee's competency level falls above the low competency level and below the high competency level, the employee's job competency level is sufficient for a given job competency.
Competency Level Rule Weight (%)	Competency Level Options Weight is used to weigh the employee competencies that make up each option within a job competency.

## Reviewing the Job Profile Report

From the Competency Management Periodic Processing menu (G05BC2), choose Job Profile Report.

When you need a formal description of a job, such as when you are advertising a job opening, you can print the Job Profile report. This report displays detailed information about the job, such as job competencies, job competency options, and job competency descriptions. It also displays the employee competencies and competency levels that are required for the job.

### See Also

- *R080021, Job Profile* in the *Reports Guide* for a report sample

## Processing Options for Job Profile Report (R080021)

### Select Tab

#### 1. Organizational Type Structure

Use this processing option to specify the organizational structure used in the Job Description report (R080021). This option will produce a report of the job descriptions for selected jobs and organizational business units.

If this field is left blank, the default organizational structure will be used.

#### 2. Job Type

Use this processing option to produce a Job Description report (R080021) on a specific job type. If a value is entered, it is necessary to also specify an organizational business unit.

Blank will produce a Job Description report (R080021) of all jobs in an organizational business unit and organizational structure.

#### 3. Job Step

Use this processing option to produce a Job Description report (R080021) on a specific job step. If a value is entered, you must also specify an organizational business unit and the job type.

A \* specifies to create a Job Description report on all job steps within a job type.

#### 4. Organizational Business Unit

Use this processing option to create a Job Description report (R080021) based on a specific organizational business unit. If you leave this processing option blank, a Job Description report will be created for all specified jobs in all organizational business units.

## **5. Date - Effective**

Use this processing option to produce a Job Description report (R080021) at a specific time.

Blank will produce a Job Description report (R080021) of jobs on the current date.

## **Versions Tab**

### **1. Job Competencies in an Organization**

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

## **Display Tab**

### **1. First Job Competency Description**

Use this processing option to specify whether to display the description for the first user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the first user defined description found in the processing options for the Job Competency Workbench.

### **2. Second Job Competency Description**

Use this processing option to specify whether to display the description for the second user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the second user defined description found in the processing options for the Job Competency Workbench.

### **3. Third Job Competency Description**

Use this processing option to specify whether to display the description for the third user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the third user defined description found in the processing options for the Job Competency Workbench.

### **4. Fourth Job Competency Description**

Use this processing option to specify whether to display the description for the fourth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the fourth user

defined description found in the processing options for the Job Competency Workbench.

### **5. Fifth Job Competency Description**

Use this processing option to specify whether to display the description for the fifth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the fifth user defined description found in the processing options for the Job Competency Workbench.

### **6. Sixth Job Competency Description**

Use this processing option to specify whether to display the description for the sixth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the sixth user defined description found in the processing options for the Job Competency Workbench.



## Working with Competencies in Organizational Structures

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To simplify the process of tracking job competencies within your organization, you can attach jobs and job competencies to the hierarchical levels within the organizational structure that you created for job competencies.

When you attach a job competency to the entity that is at the top of an organizational structure, the system applies that competency to all of the jobs that are attached to the organizational structure. Likewise, when you attach a competency to a business unit within an organizational structure, the competency applies to all of the jobs within that business unit. This feature, called *inheritance*, reduces much of the administrative work associated with attaching job competencies and helps you ensure that competencies are attached consistently throughout your organization.

Attaching job competencies to organizational structures saves you time by reducing the number of competencies that you need to assign to each job. Attaching jobs to organizational levels allows you to take advantage of the inheritance feature, as well as to indicate the business unit in which the job resides. A job can reside in more than one business unit within the structure.

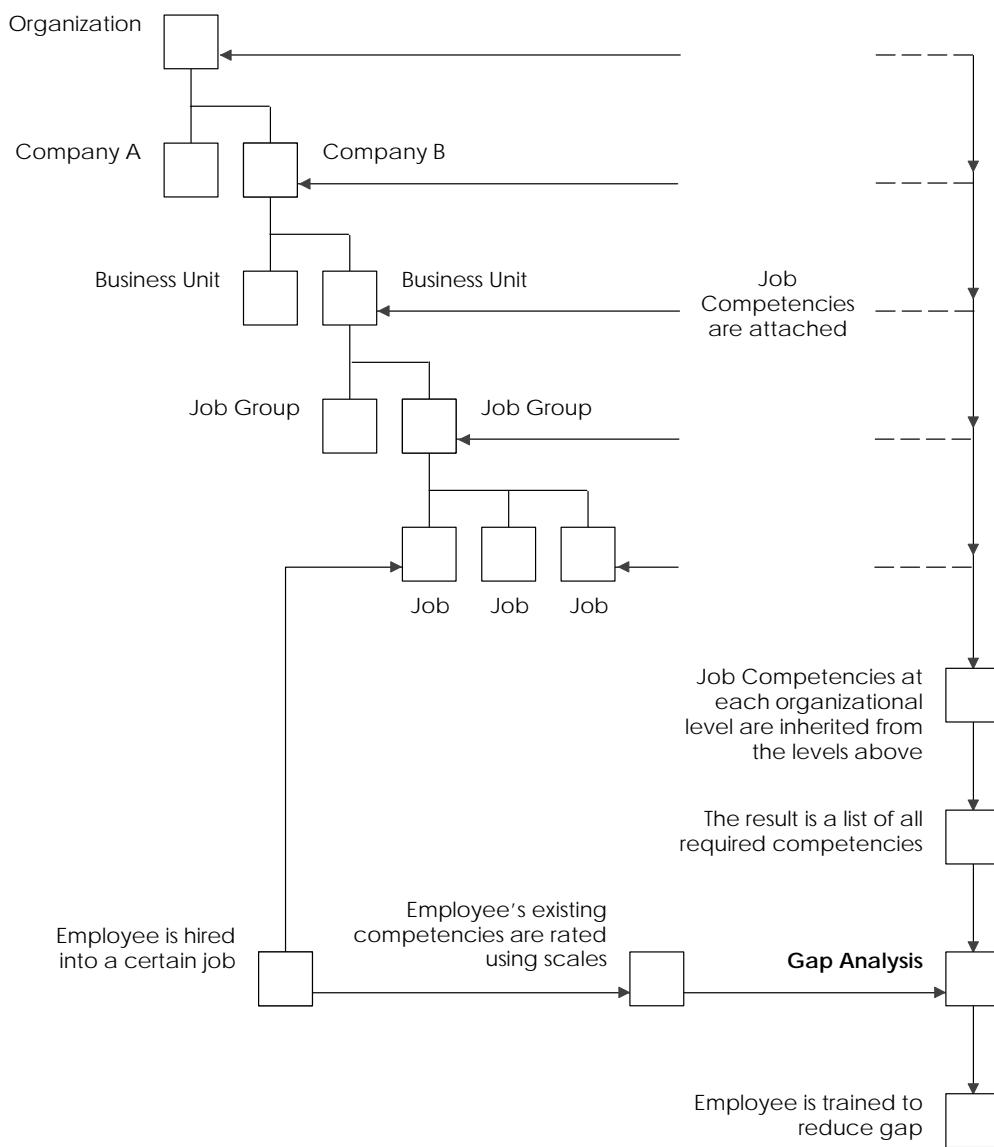
For each business unit, job group, and job, you can override certain information for inherited competencies, when necessary. To verify that inherited and overridden competencies occur where you are expecting them, you can review override information by job, job group, and business unit. If necessary, you can revise this information.

If your organization has employees in more than one country, you might want to translate the competency descriptions so that all employees can understand them. After you have reviewed job competencies and their overrides, you can enter these translated versions of the competency descriptions and attach them to the job competencies.

Typically, when you are working with competencies in organizational structures, you use a draft structure. When you have finished attaching jobs and job competencies to organizational levels and are satisfied with the results, you are ready to activate the draft organizational structure.

Working with competencies in organizational structures includes the following tasks:

- Attaching job competencies to organizational levels
- Attaching jobs to organizational levels



- Attaching additional job competencies
- Overriding inherited job competencies
- Reviewing job competency information
- Translating job competency descriptions
- Activating draft organizational structures

The following graphic illustrates how competencies can be attached at the various levels in an organization:

### Attaching Job Competencies to Organizational Levels

To reduce data entry and simplify the process of updating competencies as the goals and objectives of your organization change, you can attach job competencies to the hierarchical levels in your organizational structure. You perform this task after you have created an organizational structure for job competencies and defined the job competencies that your organization uses. Each level in the organizational structure represents a business unit within the organization.

You can use the Job Competencies in an Organization program (P08006) to assign core competencies (the competencies that apply to all of the employees in your organization) to the organizational structure itself. When you assign a competency to an organizational structure, all of the jobs that are attached to the structure inherit those competencies.

For competencies that apply only to specific business units within the structure, you can also use this program to attach job competencies to those individual business units. After you attach competencies to the organizational structure and the levels (business units) within it, you can use the Jobs in an Organization program (P08007) to attach additional, more specific competencies to job groups and individual jobs. You can also override certain job competency information at these lower levels.

You can attach job competencies to the current, active organizational structure or to a draft structure. When you attach a job competency to an organizational level, all of the subordinate organizational levels inherit that job competency. Therefore, J.D. Edwards recommends that you begin attaching competencies at the organizational structure level and then work down through the business units in each subordinate level. After you attach a competency to a business unit, you cannot attach that competency to a business unit that is at a subordinate or superior level within the organizational structure.

### Self-Service Considerations

Your organization might have set up the Job Competencies in an Organization program as a self-service application that managers and employees can use to determine where competencies are assigned within the organizational structure. If you are accessing Job Competencies in an Organization from a self-service program, such as the Form menu on Manager's Workbench (P08712), you can review the organizational structure to see where each competency is attached, but you cannot attach or delete any competencies within the structure.

### Before You Begin

- Define the organizational structure for job competencies. See *Defining Organizational Structures for Job Competencies*.

- Define the job competencies for your organization. See *Defining Job Competencies and Descriptions*.

### ► To attach a job competency to an organizational level

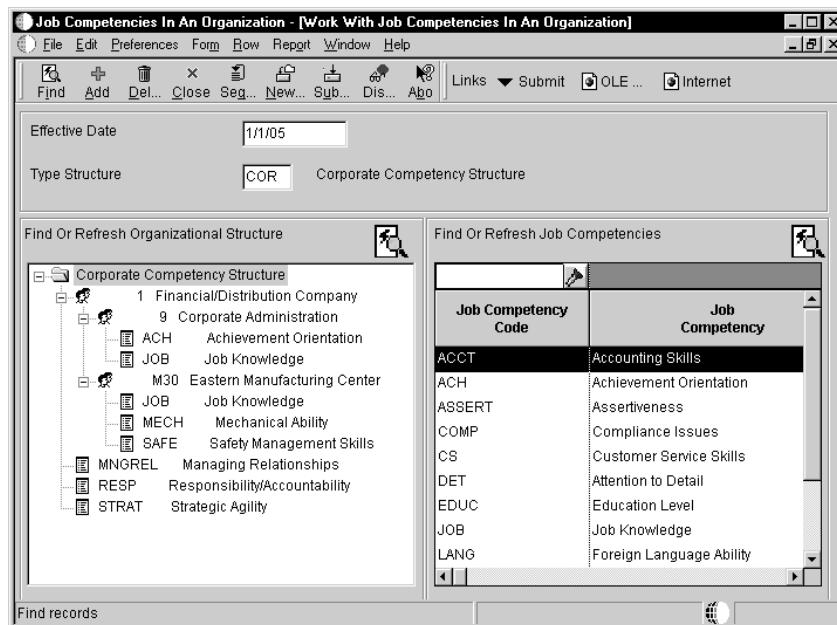
From the Competency Management Periodic Processing menu (G05BC2), choose Job Competencies in an Organization.

1. On Work with Job Competencies in an Organization, complete the following fields and click Find:
  - Effective Date
  - Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To attach a job competency to a level in the structure, click once on the level to select it, click once on the competency to select it, and then click Add.

The competency appears in the tree view under the level that you chose.



4. To remove a job competency from a level in the structure, click once on the competency in the tree view and then click the Delete button.
5. Complete steps 3 and 4 for as many competencies as you need to add or delete.
6. To save your work, choose Submit from the Form menu.

<b>Field</b>	<b>Explanation</b>
Type Structure	A user defined code (00/TS) that identifies the type of organizational structure, such as financial or responsibility. Each type of structure can have a different hierarchy.

### See Also

- *Overriding Inherited Job Competencies*

## Processing Options for Job Competencies in an Organization (P08006)

### Defaults Tab

#### 1. Audience Flag

Use this processing option to specify who is going to use the application to what capacity.

### Competency Descriptions Tab

#### 1. User Defined Competency Description Code 1

Use this processing option to list the code for the first Job Competency Code description to show. This code is associated with the first radio button on the form. When a Job Competency Code and the first radio button are selected, the associated description is displayed.

#### 2. User Defined Competency Description Code 2

Use this processing option to list the code for the second Job Competency Code description to show. This code is associated with the second radio button on the form. When a Job Competency Code and the second radio button are selected, the associated description is displayed.

**3. User Defined Competency Description Code 3**

Use this processing option to list the code for the third Job Competency Code description to show. This code is associated with the third radio button on the form. When a Job Competency Code and the third radio button are selected, the associated description is displayed.

**4. User Defined Competency Description Code 4**

Use this processing option to list the code for the fourth Job Competency Code description to show. This code is associated with the fourth radio button on the form. When a Job Competency Code and the fourth radio button are selected, the associated description is displayed.

**5. User Defined Competency Description Code 5**

Use this processing option to list the code for the fifth Job Competency Code description to show. This code is associated with the fifth radio button on the form. When a Job Competency Code and the fifth radio button are selected, the associated description is displayed.

**6. User Defined Competency Description Code 6**

Use this processing option to list the code for the sixth Job Competency Code description to show. This code is associated with the sixth radio button on the form. When a Job Competency Code and the sixth radio button are selected, the associated description is displayed.

**7. View Language Specific User Defined Competency Description**

Use this processing option to indicate whether language specific descriptions should be used. If this flag is set to 1, the program will look for a description in the user's language. If this language is not found, the default language will be used. If this flag is set to 0, the default language will always be used.

**Versions Tab****1. Jobs in an Organization Version**

Use this processing option to specify the version of the Jobs Workbench program (P08007) to use. The default is ZJDE0001.

**2. Job Competencies Version**

Use this processing option to specify the version of the Job Competencies program (P08009) to use. The default is ZJDE0001.

### **3. Gap Analysis Version**

Use this processing option to specify the version of the Gap Analysis program (P08009) to use. The default is ZJDE0001.

### **4. Organizational Structure Version**

Use this processing option to specify the version of the Organizational Structure program (P0050) to use. The default is ZJDE0001.

### **5. Copy Job Competencies Version**

Use this processing option to specify the version of the Copy Job Competencies program (P080020) to use. The default is ZJDE0001.

### **6. Job Competency Defaults and or Overrides Version**

Use this processing option to indicate whether competency description overrides may be entered by the user.

## **Attaching Jobs to Organizational Levels**

To reduce data entry and simplify the process of attaching job competencies to the jobs within your organization, you can attach jobs to the business units that compose the hierarchical levels of an organizational structure. You perform this task after you have created an organizational structure for job competencies.

When you attach a job to a business unit, the job inherits all of the competencies that are attached to that business unit and to the highest level of the organizational structure. Regardless of the business unit to which the job is attached, the job also inherits the competencies that are attached to its job group. If necessary, you can attach additional competencies to the job or override certain information for the inherited competencies.

When your organization restructures, you can easily move a job from one business unit in the organizational structure to another.

## **Self-Service Considerations**

Your organization might have set up the Jobs in an Organization program (P08007) as a self-service application that managers and employees can use to review jobs within the organizational structure. If you are accessing Jobs in an Organization from a self-service program, such as the Form menu on Managers Workbench, you can review the organizational structure to see where each job is attached, but you cannot attach or delete any jobs within the structure.

## Before You Begin

- Define the jobs for your organization. See *Entering Job Information*.
- Define the organizational structure for job competencies. See *Defining Organizational Structures for Job Competencies*.

### ► **To attach a job to an organizational level**

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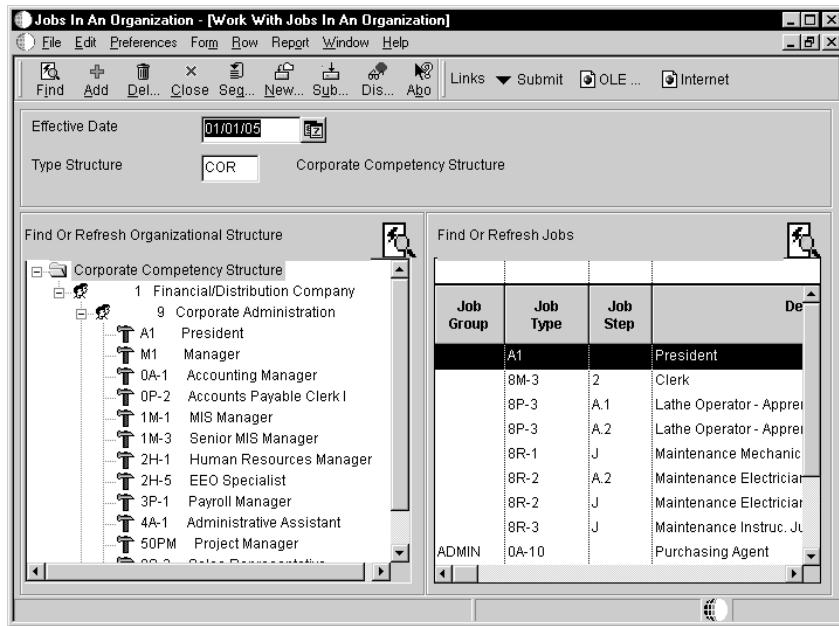
From the Competency Management Periodic Processing menu (G05BC2), choose Jobs in an Organization.

1. On Work with Jobs in an Organization, complete the following fields and click Find:
  - Effective Date
  - Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The hammer icon indicates a job. On the right side of the detail area, the system displays the jobs that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To attach a job to a level in the structure, click once on the level to select it, click once on the job to select it, and then click Add.

The job appears in the tree view under the level that you chose.



4. To remove a job from a level in the structure, click once on the job in the tree view and then click the Delete button.
5. Complete steps 3 and 4 for as many jobs as you need to add or delete.
6. To save your work, choose Submit from the Form menu.

### See Also

- *Overriding Inherited Job Competencies*
- *Attaching Additional Job Competencies* for information about entering specific competencies for job groups and individual jobs

## Attaching Additional Job Competencies

After you attach competencies to the organizational structure, you can attach additional, more specific competencies to each of the following:

- Business units
- Job groups
- Jobs
- Individual jobs within a business unit

Attaching additional competencies gives you the flexibility to customize competencies to a particular job and still take advantage of the time-saving qualities of inheritance. When you attach a job competency to a business unit or job group, all of the jobs within that business unit or job group inherit the competency.

For each job, you can also attach competencies that are specific to a particular business unit. For example, the job Administrative Assistant might require different competencies when it is in the Information Technology business unit than it does when it is in the Finance business unit. You can also override certain information for inherited competencies.

In some cases, you might want to override the decision to include a competency in gap analysis. For example, a competency such as word processing skills might be essential to the job Administrative Assistant. The job Programmer might also require word processing skills, but these skills are considered minor requirements compared to the other more essential competencies, such as programming languages and analytical thinking ability. Therefore, you might choose to include that competency in the gap analysis and performance review for administrative assistants, but not in the gap analysis and performance review for programmers.

## Before You Begin

- Attach jobs and job competencies to the levels in the organizational structure. See *Attaching Job Competencies to Organizational Levels* and *Attaching Jobs to Organizational Levels*.

### ► **To attach additional job competencies**

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From the Competency Management Periodic Processing menu (G05BC2), choose Jobs in an Organization.

1. On Work with Jobs in an Organization, complete the following fields and click Find:
  - Effective Date
  - Type Structure
2. From the Form menu, choose Competencies For and then choose one of the following options:
  - Organization
  - Job Group
  - Business Unit
  - Job

Job Competency Code	Job Competency	Include In Gap Analysis And Performance Appraisal
MGT	Management Skills	1 Yes
MNGREL	Managing Relationships	1 Yes
RESP	Responsibility/Accountability	1 Yes
STRAT	Strategic Agility	1 Yes
VCOM	Verbal Communication Skills	1 Yes
		0

3. On Attached Job Competency Codes, complete all of the following fields in the header area that correspond to the menu option that you chose, and then click Find:
  - Type Structure
  - Job Group
  - Organizational Business Unit
  - Job Type/Step

For example, if you chose Competencies For: Job Group from the menu, you would complete the Job Group field on Attached Job Competency Codes.

4. To override the decision to include an existing competency in gap analyses and performance appraisals, change the value for that competency in the following field in the detail area:
  - Include In Gap Analysis And Performance Appraisal
5. To add a job competency, complete the following fields in the first blank line of the detail area.
  - Job Competency Code
  - Job Competency Source
  - Include In Gap Analysis And Performance Appraisal
  - Overrides Exist Flag
6. When you have finished entering information, click OK.

<b>Field</b>	<b>Explanation</b>
Job Group	<p>A grouping of similar jobs that are associated as a unit. Similarities can be functions within the organization, job duties, tasks and responsibilities, job evaluation methods to be used, or similarity in pay philosophy. Typical job units are clerical/administrative, technical, engineering, scientific and professional, factory jobs, middle-management, and executive.</p>
	<p>Consider breaking up groups into separate populations based on the differences between exempt and non-exempt employees according to the rules and regulations of the Fair Labor Standards Act (FLSA). For example, consider assigning all your managers to the Managers job group.</p>
	<p>You can define job group codes using user defined code table 08/JG.</p>
Organizational Business Unit	<p>A business unit that is included in the organizational structure for job competencies. You use organizational business units to assign job competency information to levels within your organizational structure. This business unit is independent of an employee's home business unit and security business unit.</p>
Job Competency Code	<p>Used to uniquely identify each job competency. Competencies are high-level human attributes that are directly related to facilitating the achievement of a company's goals and objectives. These competencies are also the foundation for an employee's job and job description.</p>
Include In Gap Analysis And Performance Appraisal	<p>A flag to specify whether a competency will be included in a Gap Analysis evaluation. A Gap Analysis measures how an employee's competencies compare with the competencies required by a particular job. If INCLG is equal to a 1, the job competency code will be included in the Gap Analysis evaluation. If INCLG is equal to a 0, the job competency code will not be included in the Gap Analysis evaluation.</p>
Job Competency Source	<p>The location in the organizational structure where the competency is defined.</p>
Overrides Exist Flag	<p>A symbol in this field indicates that there are overrides of the default competency.</p>

## See Also

- *Overriding Inherited Job Competencies*

### Overriding Inherited Job Competencies

When you attach a competency to an organizational structure, business unit, or job group, the jobs within that level inherit that competency. After you review the inherited competencies for a job, you might need to customize these competencies to the particular needs of an organizational structure, business unit, job group, or job. For example, a competency such as computer skills might require a different level of proficiency for computer programmers than it does for administrative assistants. When you set up the options for this job competency, you might enter a basic level of proficiency. Then, for the job computer programmer (which inherits the competency), you can override the competency options by entering a different level of proficiency.

Whenever you add, change, or delete any descriptions or options for an inherited or attached competency, you are overriding that competency. You can override any inherited or attached competency at any level in the organizational structure.

Overriding inherited job competencies includes the following procedures:

- Overriding competency descriptions
- Overriding competency options

#### Before You Begin

- Attach jobs and job competencies to the levels in the organizational structure. See *Attaching Job Competencies to Organizational Levels* and *Attaching Jobs to Organizational Levels*.

#### To override competency descriptions

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From the Competency Management Periodic Processing menu (G05BC2), choose Job Competencies in an Organization.

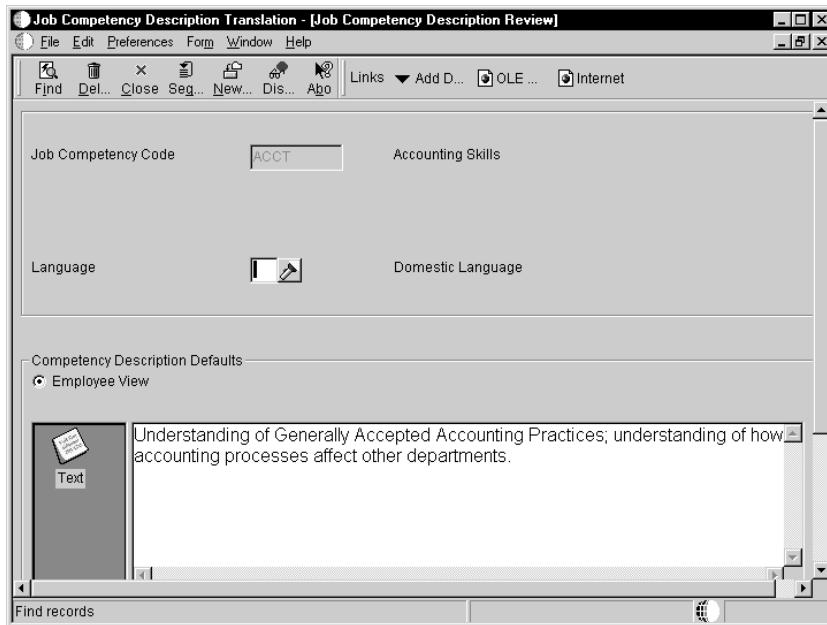
1. On Work with Job Competencies in an Organization, complete the following fields and click Find:

- Effective Date
- Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.

3. To review existing overrides, choose a competency in the tree structure and then choose Edit Descriptions from the Row menu.



4. On Job Competency Description Review, choose one of the following options and then review the corresponding definition:
  - Human Resource View
  - Manager Coaching View
  - Employee View
  - Manager View
5. To override a description, choose the option for that description and then choose Add Description from the Form menu.
6. On Job Competency Description Maintenance, enter a text description and then click OK.

### ► **To override competency options**

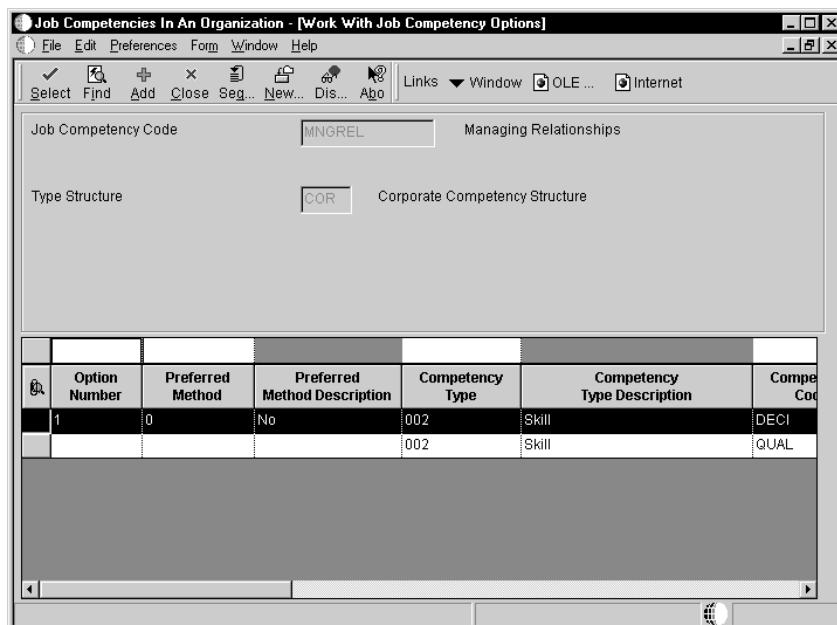
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From the Competency Management Periodic Processing menu (G05BC2), choose Job Competencies in an Organization.

1. On Work with Job Competencies in an Organization, complete the following fields and click Find:
  - Effective Date
  - Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To review the current options and enter overrides, choose a competency in the tree structure and then choose Override Option from the Row menu.



4. On Work with Job Competency Options, review the information in the detail area to see which competencies have been inherited or overridden.
5. To add an override for an option, click Add and then complete the steps for defining job competency options.

See *Defining Job Competency Options*.

**Note:** You can also delete or modify any of the existing options.

## Related Tasks

<b>Reviewing default descriptions</b>	From Work with Job Competencies in an Organization, you can review the default descriptions for a competency by choosing a competency from the list on the right side of the detail area and then choosing Default Description from the Row menu. The system displays the default descriptions for the competency that you choose. For instructions for adding options, see <i>Defining Job Competencies and Descriptions</i> .
<b>Reviewing default options</b>	From Work with Job Competencies in an Organization, you can review the default options for a competency by choosing a competency from the list on the right side of the grid and then choosing Default Options from the Row menu. The system displays the default options for the competency that you choose. For instructions for adding options, see <i>Defining Job Competency Options</i> .
<b>Excluding a competency from gap analysis</b>	If you want to include a competency in the gap analysis for some jobs but not all, you can enter that information when you attach an additional competency to a business unit, job group, or job. See <i>Attaching Additional Job Competencies</i> .

## Reviewing Job Competency Information

After you attach jobs and job competencies to levels in the organizational structure and enter any overrides, you might need to review attached competencies and competency overrides to ensure that they have been applied consistently. You can review override information, such as effective dates and gap analysis inclusion, for any of the following:

- Jobs
- Job groups
- Business units
- Organizational structures

If you need to add or revise any job competency information, you can use the options on the Form and Row menus to access the forms for entering job competencies, competency options, and competency descriptions. You can revise override information, as well as default information.

► **To review job competency information**

From the Competency Management Periodic Processing menu (G05BC2), choose Job Competency Defaults and or Overrides.

1. On Work with Job Competency Attached and Overridden, complete any of the following fields:
  - Type Structure
  - Job Competency Code
  - Job Group
  - Organizational Business Unit
  - Job Type
  - Job Step
2. Choose one of the following options:
  - Attached Competencies
  - Overridden Competencies
  - Attached and Overridden Competencies
3. Click Find.

Attached and Overridden Competencies	Type Structure	Org. Structure Description	Job Competency Code	Job Compete Code
Attached Competencies	COR	Corporate Competency Struc	ACH	Achievement Or
Attached Competencies	COR	Corporate Competency Struc	VCOM	Verbal Commun
Attached Competencies	COR	Corporate Competency Struc	WCOM	Written Commun

4. Review the information in the detail area.

Field	Explanation
Attached Competencies	<p>The type of job competency codes to display.</p> <p>'Defaults Only' will display the places in the organization where a job competency code is attached with the default Options, Descriptions, and Include in Gap/ Performance Appraisal flag.</p> <p>'Overrides Only' will display the places in the organization where a job competency code is attached with an override in the Options, Descriptions, or Include in Gap/ Performance Appraisal flag.</p> <p>'Both' will display everywhere in the organization where a job competency is defined using the default or overrides</p>

## Translating Job Competency Descriptions

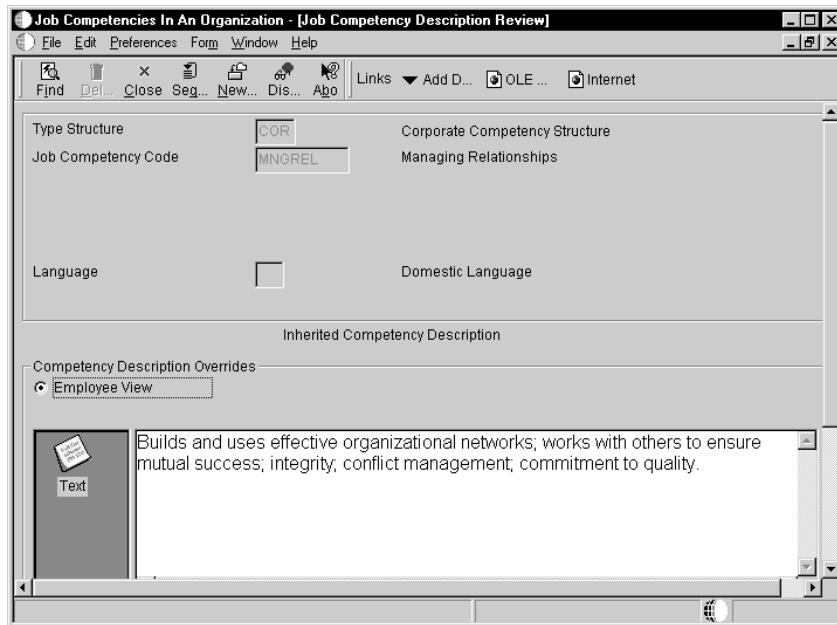
When you enter descriptions for job competencies, the system stores those descriptions in the domestic language that is specified in your user profile. If your organization has employees in more than one country, you might need to translate these descriptions into one or more additional languages. Because the system stores job competency descriptions as media objects, they are not translated along with the rest of the software. You enter translated descriptions manually, using the Job Competencies Description Translation program.

### ► To translate job competency descriptions

From the Competency Management Advanced and Technical Operations menu (G05BC3), choose Job Competency Description Translation.

1. On Work with Job Competency Description Translation, complete the following fields and then click Find to locate the job competency description that you need to translate:
  - Organization Type Structure
  - Job Competency Code
2. To narrow your search, complete any of the following fields, and then click Find:
  - Organizational Structure
  - Organizational Business Unit
  - Effective Date
  - Job Group
  - Job Type
  - Job Step

- Language
  - Descriptions Not Translated
3. Choose one of the following options to specify the audience for the description:
- View 1, Human Resources View
  - View 2, Manager Coaching Review
  - View 3, Employee View
  - View 4, Manager View



4. On Job Competency Description Review, to add a new, translated description for this view, choose Add Description from the Form Menu.
5. On Job Competency Description Maintenance, complete the following field:
  - Language
6. Enter the translated description in the media attachment area at the bottom of the form.
7. To attach other types of electronic attachments, such as pictures and links to Internet pages, right-click in the exit bar to the left of the media object, choose New from the menu, and then choose the type of object that you want to attach.
8. When you have finished entering attachments, click OK.
9. To enter a translated description for another audience, repeat steps 1 through 9.

Repeat these steps until you have entered a translated description for each of the audiences.

<b>Field</b>	<b>Explanation</b>
Organizational Structure	A user defined code (00/TS) that identifies the type of organizational structure, such as financial or responsibility. Each type of structure can have a different hierarchy.
Organizational Business Unit	A business unit that is included in the organizational structure for job competencies. You use organizational business units to assign job competency information to levels within your organizational structure. This business unit is independent of an employee's home business unit and security business unit.
Job Group	<p>A grouping of similar jobs that are associated as a unit. Similarities can be functions within the organization, job duties, tasks and responsibilities, job evaluation methods to be used, or similarity in pay philosophy. Typical job units are clerical/administrative, technical, engineering, scientific and professional, factory jobs, middle-management, and executive.</p> <p>Consider breaking up groups into separate populations based on the differences between exempt and non-exempt employees according to the rules and regulations of the Fair Labor Standards Act (FLSA). For example, consider assigning all your managers to the Managers job group.</p> <p>You can define job group codes using user defined code table 08/JG.</p>
Job Type	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
Language	<p>A user defined code (01/LP) that specifies a language to use in forms and printed reports.</p> <p>Before specifying a language, a language code must exist at either the system level or in your user preferences.</p>
Descriptions Not Translated	View job competency descriptions that have not been translated. When this box is checked and a language is entered into the language control box, the grid will display all of the descriptions that exist in the domestic language but have not been translated into the language specified in the language control box.

### Related Topics

<b>Revising descriptions</b>	To revise an existing description for a job competency, choose the Update Description option from the Form menu of Job Competency Description Maintenance.
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## Processing Options for Job Competency Description Translations (P080019)

### Version Tab

#### 1. Job Competencies in an Organization

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

## Activating Draft Organizational Structures

From the Competency Management Advanced and Technical menu (G05BC3), choose Activate Job Competencies.

When you create a new organizational structure or copy and modify an existing one, the system maintains that organization structure in draft mode. You can modify the draft organizational structure and add jobs and job competencies to it without affecting the active structure. When you are ready to begin using the draft structure, you can run a program that updates the status of the structure to Active. Activating the draft structure also makes that structure the default structure for your organization (the structure that your organization is currently using to track job competency information).

After you activate a draft structure, you cannot change it back to a draft again. To help you verify that the information in the draft structure is correct before you activate it, you can set processing options to run the program in proof mode and print a verification report. When you run the program in proof mode, the system does not update the tables to indicate that the structure is the default, active structure. When you run the program in update mode, the system performs the following functions:

- Changes the status and date of the draft organizational structure to indicate that it is Active. Because you might have more than one draft structure, you must enter in the processing options the name of the structure that you want to activate.
- Enters an ending effective date for the structure that is currently the default structure for job competencies, if one exists. The system maintains

a historical record of this structure's status so that you will know the dates when it was used as the default structure.

- Updates the system options to indicate that the new structure is the default structure.
- Updates the following tables:
  - HR Constants (F08043)
  - Date Effective Organizational Structure (F0800608)
  - Organizational Business Unit/Job Cross-Reference (F0800601)
  - Job Group Competencies (F0800603)
  - Organizational Business Unit Competencies (F0800604)
  - Job Type/Step Competencies (F0800605)
  - Competency Rules/Overrides (F0800606)
  - Date Effective Organizational Structure (F0800607)
  - Competencies in Structure and Job (F0800610)
  - Job Competency Default - Overrides (F0800611)
  - Job Competency Descriptions (F0800612)

## **Processing Options for Activate Job Competencies (R080014)**

### **Display Tab**

#### **1. Show Detail**

A code that specifies whether the system prints a detailed report. Valid values are:

- 0     No, the system does not print a detailed report.  
1     Yes, the system prints a detailed report.

If you leave this processing option blank, the system prints a detailed report.

### **Defaults Tab**

#### **1. Active Organizational Structure End Date**

Use this processing option to specify an ending date for the organizational structure that is currently active.

Blank The end date for the active organizational structure will be the current date.

## **2. New Organizational Structure**

Use this processing option to specify a new organizational structure. The new structure name is needed for updating the Beginning/End Dates for the new structure.

## **3. New Organizational Structure Begin Date**

Use this processing option to specify a beginning date for the new organizational structure.

## **4. New Organizational Structure Ending Date**

Use this processing option to specify an ending date for the new organizational structure.

## **Process Tab**

### **1. Final Mode**

A code that specifies in which mode the process will run.

- 0      No, do not run the process in final mode.
- 1      Yes, run the process in final mode and update the appropriate files.

If you leave this processing option blank, the system runs the report in final mode.



## Working with Employee Competencies

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You use competency management to track the competencies that employees possess and to compare them with those that are required for the employees' jobs. You can track the following types of employee competencies:

- Training
- Skills
- Accomplishments
- Certificates
- Degrees
- Languages

You can track a variety of competencies for each competency type. For example, for the Skills competency type, you can track programming skills, communication skills, and so on.

Working with employee competencies includes the following tasks:

- Defining scales for employee competencies
- Defining employee competencies
- Defining training courses
- Setting up security for competency levels
- Setting up routing instructions for competency approvals
- Assigning competencies to employees
- Reviewing competency history for employees

Before you enter competency information for employees, you must define the scales that you use to rate the levels of proficiency that employees demonstrate in each competency. You must also define the specific employee competencies that you are tracking for each competency type. You also can define training courses and specify the competencies that they fulfill.

You set up security for competency levels so that you can specify the type of user within your organization who is responsible for entering competency levels for employee competencies. This feature is particularly useful if your

organization allows employees and managers to enter and update competency information using self-service. In some cases when your organization is using employee self-service, you might also want to set up routing instructions for competency approvals. Routing instructions allow you to identify a person, other than an employee's supervisor, who is responsible for approving specific employee competencies or competency types.

When you assign competencies to an employee, you list each competency that the employee possesses, along with the level of proficiency that the employee demonstrates.

## Defining Scales for Employee Competencies

A *competency scale* is a method of measuring an employee's level of proficiency in a particular competency. You must associate a scale with each competency before you can begin entering competency information for employees. You can use the same scale for every competency, or you can define a separate scale for each competency. For example, for C programming ability, in the skill competency type, you might define the following numeric scale:

<b>1</b>	Beginner
<b>2</b>	Competent
<b>3</b>	Accomplished
<b>4</b>	Expert

For each level on a scale, you define a low value and a high value. Scale values always increase from low to high; therefore, low values always mean less proficient and high values mean more proficient. You can either enter the scale values manually or have the system generate them automatically.

If you are also tracking job competencies, the scales that you define for employee competencies are the same scales that you use for job competencies.

Defining scales for employee competencies includes the following tasks:

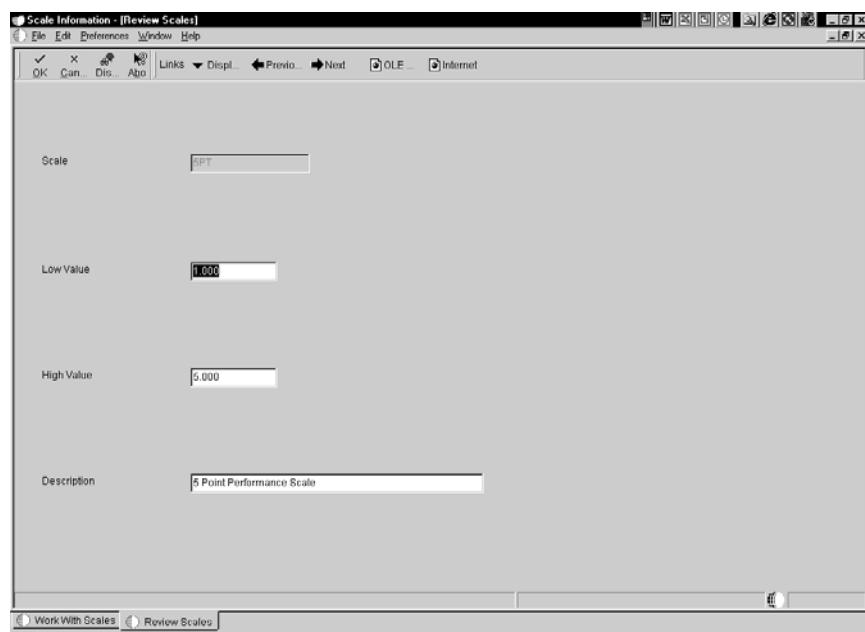
- Defining basic information for scales
- Generating values for scales automatically
- Entering values for scales manually

► **To define basic information for scales**

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From the Competency Setup menu (G05BC4), 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

After you create a scale, you must define the values for each level. You can enter the values manually or run a program that assigns them automatically.

► **To generate values for scales automatically**

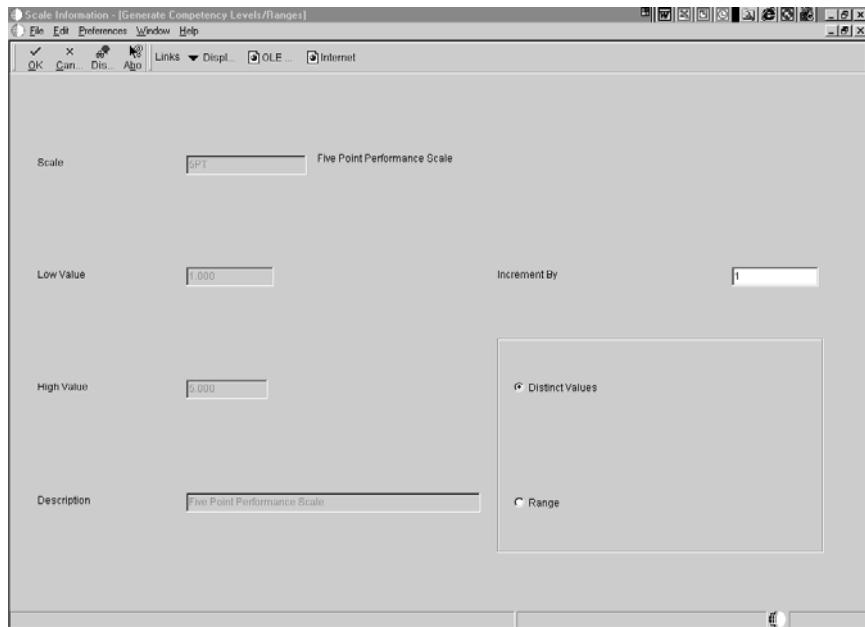
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After you complete the steps to define basic information for scales, you can have the system automatically generate the values for the scales.

1. On Work with Scales, complete the following field and then click Find to locate the scale that you just created:

- Scale

2. Choose the record in the detail area and then choose Generate Levels from the Row menu.



3. On Generate Competency Levels, complete the following field:
  - Increment By
4. Choose one of the following options and then click OK:
  - Distinct Values
  - Range

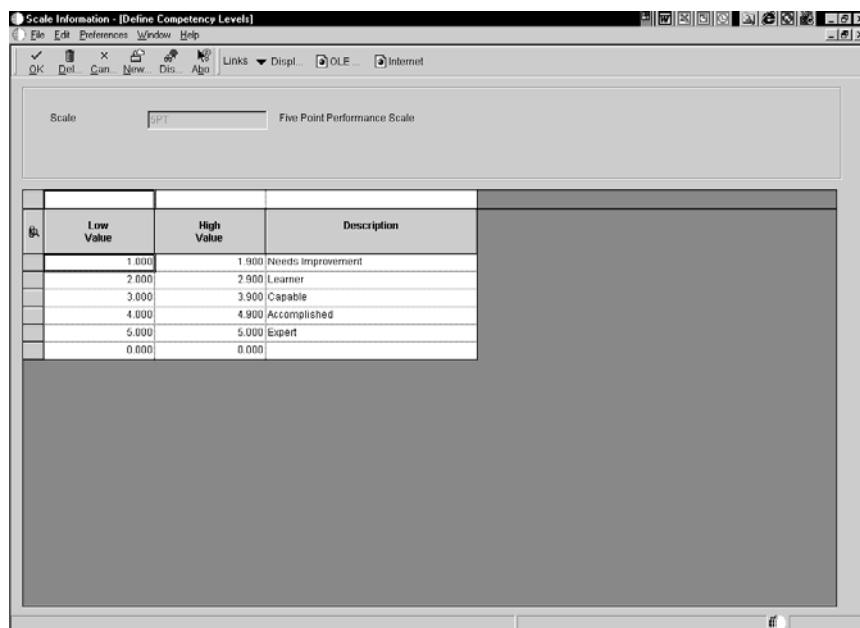
<b>Field</b>	<b>Explanation</b>
Scale	Use this processing option to specify the system to use for measuring an employee's level of proficiency in a particular competency. The scale uses a series of competency levels to represent standards of relative proficiency.
Scale	Use this processing option to specify the system to use for measuring an employee's level of proficiency in a particular competency. The scale uses a series of competency levels to represent standards of relative proficiency.

Field	Explanation
Increment By	A code that refers to the level of proficiency that a person or asset has demonstrated for a specific competency type and competency code.  ..... <i>Form-specific information</i> .....
	A numeric value that differentiates a competency level from the following level in a series.

## ► To enter values for scales manually

After you complete the steps to enter basic information for scales, you can enter values for scales manually.

1. On Work with Scales, complete the following field and then click Find to locate the scale that you just created:
  - Scale
2. Choose the record in the detail area and then choose Define Levels from the Row menu.



3. On Define Competency Levels, complete the following fields:
  - Low Value
  - High Value
  - Description

4. Repeat step 3 for as many competency levels as you need to define and then click OK.

Field	Explanation
Low Value	The lowest rating on the scale, level, or range.
High Value	The highest rating on the scale, level, or range.

## Defining Employee Competencies

You define employee competencies to quantify the skills, training, and expertise that employees possess. You categorize competencies by competency type and then track multiple competencies for that competency type. For example, for the competency type Training you might track the following competencies:

- Employee orientation
- OneWorld Foundations class
- Financials Expedition

After you define employee competencies, you can assign these competencies to employees and indicate the levels of proficiency that employees demonstrate in each competency.

### Before You Begin

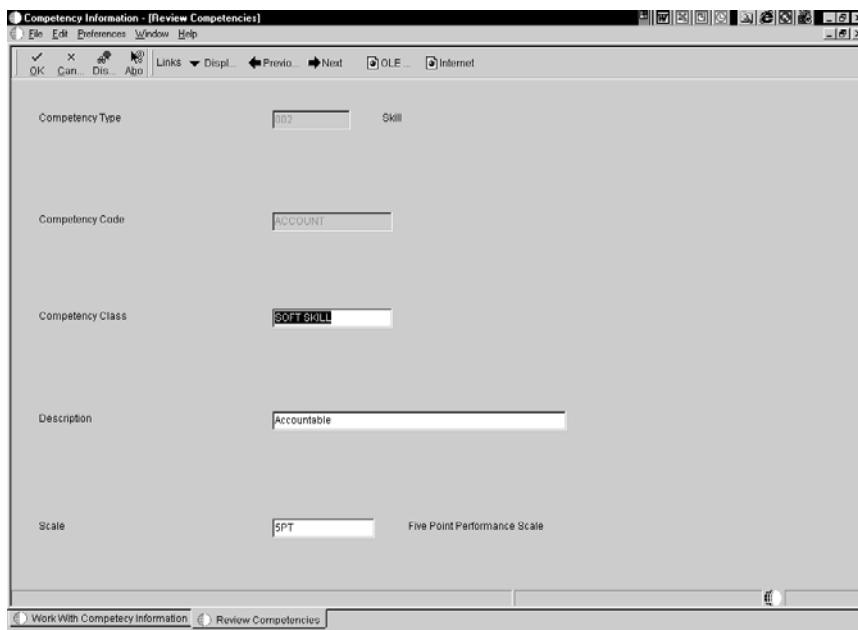
- Review UDC 05/CY for a list of available competency types. Each of the values in this UDC list represents a competency table. The values in this list are hard coded and cannot be changed. Adding additional values to this list requires that you customize the system.

### ► To define employee competencies

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From the Competency Management menu (G05BC1), choose Competency Information.

1. On Work with Competency Information, click Add.



2. On Review Competencies, complete the following fields and then click OK:
  - Competency Type
  - Competency Code
  - Competency Class
  - Description
  - Scale
  - Auto Calculate Competency
3. Repeat steps 1 and 2 for as many competencies as you need to define, and then click OK.

Field	Explanation
Competency Type	<p>A user defined code (05/CY) that represents a competency table, or category, for which you can track employee competencies. Valid values are:</p> <ul style="list-style-type: none"> <li>01 Training</li> <li>02 Skill</li> <li>03 Accomplishment</li> <li>04 Certification</li> <li>05 Degree</li> <li>06 Language</li> </ul>
	<p>The values in this user defined code list are hard-coded and cannot be changed. Therefore, each of the competencies that you track must pertain to one of these competency types. Adding additional values to this list requires system customizations.</p>
Competency Code	<p>A code that specifies a competency within a competency type. For example, a competency for the competency type "Skill" might be "C programming" or "Driving a forklift."</p>
Competency Class	<p>A division or rating based on some common attribute among competencies.</p>
Description	<p>A user defined name or remark.</p>
Scale	<p>Use this processing option to specify the system to use for measuring an employee's level of proficiency in a particular competency. The scale uses a series of competency levels to represent standards of relative proficiency.</p>
Auto Calculate Competency	<p>An option that indicates whether this competency can be automatically calculated during an employee performance appraisal.</p> <p>During an employee performance appraisal, supervisors might have the option to complete only the job competency ratings and have the program derive the new competency ratings for the employee. This option decreases the time required to complete performance appraisals and keeps the employee competency ratings up-to-date.</p> <p>For some competencies, automatically-calculated values would be erroneous. For example, if a job requires a training class, you typically would not want the system to automatically calculate a rating of 3 (Complete) if the employee has not completed the class.</p> <p>You set up the default value for this option when you define job competency options. You can override the default value at any level where you attach job competency options.</p>

## Defining Training Courses

In some cases, a training course might help employees attain a variety of competencies in addition to a specific training competency. For example, a training course in OneWorld Foundation might help employees acquire the following competencies:

### Training

OneWorld training

### Skills

Basic OneWorld skills

### Certification

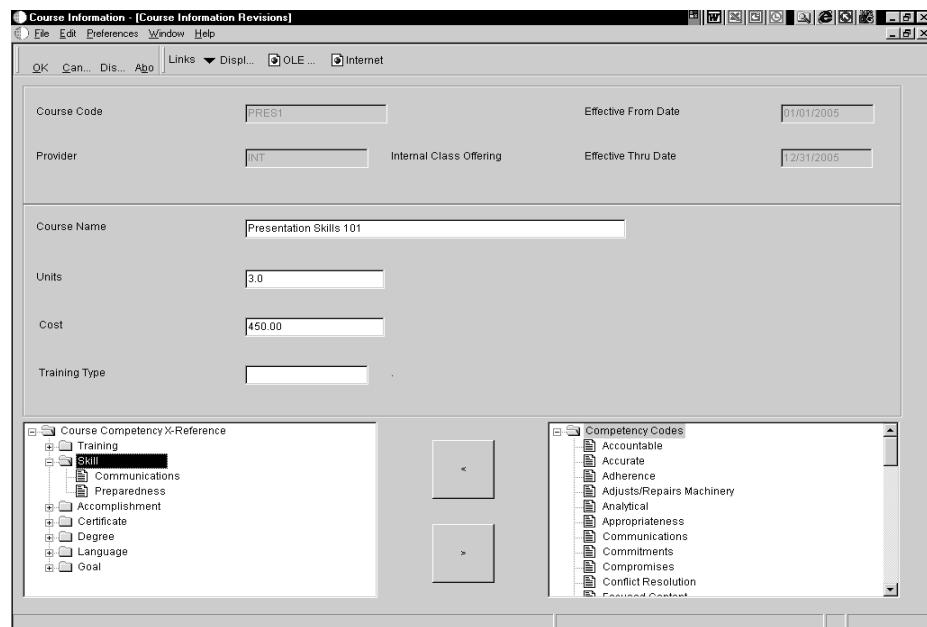
OneWorld certification

When you define a training course, you can specify the competencies that it affects. Assigning competencies to training courses helps ensure that you consistently update the competency information for the employees who complete those training courses.

### ► To define training courses

From the Competency Management menu (G05BC1), choose Course Information.

1. On Work with Course Information, click Add.



2. On Course Information Revisions, complete the following fields:
  - Course Code
  - Provider
  - Effective From Date
  - Effective Thru Date
  - Course Name
  - Units
  - Cost
  - Training Type
3. On the lower-left portion of the form, choose the competency type that the training course affects.

On the lower-right portion of the form, the system displays the competency codes for the competency type that you selected.

4. Choose the competency code that the training course affects and then click the left-arrow button in the lower-middle portion of the form.  
A + sign appears next to the competency type. When you click it, the system displays the competency code under the competency type.
5. Repeat steps 3 and 4 for as many competencies as the training course affects.

You can choose multiple competency codes for each competency type.

6. Click OK.

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<b>Field</b>	<b>Explanation</b>
Course Code	A code that represents a training course.
Provider	A person or institution that provides training.
Effective From Date	The date on which the offered course becomes effective.
Effective Thru Date	The date when the course is no longer offered.
Course Name	The text that describes a training course.
Units	A unit of measure for calculating student credits for training courses.
Cost	The cost of the training course.
Training Type	A user defined code (05/TY) that you use to categorize the type of training. Examples of training types include classroom training and computer-based training.

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## Related Topics

### **Alternate method of attaching competencies to training courses**

After you define a training course, you can use the Define Class/Competency X-Reference form to do any of the following:

- Review the competencies that are attached to the training course
- Attach additional competencies to the training course
- Delete (detach) competencies from the training course

To access the Define Class/Competency X-Reference form, choose Define X-Reference from the Row menu on Work with Course Information.

## Setting Up Security for Competency Levels

After an employee or an employee's supervisor enters competency information, another person in the organization, such as a member of the human resources department, might be responsible for assigning a competency level (the employee's level of proficiency) to each competency. You can choose a different person to enter competency levels for each competency type or individual competency.

You set up security for competency levels so that you can specify the type of user who has permission to update the competency levels for each competency that the employee enters. For example, you might set up the training competency type so that the training development manager is responsible for approving each employee's training competencies and entering the competency levels for each employee. In this case, the employees' supervisors could use the Manager's Workbench to enter and review employee training competencies, but the supervisors would not be allowed to enter the competency levels for training competencies.

You use the Competency Update Events program (P05106) to set up security for competency approvals. This program works in conjunction with a processing option on the Resource Competency Information program (P05100) to control access to the Competency Level field. You enter codes in the Competency Update Events program that represent a type of user, such as supervisors. These codes correspond to the values that you enter in a processing option on Resource Competency Information. You set up different versions of Resource Competency Information for each type of user.

## Before You Begin

- Set up the user defined code list for competency update codes (05/CU).  
The codes that you enter in this list correspond to the values that you

enter in the Competency Update Event Code processing option for the Resource Competency Information program.

### ► **To set up security for competency levels**

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From the Competency Setup menu (G05BC4), choose Competency Update Events.

1. On Competency Update Event Revisions, complete the following field to specify a category of user who is responsible for approving competencies:

- Competency Update Event Code

To give the users who are assigned to this competency update event code access to the competency levels for all employee competencies, leave the remaining fields on the form blank.

2. To limit the users who are assigned to this competency update event code to a specific competency type, complete the following field:

- Competency Type

3. To limit the users who are assigned to this competency update event code to a specific competency within the competency type, complete the following field:

- Competency Code

If you enter a competency code, you must enter a competency type.

4. To limit the users who are assigned to this competency update event code to a specific competency class, complete the following field:

- Competency Class

5. Repeat steps 1 through 4 for as many competencies, competency classes, and competency types as you need to assign to a competency update event code, and then click OK.

## **Setting Up Routing Instructions for Competency Approvals**

Your organization might allow employees to use self-service to enter their own competency information. After the employee enters competency information, the system sends an e-mail message to the person who is responsible for approving the employee's competencies. Typically, employees' supervisors are responsible for approving the information that employees enter and for assigning a competency level (the employee's level of proficiency) to each competency. In some cases, however, you might want someone other than the employees' supervisors to assign competency levels. For example, the training development manager might be responsible for approving training competencies. Routing also

occurs when another person adds competency information for an employee but is unable to update the competency levels.

You set up routing instructions for competency approvals so that you can identify a person, other than the employee's supervisor, who is responsible for approving specific employee competencies or competency types. You can choose a different person to approve each competency type or individual competency. For example, you can set up the routing instructions so that the training development manager is responsible for approving employee training competencies and the employees' supervisors are responsible for approving all other types of competencies.

When you set up routing instructions for a competency, the system sends an approval message to the person specified in the routing instructions when any other user enters information in that employee competency. For example, supervisors might be allowed to enter competency information for their employees, but they might not be responsible for approving training competency information. In this case, when a supervisor enters a training competency for an employee, the training development manager receives the approval message, just as he would if the employee entered the training competency.

If one or more competencies have no routing instructions specified, the system automatically routes approval messages for those competencies to the employee's supervisor.



### To set up routing instructions for competency approvals

---

From the Competency Setup menu (G05BC4), choose Competency Update Approval Routing.

1. On Competency Approval Routing Revisions, to limit the approver's authority to only those employees who are in a particular organization business unit, complete the following field:
  - Organizational Business Unit
2. To enter routing instructions for a particular competency type, complete the following field:
  - Competency Type
3. To enter routing instructions for a particular competency code within a competency type, complete the following field:
  - Competency Code

If you enter a competency code, you must enter a competency type.

4. Complete the following field:
  - Address Number

5. Repeat steps 1 through 4 for as many routing instructions as you need to add, and then click OK.

## Assigning Competencies to Employees

After you define employee competencies, you can assign those competencies to employees and indicate the level of proficiency that employees demonstrate in each competency. By tracking competencies for employees, you can determine the competencies that they need in order to satisfy the requirements of their current jobs and any jobs that they hope to obtain in the future. You can also create clear career goals and performance objectives for employees.

Assigning competencies to employees includes the following tasks:

- Assigning training competencies
- Assigning skill competencies
- Assigning accomplishment competencies
- Assigning certification competencies
- Assigning education competencies
- Assigning language competencies

### Self-Service Considerations

Because maintaining competency information for all of the employees in an organization can be a time-consuming task for human resources representatives, your organization might have set up the employee competency programs as self-service programs that managers can access from the Managers Workbench. Managers can enter and review competency information only for those employees who report to them.

Your organization can also activate the employee self-service programs for competency management. Employees can use these programs to enter their own competency information and then request that their managers approve the information. The employee self-service programs for competency management are slightly different from the competency programs that you access from the Competency Management menu and the Managers Workbench; however, the two sets of programs contain essentially the same information.

### Before You Begin

- Enter an organizational business unit for each employee for whom you plan to assign competencies. You enter organizational business units on the Organizational Assignment form (P0801ORG). See *Entering Organizational Assignment Information*.

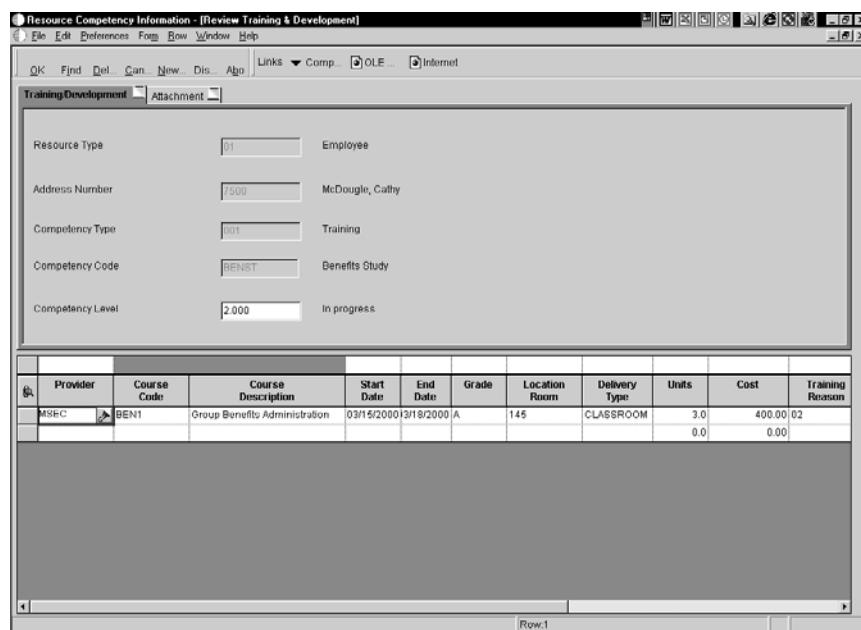
## See Also

- *Entering Competency Information Using Self-Service* for information about how employees can use self-service to enter their own competency information

### ► To assign training competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work with Competencies, enter 001 in the following field and then click Add:
  - Competency Type



2. On Review Training and Development, complete the following fields:
  - Address Number
  - Competency Code
  - Competency Level
3. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
4. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.

5. On Review Training and Development, complete the following fields in the detail area:
  - Provider
  - Course Code
  - Start Date
  - End Date
  - Grade
  - Location Room
  - Delivery Type
  - Units
  - Cost
  - Training Reason
6. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
7. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
8. Repeat steps 5 through 7 for as many training courses as you need to enter for this employee and competency code, and then click OK.

---

<b>Field</b>	<b>Explanation</b>
Competency Type	<p>A user defined code (05/CY) that represents a competency table, or category, for which you can track employee competencies. Valid values are:</p> <ul style="list-style-type: none"> <li>01 Training</li> <li>02 Skill</li> <li>03 Accomplishment</li> <li>04 Certification</li> <li>05 Degree</li> <li>06 Language</li> </ul> <p>The values in this user defined code list are hard-coded and cannot be changed. Therefore, each of the competencies that you track must pertain to one of these competency types. Adding additional values to this list requires system customizations.</p>
Address Number	<p>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, a location, and any other address book members.</p>

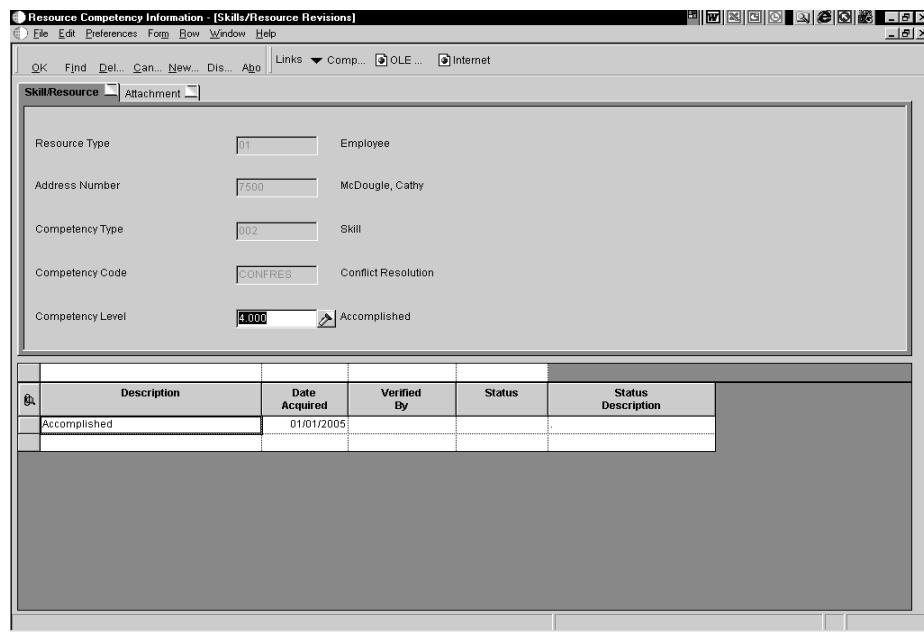
---

Field	Explanation
Competency Code	A code that specifies a competency within a competency type. For example, a competency for the competency type "Skill" might be "C programming" or "Driving a forklift."
Competency Level	A code that refers to the level of proficiency that a person or asset has demonstrated for a specific competency type and competency code.
Provider	A person or institution that provides training.
Course Code	A code that represents a training course.
Start Date	The date on which the training course started.
End Date	The date on which the training course ended.
Grade	The grade that the employee received for the course.
Location Room	The classroom or location where the training course is held.
Delivery Type	A code that specifies the way in which a course is delivered or presented. Examples of delivery type include classroom training and computer-based training.
Units	A unit of measure for calculating student credits for training courses.
Cost	The cost of the training course.
Training Reason	A user defined code (05/TN) that indicates the reason for the training.

### ► To assign skill competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work with Competencies, enter 002 in the following field and then click Add:
  - Competency Type



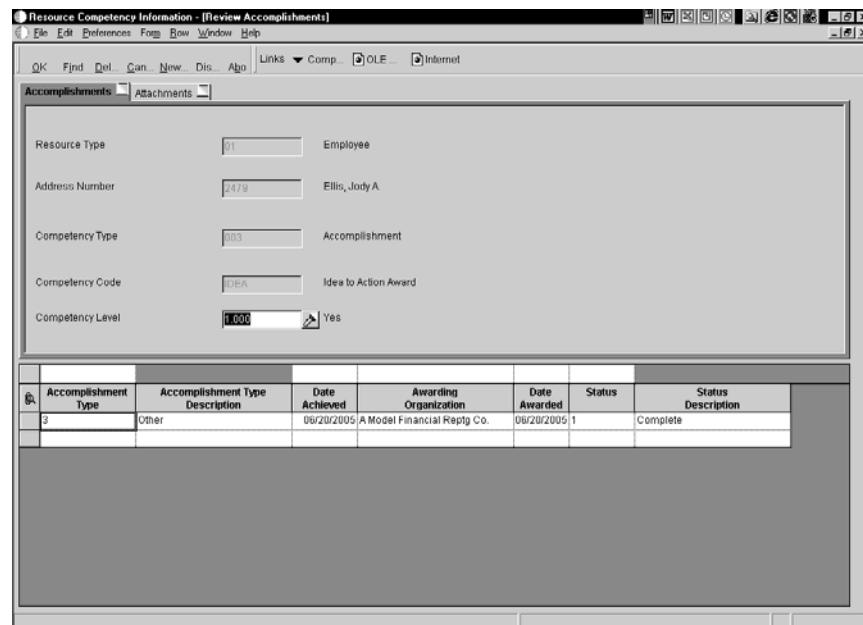
2. On Skills/Resource Revisions, complete the following fields:
  - Resource Type
  - Address Number
  - Competency Code
  - Competency Level
3. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
4. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
5. On Skills/Resource Revisions, complete the following fields in the detail area:
  - Description
  - Date Acquired
  - Verified By
  - Status
6. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
7. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
8. Repeat steps 5 through 7 for as many skills as you need to enter for this employee and competency code, and then click OK.

Field	Explanation
Resource Type	A user defined code list (05/RT) that indicates the type of resource for which you are entering competency information. Valid values are: 01 Employee 02 Asset, such as equipment
Date Acquired	The date on which the employee acquired the skill.
Verified By	The name or address book number of the person who verified that the employee is certified in the competency.
Status	A user defined code (05/CR) that indicates the progress that the employee has made toward a level of proficiency in a particular competency. For example, for certification competencies, you might define a status, Pending, to indicate that the employee has completed a certification test but has not yet received his or her test scores.

## ► To assign accomplishment competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work with Competencies, enter 003 in the following field and then click Add:
  - Competency Type



2. On Review Accomplishments, complete the following fields:

- Address Number
  - Competency Code
  - Competency Level
3. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
  4. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
  5. On Review Accomplishments, complete the following fields in the detail area:
    - Accomplishment Type
    - Date Achieved
    - Awarding Organization
    - Date Awarded
    - Status
  6. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
  7. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
  8. Repeat steps 5 through 7 for as many accomplishments as you need to enter for this employee and competency code, and then click OK.

Field	Explanation
Accomplishment Type	A user defined code (05/AT) that specifies a type of accomplishment. For example, you could define an accomplishment code for "Network Administration" as "Certification".
Date Achieved	The date on which the employee achieved the accomplishment.
Awarding Organization	The name of the organization that awards the certification or other documentation for the competency.
Date Awarded	The date on which an accomplishment was formally recognized by the awarding organization.
Status	A user defined code (05/CR) that indicates the progress that the employee has made toward a level of proficiency in a particular competency. For example, for certification competencies, you might define a status, Pending, to indicate that the employee has completed a certification test but has not yet received his or her test scores.

## ► To assign certification competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work with Competencies, enter 004 in the following field and then click Add:
  - Competency Type

Licensing Body	Licensing Body Description	Licensing Number	Issue Date	Expiration Date	Verified By	Score Rating	Verification Method	Verification Method Description	Renewal Code	Renewal Code Description	Cost	Status	De
HRCI	Human Res Cert Institute 6541356	6541356	08/01/1999	08/01/2001	6001	85	CERT	Viewed certificate	01	Continuing Education	230.00	1	Cor

2. On Certification Revisions, complete the following fields:
  - Resource Type
  - Address Number
  - Competency Code
  - Competency Level
3. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
4. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
5. On Certification Revisions, complete the following fields in the detail area:
  - Licensing Body
  - Licensing Number
  - Issue Date

- Expiration Date
  - Verified By
  - Score Rating
  - Verification Method
  - Renewal Code
  - Cost
  - Status
6. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
  7. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
  8. Repeat steps 5 through 7 for as many certifications as you need to enter for this employee and competency code, and then click OK.

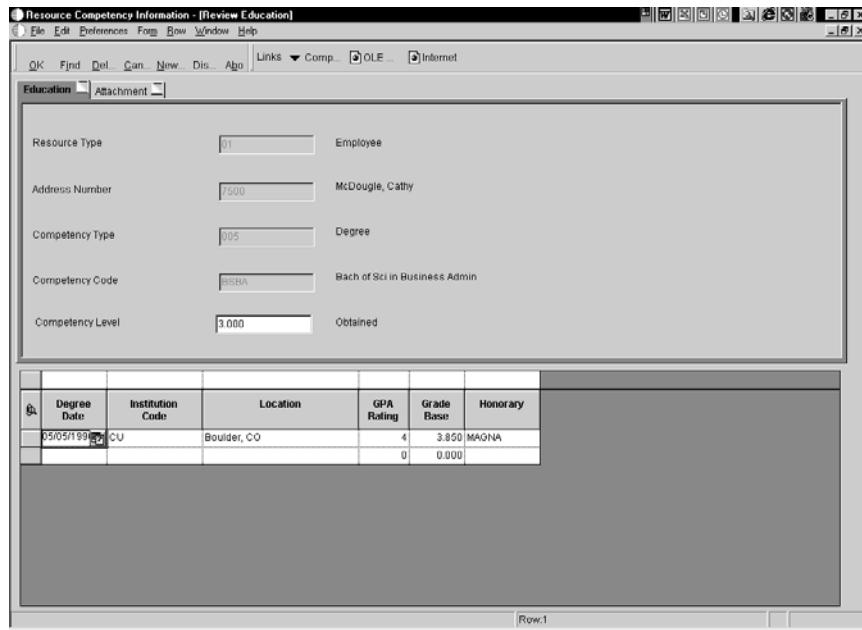
Field	Explanation
Licensing Body	A user defined code (05/LB) that represents the name of the organization that grants the professional license or certification.
Licensing Number	The identification number of the employee's professional license.
Issue Date	The date on which the professional license was issued to the employee.
Expiration Date	The date on which the employee's professional license expires.
Verified By	The name or address book number of the person who verified that the employee is certified in the competency.
Verification Method	A user defined code (05/VM) that defines the methods that you use to verify employee competency levels.
Renewal Code	A user defined code (05/RC) that indicates the requirements that the employee must complete to renew the license.

## ► To assign education competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work with Competencies, enter 005 in the following field and then click Add:

- Competency Type



The screenshot shows the 'Resource Competency Information - [Review Education]' window. At the top, there are menu options: File, Edit, Preferences, Form, Row, Window, Help. Below the menu is a toolbar with buttons for OK, Find, Del, Can, New, Dis, Abo, Links, Comp..., OLE..., and Internet.

The main area is divided into two sections: 'Education' and 'Attachment'. The 'Education' section contains the following fields:

Resource Type	01	Employee
Address Number	7500	McDougle, Cathy
Competency Type	005	Degree
Competency Code	BBA	Bach of Sci in Business Admin
Competency Level	3.000	Obtained

Below this is a table with the following data:

	Degree Date	Institution Code	Location	GPA Rating	Grade Base	Honorary
	05/05/1998	CU	Boulder, CO	4	3.850	MAGNA
				0	0.000	

At the bottom of the window, there is a status bar with the text 'Row:1'.

2. On Review Education, complete the following fields:
  - Address Number
  - Competency Code
  - Competency Level
3. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
4. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
5. On Review Education, complete the following fields in the detail area:
  - Degree Date
  - Institution Code
  - Location
  - GPA Rating
  - Grade Base
  - Honorary
6. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
7. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.

8. Repeat steps 5 through 7 for as many educational entries as you need to make for this employee and competency code, and then click OK.

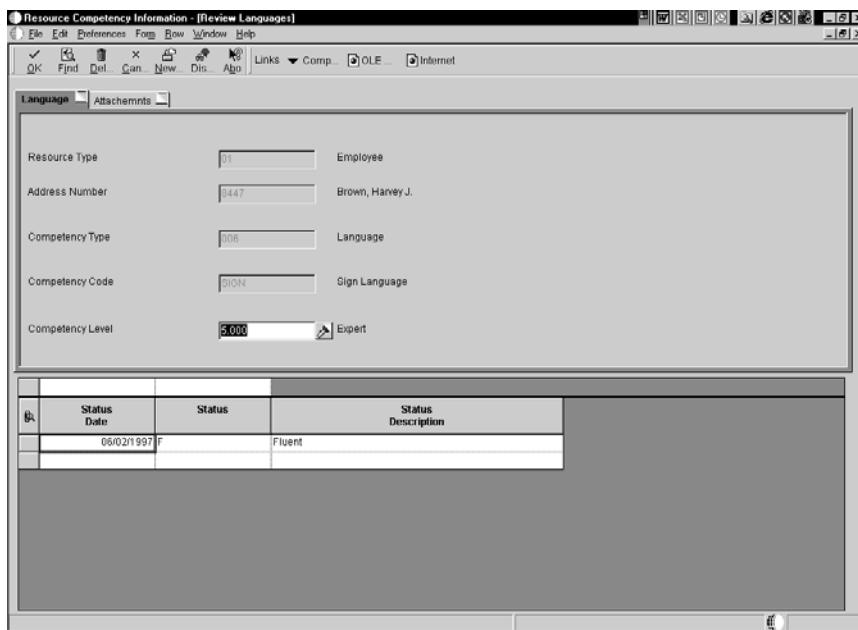
Field	Explanation
Degree Date	The date on which the employee graduated and earned a degree.
Institution Code	A user defined code (05/IC) that represents an educational institution from which employees obtained their degrees.
Location	The city or region where the educational institution is located.
GPA Rating	The overall grade or scale on which a student's grade point average is based.
Grade Base	The mathematical average of all of the grades that a student earns in a class.
Honorary	A value that indicates whether the student graduated with honors.

### ► **To assign language competencies**

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From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work with Competencies, enter 006 in the following field and then click Add:
  - Competency Type



2. On Review Languages, complete the following fields:
  - Resource Type
  - Address Number
  - Competency Code
  - Competency Level
3. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
4. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
5. Complete the following fields in the detail area:
  - Status Date
  - Status
6. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
7. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
8. Repeat steps 5 through 7 for as many languages as you need to enter for this employee and competency code and then click OK.

## Processing Options for Resource Competency Information (P05100)

### Edits Tab

#### 1. Competency Update Event Code

Use this processing option to enter a code that specifies a type of user that has access to employee competency information. The code that you enter must exist in the user defined code list for competency update codes (05/CU). This code also corresponds to a code that you entered in the Competency Update Event Code field in the Competency Update Events program (P05106).

You use this processing option in conjunction with the Competency Update Events program to control access to the Competency Level field for specific types of users. You set up different versions of Resource Competency Information for each type of user. For example, you might define a Competency Update Event Code called Train that you use to represent your organization's training manager. You can use the Competency Update Events program to grant Train the ability to update competency levels for all training competencies. You then set up a version of the Resource Competency Information program for Train.

## Reviewing Competency History for Employees

Each time someone enters or changes competency information for an employee, the system creates a historical record of the new information. You can review this history to determine whether an employee is becoming more proficient in a particular competency.



#### To review competency history for employees

---

From the Competency Management menu (G05BC1), choose Competency History.

1. On Work with Competency History, complete any of the following fields, and then click Find:
  - Resource Type
  - Address Number
  - Competency Type
  - Competency Code

**Competency History - [Work With Competency History]**

File Edit Preferences Window Help

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

Resource Type	*
Address Number	7500 McDougle, Cathy
Competency Type	*
Competency Code	*

Resource Type	Resource Type Description	Address Number	Address Number Description	Competency Type	
01	Employee	7500	McDougle, Cathy	001	Train
01	Employee	7500	McDougle, Cathy	001	Train
01	Employee	7500	McDougle, Cathy	002	Skill
01	Employee	7500	McDougle, Cathy	002	Skill
01	Employee	7500	McDougle, Cathy	002	Skill
01	Employee	7500	McDougle, Cathy	002	Skill
01	Employee	7500	McDougle, Cathy	002	Skill

Row:11

2. Review the information in the detail area.



# Working with Gap Analysis

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*Gap analysis* is the process of comparing the competencies that an employee possesses to the competencies that are required for the employee's current job, or for a job to which the employee aspires. Managers and employees can use gap analysis to develop training plans and career paths for employees who want to examine the possible career opportunities within the organization.

The system includes an online review program that you can use to review gap analysis information for individual employees. Your organization can set up this online review program for self-service so that managers and employees also can access the gap analysis information that is relevant to them.

When you need to review gap analysis information for a group of employees, you can print the Gap Analysis report. To determine which employees are qualified for a particular job, you can print the Job Match report.

To make it easier to determine which employees are competent for a particular type of job, you can define *competency aggregates*, that is, groups of related competencies. You can use the Review Competencies report to determine whether an employee has competencies in a particular competency aggregate.

Working with gap analysis includes the following tasks:

- Reviewing gap analysis online
- Reviewing the Gap Analysis report
- Reviewing the Job Match report
- Defining competency aggregates
- Reviewing the Review Competencies report

## Before You Begin

- Enter employee and job competency information. See *Working with Job Competency Information* and *Working with Employee Competencies*.

## Reviewing Gap Analysis Online

When you need to compare the competencies that an employee possesses with those that are required for a particular job, you can review gap analysis information online. You can use this information to help employees set competency goals. For each employee and job, you can determine whether the employee possesses the required competencies. You can also determine whether the employee's level of competency is sufficient to meet the competency level that is required for the job.

### Self-Service Considerations

Your organization might have set up the Competencies Gap Analysis program (P08008) as a self-service application for managers and employees. When you access Competencies Gap Analysis from employee self-service, you can review information about yourself only. If you are a manager who is accessing gap analysis from the Row menu on Manager's Workbench, you can review information only for those employees who report to you.

#### ► **To review gap analysis online**

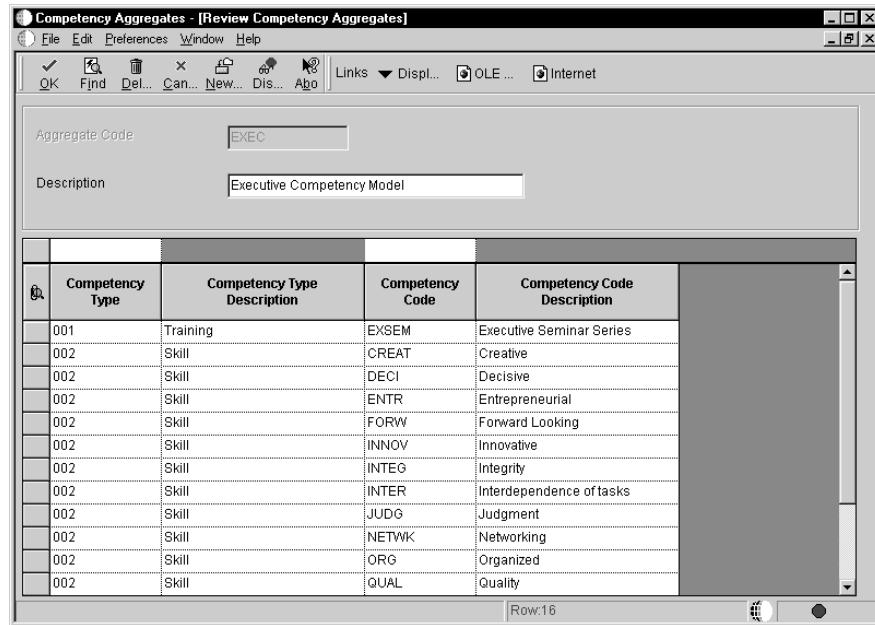
---

From the Competency Management Periodic Processing menu (G05BC2), choose Gap Analysis.

1. On Work with Employee Competency Gap Analysis, complete the following fields and click Find:
  - Employee Identification
  - Job Type (Craft) Code
  - Job Step
  - Organizational Business Unit
  - Effective Date
  - Type Structure

If you are accessing gap analysis from Managers Workbench or employee self-service, the effective date and type structure are not available to you.

2. Choose a record in the detail area and then click Select.



3. On Employee Gap Analysis Detail, review the information in the detail area.
4. To determine whether the employee is performing at the required competency level for the job, compare the values in the following fields:
  - Required Level
  - Employee Level
5. When you have finished reviewing information, click OK.

## See Also

- *Reviewing the Gap Analysis Report*

## Reviewing the Gap Analysis Report

When you need to compare the competencies that employees possess with those that are required for a particular job, you can review the Gap Analysis report. This report lists detailed gap analysis information for a group of employees. You can use this information to help employees set competency goals. For each employee and job, you can determine whether the employee possesses the required competencies. You can also determine whether the employee's level of competency is sufficient to meet the competency level that is required for the job.

## See Also

- *Reviewing Gap Analysis Online*

## Processing Options for Gap Analysis Report (R080013)

### Defaults Tab

#### 1. Organizational Type Structure

Use this processing option to specify the organizational structure to be used in the Gap Analysis report (R080013). This will report the gap analysis of employee competencies as it relates to job competencies for the specified organizational structure.

If this is left blank, the default organizational structure will be used.

#### 2. Job Type

Use this processing option to produce a Gap Analysis report (R080013) on a specific job type. If a value is entered, it is also necessary to specify an organizational business unit.

Blank will produce a Gap Analysis report (R080013) of employees in their current job.

#### 3. Job Step

Use this processing option to produce a Gap Analysis report (R080013) on a specific job step. If a value is entered, it is also necessary to specify an organizational business unit and the job type.

#### 4. Organizational Business Unit

Use this processing option to produce a Gap Analysis report (R080013) on a specific organizational business unit. If a value is entered, it is also necessary to specify a job type and job step.

Blank will produce a Gap Analysis report (R080013) of employees in their current job.

#### 5. Date - Effective

Use this processing option to produce a Gap Analysis report (R080013) at a specific point in time.

Blank will produce a Gap Analysis report (R080013) of employees for a current date.

## 6. Default Job Competency Weight %

Use this processing option to specify whether to use equal amounts as the default for job competency weight percentages. Equal amounts will be the default for the job competency percentages only if all the job competencies within a particular job are equal to zero. Valid values are:

- 1 Use equal amounts for competency weight percentages.
- Blank Do not use equal amounts for competency weight percentages.

## Display Tab

### 1. Show Job Option Details

Use this processing option to indicate whether to show details about job competency options. Valid values are:

- 1 Yes, show the option details (employee competencies) for each job competency. This value is the default.
- 0 No, do not show detail information.

## Reviewing the Job Match Report

From the Competency Management Periodic Processing menu (G05BC2), choose Job Match Report.

When you need to determine the employees who are qualified for a particular job, you can review the Job Match report. This report lists all of the required competencies for the job and the proficiency level that the employee has attained in each of these competencies. You can use a processing option to specify the minimum proficiency level that the job requires, and the report will include only those employees who have attained that minimum proficiency level. When you have a job opening within your organization, you can use this information to help you determine which employees are qualified to fill the opening.

## Processing Options for Job Match Report (R080016)

### Select Tab

#### 1. Minimum Job Competency

Use this processing option to indicate the minimum job competency percent achieved. The jobs that will be reported on the Job Match report (R080016) will be those where the employee's competencies are high enough that the minimum job competency percent achieved has been reached or exceeded.

**2. Job Type**

Use this processing option to search a specific job for the Job Match report (R080016). A blank value has the Job Match report (R080016) search through all jobs.

**3. Job Step**

Use this processing option to search a specific job for the Job Match report (R080016). A blank value has the Job Match (R080016) report search through all jobs.

**4. Job Group**

Use this processing option to search a specific job group for the Job Match report (R080016). An asterisk (\*) has the Job Match report (R080016) search through all job groups.

**4. Organizational Business Unit**

Use this processing option to search through jobs that are in the specified organizational business unit. A blank value indicates that all jobs in all organizational business units will be searched.

**5. Date - Effective**

Use this processing option to select jobs and job competencies as of a specified date. A blank value will report jobs and job competencies for the current date.

**Default Tab****1. Organizational Type Structure**

Use this processing option to specify the organizational structure. A blank value will produce the organizational structure setup in the HR Constants.

**Display Tab****1. Show Job Competency Option Details**

Use this processing option to indicate whether to hide or show job option details. Select 1 to show the option details (employee competencies) for a job competency. Select 0 to hide these details.

## 2. Show Job Competency Details

Use this processing option to hide or show job competency details. A value of 1 will show the job competencies that make up a job. A value of 0 will not show the job competencies.

## Defining Competency Aggregates

To make it easier to determine which employees are competent for a particular type of job, you can define *competency aggregates*. A competency aggregate is a group of related competencies. These competencies can be from different competency types. For example, you might create a competency aggregate called Manager that includes all of the competencies that apply to management jobs. The Manager aggregate might include the following competencies:

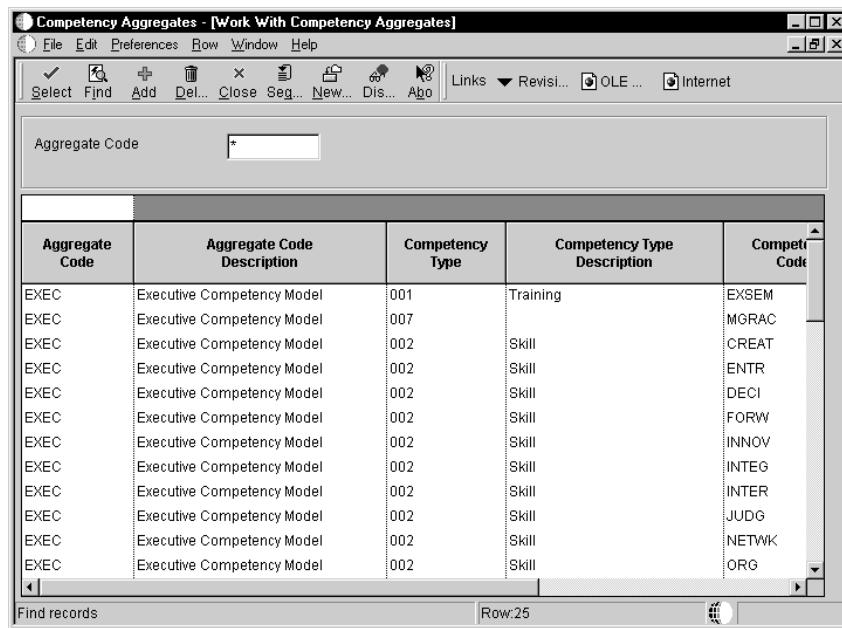
- |                 |  |
|-----------------|--|
| <b>Skills</b>   | <ul style="list-style-type: none"><li>• Leadership ability</li><li>• Conflict resolution skills</li><li>• Communication skills</li></ul> |
| <b>Training</b> | <ul style="list-style-type: none"><li>• Managing at XYZ company</li></ul>  |
| <b>Degree</b>   | <ul style="list-style-type: none"><li>• MBA</li></ul>  |

### ► To define competency aggregates

---

From the Competency Setup menu (G05BC4), choose Competency Aggregates.

1. On Work with Competency Aggregates, click Find to review any existing competency aggregates.
2. Click Add.



3. On Review Competency Aggregates, complete the following fields:
  - Aggregate Code
  - Description
4. To include a competency code in this competency aggregate, complete the following fields in the detail area:
  - Competency Type
  - Competency Code
5. Repeat step 4 for as many competency codes as you want to include in the aggregate, and then click OK.

---

Field	Explanation
Aggregate Code	A code that unifies individual competencies based on certain criteria.

---

## Reviewing the Review Competencies Report

From the Competency Management menu (G05BC1), choose Review Competency Aggregates.

When you need to determine the employees who have competencies in a particular competency aggregate, you can review the Review Competencies report. For a particular competency aggregate, this report lists each employee competency, including the proficiency level that the employee has attained in the competency.

## Processing Options for Review Competencies

Default

1. Aggregate Code
-



# **Pay-Grade Step Administration**



## Pay-Grade Step Progression

You use pay-grade step progression to automate pay-rate changes for groups of employees. Pay-grade step progression helps you ensure that all employees that perform the same job at the same level receive the same rate of pay, even if the pay rate for that position changes.

The following scenario illustrates how using pay-grade step progression can automate pay-rate changes for a group of employees. Company A negotiates a new contract with a union. The new contract includes a 2.00 USD per hour pay-rate increase for all union-related positions. More than 1000 union employees perform more than 100 different union-related jobs within the company. Using pay-grade step progression, you can automatically update the pay rates for all union-related positions and the employees who perform those jobs.

You can also use pay-grade step progression to establish job paths that employees can follow. Progression paths include predefined pay-grade step levels, each with its own rate of pay. You can automatically move groups of employees to the next level in their progression path and update their pay rates accordingly.

The following scenario illustrates how creating progression paths can automate pay-rate changes for a group of employees. Company B hires a group of employees, all for different positions, at the same time. The company policy states that employees are hired on a 30-day trial basis. After 30 days, the employees are either terminated or they are promoted to the next level and receive an associated pay-rate increase. Using pay-grade step progression, you can automatically move all selected employees to the next level in their progression paths and update their pay rates accordingly.

Automating the process of administering pay-rate changes for a group of employees can significantly decrease data entry time as well as the occurrence of data entry errors. Pay-grade step administration can also help eliminate the possibility of incorrectly excluding an employee from receiving a pay-rate change.

To use pay-grade step administration, complete the following tasks:

- Updating pay rates for pay-grade steps
- Creating progression work groups
- Working with progression work groups
- Updating pay-grade step changes to the Employee Master



- Deleting a progression work group

### **Before You Begin**

- Set up pay-grade step tables and assign pay-grade step information to your employees. See *Setting Up Job Information* for more information about setting up and assigning pay-grade step information.

## **Working with Pay Rates for Pay-Grade Steps**

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Periodically, you might need to adjust the pay rates for your pay-grade steps. For example, you might need to enter a cost-of-living increase for all pay-grade steps, or you might need to make a market adjustment to a particular pay-grade step. You can manually or automatically update the Pay Grade Step table to reflect the new rates.

You can use any of the following three methods to make automated changes to pay rates associated with pay-grade steps:

- Enter a flat amount by which the rate will change.
- Enter a percentage rate change.
- Enter a base rate and a rate multiplier.

You might also find it necessary to make additional entries to your pay grade step tables. For example, you might need to enter new rates for all pay grade steps for the upcoming year. To avoid having to manually enter all of the information into the table for the upcoming year, you can copy existing records in your table and change only the fields in the new records that have different information, such as the rate and date fields.

Updating rates in the pay grade step tables includes the following tasks:

- Updating pay rates for pay-grade steps
- Copying pay-grade step records

### **Before You Begin**

- Set up the Pay Grade Step Table and assign pay-grade step information to your employees. See *Setting Up Job Information* for more information about setting up the Pay Grade Step Table.

## **Updating Pay Rates for Pay-Grade Steps**

It might be necessary for you to change the rates of existing pay-grade step records. For example, you might need to update a table to reflect new rates for a particular job, or you might want to update pay rates with a market adjustment. You can use the following three methods to update existing pay-grade step records automatically:

- Enter a flat amount by which the rate will change.
- Enter a percentage rate change.
- Enter a base rate and a rate multiplier.

After you have entered rate change information, you can have changes automatically applied to specified pay-grade steps. You can also manually change rates using the Pay Grade Step Table program (P082003).

You use the flat amount method when you want to change all selected pay-grade steps by the same monetary amount. For example, to increase the hourly rate of all selected pay-grade steps by 2.00 USD, you would use the flat amount method to calculate the new rates.

You use the percentage rate method when you want to change all selected pay-grade steps by the same percentage amount. For example, to apply a 5% cost-of-living increase to selected pay-grade steps, you would use the percentage rate method.

You use the base rate and rate multiplier method when you have pay-grade steps for which the pay rates are all based on one rate. To calculate the pay rate for each pay-grade step, the system multiplies the base rate by the rate multiplier associated with each pay-grade step. Each selected pay-grade step must have a rate multiplier. For example, if you entered a base rate of 40,000.00 USD, and a pay-grade step has a rate multiplier of .95, the new pay rate for that pay-grade step would be 38,000.00 USD ( $40,000 \times .95 = 38,000$ ).

**Note:** To change the rates for existing records in the Pay Grade Step table, wait until those changes are effective to begin the automatic update of the table, or create new records in the table for each pay-grade step that you want to change, and include the effective date of the rate change in the new records. Using the automatic update procedure to update rates for existing pay-grade step records before the rate change becomes effective can cause undesirable results.

## ► **To update pay rates for pay-grade steps**

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From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

1. On Pay Grade Step Table, to locate the pay-grade steps that you need to update, complete any of the following fields and click Find:
  - Pay Class (H/S/P)
  - Union Code
  - Locality
  - Pay Grade
  - Effective Date

2. To change pay rates for all selected pay-grade steps simultaneously, complete one of the following fields:

- Base Rate
- OR Percent
- OR Amount

The screenshot shows the 'Pay Grade Step Table' application window. At the top, there are input fields for Pay Class(H/S/P) (S), Salaried, Union Code (\*), Locality (\*), Pay Grade (\*), and Effective Date (\*). Below these are sections for 'Std Hrs/Day' and 'Std Days/Year'. Under 'Calculation Information', there are fields for 'Base Rate', 'OR Percent', and 'OR Amount' (set to 2000). The main area is a grid table with columns: Pay Grade, Grade Step, Loc, Union Code, Effective Date, Rate Mult, Step Rate, and Next Pay Grade. Three rows of data are visible: S1-A (1/1/05, 20,874.000, S1, B), S1-A (1/1/04, 20,365.000, S1, B), and S1-A (1/1/03, 19,869.000, S1, B). A 'Find Records' button is at the bottom left.

Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade
S1	A			1/1/05		20,874.000	S1
S1	A			1/1/04		20,365.000	S1
S1	A			1/1/03		19,869.000	S1

3. To have the system calculate the new pay rate for each pay-grade step, choose Calculation from the Form menu.

The screenshot shows the same application window after a calculation update. The data in the grid has been updated: the 'Step Rate' column now shows values of 22,874.000, 22,365.000, and 21,869.000 respectively. The 'Rate Mult' column is now populated with values 1.04, 1.03, and 1.02. The 'Calculation Update' button is visible at the bottom left.

Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade
S1	A			1/1/05	1.04	22,874.000	S1
S1	A			1/1/04	1.03	22,365.000	S1
S1	A			1/1/03	1.02	21,869.000	S1

4. To manually change the pay rate for a pay-grade step, choose the record that you want to change and complete the following field:
  - Step Rate
5. To save the changes that you made to the table, click OK.
6. To restore the data in the table to the way it was before you calculated the rate changes, click Cancel.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Pay Class(H/S/P)	A code that indicates how an employee is paid. Valid codes are: Blank H      Hourly S      Salaried P      Piecework
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.
Pay Grade	A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.  To set up pay grades, use Pay Grades by Class (P082001).  If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:
	<ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>

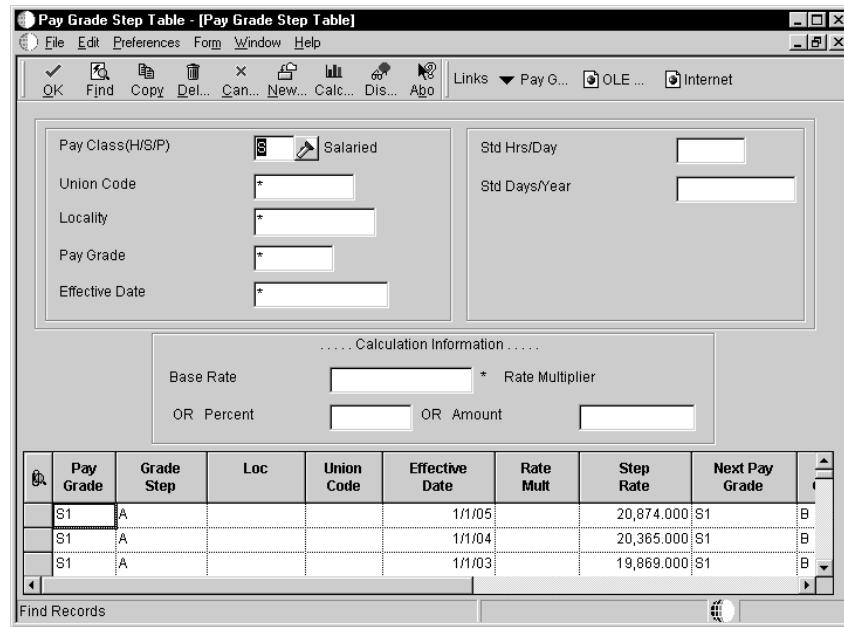
<b>Field</b>	<b>Explanation</b>
Effective Date	<p>The date on which this transaction takes effect. The effective date is used generically. It can be the date of the next raise, a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, a change in well status, or any other date that is appropriate.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>The date on which the rate associated with a pay-grade step becomes effective.</p>
Base Rate	<p>There are two uses for this value:</p> <ul style="list-style-type: none"> <li>1 This is the base rate used in conjunction with the rate multiplier to update all Pay Rate fields that correspond to the key fields entered at the top of the screen.</li> <li>2 This is the Pay Rate associated with the Pay Grade/Step values.</li> </ul> <p>..... <i>Form-specific information</i> .....</p>
	<p>The Base Rate is used as value 1 for this task. You must enter a rate, which is multiplied by the the value entered for Rate Multiplier on the grid. For example, if you are setting up pay grade step B1, you might enter a base rate of 25,000 and a rate multiplier of 1. After you click Calculate, you get a step rate of 25,000. To maintain a steady progression of step rates between steps, for pay grade step B2, you might keep the same base rate, but change the rate multiplier to 1.25 to get 31,250 for a step rate.</p>
OR Percent	<p>An abbreviation for percentage.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>Enter a percentage change for the pay-grade levels that appear on the form. Enter the percentage as a whole number, not a decimal. For example, enter 5 to indicate 5 percent.</p>
OR Amount	<p>A value that represents a monetary amount increase that the system will apply to the selections on the form.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>This value should represent a flat monetary amount. You need to enter an amount in this field, the Percent field, or the Base Rate field to change pay-grade step rates. Only one of these fields can be used at the same time.</p>

## Copying Pay-Grade Step Records

You might need to add records to your Pay Grade Step tables that are similar to records that already exist in your tables. To avoid excessive data entry, you can copy existing records and change only the information that is different for the new records. For example, if your pay-grade step rates for the upcoming year are different from the rates for the current year, you might want to create new records rather than update the existing records with the new rates. Copying existing records can significantly reduce the instances of data entry errors. After you have created the new records, you can modify them with any necessary changes.

### ► To copy pay-grade step records

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.



1. On Pay Grade Step Table, to locate the pay-grade steps that you want to copy, complete any of the following fields and click Find:
  - Pay Class (H/S/P)
  - Union Code
  - Locality
  - Pay Grade
  - Effective Date

2. Choose the records that you want to copy and then click Copy.
3. Scroll down to the newly created records, which will appear at the bottom of the Pay Grade Step Table, and make changes to any of the following fields:
  - Pay Grade
  - Grade Step
  - Loc
  - Union Code
  - Effective Date
  - Rate Mult
  - Step Rate
  - Next Pay Grade
  - Next Pay Grade Step
  - Remark
  - Hrs Day

**Note:** You must change information in the new records to avoid having duplicate records in the Pay Grade Step table.

4. Click OK.



## Creating Progression Work Groups

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After you have updated the Pay Grade Step table with rate changes, you can create groups of employees to apply those rate changes to. Creating progression work groups allows you to update all employees within a work group at the same time.

You can also use work groups to select employees that you want to move from one pay-grade step to the next. You do not need to update the Pay Grade Step table with rate changes in order to move employees to the next pay-grade step, as long as the next step is already included in the table.

When you create progression work groups, you assign an effectivity date or an effectivity data item to the entire work group. The effectivity data item can be any data item included in UDC 08/DT. The effectivity date is used to determine when the rate change will become effective for the employees included in the work group. You should use an effectivity date or data item that you want to use for all employees included in the work group. However, you can change the date for individual employees after you create the work group.

If the effectivity date falls on or before the system date, the Employee Master table is directly updated when you run the update process. If the effectivity date falls after the system date, the pay-rate change is stored in the Future Data Revisions table. The Employee Master table is then updated during the final update step of the pay period that the effectivity date falls within.

**Note:** J.D. Edwards recommends using an effectivity date that will update the Employee Master table directly. Processing future data revisions during the final update step of the payroll cycle uses additional system resources and can cause a dramatic increase in processing time. If you use the future data revisions program to update pay-grade information during final update, you must activate the payroll workbench processing option to allow future data processing.

You can set up effectivity dates for pay-rate changes using the following dates:

**System Date**

If you leave the Effectivity Date field and the Effectivity Data Item field blank, the system date will be used to determine when the pay-rate changes become effective.

**Override Date**

If you enter a date in the Effectivity Date field, that date will be used to determine when the pay-rate changes become effective.

### User-Defined Date

If you enter a data item in the Effectivity Data Item field, such as Date of Next Review or Date of Next Raise, the date associated with each employee for that particular data item is the date that is used to determine when the pay-rate changes become effective. You can enter any date included in UDC 08/DT.

**Caution:** The effectivity date is not always the date that the pay-rate change becomes effective. If you enter an effectivity date that falls after the system date when you run the update process, the Future Data Revisions table is updated. Future data revisions are not updated to the Employee Master table until the Final Update step of the payroll cycle that the effectivity date falls within. This can cause your pay-rate change to become effective on a date later than the effectivity date. For example, if you use an effectivity date of 06/16/05, and that date falls after the system date, the Future Data Revisions table is updated. If the pay cycle that includes the effectivity date includes work dates of 06/15/05 through 06/30/05, the new pay rate is not updated to the Employee Master table until Final Update of this payroll cycle, and therefore is not used to calculate pay for this payroll cycle. The pay-rate change would be effective during the next payroll cycle, making the actual effective date of the change 07/01/05.

You can base pay-rate changes on two different pay-grade step options. If you want to change the rate for an existing pay-grade step and update the employees who are currently attached to that pay-grade step with the new rate, use the existing pay-grade step option as the basis for creating the work group. If you want to move employees from one pay-grade step to the next, use the new pay-grade step option as the basis for creating the work group.

**Note:** If you want to move some employees from one pay-grade step to the next and update other employees with new rates for their current pay-grade steps, you must create more than one work group. You cannot perform both types of updates for one work group.

### Before You Begin

- Update the pay-grade steps with the rate changes in the Pay Grade Step table. See *Updating Pay Rates for Pay-Grade Steps* for more information.

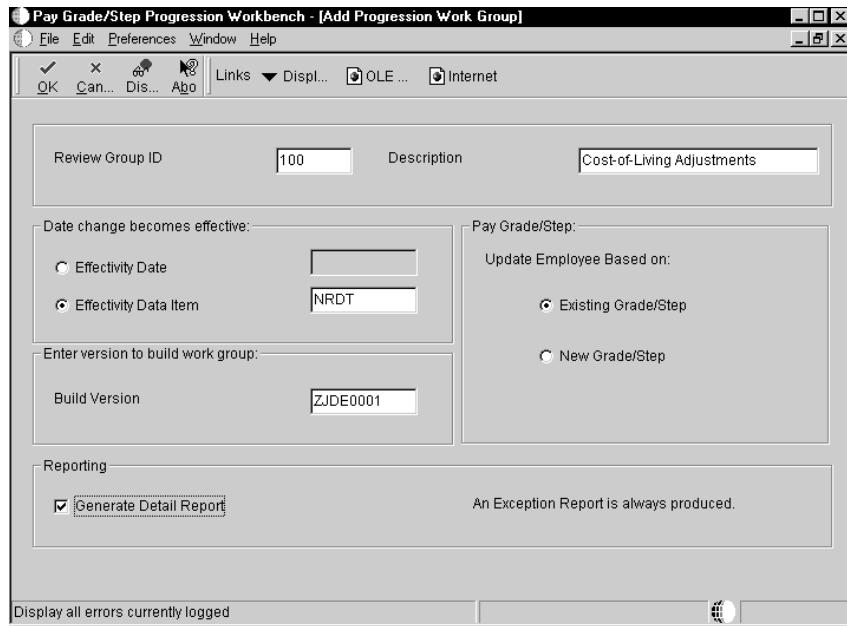
### See Also

- *Processing Future Changes* for more information about updating future data changes to the Employee Master table

## ► To create progression work groups

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On the Grade/Step Progression Workbench, click Add.



2. On Add Progression Work Group, complete the following fields:
  - Review Group ID
  - Description
3. To use the system date as the effectivity date for the rate change, click the following option and leave the Effectivity Date field blank:
  - Effectivity Date
4. To use an override date as the effectivity date for the rate changes, click the Effectivity Date option and complete the following field:
  - Effectivity Date
5. To use a user-defined date as the effectivity date for the rate changes, click the Effectivity Data Item option and complete the following field:
  - Effectivity Data Item
6. To choose the basis for the pay-rate change, click one of the following options:
  - Existing Grade/Step
  - New Grade/Step

7. To produce a report of the work group, click the following option:

- OneWorld Event Point 03

An exception report is always printed, regardless of whether you generate the Work Group Report.

8. Complete the following field and click OK:

- Version

**Note:** You cannot create progression work groups that contain employees from more than one country. If you have employees in different countries that work in the same pay-grade step, you must create country-specific work groups to update pay grade information. Using data selection, you can specify which country you want to include when creating the work groups. Including employees from more than one country in the same progression work group can cause undesirable results.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Review Group ID	A group of employees selected in order to review whether they should be in the pay-grade step progression update. This update will do one of the following: <ul style="list-style-type: none"><li>• Change the existing pay rate based on the employee's pay grade step.</li><li>• Move the employee to the next pay grade step as defined in the Pay Grade Step table (F082001) and change the pay rate, hours per day, days per year, and resultant hours per year in the employee's record.</li></ul>
Effectivity Date	An option that identifies a processing flag for an event.

Field	Explanation
Effectivity Data Item	<p>A code that specifies the date that will be used to determine when the pay-grade-step progression changes are applied to the employee master. For instance, if NRVW is entered, the date in the employee's next review date field will be used to determine when changes will become effective.</p>
	<p>Note: If you are using Future Data Revisions to update pay-grade step progression information, the effectivity date is not always the date that the pay-grade changes will become effective for the employee. When you are using Future Data Revisions, the payroll cycle that includes the effectivity date of the changes is used to update the changes to the employee master table. Because future data is updated during the final update process of the payroll cycle, any changes processed during the payroll are effective on the first day of the next payroll cycle.</p>
	<p>Available values are defined in user defined table 08/DT.</p>
Existing Grade/Step	<p>An option that specifies whether the pay-grade step progression work group is built based on existing or new pay grades.</p> <p>If a pay range has changed for a group of employees within the same pay-grade step (market adjustment), the existing pay-grade step can be used to apply the adjustment.</p> <p>If a group of employees was promoted to the next pay-grade step, the new pay-grade step can be used to apply the promotion.</p>
New Grade/Step	<p>An option that specifies whether the pay-grade step progression work group is built based on existing or new pay grades.</p> <p>If a pay range has changed for a group of employees within the same pay-grade step (market adjustment), the existing pay-grade step can be used to apply the adjustment.</p> <p>If a group of employees was promoted to the next pay-grade step, the new pay-grade step can be used to apply the promotion.</p>

## Processing Options for Grade/Step Progression Workbench (P082005)

### Versions Tab

These processing options specify the versions that are available for you to use.

### **1. Add New Work Group Version**

Use this processing option to specify the version of the Build Grade/Step Progression Work Group program on the Add Progression Work Group form when the form exit is chosen. The version may be changed on the Add form. The default is ZJDE0001.

### **2. Proof - Apply pay grade step changes version**

Use this processing option to specify the version of the Grade/Step Progression Changes program to use in proof mode. The default is ZJDE0001.

### **3. Final - Apply pay grade step changes version**

Use this processing option to specify the version of the Grade/Step Progression Changes program to use in Final Mode. The default is ZJDE0002.

## Working with Progression Work Groups

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After you create progression work groups, you can review detailed information for each employee as well as summary information for the entire work group. You can make changes to employee information and update your work group with your changes without having to rebuild the entire progression work group. You can also delete employees from a work group. However, if you accidentally delete an employee, you must rebuild the progression work group to include that employee in the work group again.

**Note:** The Create Progression Workgroups program must finish processing before you can review information in your work group. Until the process is complete, you will not see your work group on the Pay Grade/Step Progression Workbench.

Working with progression work groups includes the following tasks:

- Reviewing progression work group information
- Changing progression work group information
- Deleting employees from a progression work group

### Reviewing Progression Work Group Information

You review work group information to verify that the pay-rate changes that you created are accurate. You can review information for each employee within the progression work group as well as summary information for the entire work group.

Reviewing progression work group information includes the following tasks:

- Reviewing progression work group summary information
- Reviewing progression work group detail information

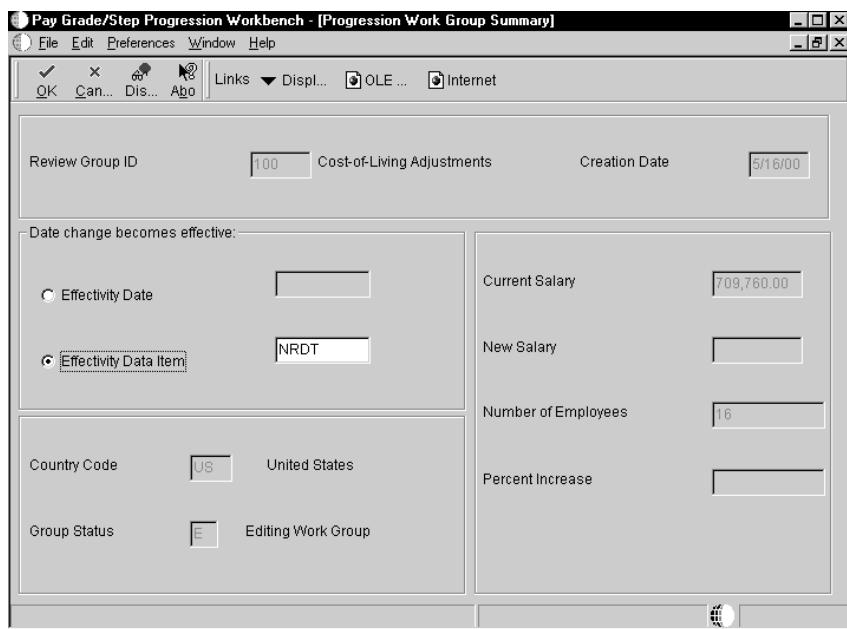
#### ► **To review progression work group summary information**

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From the Pay Grade/Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On the Grade/Step Progression Workbench form, complete any of the following fields and click Find:

- Review Group ID
  - Country Code
  - Group Status
2. To review summary information for the work group, choose the progression work group that you want to review and click Select.



3. On Progression Work Group Summary, review the following fields and click OK:

- Creation Date
- Effectivity Date
- Effectivity Data Item
- Country Code
- Group Status
- Current Salary
- New Salary
- Number of Employees
- Percent Increase

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Group Status	A code that specifies the status of a work group. This status is defined in user defined table 08/WS.
Create Date	The date the review group pool was created.
Current Salary	<p>The amount that an employee is paid in one year, provided that the employee is paid every pay period of the year.</p> <p>For World:</p> <p>For the employee's primary job, the system stores the annual salary in both the Employee Master table (F060116) and the Employee Multiple Job table (F060118). For secondary jobs, the system stores the annual salary in the Employee Multiple Job table (F060118).</p> <p>Depending on how the Display Salary (Annual/Effective) field is set in the History Constants table (F08040), this field displays one of the following:</p> <ul style="list-style-type: none"> <li>• Annual salary. For salaried employees who are not associated with a contract calendar, this amount is either entered by the user or retrieved from the Pay Grade/Step table. For employees who are associated with a contract calendar, the system calculates this amount using the formula, ((current salary minus salary paid before change) divided by number of periods to pay) multiplied by pay frequency)</li> <li>• Effective salary, which equals ((annual salary divided by pay frequency) times periods to pay)</li> </ul> <p>For employees whose jobs are associated with a contract calendar, the system recalculates the effective salary if you enter a mid-calendar salary adjustment for the employee. After you enter a mid-calendar adjustment, the effective salary equals the salary that is to be paid to the employee from the time of the adjustment to the end of the contract.</p>
New Salary	The employee's new annual salary for all payroll entries that are either manually entered or automatically generated for the payroll period after the Date of Next Raise from the employee's record.
No Empl	The total number of employees within a work group.
Perc Increase	The amount of increase specified either as a monetary amount or as a percent, that is added to the current annual salary to obtain the new annual salary.

## ► To review progression work group detail information

From the Pay Grade/Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On the Grade/Step Progression Workbench form, complete any of the following fields and click Find:
  - Review Group ID
  - Country Code
  - Group Status
2. On the Grade/Step Progression Workbench form, choose the work group that you want to review and choose Detail from the Row menu.

Employee Name	Union Description	Locality Description	Curr Grade	Curr Step	Curr Salary
Abbott, Dominique	.	Headquarters (default)	S4		38,000.
Abrams, Brooke	.	Headquarters (default)	S6		60,000.
Allen, Ray	.	Headquarters (default)	S7		75,000.
Anderson, Jeanette	.	Headquarters (default)	S5		53,040.
Bellas, Debbie	.	Headquarters (default)	S6		53,000.
Chamberlain, Carol M.	.	Headquarters (default)	S4		32,000.
Dobson, Jane	.	Headquarters (default)	S5		55,750.
Edwards, Angela	.	Headquarters (default)	S5		52,520.
Ingram, Paul	.	Headquarters (default)	S2		22,250.

3. On Progression Work Group Detail, review the following fields:
  - Employee Name
  - Locality
  - Curr Grade
  - Curr Step
  - Curr Salary
  - Curr Hourly Rate
  - Next Grade
  - Next Step
  - Next Salary
  - Next Hourly Rate
  - Effectivity Date
  - Address Number

- Home Business Unit
- Job Type
- Job Step
- FTE
- New Pay Stop Date
- New Pay Start Date
- Days Year
- Hrs Day
- Hrs/ Year

<b>Field</b>	<b>Explanation</b>
Curr Grade	<p>A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.</p> <p>To set up pay grades, use Pay Grades by Class (P082001). If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
Curr Step	<p>A code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate.</p> <p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>

<b>Field</b>	<b>Explanation</b>
Curr Salary	<p>There are two uses for this value:</p> <ul style="list-style-type: none"> <li>1 This is the base rate used in conjunction with the rate multiplier to update all Pay Rate fields that correspond to the key fields entered at the top of the screen.</li> <li>2 This is the Pay Rate associated with the Pay Grade/Step values.</li> </ul>
Curr Hourly Rate	<p>The employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.</p> <p>In the Employee Master table, this is the employee's base hourly rate. In the Union Rates table, this is the straight time rate.</p>
	<p>Note: If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.</p>
Next Step	<p>The next pay-grade step in an employee's progression path.</p>
Next Grade	<p>The next higher pay grade in an employee's progression path.</p>
Next Salary	<p>The employee's new annual salary for all payroll entries that are either manually entered or automatically generated for the payroll period after the Date of Next Raise from the employee's record.</p>
Next Hourly Rate	<p>This will be the employee's new hourly pay rate for all payroll entries input or automatically generated FOR THE PAYROLL PERIOD AFTER his Date of Next Raise from his employee master record.</p>
	<p>See definition of "Date – Next Raise" (NRDT)</p>
Job Type	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Job Step	<p>A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.</p>
FTE	<p>The full-time equivalent (FTE) amount. This figure is the portion of a full-time worker that an employee represents within the business unit. For example, an employee who works 20 hours per week would represent .50 (1/2 FTE). This number cannot be greater than 1 for any employee.</p>

Field	Explanation
New Pay Stop Date	The date an active pay structure becomes inactive.
New Pay Start Date	The date a new pay structure becomes active.

## Changing Progression Work Group Information

After you review the information in your progression work group, you might need to make changes to information for the employees included in the work group. You might also need to change the effectiveness date for an individual employee or for the entire work group.

For example, if you used effectiveness data item NRD<sub>T</sub>, the date of next raise, you might find that an employee's effectiveness date is blank. To correct this, you must enter a date in the employee's Date of Next Raise field. If you leave the effectiveness date for an employee in the work group blank, the system date when you run the update process will be used as the effectiveness date for that employee.

**Note:** You can change the effectiveness date for an individual in a progression group only if you are using an effectiveness data item to determine the date that the changes become effective. Otherwise, you must change the effectiveness date for all employees within the progression group.

You might also find that information for a particular employee is incorrect. For example, an employee might be assigned to the wrong job type, business unit, or home company. Before you continue processing, you can correct this information and automatically update the work group to reflect the changes that you make to the employee's information.

Changing progression work group information includes the following tasks:

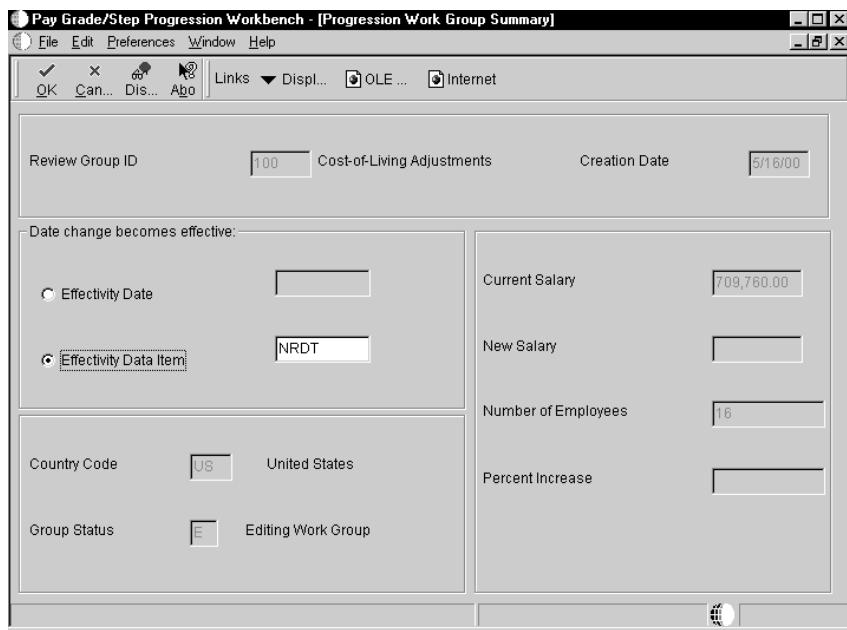
- Changing the effectiveness date for a progression group
- Changing the effectiveness date for an employee
- Changing employee information

### ► **To change the effectiveness date for a progression group**

From the Pay Grade/Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On the Grade/Step Progression Workbench form, complete any of the following fields and click Find:
  - Review Group ID
  - Country Code

- Group Status
2. To change the effectivity date for the entire work group, choose the work group that you want to update and click Select.



3. On Progression Work Group Summary, click one of the following options and complete the corresponding field, if necessary:
  - Effectivity Date
  - Effectivity Data Item
4. Click OK.
5. To update all effectivity date changes to the work group, on Progression Work Group Detail, choose Update Work Files from the Row menu.

### ► **To change the effectivity date for an employee**

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From the Pay Grade/Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On the Grade/Step Progression Workbench form, complete any of the following fields and click Find:
  - Review Group ID
  - Country Code
  - Group Status
2. On Grade/Step Progression Workbench, choose the work group that you want to change and choose Detail from the Row menu.

Employee Name	Union Description	Locality Description	Curr Grade	Curr Step	Curr Salary
Abbott, Dominique	.	Headquarters (default)	S4		38,000.
Abrams, Brooke	.	Headquarters (default)	S6		60,000.
Allen, Ray	.	Headquarters (default)	S7		75,000.
Anderson, Jeanette	.	Headquarters (default)	S5		53,040.
Bellas, Debbie	.	Headquarters (default)	S6		53,000.
Chamberlain, Carol M.	.	Headquarters (default)	S4		32,000.
Dobson, Jane	.	Headquarters (default)	S5		55,750.
Edwards, Angela	.	Headquarters (default)	S5		52,520.
Ingram, Paul	.	Headquarters (default)	S2		22,250.

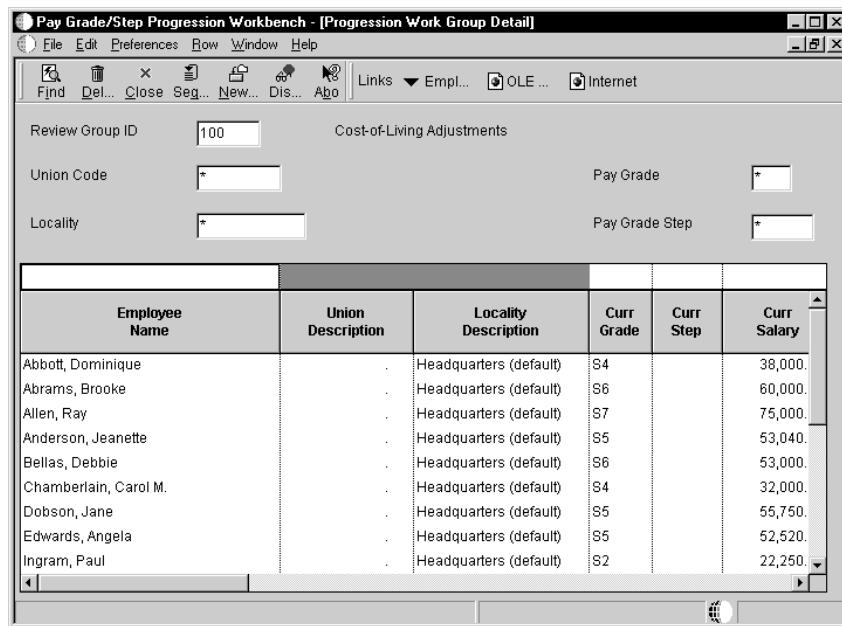
3. On Progression Work Group Detail, choose the employee that you want to change and choose Employee Master from the Row menu.
4. Make any necessary changes to the employee's effectivity data item. When all changes for the employee have been completed, click the Close button on the Work With Employee Information form.
5. To update all effectivity date changes to the work group, on Progression Work Group Detail, choose Update Work Files from the Row menu.

### ► To change employee information

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From the Pay Grade/Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On the Grade/Step Progression Workbench form, complete any of the following fields and click Find:
  - Review Group ID
  - Country Code
  - Group Status
2. Choose the work group that you want to change and choose Detail from the Row menu.



3. On Progression Work Group Detail, choose the employee that you want to change and choose Employee Master from the Row menu.
4. Make any necessary changes to the employee's information. When all changes for the employee have been completed, click the Close button on the Work With Employee Information form.
5. To update all employee information changes to the work group, on Progression Work Group Detail, choose Update Work Files from the Row menu.

## See Also

- *Revising Employee Information* for more information about changing employee master information

## Deleting Employees from a Progression Work Group

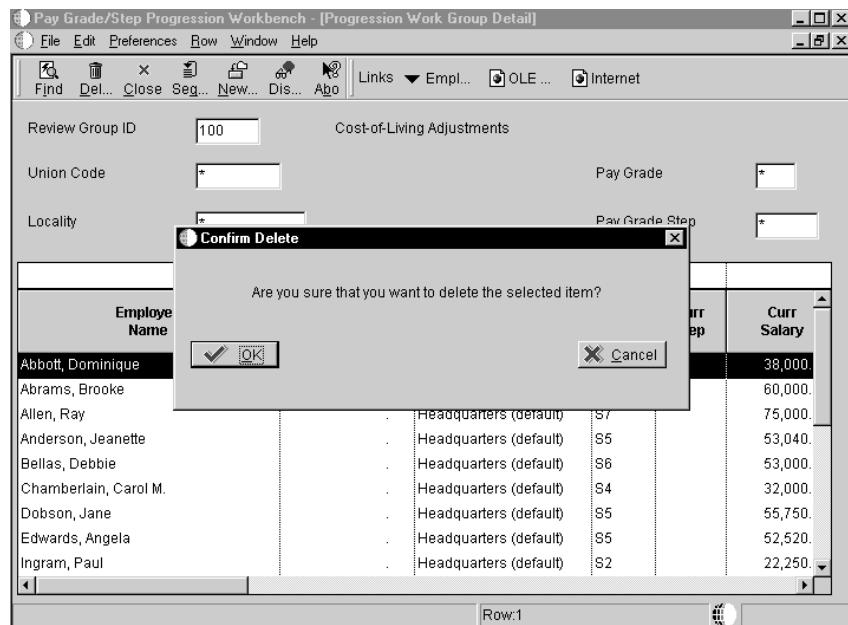
After you review the information in your progression work group, you might notice that an employee has been incorrectly included in the work group. You can delete an employee from the work group and automatically update your work group to reflect this change.

**Note:** After you choose the employee and click the delete button, the employee is deleted from the work group. You do not need to run the Update Work File process to update the work group. If you accidentally delete an employee, you must rebuild the progression work group to include that employee in the work group again.

► **To delete employees from a progression work group**

From the Pay Grade/Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On the Grade/Step Progression Workbench form, complete any of the following fields and click Find:
  - Review Group ID
  - Country Code
  - Group Status
2. On Grade/Step Progression Workbench, choose the work group that includes the employee that you want to delete and choose Detail from the Row menu.
3. On Progression Work Group Detail, choose the employee that you want to delete from the work group and click Delete.



4. On the Confirm Delete form, click OK.



## Updating Pay-Grade Step Changes to the Employee Master

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After you have reviewed and updated information in your progression work groups, you can update the employee master with the pay-rate changes. To ensure that the information you are updating is accurate, you can run the process using the proof version and review the information that will be updated before making any changes to employee information.

After you review the proof report for accuracy, you can run the final version. This process updates information to the Employee Master table or the Future Data Revisions table depending on the effectivity date of the pay-rate changes. If the effectivity date is before the system date, the Employee Master table is updated. If the effectivity date is after the system date, the Future Data Revisions table is updated.

**Caution:** Running the final version of this process directly updates payroll tables. After you have run this process, the only way to restore your information to the way it was before you updated the tables is to make manual corrections to each employee record, or to restore the tables from a backup created before you updated the tables. To avoid this, carefully review the proof report before running the final version.

**Note:** J.D. Edwards recommends using an effectivity date that will update the Employee Master table directly. Processing future data revisions during the final update step of the payroll cycle uses additional system resources and can cause a dramatic increase in processing time. If you use the future data revisions program to update pay grade information during final update, you must activate the payroll workbench processing option to allow future data processing.

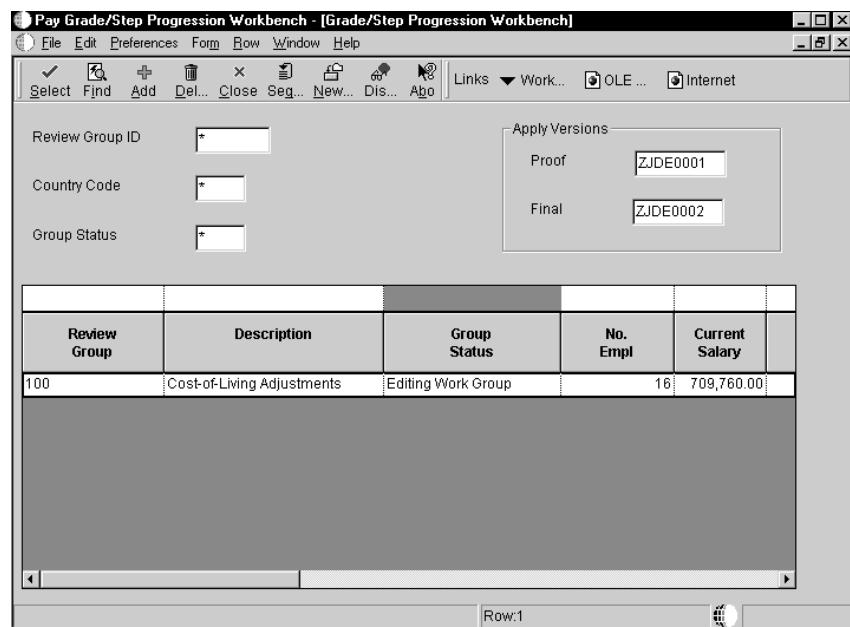


### To update pay-grade step changes to the Employee Master

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From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete the following fields:
  - Proof
  - Final



2. Complete any of the following fields and click Find:
  - Review Group ID
  - Country Code
  - Group Status
3. To run the proof version, choose the progression work group that you want to update and choose Proof - Apply from the Row menu.
4. To run the final version, choose the progression work group that you want to update and choose Final - Apply from the Row menu.
5. On the Confirm Apply Employee Master Changes form, click OK.

## Processing Options for Pay Grade to Employee Master Update (R082008)

### Process Tab

Use these processing options to specify the default values that the system will use when updating the Employee Master table.

#### 1. Generate Detail Report

Use this processing option to specify whether to create a report of updated records. An exception report will always be generated.

- 1 Create a report of updated records.  
Blank Do not create a report of updated records.

### 2. Change Reason

Use this processing option to add the change reason to the files.

### 3. Automatically Delete Workgroup

Use this processing option to automatically delete the work group when the update is completed.

- 1      Delete the workgroup.  
Balnk Do not delete the workgroup.



## Deleting a Progression Work Group

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After you review the information in your progression work group and update the changes to the employees in the work group, you can delete the work group.

To be sure that work groups are accurate and that they reflect the latest changes in your employee base, J.D. Edwards recommends that you delete work groups when you have completed the update process and that you create new work groups to process pay-grade step progression changes at a later date. Creating new work groups at the time you want to process pay-grade step progression changes ensures that you include all necessary employees in the work group.

### ► **To delete a progression work group**

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From the Pay Grade/Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, choose the work group that you want to delete, and click Delete.
2. On Confirm Delete, click OK.

**Note:** You can also delete a work group during the update process by activating the processing option for the Update Pay Grade to Employee Master program.

### See Also

- *Updating Pay-Grade Step Changes to the Employee Master* for more information about deleting progression work groups using processing options



# Time Accounting



## Time Accounting

Time accounting is a process that includes all aspects of the Time Entry system within the HR and Payroll Foundation system. Time accounting begins with creating timecards and ends with processing journal entries and updating the general ledger.

Time accounting consists of the following tasks:

- Working with employee timecards
- Overriding timecard information
- Working with time entry batch processing
- Processing journal entries

Time accounting includes a choice of programs for entering timecards, and batch processing for uploading timecard information from third-party software. The time entry program that you choose will depend on the structure of your company.

For example, you can enter time daily or enter time per pay period for a group of employees. If you have many sites where employees enter their time into a third-party source, you can use time entry batch processing to upload the timecard information into the J.D. Edwards Time Entry system to create timecards.

In all the time entry programs, the system can automatically supply a value for certain fields on each timecard that you enter. This can save data entry time if you have employees who share the same time-entry information. You can also define system-supplied values for time entry.

Processing journal entries updates the general ledger with labor, payroll burden, and equipment expenses. The way in which you process journal entries depends on whether you are using the J.D. Edwards Payroll system.





## Working with Employee Timecards

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To facilitate the process for entering timecards, you can select employees that you need to enter time for based on shared information such as business unit and supervisor. After selecting the employees, you can review the information and enter timecards for the employees.

You can enter timecards manually or allow the system to generate them automatically during payroll-cycle processing. The Time Entry system helps reduce data entry time and typing errors by automatically creating timecards for the following types of employees:

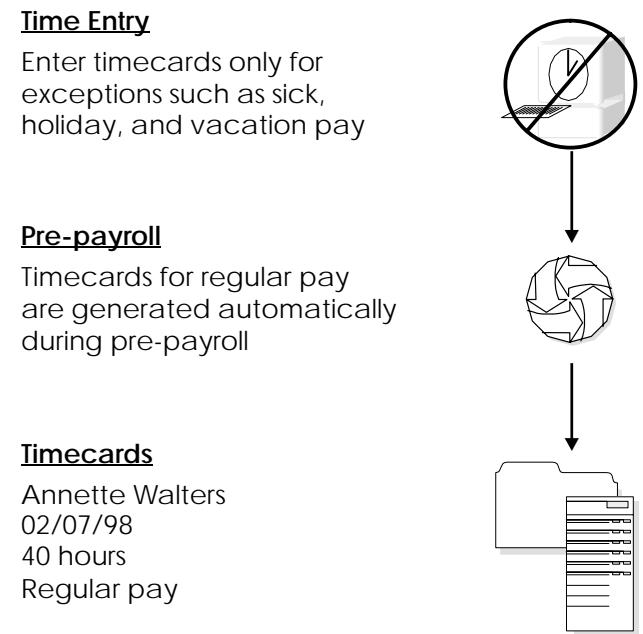
- Salaried employees
- Hourly employees for whom you entered standard hours when you entered their pay and tax information

Employees whose timecards are automatically generated are classified as autopay employees. For autopay employees, you must enter exception timecards for time other than regular work hours, such as holiday and vacation time. You can also override the default timecard information for an employee.

Working with employee timecards consists of the following tasks:

- Selecting employees for time entry
- Entering timecards for employees
- Selecting employees for Speed Time Entry
- Entering timecards for employees using Speed Time Entry

The following graphic illustrates how the system processes time entry information for autopay employees:



You can choose from various methods to enter employee timecards into the Payroll system. Consider the following when deciding which process to use:

- How many employees will I be entering timecards for?
- Have autopay timecards already been created which need modifications?
- Will I be entering timecards for groups of employees who work in the same location?
- Will I be uploading timecard information from another source, such as a separate time and attendance system or a spreadsheet?
- Will I need to refer to a timecard that has already been processed for an employee to enter a timecard in the current period?
- Will I need to refer to a timecard that has already been entered but not yet processed for an employee in the current period?
- Will I be entering a timecard for a lump sum such as a bonus, pay advance, or pay adjustment?

The time entry method that you choose depends on the criteria that you use to select employees before entering timecards.

The methods of manually entering timecards are Daily Time Entry, Time Entry by Individual, Time Entry by Time Sheet Group, and Speed Time Entry

To enter daily timecards, timecards for time sheet groups, or timecards per pay period, you must first select employees for which you want to enter timecards using time entry filters. You can select employees from the Employee Master table (F060116), select employees who have unprocessed timecards, or select employees with processed time cards.

After the employees have been selected, you can enter timecards for them using Daily Time Entry or Time Entry By Individual. As you save each timecard for an employee, the system displays a blank timecard for the next employee in the group. You can also enter time using Time Entry by Time Sheet Groups. By entering time using time sheet groups, you can automatically populate a single timecard for each employee in the selected group with information that is similar for the group, such as work date, batch number, pay type, number of hours, or lump sum amount. Batch totals are automatically created for you to use to validate the number of employees and hours that were entered for each batch of timecards. You use Speed Time Entry to enter timecards for employees in a batch or to enter timecards for employees individually based on their employee number.

Time Entry By Individual is used to enter timecards for one employee at a time. This method is beneficial when you are entering time for an employee with multiple timecards or multiple pay types. Only one pay type is allowed per line of time entry. If you have set your processing options to automatically supply the address number and pay types, you are able to increase efficiency and avoid duplication of data entry.

Speed Time Entry and Time Entry by Time Sheet Groups differ from Time Entry By Individual in that it allows you to enter multiple employees per form. You can use Speed Time Entry and Time Entry by Time Sheet Groups when entering timecards for groups of employees who have similar timecard data such as a group of employees who worked the same number of hours, charged to the same pay type, and worked in the same location during the period. As with time entry By Individual, you can set your processing options to copy the address number and pay type from the previous timecard to increase efficiency. You cannot use time entry filters to select employees for time entry if you are using Speed Time Entry.

For all four methods of entering time, each line in the time entry grid represents one timecard. If you are paying an employee multiple pay types, then each line of time entry goes onto its own line in the time entry grid because only one pay type can be associated with each line of time entry.

The first step in entering timecards for a group of employees is to select the employees for whom time is to be entered. Three filters are available from which to select employees. The Employee Master filter allows you to select from all employees, active or inactive. The Current Transactions filter allows you to select from employees for whom a timecard has been entered but not yet processed. The Historical Transactions filter allows you to select from employees for whom a timecard has been posted to history. Each of these filters allows you to search for and select employees based on information they have in common, such as

employees who reside in the same business unit or employees who share the same work location.

For a group of employees, you can enter timecards daily or enter timecards per pay period. Or you can use Speed Time Entry or Time Entry by Time Sheet Group to enter timecards for employees in a certain batch or enter timecards for employees individually based on their employee number. Speed Time Entry allows you to enter timecards per pay period only. If you need to enter daily time for employees, you cannot use Speed Time Entry (P051121).

To enter timecards with Speed Time Entry, you do not need to select a group of employees first, although you can select employees by batch number or by individual employee number on the Speed Time Entry form.

For all time entry programs, you can complete fields in the tabbed areas of the form so that certain values, such as shift code or job location, are automatically supplied for each timecard that you create. Completing these fields saves you from entering the same information for each timecard.

You can set your processing options to automatically copy information from one timecard to the next to facilitate timecard entry. If you are entering time either by individual or using Speed Time Entry, after you have entered the first timecard the system automatically supplies the address number and pay type from the previous line of time entry. You can use this feature when you are entering multiple timecards for the same employee or when you are entering timecards for multiple employees with the same pay type.

You can also define system-supplied values for timecards when you set up the Master Business Function processing options for Time Entry (P050002A).

## Selecting Employees for Time Entry

You must choose one of the following methods to select employees for time entry:

- Selecting employees from the Employee Master table
- Selecting employees who have unprocessed timecards
- Selecting employees who have processed timecards

All of these selection methods use inquiry forms that might include tabs with job-related, organization, and category code fields to narrow your employee search.

Selecting employees from the Employee Master table (F060116) allows you to select a group of employees who have common information such as a home business unit, supervisor, category code, work schedule, job type, check route code, or a combination of this information.

Selecting employees who have unprocessed timecards allows you to select a group of employees from the Employee Transaction Detail table (F06116) who have timecards that have not yet been through payroll. A Subledger tab with Subledger and Subledger Type fields allows you to narrow your search.

You might want to use this method to select a group of employees for whom you enter timecards each day. For example, as part of your daily tasks, you might need to enter time for a group of employees in Business Unit 9. After completing the Business Unit field, the system displays all the employees in Business Unit 9 who already have timecards in the Employee Transaction Detail File table (F06116).

Selecting employees who have processed timecards allows you to select employees whose timecards have already been processed and posted to the Time Card History table (F0618). You might want to use this method if you want to review employee timecard history from the Employee Transaction History table (F0618) before entering time.

You must set the processing options for Selecting Employees for Time Entry (T051191) for the tabs to appear on the forms.

After selecting employees for time entry, you can enter timecards using time sheet groups, daily timecards, or timecards per pay period. You access daily and per pay period time entry from a Row exit and you access time sheet group time entry from a Form exit.

To facilitate timecard entry, you can set your processing options so that the system copies certain information from one timecard to the next. For example, the system can supply the address number and pay type from the timecard that you previously entered.

You can also set your Master Business Function processing options for Time Entry (P050002A) to allow certain pay information to automatically be supplied on each employee's time entry form. For example, you can set your processing options to allow the system to assign a next number to the Batch field and to supply a pay rate.

### Before You Begin

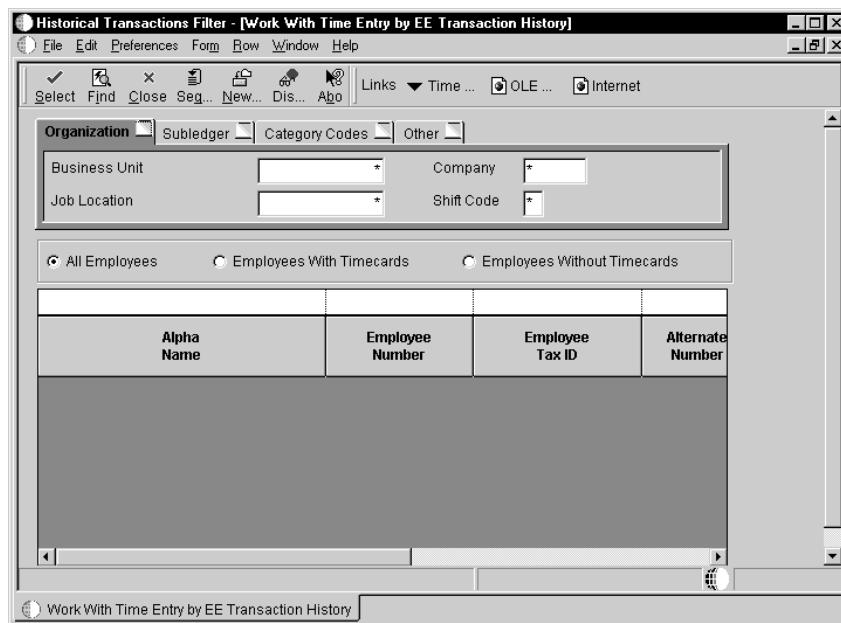
- Enter labor distribution instructions for the employee. See *Entering Labor Distribution Instructions*.
- Define your Master Business Function processing options for Time Entry. See *Setting Up Master Business Functions*.
- Set up equipment numbers on the Equipment Master form. See *Creating an Equipment Master* in the *Equipment Billing Guide*.

- Set up equipment-rate tables and equipment-rate groups in the Job Cost system. See *Setting Up Equipment Billing Information* in the *Equipment Billing Guide*.
- Set up an AAI table for all journal types. See *Setting Up AAIs for Payroll and Time Accounting*.

### ► To select employees from the Employee Master table

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From the Time Entry/Timecard Post menu (G05BT1), choose Employee Master Filter.



1. On Work With Time Entry By Employee Master, click one of the following options:
  - All Employees
  - Employees With Timecards
  - Employees Without Timecards
2. To narrow your search to employees from categories 1–20, click the appropriate tab (1–8, 9–16, or 17–20), and complete any Category code fields that apply.

Category codes 1–4 are reserved for time entry. For J.D. Edwards demo data, category codes 1–4 are Superintendent, General Foreman, Foreman, and Work Area, respectively.

3. Click the Organization tab and complete any of the following fields to search for employees who have shared organization information:

- Home Business Unit
  - Home Company
  - Supervisor
  - Security Business Unit
  - Check Route Code
4. Click the Other tab and complete any of the following fields to search for employees who have shared job information and click Find:
- Business Unit - Last Worked
  - Benefit Group
  - Job Type
  - Shift Code
  - Job Step
  - Pay Class(H/S/P)
  - Work Schedule
  - Pay Cycle Code

Your selected group of employees appears.

Proceed to the task *Entering Timecards for Employees*.

<b>Field</b>	<b>Explanation</b>
Pay Class(H/S/P)	A code that indicates how an employee is paid. Valid codes are: Blank H      Hourly S      Salaried P      Piecework
Home Business Unit	The number of the business unit in which the employee generally resides.
Home Company	The company number in which the employee generally resides.
Supervisor	The address book number of the supervisor.  Note: A processing option for some forms allows you to enter a default value for this field based on values for category codes 1 (Phase), 2, and 3. Set up the default values on the default Managers and Supervisor form. The system will automatically display the information you specified on all work orders you create if the category code criterion is met. You can override the default value.

<b>Field</b>	<b>Explanation</b>
Security Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p>
	<p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p>
	<p>Security for this field can prevent you from locating business units for which you have no authority.</p>
	<p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Check Route Code	<p>A user defined code (07/CR) that specifies the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.</p>
Business Unit - Last Worked	<p>The last business unit (job) number associated with this employee. This field is used for distribution of paychecks and in the generation of journal entries. When you process a payroll cycle that includes the employee, the system automatically updates this field.</p>
Benefit Group	<p>The benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.</p>
Job Type	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Job Step	<p>A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.</p>

Field	Explanation
Shift Code	<p>A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.</p> <p>For payroll and time entry:</p> <p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p> <p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.</p>
Work Schedule	<p>A user defined code to designate intra-pay period work schedules. This code can be used for reporting and to select employees to be included in a payroll run. For example:</p> <ul style="list-style-type: none"> <li>A Monday through Friday</li> <li>B Saturday through Wednesday</li> <li>C Monday through Thursday (4 x 10 hrs)</li> </ul>
Pay Cycle Code	A code that identifies the values for a master payroll cycle.

### ► To select employees who have unprocessed timecards

From the Time Entry menu (G05BT1), choose Current Transactions Filter.

Alpha Name	Address Number	Extension
Ingram, Paul	2111	211121112
Josephine Breton	4801	558779336
Carol Fraser	4802	335698899
Jeremy Beck	4803	668445959
Joe Guererra	4804	231115523

1. On Work With Time Entry by EE Transaction Current, complete the following fields:
  - Work Date
  - Pay Class(H/S/P)
2. Complete any of the following fields on the Organization tab to search for employees who have shared organization information:
  - Home Business Unit
  - Check Route Code
  - Batch Number
  - Shift Code
3. To narrow your search to employees from categories 1–4, click the Category Codes tab and complete any of the Category Code fields to help narrow your employee selection.

Category codes 1–4 are reserved for time entry. For J.D. Edwards demo data, category codes 1–4 are Superintendent, General Foreman, Foreman, and Work Area, respectively.

4. Click the Subledger tab.
5. Complete both of the following fields to search for employees who are associated with an account in the general ledger and click Find:
  - Subledger
  - Subledger Type

Your selected group of employees appears.

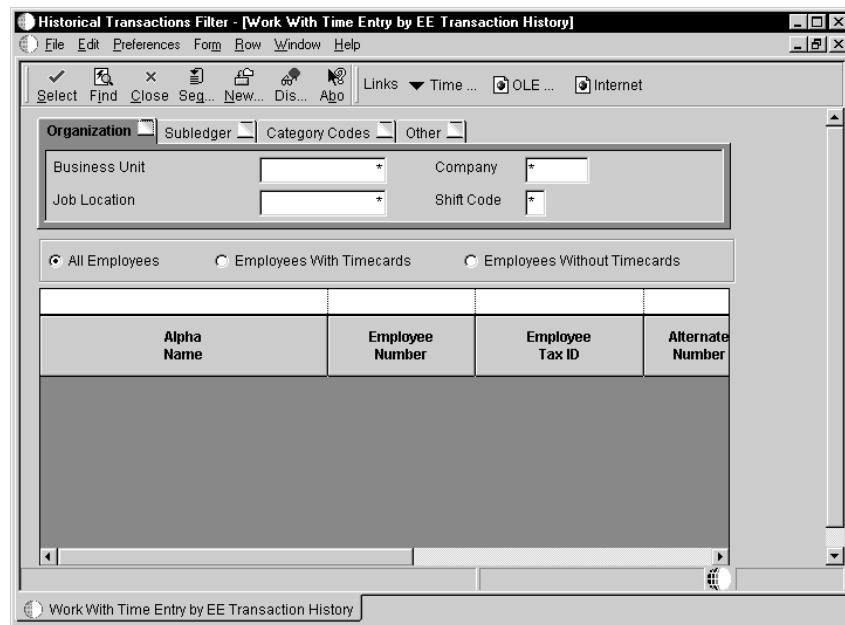
Proceed to the task *Entering Timecards for Employees*.

<b>Field</b>	<b>Explanation</b>
Work Date	The date used as the actual work date or pay-period ending date.
Batch Number	A number that identifies a group of transactions that the system processes and balances as a unit. When you enter a batch, you can either assign a batch number or let the system assign it through Next Numbers. When you change, locate, or delete a batch, you must specify the batch number.
Subledger	A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number or an address book number. If you enter a subledger, you must also specify the subledger type.

Field	Explanation
Subledger Type	<p>A user defined code (00/ST) that is used with the Subledger field to identify the subledger type and how the system performs subledger editing. On the User Defined Codes form, the second line of the description controls how the system performs editing. This is either hard-coded or user defined. For example:</p> <ul style="list-style-type: none"> <li>A Alphanumeric field, do not edit</li> <li>N Numeric field, right justify and zero fill</li> <li>C Alphanumeric field, right justify and blank fill</li> </ul>

### ► To select employees who have processed timecards

From the Time Entry menu (G05BT1), choose Historical Transactions Filter.



1. On Work With Time Entry by EE Transaction History, click one of the following options:
  - All Employees
  - Employees With Timecards
  - Employees Without Timecards
2. Click the Organization tab and complete any of the following fields to search for employees who have shared organization information:
  - Business Unit
  - Job Location

- Company
  - Shift Code
3. Click the Subledger tab and enter both of the following fields to search for employees who are associated with an account in the general ledger:
    - Subledger
    - Subledger Type
  4. To narrow your search to employees from categories 1–4, click the Category Codes tab and complete any of the Category Code fields to help narrow your employee selection.
- Category codes 1–4 are reserved for time entry. For J.D. Edwards demo data, category codes 1–4 are Superintendent, General Foreman, Foreman, and Work Area, respectively.
5. Click the Other tab and complete the following fields:
    - Pay Class(H/S/P)
    - Pay Period Ending Date
  6. Click Find.

Your selected group of employees appears.

Proceed to the task *Entering Timecards for Employees*.

Field	Explanation
Pay Period Ending Date	The last day of a processing period (pay period, month, quarter or year).
Job Location	This business unit represents the location in which the employee worked. It can be used to indicate that an employee worked at this location, but charged the time to another business unit. This field is used for deriving rates from the Union Pay Rate table and is used exclusively by the Certified Payroll Register.

## Processing Options for Time Entry Floods (P051191)

### Display Tab

Use these processing options to determine which tabs to display on the Time Entry Filter forms. Use information on the tabs to indicate selection criteria to create a group of employees with specific Employee Master table values, current timecards, or historical timecards. Use the groups of employees created by these filters to facilitate timecard entry.

## 1. Employee Master Tabs

### Category Codes 001–008

Use this processing option to specify whether you want to display the tab containing category codes 001–008 on the Employee Master Filter form. Valid values are:

- 0     Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 001–008 for determining selection criteria for the filter. If you have not defined category codes 001–008, it is not necessary to display this tab.
- 1     Display this tab on the form. By displaying this tab, you will be able to use category codes 001–008 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001–010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011–020.

### Category Codes 009–016

Use this processing option to specify whether you want to display the tab containing category codes 009–016 on the Employee Master Filter form. Valid values are:

- 0     Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 009–016 for determining selection criteria for the filter. If you have not defined category codes 009–016, it is not necessary to display this tab.
- 1     Display this tab on the form. By displaying this tab, you will be able to use category codes 009–016 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001–010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011–020.

### Category Codes 017–020

Use this processing option to specify whether you want to display the tab containing category codes 017–020 on the Employee Master Filter form. Valid values are:

- 0     Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 017–020 for determining selection criteria for the filter. If you have not defined category codes 017–020, it is not necessary to display this tab.

- 1      Display this tab on the form. By displaying this tab, you will be able to use category codes 017–020 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001–010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011–020.

### **Organization**

Use this processing option to specify whether you want to display the tab containing organization information on the Employee Master Filter form. Valid values are:

- 0      Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, supervisor, and check route code for determining selection criteria for the filter.
- 1      Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, supervisor, and check route code for determining selection criteria for the filter.

### **Other**

Use this processing option to specify whether you want to display the tab containing "other" information on the Employee Master Filter form. Valid values are:

- 0      Do not display this tab on the form. By not displaying this tab, you will not be able to use information contained in the "other" tab, such as last business unit worked, benefit group, shift code, job type, and job step and pay cycle code for determining selection criteria for the filter.
- 1      Display this tab on the form. By displaying this tab, you will be able to use information contained in the "other" tab, such as last business unit worked, benefit group, shift code, job type, and job step and pay cycle code for determining selection criteria for the filter.

## **2. Current Transactions Tabs**

### **Organization**

Use this processing option to specify whether you want to display the tab containing organization information on the Current Transaction Filter form. Valid values are:

- 0      Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, batch number, and shift code for determining selection criteria for the filter.

- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, batch number, and shift code for determining selection criteria for the filter.

### **Subledger**

Use this processing option to specify whether you want to display the tab containing subledger information on the Current Transaction Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type for determining selection criteria for the filter.
- 1 Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type for determining selection criteria for the filter.

### **Category Codes 001–004**

Use this processing option to specify whether you want to display the tab containing category codes 001–004 on the Current Transactions Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 001–004 for determining selection criteria for the filter. If you have not defined category codes 001–004, it is not necessary to display this tab.
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes 001–004 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001–010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011–020.

## **3. Historical Transactions Tabs**

### **Organization**

Use this processing option to specify whether you want to display the tab containing organization information on the Historical Transaction Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, job location, and shift code for determining selection criteria for the filter.

- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, job location, and shift code for determining selection criteria for the filter.

### **Subledger**

Use this processing option to specify whether you want to display the tab containing subledger information on the Current Transaction Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type for determining selection criteria for the filter.
- 1 Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type for determining selection criteria for the filter.

### **Category Codes 001–004**

Use this processing option to specify whether you want to display the tab containing category codes 001–004 on the Historical Transactions Filter form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes 001–004 for determining selection criteria for the filter. If you have not defined category codes 001–004, it is not necessary to display this tab.
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes 001–004 for determining selection criteria for the filter.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001–010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011–020.

### **Line Detail Time Entry Tab**

Use these processing options to determine whether you want to prevent changes to and deletion of time cards that are locked by another user, which time entry version you will use, and which tabs you want to display on the Line Detail Time Entry form.

#### **1. Time Entry Changes**

Use this processing option to specify whether you want to prevent changes to and deletion of timecards locked by another user when using the Line Detail Time Entry form. Valid values are:

- 0 Do not prevent changes to time entry on this form.

- 1 Prevent changes to time entry on this form.

### 2. Time Entry Version

Use this processing option to specify the version of the Time Entry Master Business Function (P050002A) that you want to use when processing timecards using Line Detail Time Entry. If you leave this processing option blank, the system uses the default version, ZJDE0001.

### 3. Line Detail Display Tabs

#### Category Codes

Use this processing option to specify whether you want to display the tab containing category codes on the Line Detail Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes as default information on timecards entered using the Line Detail Time Entry form. If you have not defined category codes, it is not necessary to display this tab.
- 1 Display this tab on the form. By displaying this tab, you will be able to use category codes as default information on timecards entered using the Line Detail Time Entry form.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001–010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011–020.

#### Organization

Use this processing option to specify whether you want to display the tab containing organization information on the Line Detail Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Line Detail Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Line Detail Time Entry form.

## **Subledger**

Use this processing option to specify whether you want to display the tab containing subledger information on the Line Detail Time Entry form. Valid values are:

- 0     Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Line Detail Time Entry form.
- 1     Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Line Detail Time Entry form.

## **Daily Time Entry Tab**

Use these processing options to determine the day on which the work week begins, whether the system will prevent changes to time entry, which time entry version you will use, and which tabs to display on the Daily Time Entry form.

### **1. Time Entry Week Begin Day**

Use this processing option to specify the day of the week on which your work week begins for time accounting purposes. When entering a work week begin date on the Daily Time Entry form, that date must be on the day of the week specified in this processing option. Valid values are:

- 1     Monday
- 2     Tuesday
- 3     Wednesday
- 4     Thursday
- 5     Friday
- 6     Saturday
- 7     Sunday

### **2. Time Entry Changes**

Use this processing option to specify whether you want to prevent changes to and deletion of timecards that are locked by another user when using the Daily Time Entry form. Valid values are:

- 0     Do not prevent changes to time entry on this form.
- 1     Prevent changes to time entry on this form.

### **3. Time Entry Version**

Use this processing option to specify the version of the Time Entry Master Business Function (P050002A) that you want to use when processing timecards

using Daily Time Entry. If you leave this processing option blank, the system uses the default version, ZJDE0001.

### 4. Daily Time Entry Display Tabs

#### Category Codes

Use this processing option to specify whether you want to display the tab containing category codes on the Daily Time Entry form. Valid values are:

- 0     Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes as default information on timecards entered using the Daily Time Entry form. If you have not defined category codes, it is not necessary to display this tab.
- 1     Display this tab on the form. By displaying this tab, you will be able to use category codes as default information on timecards entered using the Daily Time Entry form.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001–010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011–020.

#### Organization

Use this processing option to specify whether you want to display the tab containing organization information on the Daily Time Entry form. Valid values are:

- 0     Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Daily Time Entry form.
- 1     Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Daily Time Entry form.

#### Subledger

Use this processing option to specify whether you want to display the tab containing subledger information on the Daily Time Entry form. Valid values are:

- 0     Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Daily Time Entry form.

- 1      Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Daily Time Entry form.

## Time Sheet Time Entry Tab

Use these processing options to specify which time entry version you will use, which tabs to display on the Time Sheet Time Entry form, and whether the system will supply address numbers and pay types.

### 1. Time Entry Version

Use this processing option to specify the version of the Time Entry Master Business Function (P050002A) that you want to use when processing timecards using Time Sheet Time Entry. If you leave this processing option blank, the system uses the default version, ZJDE0001.

### 2. Time Sheet Time Entry Displays

#### Category Codes

Use this processing option to specify whether you want to display the tab containing category codes on the Time Sheet Time Entry form. Valid values are:

- 0      Do not display this tab on the form. By not displaying this tab, you will not be able to use category codes as default information on timecards entered using the Time Sheet Time Entry form. If you have not defined category codes, it is not necessary to display this tab.
- 1      Display this tab on the form. By displaying this tab, you will be able to use category codes as default information on timecards entered using the Time Sheet Time Entry form.

Use the User Defined Category Codes form exit from the Employee Information Basic Compensation form to define category codes 001–010. Use the User Defined Category Codes row exit from the Work with Employee Information form to define category codes 011–020.

#### Organization

Use this processing option to specify whether you want to display the tab containing organization information on the Time Sheet Time Entry form. Valid values are:

- 0      Do not display this tab on the form. By not displaying this tab, you will not be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Time Sheet Time Entry form.

- 1 Display this tab on the form. By displaying this tab, you will be able to use organization information such as company, business unit, supervisor, and check route code as default information on timecards entered using the Time Sheet Time Entry form.

### **Subledger**

Use this processing option to specify whether you want to display the tab containing subledger information on the Time Sheet Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Time Sheet Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use subledger information such as subledger and subledger type as default information on timecards entered using the Time Sheet Time Entry form.

### **Pay Info**

Use this processing option to specify whether you want to display the tab containing pay information such as pay type, hours, and lump sum on the Time Sheet Time Entry form. Valid values are:

- 0 Do not display this tab on the form. By not displaying this tab, you will not be able to use pay information such as pay type, hours, and lump sum as default information on timecards entered using the Time Sheet Time Entry form.
- 1 Display this tab on the form. By displaying this tab, you will be able to use pay information such as pay type, hours, and lump sum as default information on timecards entered using the Time Sheet Time Entry form.

### **3. Address Number**

Use this processing option to specify whether the system automatically supplies the address number from the previous timecard if you tab through the address number field. Valid Values are:

- 0 Enter the Address Number Manually. Use this selection if you do not wish to have the address number supplied from the previous timecard.
- 1 System Supplies Address Number. Use this selection if you wish to have the address number supplied from the previous timecard.

### **4. Pay Type**

Use this processing option to specify whether the system automatically supplies the pay type from the previous timecard if you tab through the pay type field. Valid Values are:

- 0 Enter the Pay Type Manually. Use this selection if you do not wish to have the pay type supplied from the previous timecard.
- 1 System Supplies Pay Type. Use this selection if you wish to have the pay type supplied from the previous timecard.

## Entering Timecards for Employees

After you select employees for whom you want to enter time using the time entry filters, you can enter timecards for those employees. Each row in which you enter information in the detail area of a time entry form is one timecard. The minimal information needed to create a timecard for a non-autopay employee consists of the following fields:

- Date / Batch
- Pay
- Hours

After you have selected the employees for whom you want to enter timecard information, you must choose one of the following methods for entering timecards:

- Per pay period time entry
- Daily time entry
- Time sheet group time entry

Entering timecards per pay period allows you to summarize an employee's hours with each row (timecard) that you enter in the detail area of the form. Entering daily timecards for employees allows you to enter hours for each day of the week on one row of the Daily Time Entry form. Entering timecards using time sheet groups allows you to enter timecards for multiple employees on the same form.

All of these time entry methods can track various equipment information, including:

- Equipment ID number
- Number of hours that the employee used the equipment
- Equipment billing rates
- Equipment costs and expenses

When you enter timecards, the system updates the Employee Transaction Detail table (F06116).

Entering timecards for employees includes the following tasks:

- Entering timecards per pay period for employees
- Entering daily timecards for employees
- Entering timecards using time sheet groups

## Entering Timecards Per Pay Period for Employees

Entering timecards per pay period allows you to summarize an employee's hours with each row (timecard) that you enter in the detail area of the form. Nothing prevents you from entering daily time on the Time Entry Revisions form. However, you would need to enter a row for each day of the week, and this might result in less efficient system performance when you run a payroll.

When you enter time per pay period, you can choose an option from the form menu on the Time Entry Revisions form to copy labor distribution instructions for an employee. After you enter the essential timecard information, you can copy an employee's labor distribution instructions to avoid entering timecard information such as the associated account number, job type, and business unit. The system automatically copies the employee's labor distribution rules that you entered in Labor Distribution Rules (P050151). You might enter labor distribution instructions for employees who typically charge time to the same pay types and accounts for each pay period.

If you need to enter a separate timecard for a bonus or a lump sum amount, you must create an additional timecard. You can also override system supplied information. For example, you might need to override the account number and job location when an employee works a job other than his or her regular job. The system uses this override information only once for the pay period.

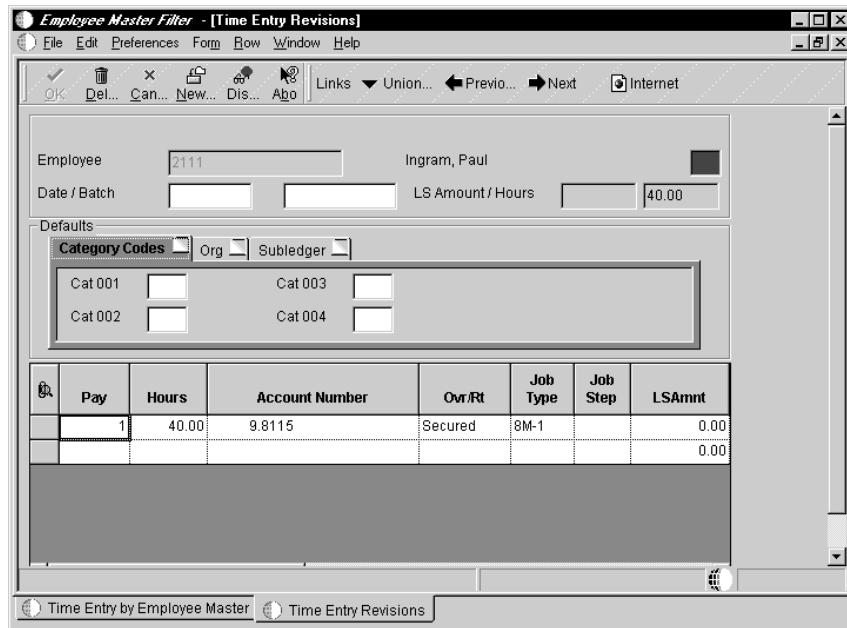


### To enter timecards per pay period for employees

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You enter time per pay period for employees after you have selected your employees for time entry. See *Selecting Employees for Time Entry* or proceed to the following steps.

1. On Work With Time Entry By Employee Master, Work With Time Entry By EE Transaction Current, or Work With EE By Transaction History, from the list of employees, choose the first employee for whom you are entering time. Then choose Line Detail from the Row menu.



2. On Time Entry Revisions, complete any of the Category Code fields on the Category Codes tab with information that you want to appear on every timecard that you enter.

Complete fields on this tab to track time entered for employees in category codes 1–4. For example, if category codes 1–4 are defined as Superintendent, General Foreman, Foreman, and Work Area, the system will track time entered for these category codes.

3. Click the Organization tab and complete any of the following fields to have organization information supplied automatically to every timecard that you enter. Complete these fields to track detailed information about a job site and to enter timecards by job or business unit.
  - Job Location
  - Check Route Code
  - Shift Code

When you enter a shift code on a time entry form, and the system finds a blank shift differential method (in the Shift table F069246), it uses the shift differential method associated with the pay type from the Pay Type table (F069116). When you don't enter a shift code, the system uses the shift differential method associated with the pay type.

4. Click the Sub Ledger tab and complete any of the following fields to have an account number automatically appear on every timecard that you enter:
  - Subledger Type
  - Subledger

- Work Order

To enter work-order information, you must complete the Subledger and Work Order fields. You can override this information in the detail area of the form for individuals who have different work-order information.

5. Review the following field in the detail area:
  - Lock Code
6. To enter a timecard, complete the following fields:
  - Date / Batch
  - Pay
7. Complete one of the following fields:
  - Hours
  - LSAmnt

If you are entering a timecard for hours worked, complete the Hours field. If you are entering a timecard for a bonus or lump sum amount, complete the LS Amnt field.

The Batch, Pay, and Hours or LS Amnt fields provide the minimal information needed to create a timecard.

8. If you have entered a timecard for a lump sum amount and you need to create an additional timecard, repeat steps 6–7 for the next row in the detail area. Or to enter a timecard for the next employee, go to step 14.
9. If you need to override a DBA amount for the employee, choose the timecard and choose One Time Override from the Form menu. Proceed to the task, *Overriding DBA Amounts One Time*.
10. To copy labor distribution instructions, choose Copy Labor Instructions from the Form menu.

The labor distribution instructions appear. If necessary, make changes to any of the fields as needed for this entry.

11. Complete or override system-supplied values in any of the following fields:

- Account Number

As you enter one timecard after another, you can save time and reduce typing errors in the Account Number field by using certain formulas. See *Duplicating Account Number Segments* in the *General Accounting Guide*.

- Ovr/Rt

If you need to override the hourly rate, proceed to the task *Overriding an Hourly Rate for an Employee*.

- Job Type
- Job Step
- Equipment
- Union
- Position ID
- Uprate
- Shift Diff.
- %/ Amt
- Billing Rate
- Work Date
- Home Co
- Home BU
- Tax Area
- Item
- Pce/Rt
- Pieces
- Phase
- Explanation
- Record Type
- WCI Code
- SC/ WC
- Transaction No. - Payroll

You need to complete the Position ID field if you want to allocate hours and pay to a specific position budget.

12. To charge for equipment use, complete the following fields:
  - Hours Equipment
  - Equipment
13. To identify the billing information for the equipment that the employee used, complete the following fields:
  - Equipment Object Account
  - Bill RtCd

- Equipment Billing Rate
14. Click OK and then click Next to display the next employee.

The system automatically adds the time entry record when you click OK and displays the next employee in the group when you click Next. You must click OK to save your time entry information before continuing to the next employee. You can click Previous to display the previous employee in the group.

Values that you entered in the tabbed fields are automatically supplied to the next employee's timecard record.

15. Repeat steps 5 through 14 for any additional employees for whom you want to enter timecard information.
16. When you finish entering timecards for all employees, click OK.

<b>Field</b>	<b>Explanation</b>
Cat 001	<p>Use this category code to fit the needs of your organization. For example, you can set up a category code for any of the following categories:</p> <ul style="list-style-type: none"> <li>• Division</li> <li>• Supervisor</li> <li>• Branch Office</li> <li>• Health Insurance Plan</li> <li>• Stock Plan</li> </ul> <p>Category Code 1 is used for time entry.</p> <p>You can use this category code for reporting purposes on timecard and human resources job information.</p> <p>The J.D. Edwards Payroll, Human Resources, and Time Accounting systems use this category code. If your company uses more than one of these systems, coordinate the use of this category code.</p>
Job Location	<p>This business unit represents the location in which the employee worked. It can be used to indicate that an employee worked at this location, but charged the time to another business unit. This field is used for deriving rates from the Union Pay Rate table and is used exclusively by the Certified Payroll Register.</p>
Check Route Code	<p>A user defined code (07/CR) that specifies the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.</p>

<b>Field</b>	<b>Explanation</b>
Shift Code	<p>A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.</p>
	<p>For payroll and time entry:</p>
	<p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p>
	<p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.</p>
	<p>..... <i>Form-specific information</i> .....</p>
	<p>The list of codes is provided from the user defined code list 06/SH. When you enter this field on a timecard, the system provides values for the Shift Differential Method and the Shift Differential Amount fields as associated in the Shift Table (F069246). If the shift differential method was set up as blank for the entered shift code, (on Shift Rate Differentials P059241) the system uses the shift differential method from the entered pay type in the Pay Type table (F069116), as set up in PDBA Setup P059241.</p>
	<p>If you leave this field blank, the system uses the shift differential method from the entered pay type in the Pay Type table (F069116).</p>
Subledger	<p>A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number or an address book number. If you enter a subledger, you must also specify the subledger type.</p>
Subledger Type	<p>A user defined code (00/ST) that is used with the Subledger field to identify the subledger type and how the system performs subledger editing. On the User Defined Codes form, the second line of the description controls how the system performs editing. This is either hard-coded or user defined. For example:</p> <ul style="list-style-type: none"> <li>A Alphanumeric field, do not edit</li> <li>N Numeric field, right justify and zero fill</li> <li>C Alphanumeric field, right justify and blank fill</li> </ul>
Work Order	<p>A number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.</p>
Date / Batch	<p>The date used as the actual work date or pay-period ending date.</p>

<b>Field</b>	<b>Explanation</b>
Batch	<p>A number that identifies a group of transactions that the system processes and balances as a unit. When you enter a batch, you can either assign a batch number or let the system assign it through Next Numbers. When you change, locate, or delete a batch, you must specify the batch number.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>You must set your processing options appropriately for the system to assign next numbers to each batch. Set up your Master Business Function processing options for Time Entry (P050002A)</p>
Pay	<p>A code that defines the type of pay, deduction, benefit, or accrual.</p>
	<p>Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>If you are using pay rate tables and have set the processing option to use union rates, you can:</p>
<ul style="list-style-type: none"> <li>• Leave the Pay field blank when you need to enter regular hours. The system automatically supplies the regular pay type and the corresponding union rate from the table.</li> <li>• Enter a code for the respective category column (either A, B, C, or D) in the Pay field to enter overtime hours.</li> </ul>	
Hours	<p>The number of hours associated with each transaction.</p>
LSAmnt	<p>A lump sum amount, an adjustment amount, or an amount that represents an employee's gross pay. This amount temporarily overrides any pay calculation that the system normally performs.</p>

<b>Field</b>	<b>Explanation</b>
Account Number	<p>A field that identifies an account in the general ledger. You can use one of the following formats for account numbers:</p> <ul style="list-style-type: none"> <li>• Standard account number (business unit.object.subsidiary or flexible format)</li> <li>• Third G/L number (maximum of 25 digits)</li> <li>• 8-digit short account ID number</li> <li>• Speed code</li> </ul> <p>The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program.</p> <p>..... <i>Form-specific information</i> .....</p> <p>If you leave this field blank, the system uses the employee's home company and home business unit to retrieve the object account and subsidiary from the accounting rules table.</p> <p>If you enter a business unit followed by a period, the system uses this business unit and retrieves the rest of the account number from the accounting rules. To specify a business unit and a subsidiary account, but have the system retrieve the object account from the accounting rules, enter business unit and subsidiary.</p> <p>For Work Orders speed code entry:</p> <p>You can use speed codes to reduce data entry when you enter work order information. When you enter a speed code, the system automatically enters account information that is stored elsewhere in the system. To enter a speed code, enter a backslash, the work order number, and a period. For example, work order 145648 is entered as \145648. in the Account Number field.</p> <p>When you add the timecard information, the system:</p> <ul style="list-style-type: none"> <li>• Replaces the speed coding information with account number information</li> <li>• Uses the Charge to Business Unit number from the work order</li> <li>• Uses the Object Account number from the automatic accounting instructions for Debit/Labor/Billing/Equipment for Journal Type LD</li> <li>• Enters the work order number in the Subledger field in the detail area</li> <li>• Enters W as the subledger type</li> </ul>

Field	Explanation
Ovr/Rt	<p>The hourly rate for the employee. If applicable, the values for Pay Type Multiplier and Differential will be added to the hourly rate.</p>
	<p>If you change the value of the data display decimals for this field, you must also change the Hourly Rate (PHRT) and Base Rate (BHRT) fields in Time Entry to have exactly the same data display decimals.</p>
Job Type	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Job Step	<p>A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.</p>
Equipment	<p>An identification code for an asset that you can enter in one of the following formats:</p> <ul style="list-style-type: none"> <li>1 Asset number (a computer-assigned, 8-digit, numeric control number)</li> <li>2 Unit number (a 12-character alphanumeric field)</li> <li>3 Serial number (a 25-character alphanumeric field)</li> </ul>
	<p>Every asset has an asset number. You can use unit number and serial number to further identify assets as needed.</p>
	<p>If this is a data entry field, the first character you enter indicates whether you are entering the primary (default) format that is defined for your system, or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats on the Fixed Assets system constants form.</p>
Union	<p>A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.</p>

<b>Field</b>	<b>Explanation</b>
Position ID	<p>A code that you use for budgetary (position) control purposes. The position ID consists of:</p> <ul style="list-style-type: none"> <li>• Position (position code and its description)</li> <li>• Fiscal year</li> <li>• Home business unit</li> </ul>
	<p>For example, you can identify position A0-1 as Accounting Manager for fiscal year 2005–2006, for home business unit 41.</p>
	<p>You might choose to set up positions so that the position IDs are the same as the corresponding job IDs. Within a home business unit, positions appear in the alphanumeric sequence of their position IDs. For example, position A0-1 appears before position A0-2.</p>
UpRate	<p>An amount that the system adds to an employee's base hourly rate. For example, you might enter a rate differential for equipment operators when they move from operating one piece of equipment to another piece. The system adds this amount directly to the base rate to calculate gross wages.</p>
	<p>The system adds the uprate amount to the base pay rate before it performs any other rate calculations, such as applying a shift differential or pay type multiplier.</p>
Shift Diff.	<p>An additional rate, expressed in dollars or percent, added to an employee's hourly rate, depending on the shift worked. This rate can be applied in one of two ways, as defined by the Shift Differential Calculation Sequence (data item CMTH).</p>
% / Amt	<p>A code that indicates whether the corresponding Shift Differential field contains an hourly rate or a percentage. Valid values are:</p>
	<p>H      The amount in the Shift Differential field is added to the hourly rate.</p>
	<p>%      The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.</p>

Field	Explanation
Billing Rate	<p>A rate used for the billing of labor services. This rate is often referred to as the billing or recharge rate. The extended amount based on this rate will be charged to the primary distribution account on the timecard with an offset being made to an account derived from the Accounting Rules table. This rate will not affect the employee's payroll. To allow billing rates in time entry, you must set the employee's record type as either 2 or 3 on the Basic Employee Entry form.</p>
	<p>Enter a rate on any of the following forms to override the rate in the Employee Primary Job table:</p> <ul style="list-style-type: none"> <li>• Pay Rate Information</li> <li>• Employee Labor Distribution</li> <li>• Occupational Pay Rates</li> <li>• Time Entry by Employee</li> <li>• Time Entry by Job or Business Unit</li> <li>• Daily Timecard Entry</li> <li>• Time Entry by Employee with Equipment</li> <li>• Time Entry by Shop Floor Control</li> </ul>
Work Date	<p>The date used as the actual work date or pay-period ending date.</p>
Home Co	<p>The company number in which the employee generally resides.</p>
Home BU	<p>The number of the business unit in which the employee generally resides.</p>
Tax Area	<p>A code that identifies a geographical location and the tax authorities for the employee's work site. Authorities include both employee and employer statutory requirements. In the payroll-tax calculation software made by Vertex, the tax-area code is synonymous with GeoCode. To determine the valid codes for your location, refer to the documentation for the tax-calculation software that you are using.</p>
	<p>For WorldSoftware: If you are using the Time Accounting system without either the Payroll or Human Resources systems, the system does not calculate taxes. However, you must enter a value in this field before you can exit the form. You use the Tax Area Information form on the Additional Constants and Tables menu to set up a tax area.</p>

<b>Field</b>	<b>Explanation</b>						
Item	<p>An inventory item number. The system provides three separate item numbers plus an extensive cross-reference capability to other item numbers (see data item XRT) to accommodate substitute item numbers, replacements, bar codes, customer numbers, supplier numbers, and so forth. The item numbers are as follows:</p> <ul style="list-style-type: none"> <li>• Item Number (short) - An eight-digit, computer-assigned item number</li> <li>• 2nd Item Number - The 25-digit, free-form, user defined alphanumeric item number</li> <li>• 3rd Item Number - Another 25-digit, free-form, user defined alphanumeric item number</li> </ul>						
Pce/Rt	<p>The rate paid for the type of component (piece) produced. If you enter a rate in this field, this rate overrides the rate in the Employee Master table.</p>						
Pieces	<p>The number of pieces for piecework or any other unit of measure you want to track for this employee. Examples are: recording miles driven for drivers of company vehicles, cubic yards of concrete, feet drilled, or miles flown and so forth.</p>						
Phase	<p>A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.</p> <p>Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.</p> <p>Note: A processing option for the SAR Entry lets you enter a default value for this field. The value than displays automatically in the System Code field on the SAR Entry form when you add a new SAR. You can either accept or override the default value.</p>						
Explanation	<p>A name or remark that describes an element in the J.D. Edwards systems.</p>						
Record Type	<p>A code that identifies whether the employee is to be handled through the Recharge processing option for the Payroll Journal Entry program. Valid codes are:</p> <table style="margin-left: 20px;"> <tr> <td>1</td> <td>Payroll Processing Only</td> </tr> <tr> <td>2</td> <td>Payroll and Recharge Processing</td> </tr> <tr> <td>3</td> <td>Recharge Processing Only</td> </tr> </table> <p>After a timecard has been added, you cannot change its record type.</p>	1	Payroll Processing Only	2	Payroll and Recharge Processing	3	Recharge Processing Only
1	Payroll Processing Only						
2	Payroll and Recharge Processing						
3	Recharge Processing Only						

Field	Explanation
WCI Code	A user defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers compensation insurance reports.
SC/ WC	<p>The subclass code defines any special circumstances associated with the workers compensation insurance (WCI) code that result in multiple rates for the same WCI code. The multiple rates may be due to location, risk, and so forth. The subclass should remain blank if multiple rates do not exist. Default codes are:</p> <ul style="list-style-type: none"> <li>Blank There are no special circumstances associated with this code.</li> <li>F There are special circumstances associated with this code.</li> </ul>
Transaction Number	<p>The system gives each timecard entered a unique transaction number. You can use this field in the Time Entry By Job program to retrieve a specific timecard for display.</p> <p>This field is also used to tie a timecard to each Actual Burden audit record created for the timecard during the Actual Burden Journaling process.</p>
Hours Equipment	<p>The number of hours the equipment was operated. If you leave this field blank, the system uses the hours from employee time entry when you enter an equipment number. If you do not enter employee hours, you must complete this field.</p>
Equipment	<p>An identification code for an asset that you can enter in one of the following formats:</p> <ul style="list-style-type: none"> <li>1 Asset number (a computer-assigned, 8-digit, numeric control number)</li> <li>2 Unit number (a 12-character alphanumeric field)</li> <li>3 Serial number (a 25-character alphanumeric field)</li> </ul> <p>Every asset has an asset number. You can use unit number and serial number to further identify assets as needed.</p> <p>If this is a data entry field, the first character you enter indicates whether you are entering the primary (default) format that is defined for your system, or one of the other two formats. A special character (such as / or *) in the first position of this field indicates which asset number format you are using. You assign special characters to asset number formats on the Fixed Assets system constants form.</p>

Field	Explanation								
Equip Obj	Use this field to indicate the object account to which you want the system to distribute equipment utilization charges. If you leave this field blank, the system uses a default value from the Payroll Accounting tables. You can override this value on individual timecards.								
Bill RtCd	<p>A user defined code (00/RC) that indicates a billing rate, such as DY for daily, MO for monthly, and WK for weekly. You can set up multiple billing rates for a piece of equipment.</p> <p>If you leave this field blank, the system searches for a valid billing rate in the following sequence:</p>								
	<ol style="list-style-type: none"> <li>1. Account Ledger Master (F0901) - This table contains the most detailed rate information. You can assign multiple rates for a job. For example, you can set up separate rates for different equipment working conditions.</li> <li>2. Job or Business Unit Master (F0006) - This table contains less detailed rate information than the Account Ledger Master. You can only set up a single rate for a job based on this table.</li> <li>3. Rental Rules (F1302) - This table contains the least detailed rate code information. The system searches this table according to the criteria you establish when setting up the table.</li> </ol>								
Equipment Billing Rate	<p>The dollar amount for the equipment billing rate. Each equipment item can have numerous billing rates based on the rate code (see Equipment Billing Rate - ERC). The equipment billing rate can consist of up to ten different rates. For example:</p>								
	<p>Billing Rate = \$100</p> <table style="margin-left: 20px;"> <tr><td>\$20</td><td>Rate 1 (Ownership Component)</td></tr> <tr><td>\$50</td><td>Rate 2 (Operating Component)</td></tr> <tr><td>\$25</td><td>Rate 3 (Maintenance Component)</td></tr> <tr><td>\$5</td><td>Rate 4 (Other Costs Component)</td></tr> </table>	\$20	Rate 1 (Ownership Component)	\$50	Rate 2 (Operating Component)	\$25	Rate 3 (Maintenance Component)	\$5	Rate 4 (Other Costs Component)
\$20	Rate 1 (Ownership Component)								
\$50	Rate 2 (Operating Component)								
\$25	Rate 3 (Maintenance Component)								
\$5	Rate 4 (Other Costs Component)								
	<p>You can enter debits or charges to specific cost accounts using the total billing rate (for example, \$100). When these entries are posted to the general ledger, credits are recognized in revenue accounts for each of the rate components. This allows you to separate portions of the equipment billing by type of cost. You do not need to use the rate components concept unless it is appropriate to your business.</p>								

## Entering Daily Timecards for Employees

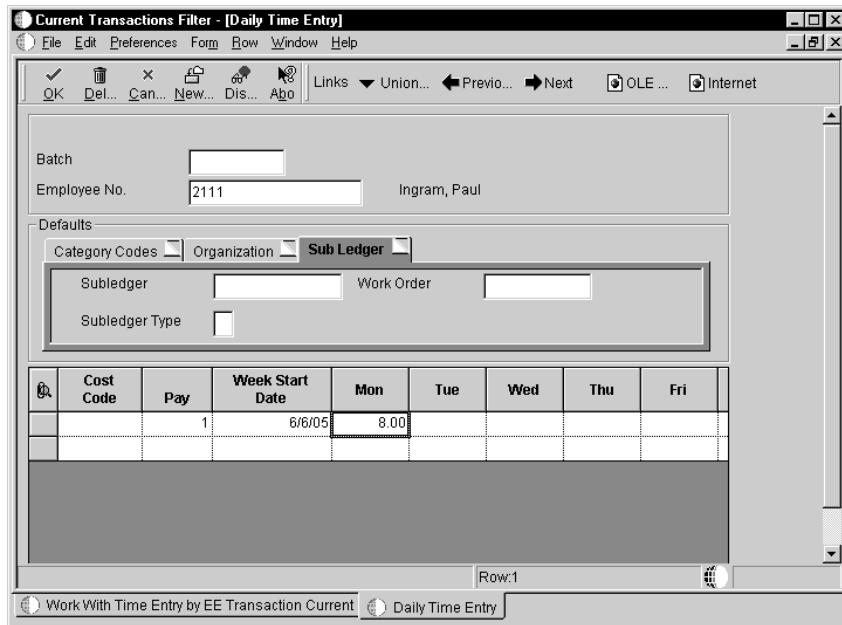
Entering daily timecards for employees allows you to enter hours for each day of the week on one row of the Daily Time Entry form. Use this method if your company needs to post labor to the general ledger every day.

If you need to enter a separate timecard for a bonus or a lump sum amount, you must create an additional timecard. You can also override system supplied information. For example, you might need to override the account number and job location when an employee works a job other than his or her regular job. The system uses this override information only once for the pay period.

## ► To enter daily timecards for employees

You enter daily timecards for employees after you have selected your employees for time entry. See *Selecting Employees for Time Entry* or proceed to the following steps.

1. On Work With Time Entry By Employee Master, Work With Time Entry By EE Transaction Current, or Work With EE By Transaction History, from the list of employees, choose the first employee for whom you are entering time. Then choose Daily from the Row menu.



2. On Daily Time Entry, complete any of the Category Code fields on the Category Codes tab with information that you want to appear on every timecard that you enter.

Complete fields on this tab to track time entered for employees in category codes 1–4. For example, if category codes 1–4 are defined as Superintendent, General Foreman, Foreman, and Work Area, the system will track time entered for these category codes.

3. Click the Organization tab and complete any of the following fields to have organization information supplied automatically on every timecard

that you enter. Complete these fields to track detailed information about a job site and to enter timecards by job or business unit.

- Job Location
- Check Route Code
- Shift Code

When you enter a shift code on a time entry form and the system finds a blank shift differential method (in the Shift table F069246), it uses the shift differential method associated with the pay type from the Pay Type table (F069116). When you don't enter a shift code, the system uses the shift differential method associated with the pay type.

4. Click the Sub Ledger tab and complete any of the following fields to have an account number automatically appear on every timecard that you enter:
  - Subledger
  - Subledger Type
  - Work Order

To enter work-order information, you must complete the Subledger and Work Order fields. You can override this information in the detail area of the form for individuals who have different work-order information.

5. Review the following field in the detail area:
  - Lock Code
6. To enter a timecard, complete the following fields:
  - Batch
  - Pay
7. Enter the number of hours worked for one of the following days or complete the LS Amnt field:
  - Mon
  - Tue
  - Wed
  - Thu
  - Fri
  - Sat
  - Sun

If you are entering a timecard for hours worked, complete one of the day fields. If you are entering a timecard for a bonus or lump sum amount, complete the LS Amnt field.

The Batch, Pay, and one of the day fields or the Lump Sum Amount field provide the minimal information needed to create a timecard.

8. If you have entered a timecard for a lump sum amount and you need to create an additional timecard, repeat steps 6–7 for the next row in the detail area. Or to enter a timecard for the next employee, go to step 14.
9. Complete the following field:
  - Week Start Date
10. To track time by job or business unit, complete the following field:
  - Cost Code
11. To override system-supplied information, complete any of the following fields:
  - Account Number

As you enter one timecard after another, you can save time and reduce typing errors in the Account Number field by using certain formulas. See *Duplicating Account Number Segments* in the *General Accounting Guide*.

- Ovr/Rt

If you need to override the hourly rate, proceed to the task *Overriding an Hourly Rate for an Employee*.

- Record Type
- Job Type
- Job Step
- Equipment
- Union
- Position ID
- Uprate
- Shift Diff.
- %/ Amt
- Billing Rate
- Home Co
- Home BU
- Tax Area
- Item
- Pieces

- Pce/Rt
- Phase
- Explanation
- WCI Code
- SC/ WC

You need to complete the Position ID field if you want to allocate hours and pay to a specific position budget.

12. To charge for equipment use, complete the following fields:
  - Hours Equipment
  - Equipment
13. To identify the billing information for the equipment that the employee used, complete the following fields:
  - Bill RtCd
  - Equip Obj
  - Equipment Billing Rate
14. Click OK and then click Next to display the next employee.

The system automatically adds the time entry record when you click OK and displays the next employee in the group when you click Next. You must click OK before you continue to the next employee if you want to save time entry information. You can click Previous to display the last employee for whom you entered time.

Values that you entered in the tabbed fields are automatically supplied to the next employee's timecard record.

15. Repeat steps 5 through 14 for each additional employee for whom you want to enter timecard information.
16. When you finish entering timecards for all employees, click OK.

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<b>Field</b>	<b>Explanation</b>
Cost Code	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.

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Field	Explanation
Week Start Date	<p>The date used as the actual work date or pay-period ending date.</p> <p>..... <i>Form-specific information</i> .....</p> <p>If you enter time on a weekly or bi-weekly basis, you can use any date within the pay period. If you enter time daily, use the specific date for that day's transactions.</p>

## Entering Timecards Using Time Sheet Groups

You can use Time Entry by Time Sheet Groups (P051122) to enter timecards for groups of employees on the same time entry form. Using time sheet groups can be a useful method for entering timecards if you need to enter similar timecards for multiple employees. For example, if you have a group of employees for which you would need to enter timecards that include the same pay type and number of hours, you can do so using time sheet groups.

Time Entry by Time Sheet Groups creates one time entry record for each employee that you select. To use this time entry method, you must first select employees for whom you want to enter timecards using the time entry filters because this program is accessible only from a Form menu option from the time entry filter programs. You can use either of the following methods to enter timecards:

- Time Sheet All
- Time Sheet Select

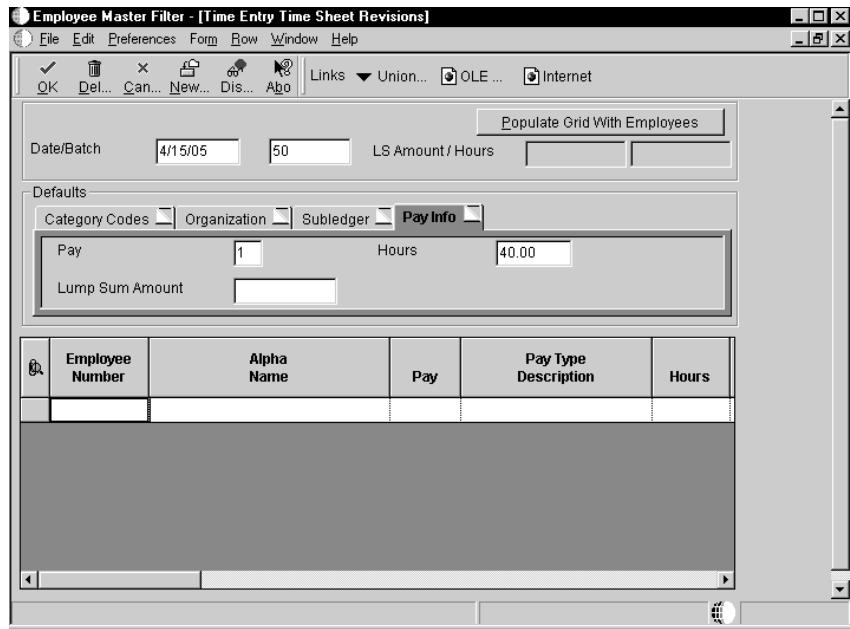
After you have created a list of employees using a time entry filter, you can enter timecards for all of the employees that you have selected using the filter, or you can create timecards for selected employees within the list of employees generated by the time entry filter. If you want to enter timecards for all of the employees generated by the time entry filter, choose the Time Sheet All option from the Form menu. If you want to select a group of employees from the list generated by the time entry filter, choose Time Sheet Select from the Form menu.

If you need to enter a separate timecard for a bonus or a lump sum amount, you must create an additional timecard. You can also override information that the system supplies. For example, you might need to override the account number and job location when an employee works a job other than his or her regular job. The system uses this override information only once for the pay period.

► **To enter timecards using time sheet groups**

You enter timecards using time sheet groups after you have selected your employees for time entry. See *Selecting Employees for Time Entry* and then proceed to the following steps.

1. To enter timecards for all of the employees listed on the form, from the Work With Time Entry By Employee Master form, Work With Time Entry By EE Transaction Current form, or Work With EE By Transaction History form, choose Time Sheet All from the Form menu.
2. To enter timecards for selected employees listed on the form, choose the employees for whom you want to enter timecards and choose Time Sheet Select from the Form menu.
3. On Time Entry Time Sheet Revisions, complete the following fields with information that you want to appear on every timecard that you create:
  - Work Date
  - Batch



4. On Time Entry Time Sheet Revisions, complete any of the Category Code fields on the Category Codes tab with information that you want to appear on every timecard that you create.

Complete fields on this tab to track time entered for employees in category codes 1–4. For example, if category codes 1–4 are defined as Superintendent, General Foreman, Foreman, and Work Area, the system will track time entered for these category codes.

5. Click the Organization tab and complete any of the following fields to have organization information supplied automatically on every timecard that you create. Complete these fields to track detailed information about a job site and to enter timecards by job or business unit.
  - Job Location
  - Check Route Code
  - Shift Code

When you enter a shift code on a time entry form and the system finds a blank shift differential method (in the Shift table F069246), it uses the shift differential method associated with the pay type from the Pay Type table (F069116). When you don't enter a shift code, the system uses the shift differential method associated with the pay type.

6. Click the Sub Ledger tab and complete any of the following fields to have an account number automatically appear on every timecard that you enter:
  - Subledger Type
  - Subledger
  - Work Order

To enter work-order information, you must complete the Subledger and Work Order fields. You can override this information in the detail area of the form for individuals who have different work-order information.

7. Click the Pay Info tab and complete any of the following fields to have pay information supplied automatically on every timecard that you enter:
  - Pay Type
  - Lump Sum Amount
  - Hours
8. Click the Populate Grid with Employees button.

Employee Number	Alpha Name	Pay	Pay Type Description	Hours
2111	Ingram, Paul	1	Regular	40.00
2275	Nguyen, Daniel	1	Regular	40.00
2428	Escalante, George	1	Regular	40.00
2479	Ellis, Jody A.	1	Regular	40.00

9. Review the following field in the detail area:
  - Lock Code
10. To override system-supplied information, complete any of the following fields:
  - Account Number
  - Ovr/Rt

If you need to override the hourly rate, proceed to the task *Overriding an Hourly Rate for an Employee*.

- Record Type
- Job Type
- Job Step
- Equipment
- Union
- Position ID
- Uprate
- Shift Diff.
- %/ Amt
- Billing Rate
- Home Co
- Home BU

- Tax Area
- Item
- Pieces
- Pce/Rt
- Phase
- Explanation
- WCI Code
- SC/ WC

You need to complete the Position ID field if you want to allocate hours and pay to a specific position budget.

11. To charge for equipment use, complete the following fields:
  - Hours Equipment
  - Equipment
12. To identify the billing information for the equipment that the employee used, complete the following fields:
  - Bill RtCd
  - Equip Obj
  - Equipment Billing Rate
13. Click OK.

## Selecting Employees for Speed Time Entry

The Speed Time Entry program (P051121) allows you to enter timecards for multiple employees per pay period. If you need to enter daily timecards, you cannot use this program. The system does not require you to select employees for Speed Time Entry before entering timecards. However, selecting employees is beneficial if you need to review certain information before you enter timecards.

To select employees for Speed Time Entry you must choose one of the following selection methods:

- Selecting an employee by employee number
- Selecting employees by batch number

Selecting employees by employee number is preferable if you need to review certain timecard information before entering another timecard for that employee. When you select employees by employee number, the system displays all the employee's timecards from the Employee Transaction Detail table (F06116) by

batch number. You can review certain timecard information such as work date, home business unit, home company, pay, hours, lump sum amount, subledger, and sub type.

Selecting employees by batch number is preferable if you always enter timecards according to the batch number. The system displays the batch number that you entered and batch information such as the number of timecards in the batch, the number of employees in the batch, batch hours, and the batch lump sum amount. You can enter all timecards for every employee on one form.

Both methods of selecting employees access the same Speed Time Entry Revisions form (W051121C), which allows you to enter all timecards on one form. Each row that you enter represents one timecard per employee.

The system locates information for Speed Time Entry in the Employee Transactions Detail table (F06116).

After selecting employees for Speed Time Entry, the system automatically supplies a form for you to enter timecards per pay period.

## Before You Begin

- Enter labor distribution instructions for the employee. See *Entering Labor Distribution Instructions*.
- Define your Master Business Function processing options for Time Entry. See *Setting Up Master Business Functions*.
- Set up equipment numbers on the Equipment Master form. See *Creating an Equipment Master* in the *Equipment Billing Guide*.
- Set up equipment-rate tables and equipment-rate groups in the Job Cost system. See *Setting Up Equipment Billing Information* in the *Equipment Billing Guide*.
- Set up an AAI table for all journal types. See *Setting Up AAIs for Payroll and Time Accounting*.

### ► To select an employee by employee number

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From the Time Entry menu (G05BT1), choose By Individual.

On Work With Time Entry By Individual, complete the following field and click Find:

- Employee Number

The system displays all timecards for the employee.

Review the information and then proceed to the task *Entering Timecards for Employees Using Speed Time Entry*.

### ► To select employees by batch number

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From the Time Entry menu (G05BT1), choose Speed Time Entry.

On Work With Speed Time Entry, complete the following field and click Find:

- Batch Number

The system displays all batches associated with the user's ID.

Review the batch information and then proceed to the task *Entering Timecards for Employees Using Speed Time Entry*.

## Entering Timecards for Employees Using Speed Time Entry

You can enter timecards for employees using Speed Time Entry after you have selected employees for Speed Time Entry. If you do not want to select employees before entering their timecards, you must enter timecards from either the By Individual or Speed Time Entry menu options. Either menu option supplies the same time entry form.

If you need to enter daily timecards, you cannot use this program. You can use Speed Time Entry to enter timecards for employees per pay period only. Using Speed Time Entry allows you to enter all your employees timecards on the same form using each row as a timecard.

For employees who work with equipment, you can track the following equipment information on their timecards:

- Equipment ID number
- Number of hours that the employee used the equipment
- Equipment billing rates
- Equipment costs and expenses

To facilitate timecard entry, you can set your processing options so that the system copies certain information from one timecard to the next. For example, after you enter the minimal amount of information needed to create a timecard, the system can supply the business unit, work order, and account number from the timecard that you previously entered.

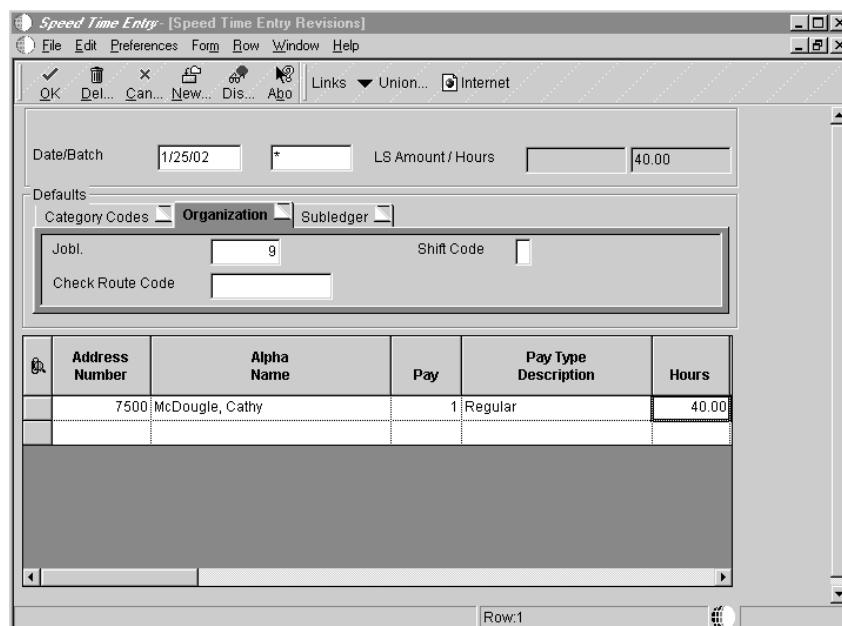
You can also set your Master Business Function processing options for Time Entry (P050002A) to allow certain pay information to automatically be supplied

on each employee's time entry form. For example, you can set your processing options to allow the system to assign a next number to the Batch field and to supply a pay rate.

### ► To enter timecards for employees using Speed Time Entry

You can enter time for employees using Speed Time Entry after you have selected your employees for Speed Time Entry. See *Selecting Employees for Speed Time Entry*. Or if you do not select employees, from the Time Entry menu (G05BT1), choose By Individual or Speed Time Entry.

1. On Work With Time Entry By Individual or Work With Speed Time Entry, if you selected employees first, choose a record and then click Select. If you did not select employees first, click Add.



2. On Speed Time Entry Revisions, complete the following fields:
  - Work Date
  - Batch
3. Complete any of the Category Code fields on the Category Codes tab to have the information supplied automatically to every timecard that you enter.

Complete these fields to track time entered for employees in category codes 1–4. For example, if category codes 1–4 are defined as Superintendent, General Foreman, Foreman, and Work Area, the system will track time entered for these category codes.

4. Click the Organization tab and complete any of the following fields to have organization information supplied automatically to every timecard that you enter. Complete these fields to track detailed information about a job site and to enter timecards by job or business unit.
  - Job Location
  - Check Route Code
  - Shift Code

When you enter a shift code on a time entry form, and the system finds a blank shift differential method (in the Shift table F069246), it uses the shift differential method associated with the pay type from the Pay Type table (F069116). When you don't enter a shift code, the system uses the shift differential method associated with the pay type.

5. Click the Sub Ledger tab and complete any of the following fields to have an account number automatically appear on every timecard that you enter:
  - Subledger
  - Order Number
  - Subledger Type

To enter work-order information, you must complete the Subledger and Work Order fields. You can override this information in the detail area of the form for individuals who have different work-order information.

6. Review the following field in the detail area:
  - Lock Code
7. Complete the following field in the detail area:
  - Pay
8. Complete one of the following fields:
  - Hours
  - LS Amnt

If you are entering a timecard for hours worked, complete the Hours field. If you are entering a timecard for a bonus or lump sum amount, complete the LS Amnt field.

The Batch, Pay, and Hours or LS Amnt fields provide the minimal information needed to create a timecard.

9. If you have entered a timecard for a lump sum amount and you need to create an additional timecard, repeat steps 7–8 for the next row in the detail area. Or to enter a timecard for the next employee, go to step 13.

10. If you need to override a DBA amount for the employee, choose the timecard and select One Time Override from the Row menu. Proceed to the task, *Overriding DBA Amounts One Time*.
11. To copy labor distribution instructions, choose Copy Labor Instructions from the Form menu.

The labor distribution instructions appear. If necessary, make changes to any of the fields as needed for this entry.

12. To override system-supplied information, complete any of the following fields and click OK:

- Account Number

As you enter one timecard after another, you can save time and reduce typing errors in the Account Number field by using certain formulas to key in. See *Duplicating Account Number Segments* in the *General Accounting Guide*.

- Ovr/Rt

If you need to override the hourly rate, proceed to the task *Overriding an Hourly Rate for an Employee*.

- Job Step
- Job Type
- Union
- Position ID
- Job Location
- Uprate
- Shift Code
- Shift Diff.
- %/ Amt
- Billing Rate
- Work Date
- Home Co
- Home BU
- Tax Area
- Item
- Pce/Rt
- Pieces

- Phase
  - Explanation
  - Record Type
  - WCI Code
  - SC/ WC
  - Transaction No. - Payroll
13. If you selected employees first, click Next to display the next employee or the next batch of employees. You can click Previous to display the last employee that you entered time for.
- Values that you entered in the tabbed fields are automatically copied into the next employee's timecard record.
14. When you finish entering timecards, click OK.

## Processing Options for Speed Time Entry

### Time Entry Tab

Use these processing options to specify whether the system prevents changes to timecards and which version is used to process a batch of timecards.

#### 1. Time Entry Changes

Use this processing option to specify whether you want to prevent changes and deletions to timecards that are locked to another user.

Valid values are:

- 1 Prevent changes and deletions.
- 0 Do not prevent changes and deletions.

#### 2. Time Entry Version

Use this processing option to specify which version of the Time Entry Master Business Function (P050002A) you want to use to process timecards. If you leave this processing option blank, the system uses the default version, ZJDE0001.

A version is a set of user-defined specifications. These specifications control how applications and reports run. Use versions to group and save a set of user-defined processing option values, data selection options, and data sequencing options. Interactive versions are associated with applications, usually as menu selections. Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

## **Defaults Tab**

These processing options define the values that the system automatically supplies when you are entering timecards with Speed Time Entry.

### **1. Address Number**

Use this processing option to specify whether the system automatically supplies this field as you enter timecards on the Speed Time Entry Revisions form (W051121C). The system supplies this field if you leave it blank and tab to the next field. Valid values are:

- 1 Allow the system to supply the value (default).
- 0 Do not allow the system to supply the value.

### **2. Pay Type**

Use this processing option to specify whether the system automatically supplies this field as you enter timecards on the Speed Time Entry Revisions form (W051121C). The system supplies this field if you leave it blank and tab to the next field. Valid values are:

- 1 Allow the system to supply the value (default).
- 0 Do not allow the system to supply the value.

## Overriding Timecard Information

---

When you enter the minimal timecard information needed to create a timecard, the system can supply additional information depending on how you've defined your processing options and system setup. For example, the employee's pay rate might come from the Pay Rate table, and the account number might come from automatic accounting instructions (AAIs).

You can temporarily override the DBA amount that the system normally calculates. For example, you might need to override DBA amounts for employees who began employment in the middle of a pay period. You can override the DBA amount when you enter a timecard for an employee, but you do not need to actually enter the hours that the employee worked to override a DBA amount. For example, you can override the DBA amount for an autopay employee or enter the hours worked for an hourly employee later.

In some cases, you might need to temporarily override an employee's system-supplied hourly rate. For example, an employee might receive a higher rate for working in a job other than the employee's regular job. You can use time entry to override an employee's hourly rate for the current timecard.

Overriding timecard information includes the following tasks:

- Overriding DBA amounts one time
- Overriding an hourly rate for an employee

### See Also

- *Appendix C: Timecard Derivation Sequence* for information about how the system derives timecard information

## Overriding DBA Amounts One Time

To override DBA amounts, change the monetary amount (or the hour amount for an hourly accrual) that the system calculates for that DBA during payroll-cycle processing. You can enter zero or any adjusted amount.

When you override DBA amounts, the system updates the Deduction/Benefit/Accrual Ledger File table (F0709).

When you review timecards, the system does not indicate that a DBA one-time override exists.

### ► To override DBA amounts one time

You override DBA amounts one time when you are entering time for an employee. See *Entering Timecards for Employees* or *Entering Timecards for Employees Using Speed Time Entry*.

1. On Speed Time Entry Revisions or Time Entry Revisions, choose the record for which you need to override a DBA and choose One-Time Override from the Row menu.

The screenshot shows a software interface titled 'By Individual - [One Time Overrides]'. At the top, there are buttons for OK, Find, Del., Can..., New..., Dis..., and Abo. Below these are links for Links, PDRA..., OLE..., and Internet. The main area has fields for 'Address Number' (7500) and 'McDougle, Cathy'. Under 'Work Date', it shows '3/31/05'. Below this is a grid table with columns: DBA, Description, Amount, Basis, Union, Job Typ, Job Step, and Business Unit. The grid contains the following data:

DBA	Description	Amount	Basis	Union	Job Typ	Job Step	Business Unit
1016	LTD Coverage	29.40					
1017	STD Coverage	21.84					
1020	Dental EE+1	66.00					
1320	United Way	30.00					
3002	Life Ins.	210.00					
4003	Med-EE	72.00					
5105	Life 10K	72.00					
5502	Vision EE+1	18.30					
7000	401(k)	499.97					
<b>Σ</b>		<b>1,019.51</b>					

2. On One-Time Overrides, review the information and revise any of the following fields for a specific DBA:
  - Amount
  - Basis
  - Union Code
  - Job Typ
  - Job Step
  - Business Unit
  - Company
  - Work Tax Area
3. To override voucher information, complete the following fields:

- A/P Voucher
  - Payee No
4. If you are overriding a wage attachment deduction, complete the following field:
    - Wage Att
  5. If you need to review or revise a DBA in the database, choose the DBA and choose PDBA Setup from the Form menu. Proceed to the task *Setting Up Essential DBA Information*.
  6. Click OK.

<b>Field</b>	<b>Explanation</b>
DBA	<p>A code that defines the type of pay, deduction, benefit, or accrual.</p> <p>Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.</p>
Amount	<p>The actual gross pay amount for an employee. This is to be distinguished from the distributed gross pay amount used for labor distribution. See data item DPAY.</p> <p>When using Work Order Time Entry, this field is used to record miscellaneous pay for an employee, (i.e. piece rate bonus).</p>
Basis	The number of hours associated with each transaction.
Union	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Business Unit	<p>This field will come from one of two sources:</p> <ol style="list-style-type: none"> <li>1. Direct entry of a business unit on the One-Time-Override screen; or</li> <li>2. When the system automatically calculates a DBA based on finding an entry in the Union/Plan Master (F069106) specifically for the business unit matching one or more time cards. Only in these two cases will the business unit be filled in in the F0609 and F0619 files. In all other cases it will be blank.</li> </ol>
Company	The company to which the employee is assigned. This code is used to store historical payroll information and to determine accounts for some journal entries.

<b>Field</b>	<b>Explanation</b>
Work Tax Area	<p>A code that identifies a geographical location and the tax authorities for the employee's work site. Authorities include both employee and employer statutory requirements. In the payroll-tax calculation software made by Vertex, the tax-area code is synonymous with GeoCode. To determine the valid codes for your location, refer to the documentation for the tax-calculation software that you are using.</p>
	<p>For WorldSoftware: If you are using the Time Accounting system without either the Payroll or Human Resources systems, the system does not calculate taxes. However, you must enter a value in this field before you can exit the form. You use the Tax Area Information form on the Additional Constants and Tables menu to set up a tax area.</p>
A/P Voucher	<p>A code used to determine whether the system should generate a voucher for the DBA, tax, or wage attachment during the final update phase of the payroll processing cycle. Valid codes are:</p>
	N      No, do not generate a voucher
	Y      Yes, generate a voucher
Payee No	<p>The address book number for the supplier who receives the final payment.</p>
	<p>In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.</p>
	<p>For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.</p>
Wage Att	<p>A control number used to group and identify all related elements associated with a Wage Attachment (Garnishment, Levy, Child Support or Loan). This number is assigned by the system and is used to attach a specific deduction to its related Wage Attachment information.</p>

## Overriding an Hourly Rate for an Employee

When you enter time for an employee, you typically do not need to enter an hourly pay rate. The system derives the hourly rate in the following sequence using the information that is entered and stored in these programs and tables:

1. Time Entry (P051121 and P051191) - Hourly rate

The value in the Hourly Rate field is used as it is entered on the time entry forms for P051121 and P051191.

### 2. Union Rates Master Revisions (P059121) - Union and Job type

This information is obtained from the Union Rates table (F069126).

### 3. Occupational Pay Rates (P050231) - Job type and Job step

This information is obtained from the Employee Pay Rates table (F060146).

### 4. Employee Information (P0801) - Hourly rate

This information is obtained from the Employee Master table (F060116).

Unless you set up your processing options differently, the system uses this sequence to derive an employee's hourly rate. For each employee, the system starts searching with the time entry programs and stops when it finds an hourly rate.

To override an employee's system-supplied hourly rate for a timecard, you can enter the hourly rate on a time entry form.

If you change the pay rate for an employee on the Employee Information form after entering time for that employee, you must revise the timecard and remove the value from the Override/Rate field. The system obtains the new rate and recalculates the gross pay for that timecard.



### To override an hourly rate for an employee

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You override an hourly rate for an employee when you are entering time for an employee. See *Entering Timecards for Employees* or *Entering Timecards for Employees Using Speed Time Entry*.

1. On Speed Time Entry Revisions or Time Entry Revisions, complete the following field to override the system-supplied hourly rate:
  - Ovr/Rt
2. Complete any of the following fields and click OK:
  - Uprate
  - Shift Code
  - Shift Diff.
  - %/ Amt

<b>Field</b>	<b>Explanation</b>
Ovr/Rt	<p>The employee's hourly rate. If applicable, the system adds Pay Type Multiplier and Shift Differential values to the hourly rate.</p> <p>If you change the value of the data display decimals for this field, you must also change the Hourly Rate (PHRT) and Base Rate (BHRT) fields in time entry to have exactly the same data display decimals.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p>
UpRate	<p>Enter an amount in this field to override all the rates that would have been derived elsewhere. The system uses this rate to calculate the employee's pay based on the hours you enter. Depending on where the system finds the rates, one of the following occurs:</p> <ul style="list-style-type: none"> <li>• If the system retrieves the rate from the Employee Master table (F060116), the system does not display rate amounts. A message of Secured indicates that the system used employee information.</li> <li>• If the system retrieves the rate from the Union Rates or Occupational Pay Rates table, the system displays the rate of pay, provided that the rates for all lines of time entry are the same. If the system detects different rates for the lines of time entry, the message Dff U. Rate appears.</li> <li>• If you enter a lump sum amount, the system shows the calculated rate using that amount.</li> </ul> <p>An amount that the system adds to an employee's base hourly rate. For example, you might enter a rate differential for equipment operators when they move from operating one piece of equipment to another piece. The system adds this amount directly to the base rate to calculate gross wages.</p> <p>The system adds the uprate amount to the base pay rate before it performs any other rate calculations, such as applying a shift differential or pay type multiplier.</p>
Shift Code	<p>A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.</p> <p>For payroll and time entry:</p> <p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p> <p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.</p>

Field	Explanation				
Shift Diff.	An additional rate, expressed in dollars or percent, added to an employee's hourly rate, depending on the shift worked. This rate can be applied in one of two ways, as defined by the Shift Differential Calculation Sequence (data item CMTH).				
%/ Amt	A code that indicates whether the corresponding Shift Differential field contains an hourly rate or a percentage. Valid values are: <table><tr><td>H</td><td>The amount in the Shift Differential field is added to the hourly rate.</td></tr><tr><td>%</td><td>The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.</td></tr></table>	H	The amount in the Shift Differential field is added to the hourly rate.	%	The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.
H	The amount in the Shift Differential field is added to the hourly rate.				
%	The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.				



## Working with Time Entry Batch Processing

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Time entry batch processing is a process that uploads timecard information from a third-party source to the J.D. Edwards Payroll system. When you upload timecard information, the system converts it so that the information can be used to create timecards in OneWorld. You might upload timecard information from any of the following third-party sources:

- A remote PC time entry program
- Custom systems
- Electronic Data Interchange (EDI) transactions

The J.D. Edwards Interoperability model makes possible the sharing and processing of information between a third-party source and J.D. Edwards software. Inbound transactions are possible for release B73.3.1 and later. That is, you can upload timecard information from a third-party source. A future release will allow outbound transactions also. That is, you will be able to download timecard information to a third-party source.

The Batch Time Entry File Upload (R47002C) program verifies that the information entered into the Employee Transactions Batch table (F06116Z1) is processed correctly and copied to the Employee Transactions Detail table (F06116). After the information is in the F06116Z1 table, you can create timecards.

Working with time entry batch processing includes the following tasks:

- Setting up a flat file cross-reference
- Completing required fields for the Employee Transactions Batch table (F06116Z1)
- Uploading timecard information
- Revising uploaded timecard information
- Reviewing the Batch Time Entry File Register report
- Creating timecards from uploaded information
- Purging processed payroll batches

You can upload timecard information from a third-party source as a flat file that will correspond to J.D. Edwards time entry forms. You might need to format the timecard information in your third-party source so that the information uploads in a corresponding tabular format.

The uploaded timecard information is stored in the Employee Transactions Batch table (F06116Z1) until you process the information. When you process the information, the system creates timecards and stores them in the Employee Transactions Detail table (F06116) with all other timecards.

Before you create timecards from uploaded information, you can review and revise the information in the table for accuracy. You can use the Batch File Register report to verify that the uploaded batches are accurate.

After you have reviewed and revised a batch of uploaded timecard information, you can use the information to create timecards. After creating the timecards, you can include those timecards in payroll-cycle processing.

If your processing options are set up appropriately when you create the timecards, the system automatically purges the processed batches from the Employee Transactions Batch table (F06116Z1). Purging conserves computer disk space and makes it easier for you to locate unprocessed batches.

## **Setting Up a Flat File Cross-Reference**

The system needs to identify the flat file with the timecard information before it can upload data from a third party source. When you upload timecard information, the system retrieves the data from the flat files and stores it in the Employee Transactions Batch table (F06116Z1). You use flat file cross-reference information for the following conditions:

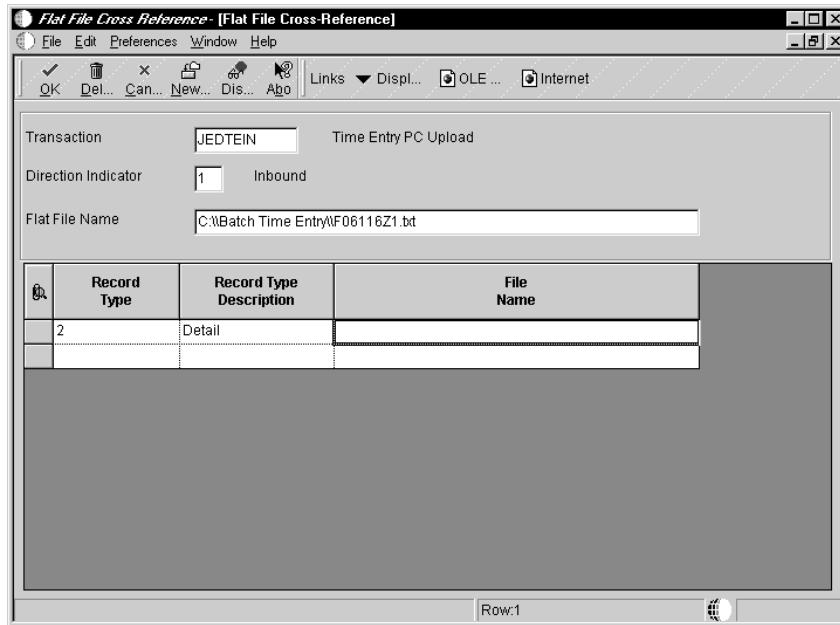
- For inbound transactions, if the third party source cannot write data to the interface tables in the required format for OneWorld. The third party source can write the data to a specific flat file for each transaction and record type.
- For uploading information, if the third party source is a new or different source.

### **► To set up a flat file cross-reference**

---

From the Partner Process menu (G05BPP), choose System Setup. From the System Setup menu (G05BPP40), choose Personic. From the Personic menu (G05BPP41), choose Flat File Cross Reference.

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



2. On Flat File Cross-Reference, enter JDETEIN in the following field:
  - Transaction
3. Type 1 in the following field:
  - Direction Indicator
4. In the following field, type a filename for the flat file that the data will be uploaded to:
  - Flat File Name

**Note:** Any folders in the filename path *must* already exist. OneWorld will not create the folders. Also, use double backslashes (\\\) in the filename (for example, c:\\Batch Time Entry\\\\F06116Z.txt).

5. Type 2 in the following field:
  - Record Type
6. Click OK.

---

<b>Field</b>	<b>Explanation</b>
Transaction	A code that identifies a transaction by type.
Direction Indicator	A code that indicates the direction of the transaction.
Flat File Name	The name of the flat file. This includes the directory path where the flat file exists.
Record Type	A user defined name or remark.

---

<b>Field</b>	<b>Explanation</b>
Record Type Description	The identifier used to mark EDI transaction records as header and detail information. This is an EDI function only.

## Completing Required Fields for the Employee Transactions Batch Table (F06116Z1)

When you upload flat file information to the Employee Transactions Batch table (F06116Z1), the system must store the information in required fields on the table. These fields correlate with a OneWorld timecard. You must enter required fields in a custom program so that the system can identify the information and then create a timecard with another program.

Review the following tables for the field names, alpha names, explanations, and values of required fields needed for the Employee Transactions Batch table (F06116Z1).

### Required Transaction Fields

The following fields must be completed in a custom program for the system to identify the transaction and put the values in the Employee Transactions Batch table (F06116Z1):

<b>VLEDUS (User ID)</b>	Enter the ID of the user entering the transactions.
<b>VLEDTN (User Transaction Number)</b>	Enter a number to identify a specific transaction within a batch.
<b>VLEDLN (Line Number)</b>	Enter a number to identify each line within a given transaction.
<b>VLEDDT (EDI Transmission Date)</b>	Enter the Julian date of the transmission.
<b>VLEDER (Send/Receive Indicator)</b>	Enter R for inbound transactions. This indicates that the record was written by a system external to OneWorld with the intent that the transaction be received in OneWorld.
<b>VLEDSP (Processed Flag)</b>	Enter 0 for inbound transactions. When the system finishes uploading the information, it updates this field to 1.
<b>VLEDTC (Action Flag)</b>	Enter either A for add or D for delete. (Left justified)

<b>VLEDTR (Transaction Type)</b>	Enter 1 for the inbound transaction.
<b>VLEDBT (User Batch)</b>	Enter a batch number to identify a specific transaction for the specific user ID.

**Note:** VLEDUS, VLEDBT, and VLEDTN must contain values that identify the transaction within the table. You can complete any combination of these three fields to identify the transaction during the interface processing.

## Required Data Fields

You must complete the following fields for the system to accept the transaction:

<b>VLAN8 (Address Number)</b>	Enter the employee's address book number.
<b>VLPTRR (Transaction Number)</b>	Enter a unique number assigned within the batch.
<b>VLPHRW (Hours Worked)</b>	Enter a number with implied decimals.
<b>VLDWK (Date Worked)</b>	Enter the date used as the actual work date or pay period ending date in Julian format.
<b>VLPDBA (Pay Type Code)</b>	Enter a pay type. The pay types are controlled by table F069116.
<b>VLICU (Batch Number)</b>	Enter a number assigned to a batch of timecards. This can be the same as EDBT (User Batch).

## Optional Fields

See *Appendix D: Optional Fields for the Employee Transactions Batch table (F06116Z1)*.

## Uploading Timecard Information

From the Advanced/Technical Operations menu (G05B30), choose Batch Time Entry Processing. From the Batch Time Entry Processing menu (G05BBT3), choose Batch Time Entry File Upload.

If you use a third-party source to store timecard information, you need to upload the information from a flat file into the Employee Transactions Batch table (F06116Z1) before you can create timecards. For example, if you keep timecard information in an Excel spreadsheet, you need to import that information into the J.D. Edwards Time Entry system in order to create timecards.

Always run the default version XJDE0031. This version is set up with the proper processing options attached to it.

After uploading timecard information, review the information before you create timecards. See *Revising Uploaded Timecard Information*.

### Processing Options for Inbound Flat File Conversion

#### Transaction

1. Enter the transaction to process.

---

#### Separators

1. Enter the field delimiter.3333
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.

---

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### What You Should Know About Processing Options

The following table lists information about using certain values for these processing options:

**Transaction tab**

JDETEIN is the default value and is set up as the Time Entry PC Upload transaction type.

**Separators tab**

1. Enter a value that the system recognizes as the beginning and end of the text within each cell or field when creating a flat file.
2. Enter a value that allows the system to recognize a new field or cell when creating the flat file.

**Process tab**

1. Enter the program number for Batch Time Entry Processor, R05116Z1I, if you want the system to automatically create timecards from the uploaded timecard information. If you want to review and revise your batch after uploading the timecard information, do not enter a value.
2. Enter the version of the processor program R05116Z1I.

## Revising Uploaded Timecard Information

When the system uploads timecard information, it often identifies one or more inbound transactions that contain invalid transactions. For example, an employee might have an invalid employee number. In this case, the system does not add the record to the Employee Transactions Batch table. Instead, it e-mails the user's Employee Work Center Queue indicating the transaction number for the transaction that is in error.

After uploading timecard information to the Employee Transactions Batch table (F06116Z1), you should review the information and correct any errors before you create timecards. This process helps prevent errors on timecards and in your timecard tables.

### Before You Begin

- View your employee work center queue for transaction errors. See *Viewing Messages* in the *OneWorld Foundation Guide*.
- You can run the Batch Time Entry File Register report as an alternative to reviewing timecard information errors online. See *Reviewing the Batch Time Entry File Register Report*.

### ► To revise uploaded timecard information

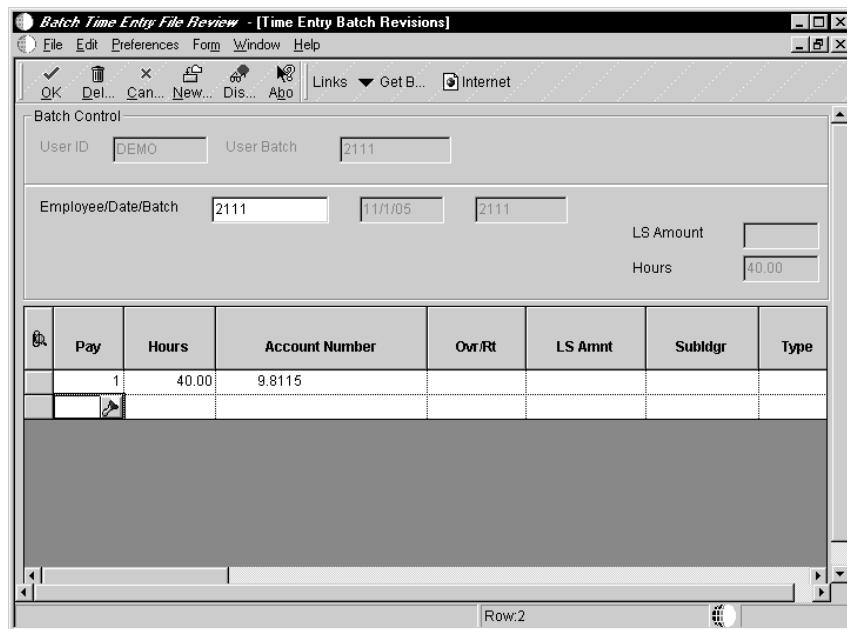
---

From the Batch Time Entry Processing menu (G05BBT3), choose Batch Time Entry File Revisions.

1. On Work With Time Entry Batch File Revisions, complete the following fields:
  - User ID
  - Batch Number
2. To further limit your search, complete one or more of the following optional fields and click Find:
  - From Date

- Thru Date

3. Choose a record and then choose Time Entry from the Row menu.



4. On Time Entry Batch File Revisions, enter corrections or override information and click OK.

The server completes blank fields during processing.

Field	Explanation
User ID	The source of the transaction. This can be a user ID, a workstation, the address of an external system, a node on a network, and so on. This field helps identify both the transaction and its point of origin.
Batch Number	The number that the transmitter assigns to the batch. During batch processing, the system assigns a new batch number to the J.D. Edwards transactions for each control (user) batch number it finds.
From Date	The date used as the actual work date or pay-period ending date.
Thru Date	The date used as the actual work date or pay-period ending date.

Field	Explanation								
Processed	<p>An indicator to mark records as successfully processed through the batch processing system. After a record has been marked as processed, it can no longer be updated through the batch processing program.</p> <p>Valid values for WorldSoftware are:</p> <table> <tr> <td>0</td> <td>Unprocessed only</td> </tr> <tr> <td>1</td> <td>Processed and unprocessed</td> </tr> </table> <p>For OneWorld software:</p> <table> <tr> <td>On</td> <td>The system shows records that have been successfully processed.</td> </tr> <tr> <td>Off</td> <td>The system shows records that have not yet been processed.</td> </tr> </table>	0	Unprocessed only	1	Processed and unprocessed	On	The system shows records that have been successfully processed.	Off	The system shows records that have not yet been processed.
0	Unprocessed only								
1	Processed and unprocessed								
On	The system shows records that have been successfully processed.								
Off	The system shows records that have not yet been processed.								

## Reviewing the Batch Time Entry File Register Report

From the Batch Time Entry Processing menu (G05BBT3), choose Batch Time Entry File Register.

After you revise uploaded timecard information, you should run the Batch Time Entry File Register report to verify that the information is correct.

### Processing Options for Batch Time Entry File Register

#### Defaults

1. Enter the type of Time Cards you wish to print. ('L' = Labor Time Cards, 'R' = Recharge Time Cards, 'E' = Equipment Time Cards.)

Time Card Type

2. If 'L', enter the type of Employee Number you wish to print.

Employee Number Format

3. Enter a '1' to print the GL Account Number and Tax Area. '0' is the default, and will not print these items.

Print GL Account Number and Tax Area

4. Enter a '1' to print with EE Totals. '0' is the default, and will print without EE Totals.

Print EE Totals

## **Creating Timecards from Uploaded Information**

From the Batch Time Entry Processing menu (G05BBT3), choose Batch Time Entry Processor.

After you review and revise uploaded timecard information, you can create timecards. You then include those timecards in your usual payroll-cycle processing.

When you create timecards from uploaded timecard information, the system verifies the information against constants tables in the Payroll system.

To create timecards, the system transfers the uploaded information from the Employee Transactions Batch table (F06116Z1) to the Employee Transactions Detail table (F06116).

You need to set up your processing options for Batch Time Entry Processor (R056116Z1I) to run this program in proof or final mode. When you run the program in proof mode, the system prints the Employee Transaction Update report and the Transaction Errors report without updating the Employee Transactions Detail table (F06116). Correct any errors before resetting your processing options to run the program in final mode.

When you run the program in final mode, the system does the following:

- Uses next numbers to assign batch numbers and transaction numbers for each timecard
- Creates and prints the Employee Transaction Update report and the Transaction Errors report
- Marks transactions as processed
- Supplies any applicable default values in the optional timecard fields

If no errors appear on the Transaction Errors report, the system creates timecards in the Employee Transactions Detail table (F06116). If errors occur, the system does not create timecards, but sends an error message to the appropriate person as defined in your processing options.

If errors occur, correct the errors and run the batch again. If processing options are set up appropriately the system automatically purges the records from the Employee Transactions-Batch table (F06116Z1) when the batch runs successfully.

You cannot use the Batch Time Entry File Review and Revisions form to revise processed batches. If you find an error in processed batches, you must make revisions on individual time entry forms.

## See Also

- *Revising Uploaded Timecard Information* for information about making corrections

## Processing Options for Time Entry Batch Processor Report (R05116Z1I)

### Processing Tab

Use these processing options to determine whether this report will be run in final or proof mode, whether the system will purge processed transactions, and how the system will process employee records that are locked to a payroll.

#### 1. Time Entry Version

Use this processing option to override the processor for standard time entry. The default version for Time Entry Master Business Function (P050002A) is ZJDE0001. To change the default, enter another version. Only persons responsible for system-wide setup should change this option.

#### 2. Final Flag

Use this processing option to specify the mode in which to run the UBE. Valid values are:

Blank Process batch information in proof mode. The system generates a report but does not update tables. This option allows you to preview the results which would occur from processing batch information in final mode.

- 1 Process the batch information in final mode. The system updates batch information in the relevant tables.

#### 3. Purge Flag

Use this processing option to specify whether to purge processed transactions from the Employee Transaction Batch table (F06116Z1) when the transactions are complete. Valid values are:

- 1 Automatically purge processed transactions from the batch file.  
Blank Flag transactions as processed, but do not purge transactions from the batch file.

### Messages Tab

Use this processing option to specify the individual who will receive error messages resulting from this report.

## 1. User ID for Work Center Messages

Use this processing option to specify how the system manages an employee record that is locked out of a payroll. Valid values are:

- 1 Report an error for a specific employee who is locked out of a payroll. The system does not upload time for the locked employee.
- 2 Report a warning for a specific employee. The system sends a warning message to the message center indicating the employee and payroll ID that caused the error, but the system uploads time for the employee. This setting can force an active payroll into a changes-only run.
- 3 Receive no messages. The system uploads time for the employee. This setting can force an active payroll into a changes-only run.

## Purging Processed Payroll Batches

From the Batch Time Entry Processing menu (GO5BBT3), choose Purge Batch Time Entry.

After you create timecards, you should purge the processed batches if your processing options are not set up to do so automatically. Purging batches conserves disk space and makes it easier to locate unprocessed batches. When you purge processed batches, the system removes records from the Employee Transactions Batch table (F06116Z1).

## Processing Journal Entries

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You process journal entries to update the general ledger with labor, payroll burden, and equipment expenses. The way in which you process journal entries depends on whether you are using the J.D. Edwards Payroll system.

If you are using the J.D. Edwards Payroll system, you process journal entries as part of each payroll cycle. You also process journal entries when you process an interim payment for an employee. In some cases, you might choose to process journal entries at other times during a pay period. For example, labor-intensive organizations might need to monitor and analyze labor expenses on a daily basis. These organizations can process journal entries for timecards daily.

If you are not using the J.D. Edwards Payroll system, but you are using the time accounting features of the HR and Payroll Foundation system to enter timecards and to track labor and equipment expenses, you can process journal entries for timecards.

You process two types of journal entries for payroll and time accounting:

**Pro forma journal entries**

These are preliminary, review-level journal entries that the system stores in the Compressed Payroll Journal workfile (F063951).

**Actual journal entries**

These are journal entries that the system posts to the Account Ledger table (F0911) and, optionally, the Account Balances table (F0902).

When you process journal entries for Payroll, you create pro forma journal entries during each payroll cycle. After you review the pro forma journal entries, you can create the actual journal entries that you post to the general ledger. You can set up your company options so that the system automatically posts actual journal entries during the final update step of the payroll cycle. If your company options are set up so that the system does not automatically post the actual journal entries, you or someone in your accounting department must post the journal entries manually. You also must post the actual journal entries manually when an error prevents the system from posting them automatically.

When you process journal entries for timecards, you run a batch program to create the pro forma journal entries. After you review the pro forma journal entries and correct any errors, you run another batch program to create the actual journal entries and post them to the general ledger.

You can create journal entries for the following document types:

**Document types for payroll**

- T1 Payroll disbursement
- T2 Payroll labor distribution
- T3 Actual burden
- T4 Labor billing distribution
- T5 Equipment distribution
- T6 Payroll accruals and deferrals
- T7 Payroll vouchers

The system creates document-type T7 journal entries only when your Payroll system is integrated with the J.D.Edwards Accounts Payable system.

**Document types for time accounting**

- T2 Payroll labor distribution
- T4 Labor billing distribution
- T5 Equipment distribution

Processing journal entries includes the following tasks:

- Processing pro forma journal entries for timecards
- Reviewing the Journal Batch Proof report
- Reviewing batches of journal entries
- Deleting a batch of pro forma journal entries
- Posting journal entries for payroll or time accounting

You process pro forma journal entries for timecards only when you are not processing the journal entries associated with a payroll cycle. You can use the Journal Batch Proof report to review the pro forma journal entries before you post them to the general ledger. You can also use this report to review the pro forma journal entries that the system created during a payroll cycle. If errors occur in the journal batch, you can correct the errors, delete the batch, and reprocess the pro forma journal entries.

When the pro forma journal entries are error-free and approved for posting, you post them to the general ledger. You can post either of the following types of pro forma journal entries:

- Timecard journal entries
- Payroll journal entries that were not posted during the payroll cycle, either because of errors or because of the way in which your company options are set up

When you post journal entries, the system creates, posts, and removes the timecard batch details from the Payroll Journal Compression workfile (F063951) and updates the Account Ledger table (F0911) and the Account Balances table (F0902) with the timecard transactions.

**Caution:** You must run the full journal entry process either in WorldSoftware or in OneWorld.

## See Also

- *Interactive Versions for Applications* in the *OneWorld Foundation Guide*

## Processing Pro Forma Journal Entries for Timecards

From the Timecard Post/History Update menu (G05BT11), choose Generate Timecard Journals.

You process pro forma journal entries for timecards only if you are not creating the journal entries associated with a payroll cycle.

When you process pro forma journal entries for timecards, the system converts the Employee Transactions Detail table (F06116) into the Compressed Payroll Journal Workfile (F063951) and the Burden Distribution Workfile (F06241). When you process these journal entries, you can do the following:

- Define the general ledger date for the journal entries
- Select timecards based on a range of dates

In addition to generating pro forma journal entries, this program generates the Journal Batch Proof report. You review this report to verify the accuracy of the transactions that the system generated from the journal data. This report includes individual entries and totals for document type, period, and company, as well as a grand total for the batch report. If necessary, you can rerun this report without rerunning the pro forma journal entries.

## See Also

- *Processing Pro Forma Journal Entries* in the *Payroll Guide* for information about processing journal entries during a payroll cycle
- *Reviewing the Journal Batch Proof Report* for more information about that report

## Processing Options for Generate Timecard Journals (R052901)

### Date Tab

This processing option determines the date the system uses to post journal entries.

#### General Ledger Date

Use this processing option to define whether the program uses the G/L date or the system date when it posts journal entries. To use the system date, leave this processing option blank. Timecards that have multiple work dates are posted on the date that you define in this processing option. To account for daily timecards, you must run this program every day with the processing option set to the system date.

### Process Tab

These processing options determine certain values processes related to Benefits, Intercompany Settlements, Components, and Premium.

#### 1. Benefits

Use this processing option to define how the system processes benefits and accrual when it posts journal entries for timecards. Valid values are:

- 0     Do not calculate any benefits or accruals for the employees.
- 1     Calculate only non-monthly benefits and accruals for the employees.
- 2     Calculate monthly and non-monthly benefits and accruals for the employees. Enter this value only when you are processing the last timecards for calendar month. The system uses the month that corresponds to the general ledger date.

Non-monthly benefits and accruals are those for which you entered M in the fifth Pay Period of the Month field on the Basic DBA Information form (W059116E). An M in this field indicates that the system calculates the benefit or accrual during daily timecard post.

Monthly benefits and accruals are calendar-month DBAs, including those that are non-monthly, that have the following characteristics:

- Are set up to calculate for the employee for an entire calendar month
- Have a value of 2 or Blank in the Limit Method field on the Advanced DBA Information form (W059117A).

## 2. Intercompany Settlements

Use this processing option to define whether you want to process intercompany settlements when you post timecard journal-entries. Valid values are:

- 1 Process intercompany settlements. When processing intercompany settlements, the system uses the general accounting constants and the company number on the timecard.
- 0 Do not process intercompany settlements

This processing option applies only when the journal type IC is set up in the Debit/Credit-Accruals Clearing table (P069041).

## 3. Components

Use this processing option to define how you want to post timecard journal-entries for equipment time when the equipment is used to build an item that is comprised of multiple components.

Valid values are:

- 1 Distribute equipment time billed from the parent item to its components.
- 0 Bill equipment time to parent item only.

In the Asset Master table (F1201), you define the parent/child relationship between parent items and their components. You enter billing rates for the components in the Equipment Rates table (F1301).

## 4. Premiums

Use this processing option to define how you want to update the Account Ledger table (F0911) for premium labor entries. Premium labor entries are entries for pay types that have a pay type multiplier greater than 1. Valid values are:

- 1 Update labor hours to the Units field for premium labor entries. Choose this option when you want journal type PR to include labor hours in the Units field.
- 0 Do not update labor hours to the Units field for premium labor entries. Choose this option when you want only journal type LD to include labor hours in the Units field.

This processing option applies only when the Debit Burden/Premium Labor Distribution table (P069042) is set up in the following way:

- The journal type PR has been added to the table.
- The company burden rules are set up to separate the premium portion of a pay type from the regular portion.

## 5. Summarization Rules

Use this processing option to define how Journal Entries are created and printed. Each account number has a summarization rule defined for it in the Journal Summarization Rules program (P06914). This processing option enables you to override the summarization code, so it will be a Type 6, so you can see the Journal Entries in the highest level of detail possible. Valid values are:

- 1 This option overrides any summarization rules, making the summarization code a Type 6. Choose this option when you want the Journal Entries to be created and printed in full detail.
- 0 This option is the default, so the pre-defined summarization rule will be used.

## Reviewing the Journal Batch Proof Report

From the Timecard Post/History Update menu (G05BT11), choose Journal Batch Proof.

After you process pro forma journal entries, you review the Journal Batch Proof report. The system prints this report when you do either of the following:

- Process pro forma journal entries for timecards
- Process the journal entry step of a payroll cycle

Use this report to review the accuracy of the journal entries before you post the information to the general ledger.

The Journal Batch Proof report lists the journal entry information by document types. Grouping journal entries by document types enables you to separate various types of accounts. The system uses the following document types to group payroll journal entries:

- T1 - Payroll Disbursement
- T2 - Payroll Labor Distribution
- T3 - Actual Burden
- T4 - Labor Billing Distribution
- T5 - Equipment Distribution
- T6 - Payroll Accruals and Deferrals

**Caution:** If you find errors on the Journal Batch Proof report, you must correct the errors and rerun the pro forma journal entries. The following list contains examples of what might cause errors to appear on the Journal Batch Proof report:

- Inaccurate AAIs.

- An account number not yet added to the chart of accounts.
- Incorrect setup of nontaxable benefits or accruals that were processed in the journal entries step.
- Incorrectly entered timecard information. (In this case, if you are processing journal entries for a payroll cycle, you also must rerun pre-payroll.)

The system does not recognize the corrections until you rerun the pro forma journal entries. If you do not rerun the pro forma journal entries after you correct the errors, the system creates the actual journal entries with errors.

When you are processing journal entries as part of a payroll cycle and you have not yet printed the payments, you can complete the following procedure to correct inaccurate timecard information:

1. Rerun the journal entries step and delete the previous journal entries to remove the lockout code on the timecards.
2. Correct the inaccurate timecards.
3. Run a changes-only pre-payroll.
4. Rerun the journal entries step.

You can reprint the Pay Period Journal Batch Proof report when you want to print the report without re-creating the pro forma journal entries. The system prints the same proof report that was created during the last iteration of the process. The related payroll ID appears on the report when you reprint it. You can print this report as many times as necessary before you run the final update. After you run the final update, the system clears the Summarized Journal Entry Workfile, and the report does not produce any information.

## See Also

- *Processing Pro Forma Journal Entries* in the *Payroll Guide*
- *Setting Up AAIs for Payroll and Time Accounting*
- *Setting Up Deductions, Benefits, and Accruals*
- *Processing Changes-Only Pre-Payroll* in the *Payroll Guide*
- *Verifying the Journal Entry Post* in the *General Accounting Guide* for common error messages associated with journal entries

## Reviewing Batches of Journal Entries

After you generate pro forma journal entries, you can review them to verify that they are correct. You can review batches of journal entries based on your user ID, the batch number, a posting status, or a specific date range. You can review batches of pro forma journal entries to verify that they are error-free before you

post them. You can review the pro forma journal entries that were generated from the payroll cycle, as well as those that were generated from timecards.

You also can review actual journal entries that the system creates when you post timecard journal entries to the general ledger, as well as the actual journal entries that were created during the final update step of the payroll cycle. Depending on how your company options are set up, the system might automatically post these actual payroll journal entries.

The system uses batch types to group the various kinds of journal entries. You can review the following batch types:

**51**

Timecard pro forma journal entries. You can review summary information only. Use the Journal Batch Proof report to locate any errors.

**41**

Payroll pro forma journal entries. You can review summary information only. Use the Journal Batch Proof report to locate any errors.

**P**

Actual timecard journal entries that have been posted to the general ledger.

**7**

Actual payroll journal entries that have been posted to the general ledger.

If you discover errors when you review batches of pro forma journal entries, you must delete the entire batch, correct the errors, and then generate the pro forma journal entries again.

If you discover errors when you review batches of actual journal entries, you can use the General Journal Review program to do any of the following to individual journal entries:

- Revise unposted journal entries
- Delete unposted journal entries
- Void posted journal entries

You can revise and delete actual journal entries only. You cannot revise or delete pro forma journal entries.

### See Also

- *Reviewing Journal Entries* in the *General Accounting Guide* for the steps to review and revise journal entries

- *Deleting a Batch of Pro Forma Journal Entries*
- *Deleting an Unposted Journal Entry* in the *General Accounting Guide*
- *Voiding a Posted Journal Entry* in the *General Accounting Guide*

## Deleting a Batch of Pro Forma Journal Entries

From the Timecard Post/History Update menu (G05BT11), choose Batch Delete.

You delete an unposted batch of pro forma journal entries when the batch contains errors and you must correct the timecard entries before you regenerate the corrected batch.

## Processing Options for Batch Delete (R05227)

### Select Tab

Use this option to select the Daily Timecard Journal Batch that you wish to delete. Use caution when exercising this option, because you cannot recover batches after they have been deleted.

#### 1. Batch Number

Enter the batch number that the system assigned to the Daily Timecard Journal Batch that you wish to delete. Use caution when exercising this option, because you cannot recover batches after they have been deleted.

## Posting Journal Entries for Payroll or Time Accounting

From the Timecard Post/History Update menu (G05BT11), choose Post Journals to General Ledger.

Alternatively, from the Payroll Workbench menu (G07BUSP11), choose Manual Payroll Journal Post.

For time accounting, you must run a program to post the batch of timecard journal entries to the general ledger. The batch that you post for timecards contains pro forma journal entries. During the posting process, the system creates the actual journal entries in the Account Ledger table (F0911) and automatically posts them to the Account Balances table (F0902).

For payroll journal entries, you can set up your company options for either of the following:

**The system automatically posts actual journal entries during final update**

You use the manual post program only if an error occurred during final update that prevented the system from posting the journal entries.

**The system does not automatically post actual journal entries**

After you run the final update, you run the manual post program to post the actual journal entries to the general ledger. You or someone in your accounting department might need to approve the batch before you run the post program.

If the Pre-Post General Ledger program encounters any errors, the system creates the actual journal entries in the Account Ledger table but does not post them. After you have corrected the actual journal entries, you must resubmit the batch for posting. Since the batch contains actual journal entries, you must use a General Accounting post program.

When you run the manual post program, the system prints the General Ledger Post report. If errors occurred during the posting process, the system also prints the Post Detail Error report. Review these reports to verify that the journal entries were posted successfully.

The General Ledger Post report lists all journal entries. The column titles and information are similar to the Journal Batch Proof report. However, the General Ledger Post report prints the journal entry number, general ledger date, and account descriptions instead of the document reference numbers.

### Before You Begin

- Review the batch of journal entries to verify that it is approved for posting. You might need to approve the batch before posting can occur. See *Approving Batches of Journal Entries for Posting* in the *General Accounting Guide*.

### See Also

- *Posting Journal Entry Batches* in the *General Accounting Guide* for information about using a General Accounting program to post batches
- *Verifying the Journal Entry Post* in the *General Accounting Guide* for information about the General Ledger Post report and the Post Detail Error report

# Setup



# General System Setup

Before using any features in your HR and Payroll Foundation system, you need to define critical information that the system uses for processing. You also need to define information that you will use to enter data throughout the system.

This information consists of the following:

<b>System controls</b>	Set up system controls to activate specific features and systems, such as the following: <ul style="list-style-type: none"><li>• Country-specific HR and Payroll Foundation system</li><li>• Personic Workflow</li></ul>
<b>System options</b>	Set up system options to define default information and to activate processes, such as the following: <ul style="list-style-type: none"><li>• History tracking</li><li>• Recruitment management</li><li>• Pay grade step management</li><li>• Position budget management</li></ul>
<b>Company options</b>	Set up company options to define default information that applies to all of the employees in a particular company within your organization. For example, company options let you define different standard hours per day for each company within your organization.
<b>Business-unit constants</b>	Set up business unit constants to define default information associated with a business unit.
<b>Common settings</b>	Set up common settings to control specific display or processing features of benefits enrollment, compensation management, and self-service applications.
<b>Employee information</b>	Set up employee information to do the following: <ul style="list-style-type: none"><li>• Track information that is unique to your organization or your industry</li><li>• Define the fields for which you will allow future changes</li></ul>



<b>Employee history and turnover tracking</b>	Set up employee history and turnover tracking to track historical records of employee information.
<b>Job information</b>	Set up job information to track complete information about the jobs within your organization.
<b>Earnings information</b>	Set up earnings information to define the types of pay that your employees receive.
<b>Tax information</b>	If you are using the Payroll system, set up tax information so that you can process payroll for employees.

To set up general system information, complete the following tasks:

- Setting up system controls
- Setting up system options
- Setting up company options
- Setting up business-unit constants
- Setting up common settings for human resources
- Setting up employee information
- Setting up employee history and turnover tracking
- Understanding pay rate source setup
- Setting up job information
- Setting up pay rate table information
- Setting up earnings information
- Setting up tax information
- Understanding Master Business Functions
- Setting up Master Business Functions
- Understanding Workflow setup

# Setting Up System Controls

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You use system controls to control specific features or activate various modules within OneWorld. For example, if you are using OneWorld in conjunction with Personic Workflow or Criterion Blueprint, you need to activate the Personic or Criterion modules.

Consult the following table to understand the data items that you can activate for certain OneWorld HR and Payroll processes in the System Control table:

## System Controls for System Activation

<b>To activate French Canadian Specific HRM Foundation system</b>	SY05QU. Use HRM Foundation-French CDN Specific. Set this data item to Yes if you have the French Canadian version of Foundation. You need to do this in addition to entering the Country Code on User Profile Revisions.
<b>To activate the U.S. specific HR and Payroll Foundation system</b>	SY05U. Use HRM Foundation-U.S. Specific. This data item allows the system to provide U.S.-specific fields and forms in the HR and Payroll Foundation system.
<b>To activate the Canadian specific HR and Payroll Foundation system</b>	SY05C. Use HRM Foundation-Canadian Specific. This data item allows the system to provide Canadian-specific fields and forms in the HR and Payroll Foundation system.
<b>To activate Payroll B73.3 or later</b>	SY07P733. Use OneWorld Payroll B73.3 Or Later. Set this data item to Yes if you are using OneWorld Payroll B73.3 and above. If this data item is set to Yes, the system searches for history records in the F07*tables. If this data item is not set to No, the system searches for history records in the F06* tables.
<b>To activate Criterion</b>	SY05CRTN. Use Criterion Integration.
<b>To activate Personic</b>	SY05PRSC. Use Personic Integration.

## System Controls for Processes and Features

### To activate Wage and Salary Administration

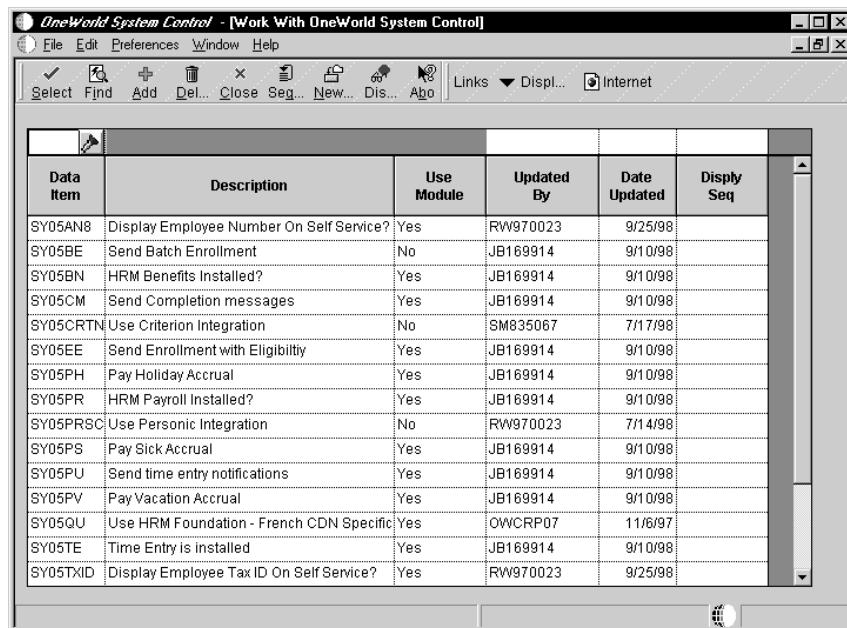
- SY08W. Use HRM Wage and Salary Administration. This system control will be available in a future release.

### See Also

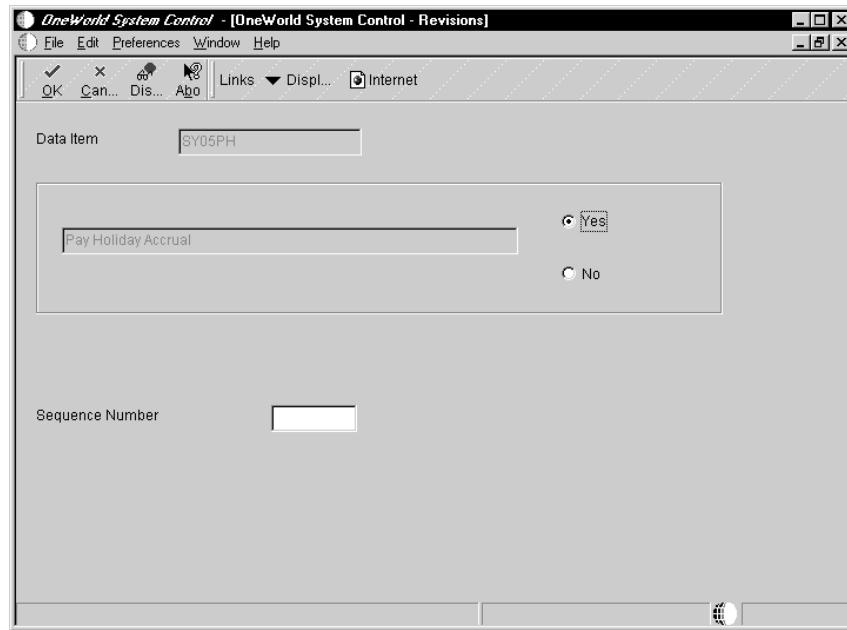
- About Criterion BluePrint* in the *HR - Benefits Guide*
- About Personic Workflow* in the *HR - Benefits Guide*

### ► To set up system controls

From the HRM Setup menu (G05B4), choose OneWorld System Control.



- On Work With OneWorld System Control, choose the row containing the data item that you want to activate and click Select.



2. On OneWorld System Control - Revisions, click Yes and then click OK.



# Setting Up System Options

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To define default information that applies to your entire system, you set up system options. These options control the types of information that you track and the rules that the system uses to perform certain calculations. For example, you use system options to specify the date that the system will use for tracking changes.

You use system options to control the following types of information:

## **Pay information**

To ensure that you enter acceptable pay rates for employees, set up the system to verify appropriate pay types for an employee's pay grade or pay-grade step.

## **Employee history and turnover**

To define whether you want to keep historical records of employee information, set up employee history and turnover options. These options are crucial to successful history and turnover tracking.

## **Recruitment**

To automate the process of creating and maintaining requisitions, set up requisition information.

## **Position control information**

To create, monitor, and control position budgets, set up position information.

Setting up system options includes the following tasks:

- Setting up general options
- Setting up position control options

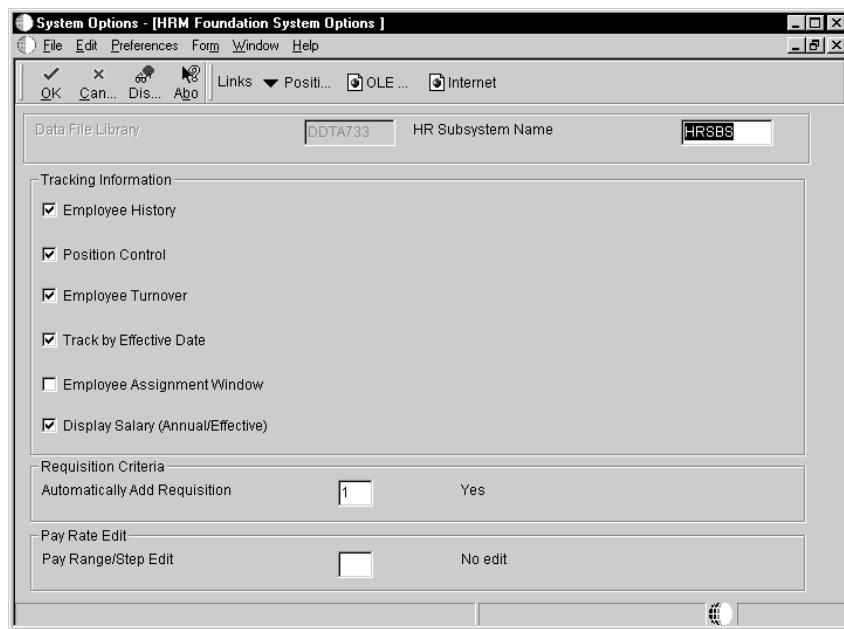
## **Before You Begin**

- ❑ Choose data for history tracking. Also, research whether you should add employee records to the database before or after setting up employee history and turnover tracking options. See *Setting Up Employee History and Turnover Tracking*.

### ► To set up general options

From the HRM Setup menu (G05B4), choose System Options.

1. On Work With HRM Foundation System Options, if you are using the World Human Resources or Payroll system in conjunction with the OneWorld system, click the Co-Existence Flag option to turn it on.
2. Click Select.



3. On HRM Foundation System Options, click any of the following options that you want for the default system:
  - Employee History
  - Position Control
  - Employee Turnover
  - Track by Effective Date
  - Employee Assignment Window
  - Display Salary (Annual/Effective)
4. Complete the following fields:
  - Automatically Add Requisition
  - Pay Range/Step Edit
5. If you are tracking history and turnover, and you are using the OneWorld Human Resources system in conjunction with the World Human Resources

system, you must complete the following field in the World Human Resources system:

- HR Subsystem Name

See *Setting Up History and Turnover Constants* in the *Human Resources Guide* for World software.

If you clicked the Position Control option, complete the steps to set up position control options.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

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Field	Explanation
Employee History	A code that determines whether the system creates employee history records when you enter or change employee information. The system can create employee history records for only that information that is stored in the Employee Master table (F060116). To specify the information for which you want to track history, use the program, Select Data Items for History Tracking (P08041).  Employee history records are stored in the HR History table (F08042).  For World: Before the system can create history records, you must start the Human Resources subsystem and monitor.
Position Control	A code that indicates whether you want the system to create records in the Position Activity table (F08111) when you enter or change position-related information for an employee. If you choose to use this feature, you must also choose to track employee history.
Employee Turnover	A code that determines whether the system creates employee turnover records when you change employee information.  Turnover information consists of any records in the Employee Turnover Analysis table (F08045) with a change reason that is not blank.  For World: Before the system can create turnover records, you must start the Human Resources subsystem and monitor.

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<b>Field</b>	<b>Explanation</b>
Track by Effective Date	<p>A code that indicates the date on which the system creates employee history and turnover records, in relation to the date of the change. This field controls the dates that appear on history and turnover reports and review forms. It does not function as a suspense operation that allows you to enter a change now, and update the history and turnover tables at a later time. When this field is activated, the system tracks both the effective date of a change and the date that the change was entered into the system.</p> <p>Valid values for World are:</p> <ul style="list-style-type: none"> <li>Y Yes, use the effective date of the change (data item EFTO) to track employee history and turnover</li> <li>N No, instead of using the effective date of change, use the date on which you entered changes into the system</li> </ul> <p>Valid values for OneWorld are:</p> <ul style="list-style-type: none"> <li>On Use the effective date of the change (data item EFTO) to track employee history and turnover</li> <li>Off Instead of using the effective date of change, use the date on which you entered changes into the system</li> </ul> <p>If you choose to use the effective date of the change, the system prompts you to enter an effective date each time you change any employee information for which you are tracking history or turnover.</p> <p>If you choose to use the effective date of the change, you must also choose to track employee history, employee turnover, or both.</p>
Employee Assignment Window	<p>This field specifies whether the system displays the Employee Assignment window when an employee changes to a new job, position, or home business unit. You use the employee assignment window to update requisition information for the requisitions affected by the change.</p>

Field	Explanation
Display Salary (Annual/Effective)	<p>A field that specifies whether the system displays annual or effective salaries for employees.</p>
	<p>An employee's annual salary is the number of hours per year that the employee works multiplied by the employee's hourly rate. The effective salary is (annual salary divided by pay frequency) multiplied by periods to pay. For employees whose jobs are associated with a contract calendar, the system recalculates the effective salary if you enter a mid-calendar salary adjustment for the employee. After you enter a mid-calendar adjustment, the effective salary equals the salary that is to be paid to the employee from the time of the adjustment to the end of the contract.</p>
	<p>You can set up your system to use the Pay Grade Step table as the source of employee pay rates. The pay rates in the Pay Grade Step table are based on the table's number of hours worked per year (hours per day times days per year). When the employee's standard hours per year are different than the amount in the table, the employee's hours per year times the table's hourly rate is the employee's effective salary.</p>
	<p>When the table hours and employee hours are the same, the employee's effective and annual salaries are the same.</p>
	<p>For OneWorld:</p>
	<p>Valid values are:</p>
	<p>On      Display annual salaries</p>
	<p>Off     Display effective salaries</p>
	<p>For World:</p>
	<p>Valid values are:</p>
	<p>A      Display annual salaries</p>
	<p>E      Display effective salaries</p>
Automatically Add Requisition	<p>This field specifies whether the system automatically creates a requisition for the position when you terminate an employee.</p>

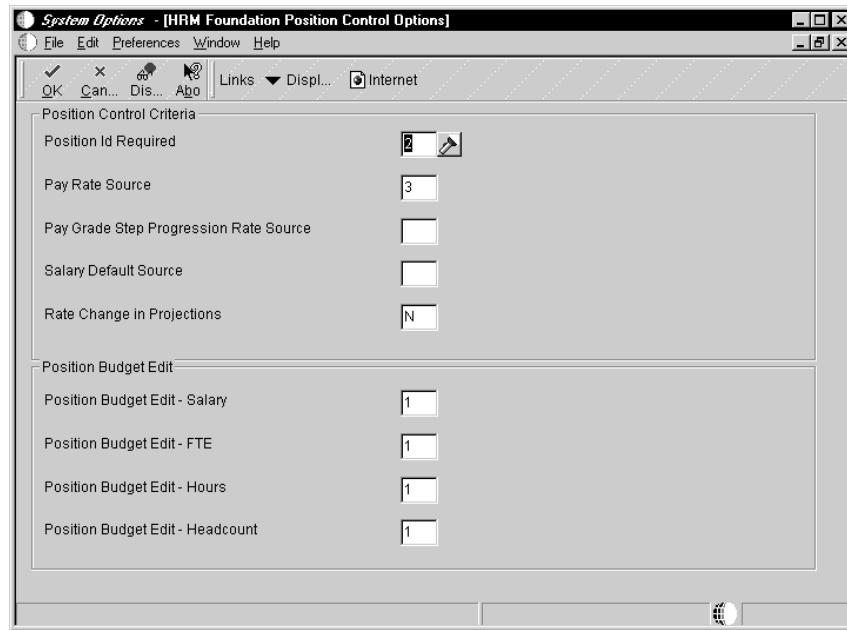
<b>Field</b>	<b>Explanation</b>
Pay Range/Step Edit	<p>This field specifies whether the system displays an error or warning message when you enter a pay rate for an employee that is not within the pay range for the employee's pay grade. If you are using pay grade step progression, the system displays an error or warning message when you enter a pay rate for an employee that does not match the rate for the employee's pay grade step.</p> <p>Allowed values are:</p> <ul style="list-style-type: none"> <li>blank No Edit</li> <li>1 Warning message if the rate is out of range for the pay grade, or if it is not the rate for the pay grade step. Processing continues.</li> <li>2 Hard error if the rate is out of range for the pay grade, or if it is not the rate for the pay grade step. Processing stops, and the system does not update any tables.</li> </ul>
HR Subsystem Name	<p>Enter the name of the Human Resources subsystem. A subsystem is the portion of the overall processing capacity of the computer that is used for a specific purpose. The system creates the subsystem (if it doesn't already exist) when you run the program that starts the Human Resources subsystem. Because the Human Resources subsystem provides a place for the monitor to run, it is important to know the name of the subsystem so you can determine if the monitor is running.</p>

### ► To set up position control options

From the HRM Setup menu (G05B4), choose System Options.

Set up position control options if you clicked the Position Control option when you set up general system options.

1. On Work with HRM Foundation System Options, choose Position Control from the Form menu.



2. On HRM Foundation Position Control Options, complete the following fields:

- Position Id Required
- Pay Rate Source
- Pay Grade Step Progression Rate Source
- Salary Default Source
- Rate Change in Projections
- Position Budget Edit – Salary
- Position Budget Edit – FTE
- Position Budget Edit – Hours
- Position Budget Edit – Headcount

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Position Id Required	<p>This code determines whether you are using the position control feature and, if so, whether all employees are required to have a position ID.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>1 Position ID is required.</li> <li>2 Position ID is optional. The Position ID field appears on the HR Employee Entry form.</li> <li>3 Position ID is not required, and the Position ID field does not appear on the HR Employee Entry form.</li> </ul>
Pay Rate Source	<p>If you leave this field blank, the system assumes that the Position ID is optional (code 2).</p> <p>When you set this option to position ID required, the job ID associated with a position in the Position Master table becomes the default job for the employee.</p>
Pay Grade Step Progression Rate Source	<p>This constant specifies the default source for employee pay rates. When you add or change employee information, the system uses this constant to locate a pay rate for an employee when you leave the salary and hourly rate fields blank.</p> <p>Pay Rate Source</p> <ul style="list-style-type: none"> <li>1 Pay Rate Tables</li> <li>2 Pay Grade Step Table</li> <li>3 None</li> </ul>

Field	Explanation						
Salary Default Source	<p>This field specifies the default source for salary (pay rate) that the system uses to create new positions or to define vacancies when you run the Create Next Year's Position program (P081820). Allowed values are:</p> <ul style="list-style-type: none"> <li>blank None</li> <li>1 Pay Grade Minimum</li> <li>2 Pay Grade Midpoint</li> <li>3 Pay Grade Maximum</li> <li>4 Pay Grade Step Amount</li> </ul>						
	<p>When the salary default source is the Pay Grade Step table, that table's calculated hours per year (hours per day multiplied by days per year) is the default standard hours per year for the position. If standard hours per year do not exist in the table, the system uses the following default sequence to determine the standard hours per year for the position:</p> <ul style="list-style-type: none"> <li>• Home Company Standard Hours Per Year</li> <li>• Default Company Standard Hours Per Year</li> <li>• Data Dictionary</li> <li>• 2080</li> </ul>						
Rate Change in Projections	<p>This constant indicates whether the system uses future rate changes, based on an employee's salary forecast change date, to calculate projected year-end values for position budgets.</p> <p>Valid values are:</p> <table style="margin-left: 20px;"> <tr> <td>Y</td> <td>Yes</td> </tr> <tr> <td>N</td> <td>No</td> </tr> </table>	Y	Yes	N	No		
Y	Yes						
N	No						
Position Budget Edit – Salary	<p>This field specifies whether you want the system to use position budget editing, and if so, whether the system displays a warning or error message when you enter or change a salary that is over the budgeted salary for the position. The system checks (edits) the Salary, Hourly Rate and Position fields on P0801CMP against the Position Master Table (F08101).</p> <p>Valid values are:</p> <table style="margin-left: 20px;"> <tr> <td>Blank</td> <td>No edit</td> </tr> <tr> <td>1</td> <td>Warning message if over budget, but allowed to continue.</td> </tr> <tr> <td>2</td> <td>Hard error if over budget, processing stops, no table updates.</td> </tr> </table>	Blank	No edit	1	Warning message if over budget, but allowed to continue.	2	Hard error if over budget, processing stops, no table updates.
Blank	No edit						
1	Warning message if over budget, but allowed to continue.						
2	Hard error if over budget, processing stops, no table updates.						

<b>Field</b>	<b>Explanation</b>
Position Budget Edit – FTE	<p>This field specifies whether you want the system to use position budget editing for full-time equivalents (FTE), and if so, whether the system displays a warning or error message when a change to the the full-time equivalent field is not within the budgeted full-time equivalents for the position.</p> <p>Allowed values are:</p> <ul style="list-style-type: none"> <li>Blank No edit</li> <li>1 Warning message if over budget, but allowed to continue.</li> <li>2 Hard error if over budget, processing stops, no table updates.</li> </ul>
Position Budget Edit – Hours	<p>This field specifies whether you want the system to use position budget editing for work hours, and if so, whether the system displays a warning or error message when the employee's work hours are not within the budgeted effective hours for the position.</p> <p>Allowed values are:</p> <ul style="list-style-type: none"> <li>Blank No edit</li> <li>1 Warning message if over budget, but allowed to continue.</li> <li>2 Hard error if over budget, processing stops, no table updates.</li> </ul>
Position Budget Edit – Headcount	<p>This field specifies whether you want the system to use position budget editing for headcount, and if so, whether the system displays a warning or error message when you enter or change headcount that is not within the budgeted effective headcount for the position.</p> <p>Allowed values are:</p> <ul style="list-style-type: none"> <li>Blank No edit</li> <li>1 Warning message if over budget, but allowed to continue.</li> <li>2 Hard error if over budget, processing stops, no table updates.</li> </ul>

## Setting Up Company Options

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To define default information that applies to a specific company within your organization, you set up company options. These options control the types of information that you track for a specific company. Typically, you first set up options for the default company. When you enter options for other companies, you can override the corresponding values that you entered for the default company. For example, you can enter standard hours per year for a particular company that vary from the standard hours per year that you entered for the default company. The options that you enter for the default company apply to any other company for which you did not override these options.

You set up company options to control the payroll processing for the employees of each company. You must set up company options for the default company before you can process a payroll or account for labor.

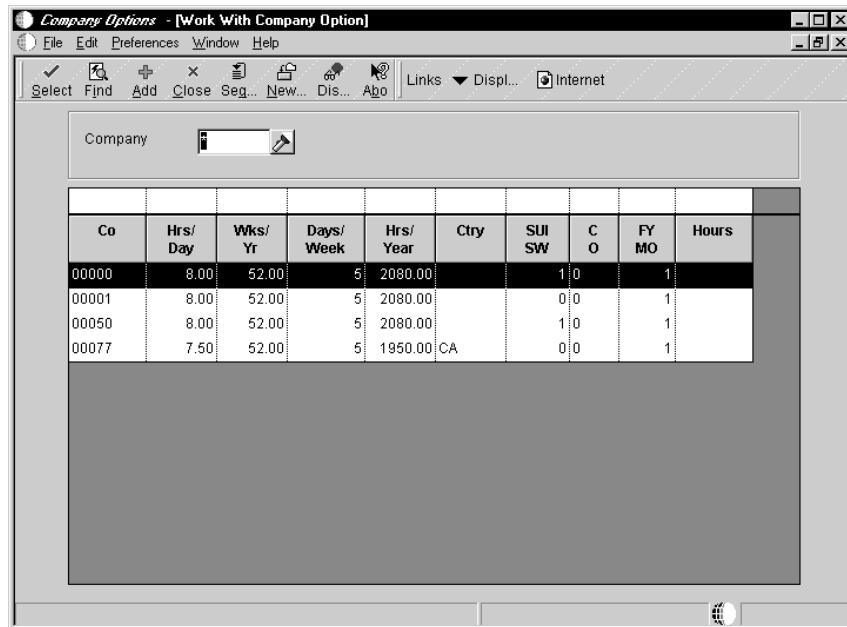
**Note:** If you use the J.D. Edwards General Accounting system, you must set up separate company options for that system.

### Before You Begin

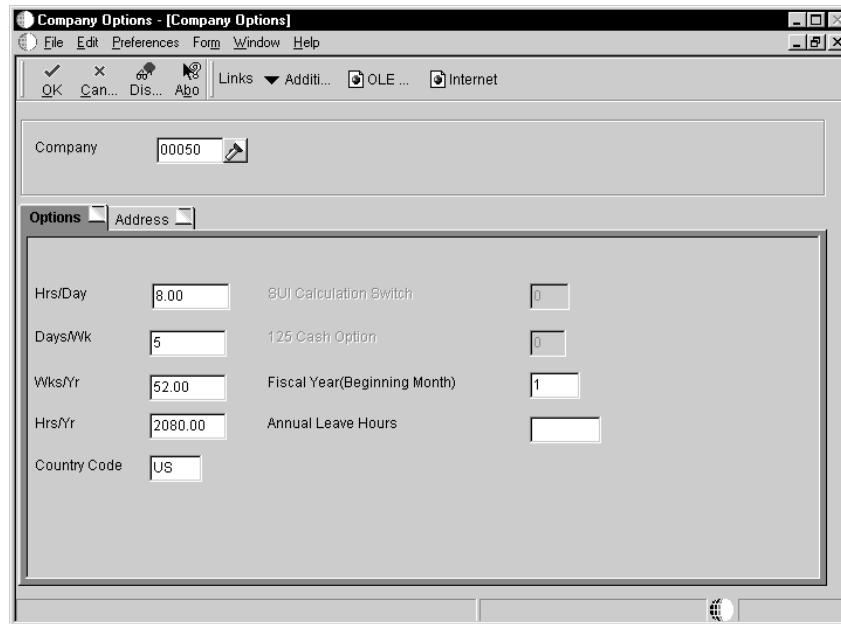
- Verify that the companies within your organization have been set up in the General Accounting system. Typically, the Accounting Department is responsible for setting up companies.

► **To set up company options**

From the HRM Setup menu (G05B4), choose Company Options.



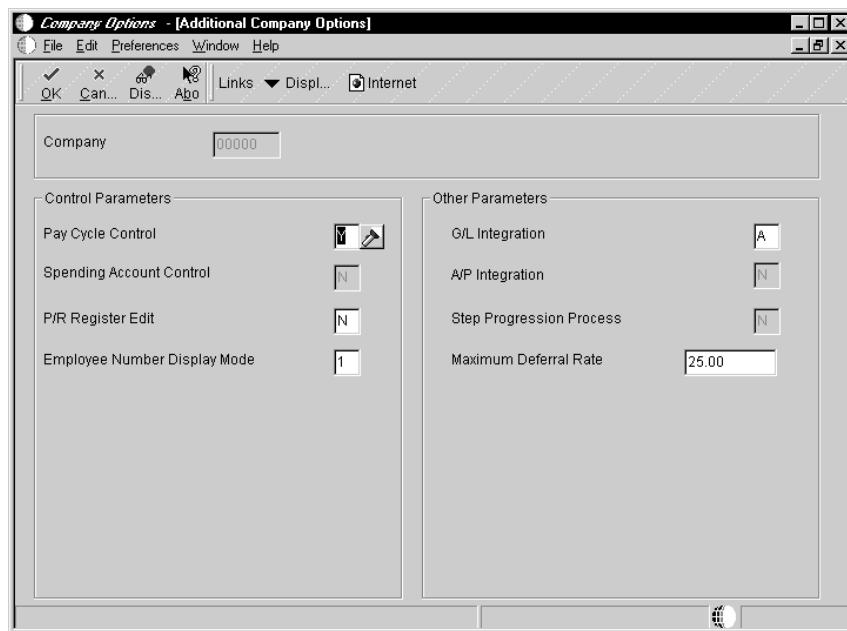
1. On Work With Company Option, to revise existing company options, choose a company and click Select.
2. To delete an existing company option, choose a company and click Delete.
3. To add new company options, click Add.



4. On Company Options, complete the following field:
  - Company
5. To define standard working times, on the Options tab, complete any of the following fields:
  - Hours per Std. Work Day
  - Days per Standard Week
  - Weeks (working)per Year
  - Hours per Standard Year
6. To use a country code for this company that varies from the default country code for the system, complete the following field:
  - Country Code
7. To define payroll information, complete the following fields:
  - Fiscal Period – Beginning Month
  - Hours Worked – Annual Leave
8. Click the Address tab and complete the following fields that are not already provided by default information:
  - Name – Mailing
  - Address Line 1
  - Address Line 2
  - Address Line 3
  - Address Line 4

- City
- State
- Postal Code
- County

9. Choose Additional Options from the Form menu to set up more company options.



10. On Additional Company Options, complete the following parameter fields:

- Pay Cycle Control
- P/R Register Edit
- Employee Number Display Mode
- G/L Integration
- Maximum Deferral Rate

11. If you are using the J.D. Edwards Payroll system and you want to use Payroll to create vouchers for payroll taxes and other payroll liability amounts, complete the following field:

- A/P Integration

12. Click OK.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Company	<p>A code that identifies a specific organization, fund, entity, and so on. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p> <p>Note: You can use Company 00000 for default values, such as dates and automatic accounting instructions. You cannot use Company 00000 for transaction entries.</p>
Hrs/Day	<p>This field indicates the number of hours in a standard working day. This information may be used for automatic overtime computations and other scheduling purposes.</p>
Days/Wk	<p>The number of days in the work week. This number may be used (among other reasons) in the computation of automatic overtime.</p>
Wks/Yr	<p>The number of work weeks in the year.</p> <p>The number of bi-weekly, semi-monthly, and monthly periods in the year will be assumed to be 26, 24, and 12, respectively.</p>
Hrs/Yr	<p>The number of work hours in the year. When you do not set your payroll company constants to use the Pay Grade Step table as the pay-rate source, the system uses this number to compute the hourly rate when you supply the annual salary (or to compute the annual salary when you supply the hourly rate).</p> <p>When you set your constants to use the Pay Grade Step table as the pay rate source, the system uses the following sequence to search for the standard number of hours that it uses to calculate the salary or hourly rate per pay period:</p> <ul style="list-style-type: none"> <li>• Employee entry forms (this field)</li> <li>• Pay Grade Step table (hours per day multiplied by days per year)</li> <li>• Payroll company constants for the employee's company</li> <li>• Payroll company constants for the default company (company 00000)</li> <li>• Data dictionary</li> <li>• System default value of 2080 standard hours per year</li> </ul>
Country Code	<p>A user defined code list 00/CN that indicates the country in which the employee resides.</p>
Fiscal Year(Beginning Month)	<p>The number of the month in which the payroll fiscal year begins.</p>
Annual Leave Hours	<p>The standard number of hours generated as Annual Leave during automatic wage processing.</p>

Field	Explanation
Pay Cycle Control	<p>A code specifying whether to incorporate execution control into the payroll cycle steps. Valid codes are:</p> <ul style="list-style-type: none"> <li data-bbox="719 318 1367 413">Y Yes. You must set up execution control, by version, to determine who can execute the steps within the payroll cycle.</li> <li data-bbox="719 413 1367 508">N No. No execution control. The person who runs the first pre-payroll step must run all steps in the cycle. This is the default value.</li> </ul>
P/R Register Edit	<p>A code that specifies a type of error. The system always notes errors in the Payroll Register if the gross pay amount minus the taxes and applicable deductions does not equal net pay.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li data-bbox="719 699 1367 772">Y Hard error. You must correct the error and run Pre-Payroll again. This is the default code.</li> <li data-bbox="719 772 1367 899">N Soft error. This error is noted on the Payroll Register but Payroll Cycle processing can continue. You must make the necessary corrections after the Payroll Cycle is complete.</li> </ul>
Employee Number Display Mode	<p>A code that specifies the type of employee number displayed on inquiry screens. Valid values are:</p> <ul style="list-style-type: none"> <li data-bbox="719 984 1331 1047">1 Display the eight-digit Address Book number (default).</li> <li data-bbox="719 1047 1331 1079">2 Display the nine-digit Social Security number.</li> <li data-bbox="719 1079 1331 1142">3 Display the eight-digit Additional Employee number preceded by a forward slash (/).</li> </ul>
	All forms of employee number remain valid.
G/L Integration	<p>Code that indicates how batches of payroll journals are posted to the General Ledger. Valid codes are:</p> <ul style="list-style-type: none"> <li data-bbox="719 1269 1367 1406">A Automatic. If batches are in balance and there are no errors, the system posts batches automatically during the final update step of the payroll cycle. This is the default value.</li> <li data-bbox="719 1406 1331 1438">M Manual. Each batch must be posted manually.</li> <li data-bbox="719 1438 1331 1469">N None. There is no General Ledger interface.</li> <li data-bbox="719 1469 1005 1501">T Time Accounting</li> </ul>
Maximum Deferral Rate	The maximum percentage of pre-tax earnings that an employee is allowed to defer to a 401(k) plan. This rate is used in the 415 Nondiscrimination Test. For example, to enter a rate of 12.75 percent, enter 12.75 in this field.

<b>Field</b>	<b>Explanation</b>								
A/P Integration	<p>This field specifies the level of integration between the Payroll and the Accounts Payable systems. The system creates pro forma vouchers during the payroll journal entries step of the payroll cycle. The system creates actual vouchers during the final update step.</p> <table style="margin-left: 20px;"> <tr> <td style="width: 20px;">N</td> <td>No integration</td> </tr> <tr> <td>0</td> <td>Create vouchers for both DBAs and taxes that have been setup with A/P integration</td> </tr> <tr> <td>1</td> <td>Create vouchers only for DBAs that have been setup with A/P integration</td> </tr> <tr> <td>2</td> <td>Create vouchers only for taxes that have been setup with A/P integration</td> </tr> </table>	N	No integration	0	Create vouchers for both DBAs and taxes that have been setup with A/P integration	1	Create vouchers only for DBAs that have been setup with A/P integration	2	Create vouchers only for taxes that have been setup with A/P integration
N	No integration								
0	Create vouchers for both DBAs and taxes that have been setup with A/P integration								
1	Create vouchers only for DBAs that have been setup with A/P integration								
2	Create vouchers only for taxes that have been setup with A/P integration								

## See Also

- *Understanding Accounts Payable Integration* in the *Payroll Guide* for more information about creating vouchers for payroll taxes and liabilities



## **Setting Up Business-Unit Constants**

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You set up business-unit constants to define default information that is associated with a business unit. Default business-unit information expedites data entry for time entry and payroll information.

Setting up business-unit constants also allows you to do the following:

- Define taxing authorities for a business unit.
- Apply flat burden rates to a specific business unit.
- Set up the business unit to act as a certified job for governmental reporting purposes. Job information for the business unit will be included in certified payroll reports.

You can associate a business unit with one company only.

When you set up a business unit, the system adds that business unit to the Business Unit Master table (F0006) if the business unit does not already exist in that table. In many companies, business units are set up in the J.D. Edwards General Accounting system by the Accounting department.

You must use the General Accounting system and not the Payroll system to change any of the following information:

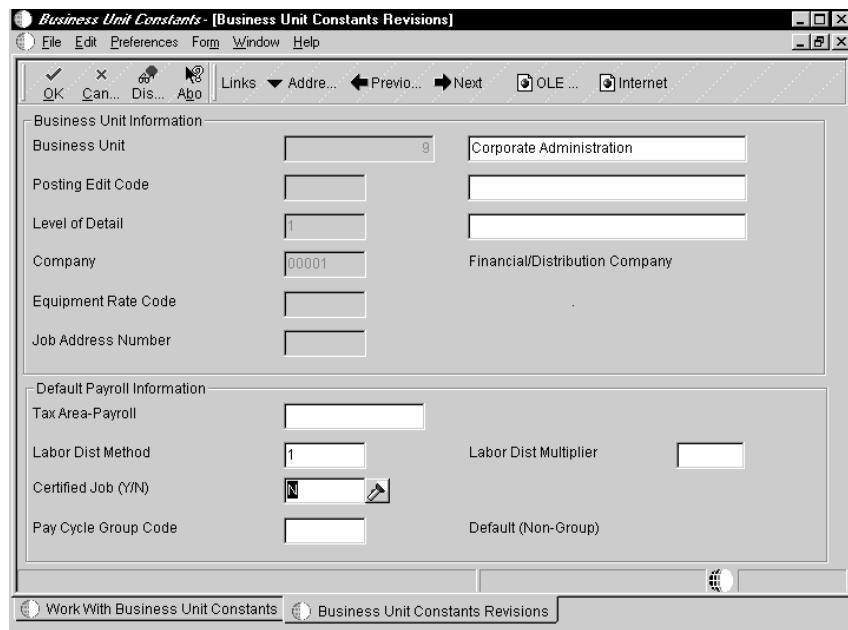
- Posting Edit – Business Unit
- Level of Detail – Business Unit
- Company
- Equipment Rate Code
- Address Number

### **► To set up business-unit constants**

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From the HRM Setup menu (G05B4), choose Business Unit Constants.

1. On Work With Business Unit Constants, click Add.



2. On Business Unit Constants Revisions, complete the following optional fields under the Default Payroll Information heading:
  - Business Unit
  - Tax Area
  - Labor Distribution Method
  - Labor Distribution Multiplier
  - Pay Cycle Group Code
3. For governmental reporting in the U.S. only, complete the following optional field and click OK:
  - Certified Job

Field	Explanation
Business Unit Number	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p>
	<p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p>
	<p>Security for this field can prevent you from locating business units for which you have no authority.</p>
	<p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Company Number	<p>A code that identifies a specific organization, fund, entity, and so on. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p>
	<p>Note: You can use Company 00000 for default values, such as dates and automatic accounting instructions. You cannot use Company 00000 for transaction entries.</p>
Tax Area	<p>Tax Area-Payroll. The code of a taxing authority. All time entries for this Cost Center default to the value entered in this field.</p>
Labor Distribution Method	<p>Controls whether the labor costs include a flat burden for payroll taxes and benefits. Valid values are:</p> <ul style="list-style-type: none"> <li data-bbox="780 1241 1388 1298">0      The flat burden factor is always 1.0000, so the resulting amount for the flat burden is zero.</li> <li data-bbox="780 1298 1405 1396">1      The flat burden factor is always greater than or equal to 1.0000, so the labor costs include a flat burden.</li> </ul>
Labor Distribution Multiplier	<p>A multiplier to load direct labor costs with burden. For example, a factor of 1.32 loads every dollar of labor cost with 32 cents worth of burden.</p>
Pay Cycle Group Code	<p>A user defined code (07/PG) that indicates a pay cycle group. If you enter a pay cycle group code here, the system processes only those timecards whose business unit has that pay cycle group assigned in the business unit constants. The type code explained below determines which business unit is used in the selection process.</p>
	<p>This field and the accompanying Type field override the DREAM Writer home business unit selection. Employees must first be selected in the DREAM Writer Data Selection, then timecards for those employees are selected based on Pay Cycle Group Code and Type.</p>



# Setting Up Common Settings for Human Resources

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You use the common settings for human resources to control specific features of several human resources processes, such as benefits enrollment, compensation management, and self-service applications.

Setting up the common settings updates the Common Setting for Human Resource Employee Self Service table (F05004).

## Categories of Common Settings

The common settings for human resources are grouped into the following categories:

- Common Settings for Benefits Enrollment
- Common Settings for Compensation Management
- Common Settings for self-service applications

Data Item	Description	Current Setting	Updated By	Date Updated
ACBEN	Associate Beneficiaries to Plans?	Yes	KT6078909	10/14/99
ACDEP	Associate Dependents To Benefit Plans?	Yes	TRN8015	5/9/00
BDRQDOB	Date of Birth Required for Dep/Ben?	Yes	KT6078909	10/14/99
BDRQTXID	Tax ID Required for Dep/Ben?	Yes	KT6078909	10/14/99
CMPBDGT	Eligibility Override Reflected in Budget	No	KT6078909	12/7/99
CMPOPEN	Open Compensation Review Process	No	KT6078909	12/7/99
CMPOVEL	Allow Override of Increase Eligibility	No	KT6078909	12/7/99
CMPPRFT	Use prorate factor in Compens.Review	No	KT6078909	12/7/99
CMPSPNT	Use Prorate amount as Spent Amount	No	KT6078909	12/7/99
CMPSYNC	Synchronize Compensation Work Tables	No	KT6078909	12/7/99
ENDSS	Display Employee Number on Self Service?	Yes	MS238060	3/8/99
MXDP	Maximum Number of Dependents	No	KT6078909	10/14/99
PNDSS	Display Participant No. on Self Service?	Yes	MS238060	3/8/99
SHCEOV	Display Overrides Outside Benefit Group?	Yes	KT6078909	10/14/99
SHPER	Display Personal Tab in Self Service?	Yes	KT6078909	10/14/99

## Common Settings for Benefits Enrollment

Setting up the common settings for benefits enrollment allows you to specify whether to link dependents and beneficiaries to benefit plans and whether to require date of birth and tax ID when adding a new dependent or beneficiary.

The following table describes the common settings for data items on Work With HRM Common Display Settings. You can specify the current setting for each of these data items for enrolling dependents and beneficiaries in benefit plans on OneWorld System Control - Revisions.

<b>Associate Beneficiaries to Plans?</b>	This common setting indicates whether to associate beneficiaries to benefit plans. If you want to require that beneficiaries be associated with a plan when you are enrolling beneficiaries in benefit plans, set this setting to Yes.
<b>Associate Dependents To Benefit Plans?</b>	This common setting indicates whether to associate dependents to benefit plans. If you want to require that dependents be associated with a plan when you are enrolling dependents in benefit plans, set this setting to Yes.
<b>Date of Birth Required for Dep/Ben?</b>	This common setting indicates whether date of birth is required for dependents and beneficiaries. If you want the date of birth to be required when you add a new dependent or beneficiary, set this setting to Yes.
<b>Tax ID Required for Dep/Ben?</b>	This common setting indicates whether tax ID is required for dependents and beneficiaries. If you want the tax ID to be required when you add a new dependent or beneficiary, set this setting to Yes.

## See Also

- *Enrolling Dependents and Beneficiaries in Benefit Plans in the Human Resources - Benefits Guide*

## Common Settings for Compensation Management

Setting up the common settings for compensation management allows you to specify whether the application will perform certain processes, and how.

The following table describes the common settings for data items on Work With HRM Common Display Settings. You can specify the current settings for these data items for compensation management on OneWorld System Control - Revisions.

<b>Eligibility Override Reflected in Budget</b>	If you want the salary of an employee whose eligibility you overrode to be included in budget calculations, you need to set this setting to Yes.
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<b>Open Compensation Review Process</b>	When HR gives access to the supervisors to open the compensation review process, you need to set this setting to Yes. While you are setting up compensation management and after the managers have finished the review process, set this setting to No.
<b>Allow Override of Increase Eligibility</b>	If you want to allow the manager to override the default eligibility of an employee for an increase type, set this setting to Yes.
<b>Use prorate factor in Compensation Review</b>	If you want to use prorate factors in the compensation review, you need to set this setting to Yes.
<b>Use Prorate amount as Spent Amount</b>	If you chose to use prorate factors and you want the prorated amount to be reflected in the spent calculations, you need to set this setting to Yes. If you want the full increase amount to be reflected in the spent calculations, set this setting to No.
<b>Synchronize Compensation Work Tables</b>	This common setting indicates whether to synchronize the compensation work tables with employee changes. After the compensation work tables are built, set this setting to Yes to keep the compensation review work tables synchronized with employee changes made to the employee master table. After HR closes the compensation review process to the managers, set this setting to No.

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## See Also

- *Setting Up Compensation Management* in the *Human Resources Guide*

## Common Settings for Self-Service Applications

When you set up common settings for self-service applications, you specify whether to display employee numbers, employee tax identification numbers, and participant numbers of benefit plans in the upper left corner of all self-service web pages, except for the W-4 program. You can also specify whether to limit the number of dependents that an employee can enroll in one of his or her plans through self-service, whether to display for self-service enrollment any benefits that are outside an employee's benefit group but in which the employee is enrolled, and whether to display the Personal tab for adding and viewing dependents and beneficiaries.

The following table describes the common settings for data items on Work With HRM Common Display Settings. You can specify the current settings for these data items for self-service applications on OneWorld System Control - Revisions.

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<b>Display Employee Number on Self Service?</b>	This common setting specifies whether to display the employee number on the top left corner of all employee self service applications, such as Name and Address Change.
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<b>Maximum Number of Dependents</b>	This common setting denotes the maximum number of dependents that may be enrolled in a benefit plan
<b>Display Participant Number on Self Service?</b>	This common setting specifies whether to display the participant number on the top left corner of all employee self service applications, such as Name and Address Change.
<b>Display Overrides Outside Benefit Group?</b>	This common setting indicates whether to show current enrollment overrides outside employee's benefit group in P08530.
<b>Display Personal Tab in Self Service?</b>	This common setting indicates whether to show the personal tab in benefit enrollment.
<b>Display Tax ID On Self Service?</b>	This common setting indicates whether to display the employee tax ID on the top left corner of all employee self service applications, such as Name and Address Change.

## See Also

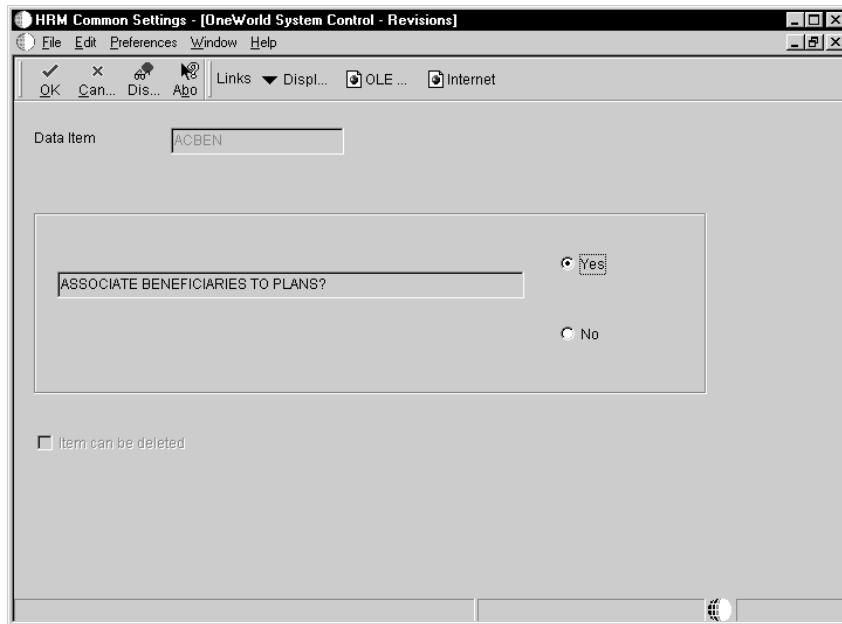
- *Self-Service Setup*

### ► **To set up common settings for human resources**

From the Self Service Setup menu (G05BESS4), choose Common Settings for EE Self Service Appl. Alternatively, from the Compensation Management System Setup menu (G08CM14), choose HRM Common Settings.

1. On Work With HRM Common Display Settings, choose the row containing the data item for which you want to change the current setting and click Select.

You cannot delete these data items from the system.



2. On OneWorld System Control Revisions, click the Yes or No option to specify the current setting and then click OK.
3. To add extra data items, on Work With HRM Common Display Settings, click Add.
4. On OneWorld System Control Revisions, complete the following field:
  - Data Item
5. Click the Yes or No option to specify the current setting and then click OK.
6. If you need to delete a data item, on Work With HRM Common Display Settings, choose the data item and click Delete.



# Setting Up Employee Information

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Before you begin adding employee records to your system, you should set up employee information. If you need to track information that is unique to your organization or your industry, you can define category codes. To allow users to enter future changes for specific types of information, you can choose fields for future data revisions.

To set up employee information, complete the following tasks:

- Defining category codes
- Choosing fields for future data revisions

## Before You Begin

- Set up the user defined codes for employees. See *User Defined Codes for HR and Payroll Foundation*.

## Defining Category Codes

You might need to track information that is unique to your organization or your industry. For example, you might need to track the employees who are participating in the company stock purchase plan. J.D. Edwards provides category codes that you can define to track any type of additional information that your organization needs.

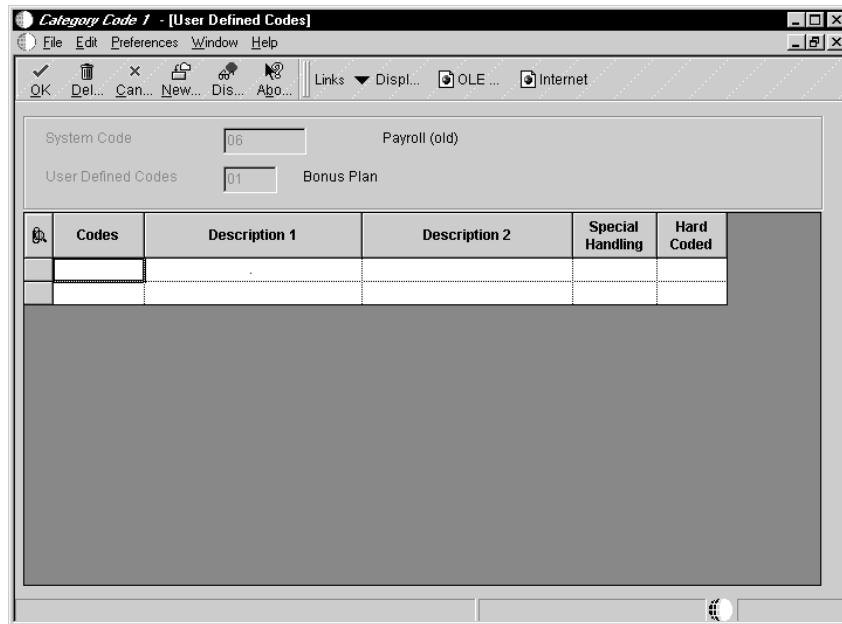
Category codes are a type of user defined code that you use to classify employees for tracking and reporting. You can define up to 20 category codes to meet the specific requirements of your organization.

### ► **To define category codes**

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From the Employee Category Codes Setup menu (G05BE41), choose an option.

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



2. On User Defined Codes, complete the following fields:

- Codes
- Description 1

3. Complete the following optional field and click OK:

- Description 2

Field	Explanation
Codes	A list of valid codes for a specific user defined code list.
Description 1	A user defined name or remark.
Description 2	Additional text that further describes or clarifies a field in the J.D. Edwards systems.

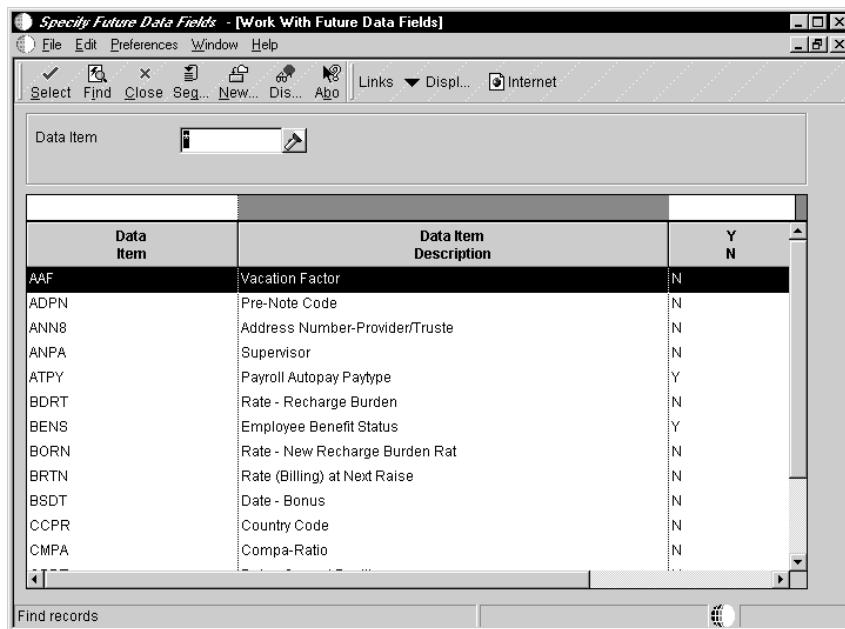
## Choosing Fields for Future Data Revisions

Choosing fields for future data revisions activates data items in the Employee Master table so that they can be updated using the future data forms. For example, you activate the Marital Status field so that, in the event of marriage, you can change the employee's marital status in the Employee Master table using a future data form.

**Note:** Some fields have default activation values that you cannot change.

## ► To choose fields for future data revisions

From the Employee Management Setup menu (G05BE4), choose Specify Future Data Fields.



1. On Work With Future Data Fields, complete the following field and click Find:
  - Data Item
2. For each data item, review the value in the Y/N field.

You can enter future data changes for data items for which you enter a Y (yes) value.

3. To indicate that you want to allow future data revisions for a data item, select a data item that has N in the Yes or No field.
4. On Change Verification, click Yes to accept the change.
5. Repeat steps 2–4 for each data item for which you want to allow future data revisions.

<b>Field</b>	<b>Explanation</b>
Data Item	<p>For World, the RPG data name. This data field has been set up as a 10-byte field for future use. Currently, it is restricted to 4 bytes so that, when preceded by a 2-byte table prefix, the RPG data name will not exceed 6 bytes.</p> <p>Within the Data Dictionary, all data items are referenced by this 4-byte data name. As they are used in database tables, a 2-character prefix is added to create unique data names in each table specification (DDS). If you are adding an error message, this field must be left blank. The system assigns the error message number using next numbers. The name appears on a successful add. You should assign error message numbers greater than 5000. Special characters are not allowed as part of the data item name, with the exception of #, @, \$.</p> <p>You can create protected data names by using \$xxx and @xxx, where you define xxx.</p> <p>For OneWorld, a code that identifies and defines a unit of information. It is an 8-character, alphabetical code that does not allow blanks or special characters such as: % &amp; , . +.</p> <p>Create new data items using system codes 55-59.</p> <p>The alias cannot be changed.</p>
PR History–Include Y/N	A code which is used to indicate whether the Employee Master field is to be included in the Future Data Facility processing capabilities.

## **Setting Up Employee History and Turnover Tracking**

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To help you manage your employee information, you can set up your system to store historical records of employee information. This means that when you enter or update employee information, the system creates a historical record of the old information. For example, when an employee receives a promotion or changes marital status, you can update the employee's current information to reflect the change and store the previous information in historical records.

You can also set up your system to store turnover records. Turnover records show employee movement within your organization, such as when an employee changes jobs, as well as movement resulting from new hires and terminations.

You can use history and turnover information to do the following:

- Review the employee's job progression since you began tracking history
- Review salary increases given at the same time that a job change was made
- Analyze historical changes to employee information
- Monitor employee movement within your company

When you initialize history and turnover tracking, the system creates initial history records for all employee records in the Employee Master table. Furthermore, the system tracks history only for specific fields that you choose to track before you initialize. The history records are dated so that you can determine when you began tracking history and turnover.

You can track history and turnover for any fields that the system stores in the Employee Master table (F060116). It is important to choose these fields before initializing to eliminate cluttering the History table (F08042) with unneeded history information.

Setting up employee history and turnover tracking includes the following tasks:

- Choosing data for history tracking purposes
- Initializing history and turnover tracking

Setting up history and turnover tracking also includes enabling your history and turnover tracking options in System Options, and entering all employee records in the database. Whether you need to initialize history and turnover tracking depends on the order in which you complete these tasks and your history record

specifications. The following table explains when you might or might not initialize history:

<b>Do not initialize history and turnover tracking</b>	Choose data for history tracking purposes and then enable the history and turnover system options. After enabling the history and turnover system options, enter or upload all employee records into the database.
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In this case you might not want to initialize history. The system creates initial history records for all employees as they are entered into the system.

This option is preferable if you want history records for every employee on the date that they are entered into the system. However, you do not get the chance to verify the employee information before creating history records.

<b>Initialize history and turnover tracking</b>	Choose data for history tracking purposes and then enter or upload all employee records into the database. After entering employee records, enable the history and turnover system options, and then initialize history and turnover tracking.
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This option allows you to verify your employee records before creating initial history records. This process is preferable if you want to avoid adding and then deleting incorrect history records from the History table. The system creates history records beginning with the date that you determine in your Initialize Employee History and Turnover Processing Options.

## See Also

- *Setting Up System Options* for information about enabling the history and turnover tracking options
- *Adding Employee Records One at a Time* for information about adding employee records to the database

## Choosing Data for History Tracking Purposes

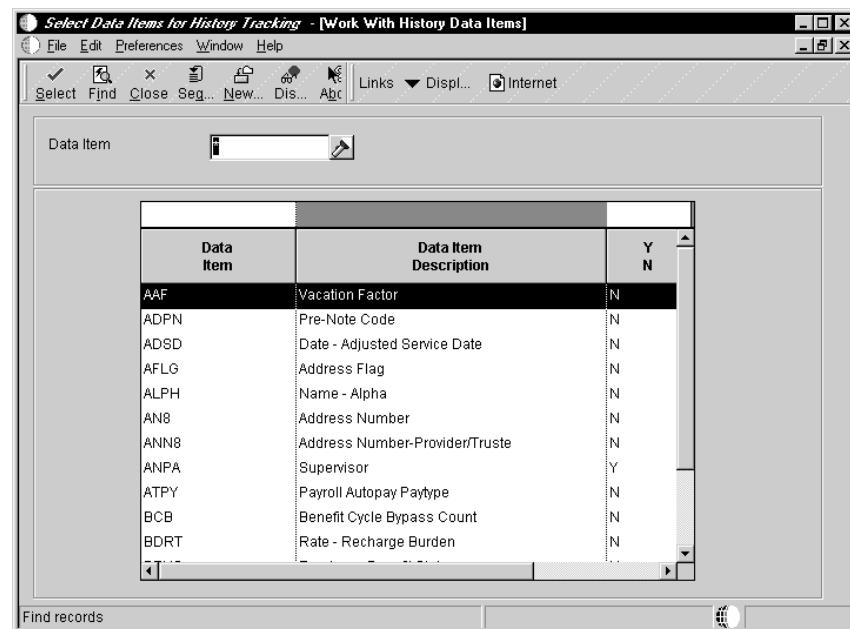
You choose the data items for which you want to track history before you initialize history and turnover tracking. Limiting the data items for which you track history makes it easier to locate information when you review history records. For example, you might choose to track history for data items such as Marital Status, Employment Status, Salary, and Pay Status, but not for items that rarely change, such as Gender and Tax ID.

If you do not choose data for history tracking purposes before you initialize, the system will automatically track history for every item on the Employee Master table.

After initializing, you can deactivate certain Employee Master table data items if you do not want to track certain history items anymore.

### ► To choose data for history tracking purposes

From the Employee History Setup menu (G05BH4), choose Select Data Items for History Tracking.



1. On Work With History Data Items, complete the following field and click Find:
  - Data Item
2. For each data item, review the value in the following field:
  - Y N

The system tracks history for data items that display a Y value.
3. To specify that you want to track history for a data item, choose a data item that has an N in the Yes or No field and click Select.
4. On Change Verification, click Yes to accept the change.
5. Repeat steps 3 and 4 for each data item for which you want to track history.

## Initializing History and Turnover Tracking

From the Employee History Setup menu (G05BH4), choose Initialize History and Turnover.

After choosing data for history tracking, you initialize history and turnover tracking. The system activates history tracking for your chosen fields on the Employee Master table (F060116). You can review which fields are on the Employee Master when you choose data for history tracking purposes.

If you set up your system options for history and turnover tracking before you begin entering employee records, you do not need to initialize history and turnover tracking. In this case, the system automatically creates history and turnover records when you add new employee records.

You need to run this program only if you begin using the history and turnover features after you have been using the system for a while. You can use these initial history and turnover records to determine when you began tracking history and turnover. After initializing, the system continues to create history and turnover records each time you change employee information fields that update the Employee Master table.

### Before You Begin

- Add all employee records to your system. See *Adding Employee Records One at a Time*.

### Processing Options for Initialize Employee History & Turnover

#### Initialize

- 1) Enter a date to be used as the Effective Date for all history records. Blank will default the date when each employee record was last changed.

#### Effective Date

- 2) Choose what files to initialize given the following choices:  
H = Initialize History file only.  
(Default) T = Initialize Turnover file only. B = Initialize both History and Turnover files.  
History and Turnover files.

#### Initialize which file(s).

- 3) To clear records from the indicated file(s) before initialization, enter one of the following values:  
1 = Clear the entire selected file(s). 2 = Clear History/Turnover records for the selected employees only.  
' ' = Do not clear records.  
(Default)  
' ' = Do not clear records. (Default)

#### Clear Mode

- 4) Enter a change reason for initial turnover and history records. A blank will default a change reason of '001' (New Hire).

#### Change Reason

### What You Should Know About Processing Options

#### Effective dates (1)

J.D. Edwards recommends that you enter an effective date for this processing option. The effective date should be a day prior to the date of your first date for reporting turnover. The system considers employees active as of the initialize effective date.

#### Change reason (4)

Enter a numeric change-reason code for this processing option.



# **Understanding Pay Rate Source Setup**

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Before you enter employee compensation, you must choose an appropriate pay-rate source based on your business purpose and organizational structure. The HR and Payroll Foundation system provides the following pay-rate source options:

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

## **Pay Rate Table**

When you need to associate pay rates with a specific group of employees, such as members of a union, you can use the Pay Rate table as the default pay rate source. The Pay Rate table, as set up in Union Rates and Master Revisions (P059121), associates job types and steps with union codes. Therefore, specific hourly rates are attached to union codes when you set up hourly rates with job types and steps.

Pay rate tables are useful for positions that are compensated based on a flat rate rather than a pay range. Pay rates can be used with hourly jobs, for which an employee is paid a set hourly rate regardless of performance or seniority. For use with unions, pay rate ranges would usually need to accommodate only seniority adjustments. However, the use of pay rates can include performance adjustments. To recognize performance, you would need to set up a pay type, such as bonus pay, or change the employee's job type to a job type attached to an increased pay rate.

The Pay Rate table is frequently used by the public sector and other industries that are closely linked to unions.

## **See Also**

- *Setting Up Pay Rate Tables*

## Pay-Grade Step Table

To ensure that all of the employees working in a job receive the same rate of pay, and to provide for progression within a pay grade, you can use the Pay Grade Step table as the pay rate source.

Using the Pay Grade Step table is convenient for a company whose structure consists of many positions that allow for progressive advancement. Using the Pay Grade Step table to enter compensation also saves data entry time and reduces calculation errors and compensation inconsistencies.

On the Pay Grade Step table, a pay grade consists of a group of jobs that are equal in pay range. For example, assume all junior accountant positions and junior graphic artists in a company are in pay grade A and pay grade A represents a pay range of 30,000–40,000. Therefore, all junior accountant and junior graphic positions need to be compensated within this pay range.

However, within each pay grade, you set up pay grade steps that represent a specific salary or hourly rate. For example, in pay grade A are pay steps A1, A2, and A3. Employees in step A1 receive 15.00 per hour, employees in step A2 receive 15.50 per hour, and employees in step A3 receive 16.00 per hour.

Setting up pay-grade steps lets you automate the process of entering compensation information for employees. When you enter employee information, the system automatically calculates the employee's salary or hourly rate, based on the pay-grade step that you enter for the employee.

When you define pay-grade steps, you can also save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then you enter a pay-rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step's pay-rate multiplier.

You might also prefer to use pay grades without using pay grade steps to calculate compa-ratios for pay-grades. Compa-ratios are helpful calculations for management to determine equitable pay increases for employees.

### See Also

- *Setting Up Pay Grades and Setting Up Pay-Grade Steps*

## None (No Default Pay Rate Source)

If in your organization, employees' salaries and hourly rates are not associated with specific amounts for a job or pay grade steps, you can use no default pay rate source. If you choose this option, you will need to enter each salary or hourly rate individually.

This is a good option for companies that do not use predefined rates for all employees in like jobs. This may also be preferable for an organization with fewer positions and fewer job types.

Compa-ratios can be determined by calculating salary midpoints on the Job Information table (F08001).



## Setting Up Job Information

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Before you can use your system to define the jobs within your organization, you must define pay and job evaluation information. You define pay information to set up the pay ranges or amounts associated with each job. You define job evaluation information to define the methods that you use to evaluate jobs. You use job evaluations to determine equitable pay ranges for jobs. You also can set up a cross-reference table by business unit to define default job information for employees in a specific business unit.

You can set up job-classification constants to maintain various classifications of jobs related to job type, job step, union, and business unit. For payroll, you can identify combinations of job types and job steps that you want to print on the Certified Payroll Register report to meet taxing authority regulations.

Setting up job information includes the following tasks:

- Setting up pay grades
- Setting up pay-grade steps
- Setting up pay-range formulas
- Defining job evaluation factors
- Setting up a cross-reference table by business unit
- Setting up job classification constants

### Before You Begin

- Set up the user defined codes for jobs. See *User Defined Codes for HR and Payroll Foundation*.
- Review the pay range and step information that you have set up in your system options. See *Setting Up System Options*.

## Setting Up Pay Grades

To create categories for grouping employees according to pay ranges, you can define pay grades for each pay class within your organization. A pay class defines how an employee is paid, such as salaried, hourly, and so on. For example, within the pay class Salaried you can define pay grades 1 through 10. For each of these pay grades, you define a minimum, midpoint, and maximum salary amounts. These amounts define the pay range for the pay grade. For example, the pay range for pay-grade 1 might be:

- Minimum = 20,000.00
- Midpoint = 25,000.00
- Maximum = 30,000.00

This means that the annual salary for an employee in pay-grade 1 can be any amount between 20,000.00 and 30,000.00.

For each pay grade, you can define a separate pay range for each of the following factors:

- Locality
- Union
- Salary data source
- Effective date

For example, if your organization has three locations in different areas of the country, you might want the pay ranges for employees in the same job to vary according to the location where the employees work. When you create a pay grade, you can define a separate pay range for each of the three locations:

**West Area**                                   Minimum = 25,000

   Midpoint = 30,000

   Maximum = 35,000

**Midwest Area**                                   Minimum = 28,000

   Midpoint = 33,000

   Maximum = 38,000

**East Area**

Minimum = 31,000

Midpoint = 36,000

Maximum = 41,000

When you define pay grades by class, you create a record of the pay ranges for your organization's pay grades. The system uses these pay ranges to calculate compa-ratios for the employees whom you assign to these pay grades. When you enter employee information, either an error or a warning message appears when you enter a rate that is not within the pay range for an employee's pay grade. The type of message that appears depends on how you set up your system options.

If you are using pay-grade steps, you can define pay grades at the same time that you define pay-grade steps. You do not need to define pay grades by class to use the Pay Grade Step table.

The Pay Grades by Pay Class program updates the Pay Grade and Salary Range table (F082001).

### ► To set up pay grades

From the Job Specifications Setup menu (G05BJ4), choose Pay Grades by Class.

Pay Grade	Locality	Source	Effective Date	Union Code	Minimum Salary	2nd Quartile Salary	Midpoint Salary
S2			1/1/97		19,500.000		24,750
S3			1/1/97		25,000.000		31,000
S4			1/1/97		31,500.000		38,000
S6			1/1/97		46,500.000		55,750
S7			1/1/97		55,000.000		66,480
S2			1/1/05		19,500.000		24,750
S3			1/1/05		25,000.000		31,000
S4			1/1/05		31,500.000		38,000

1. On Pay Grades by Pay Class, complete the following fields:

- Pay Class (H/S/P)
  - Pay Grade
  - Amount – Minimum Salary
  - Amount – Midpoint Salary
  - Amount – Maximum Salary
  - Date – Effective
2. Complete any of the following optional fields and click OK:
- Locality
  - Source
  - 2nd Quartile Salary
  - 4th Quartile Salary
  - Remark
  - Union Code

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

---

Field	Explanation
Pay Class(H/S/P)	A code that indicates how an employee is paid. Valid codes are: Blank H      Hourly S      Salaried P      Piecework

---

Field	Explanation
Pay Grade	<p>A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.</p>
	<p>To set up pay grades, use Pay Grades by Class (P082001).</p>
	<p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p>
	<ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
Minimum Salary	<p>The minimum salary or hourly rate allowed for a pay grade.</p>
	<p>The system displays a warning or error message (depending on processing options) when you enter a pay rate for an employee that is lower than the minimum rate for the pay grade.</p>
Midpoint Salary	<p>The midpoint salary or hourly rate for a pay grade or pay range.</p>
	<p>For job IDs with a defined pay grade, you enter the midpoint amount in the Pay Grade table (F082001). For job IDs that you evaluated by points, the system calculates the midpoint amount using a Pay Range Formula table (F08290).</p>
	<p>The system calculates a compa-ratio (data item #CRA) for an employee by dividing the employee's salary or rate by the midpoint for the employee's pay grade.</p>
Maximum Salary	<p>The maximum salary or hourly rate for a pay grade.</p>
	<p>The system displays a warning or error message (depending on processing options) when you enter a pay rate for an employee that is higher than the maximum rate for the pay grade.</p>
Effective Date	<p>The date on which this transaction takes effect. The effective date is used generically. It can be the date of the next raise, a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, a change in well status, or any other date that is appropriate.</p>

Field	Explanation
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.
Source	A user defined code (08/SS) that identifies the source of the salary information. To display all pay grades regardless of the source, place an asterisk (*) in this field.
2nd Quartile Salary	An information only field for a user defined second figure in a pay grade salary range. This field is for display only. It is not used in any of the computations done on this screen.  This field is reserved for future use.
4th Quartile Salary	An information only field for a user defined fourth figure in a pay grade salary range. This is a display only field. It is not used in any of the computations done on this screen.  This field is reserved for future use.
Remark	A generic field that you use for a remark, description, name, or address.
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.

## Setting Up Pay-Grade Steps

To ensure that all of the employees working in a job receive the same rate of pay, and to establish progression within a pay grade, you can set up pay-grade steps. For example, you might have a pay grade A that contains pay steps A1, A2, and A3. Employees in step A1 receive 15.00 per hour, employees in step A2 receive 15.50 per hour, and employees in step A3 receive 16.00 per hour.

Setting up pay-grade steps lets you automate the process of tracking pay information for employees. You can set up your system options so that, when you enter employee information, the system automatically calculates the employee's salary or hourly rate, based on the pay-grade step that you enter for the employee.

When you define pay-grade steps, you can save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then you enter a pay-rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step's pay-rate multiplier.

When you set up pay-grade steps individually, you enter a pay rate for each pay-grade step. When you set up pay-grade steps using a pay-rate multiplier, you enter a base pay rate and apply a pay-rate multiplier to each pay-grade step.

You can define pay grades at the same time that you define pay-grade steps. You do not need to define pay grades by class to use the Pay Grade Step table.

The Pay Grade Step Table program updates the Pay Grade and Salary Range table (F082001).

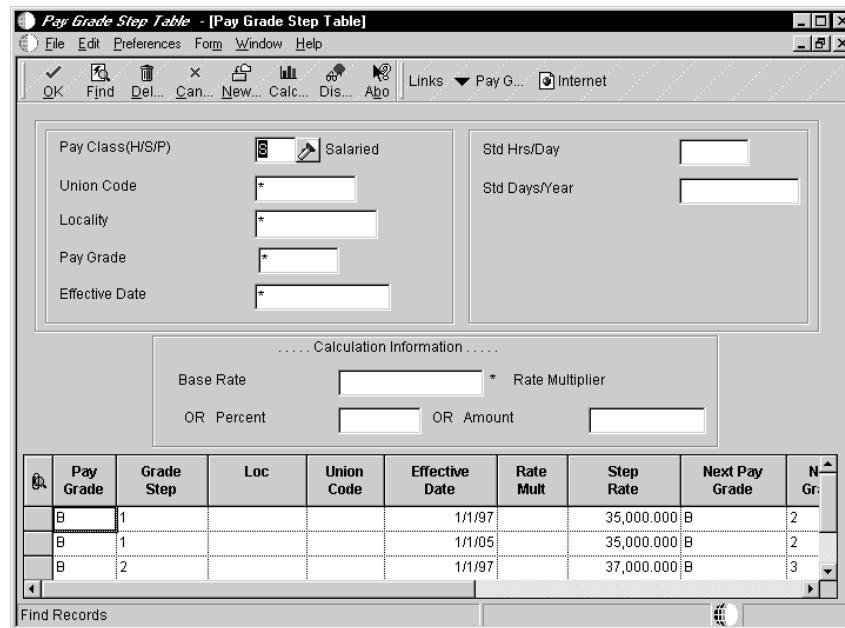
Setting up pay-grade steps includes the following tasks:

- Setting up pay-grade steps individually
- Setting up pay-grade steps using a multiplier

### ► To set up pay-grade steps individually

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From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.



1. On Pay Grade Step Table, complete the following field and click Find:
  - Pay Class (H/S/P)
2. To define information that applies to all or most of the pay-grade steps that you need to add, complete any of the following fields and click Find:
  - Union Code

- Locality
  - Std Hrs/Day
  - Std Days/Year
  - Effective Date
3. For each step that you need to set up, move to a blank line in the detail area and complete the following fields:
- Pay Grade
  - Grade Step
  - Step Rate
4. Complete the following optional fields:
- Next Pay Grade
  - Next Pay Grade Step
5. To define information for this step that varies from the information that you entered for the pay class, complete the following fields and click OK:
- Union Code
  - Loc
  - Effective Date
  - Hrs Day
  - Days Year

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Pay Class(H/S/P)	A code that indicates how an employee is paid. Valid codes are: Blank H      Hourly S      Salaried P      Piecework
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.

Field	Explanation
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.
Std Hrs/Day	The number of hours that the employee normally works in one day. If you leave this field blank, the default is the standard number of hours per day that you defined in the payroll company constants (company options, in OneWorld).
	For example, if, in the payroll company constants (company options), you specified 8 as the standard number of hours per day, but a few employees normally work 7 hours per day, enter 7 in this field for those employees.
Std Days/Year	The number of workdays in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year. When you set up the human resources constants (System Options, in OneWorld) and you use the pay grade step table as the default source for the pay rate, the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate.
Effective Date	The date on which this transaction takes effect. The effective date is used generically. It can be the date of the next raise, a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, a change in well status, or any other date that is appropriate.
	<i>..... Form-specific information .....</i>
	The date on which the rate associated with a pay-grade step becomes effective.

<b>Field</b>	<b>Explanation</b>
Pay Grade	<p>A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.</p> <p>To set up pay grades, use Pay Grades by Class (P082001).</p>
	<p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p>
<ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>	
Grade Step	<p>A code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate.</p> <p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p>
<ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>	
Step Rate	<p>There are two uses for this value:</p> <ol style="list-style-type: none"> <li>1 This is the base rate used in conjunction with the rate multiplier to update all Pay Rate fields that correspond to the key fields entered at the top of the screen.</li> <li>2 This is the Pay Rate associated with the Pay Grade/Step values.</li> </ol> <p>..... <i>Form-specific information</i> .....</p>
	<p>The Base Rate is used as value 1 for this task. You must enter a rate, which is multiplied by the the value entered for Rate Multiplier on the grid. For example, if you are setting up pay grade step B1, you might enter a base rate of 25,000 and a rate multiplier of 1. After you click Calculate, you get a step rate of 25,000. To maintain a steady progression of step rates between steps, for pay grade step B2, you might keep the same base rate, but change the rate multiplier to 1.25 to get 31,250 for a step rate.</p>

Field	Explanation
Next Pay Grade	The next higher pay grade in an employee's progression path.
Next Pay Grade Step	The next pay-grade step in an employee's progression path.

### ► To set up pay-grade steps using a multiplier

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

1. On Pay Grade Step Table, complete the following field:
  - Pay Class (H/S/P)
2. To define information that applies to all (or most) of the pay-grade steps, complete any of the following fields:
  - Union Code
  - Locality
  - Std Hrs/Day
  - Std Days/Year
  - Effective Date
3. Complete the following field:
  - Base Rate
4. For each step that you need to set up, complete the following fields:
  - Pay Grade
  - Grade Step
  - Rate Mult
5. Complete the following optional fields:
  - Next Pay Grade
  - Next Pay Grade Step
6. To define information for this step that varies from the information that you entered for the pay class, complete the following fields:
  - Union Code
  - Loc
  - Effective Date
  - Hrs Day
  - Days Year

7. Click Calculate.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Pay Class(H/S/P)	A code that indicates how an employee is paid. Valid codes are: Blank H      Hourly S      Salaried P      Piecework
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.
Std Hrs/Day	The number of hours that the employee normally works in one day. If you leave this field blank, the default is the standard number of hours per day that you defined in the payroll company constants (company options, in OneWorld).  For example, if, in the payroll company constants (company options), you specified 8 as the standard number of hours per day, but a few employees normally work 7 hours per day, enter 7 in this field for those employees.
Std Days/Year	The number of workdays in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year. When you set up the human resources constants (System Options, in OneWorld) and you use the pay grade step table as the default source for the pay rate, the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate.

Field	Explanation
Effective Date	<p>The date on which this transaction takes effect. The effective date is used generically. It can be the date of the next raise, a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, a change in well status, or any other date that is appropriate.</p> <p>..... <i>Form-specific information</i> .....</p>
Base Rate	<p>The date on which the rate associated with a pay-grade step becomes effective.</p> <p>There are two uses for this value:</p> <ol style="list-style-type: none"> <li>1 This is the base rate used in conjunction with the rate multiplier to update all Pay Rate fields that correspond to the key fields entered at the top of the screen.</li> <li>2 This is the Pay Rate associated with the Pay Grade/Step values.</li> </ol> <p>..... <i>Form-specific information</i> .....</p>
Pay Grade	<p>The Base Rate is used as value 1 for this task. You must enter a rate, which is multiplied by the the value entered for Rate Multiplier on the grid. For example, if you are setting up pay grade step B1, you might enter a base rate of 25,000 and a rate multiplier of 1. After you click Calculate, you get a step rate of 25,000. To maintain a steady progression of step rates between steps, for pay grade step B2, you might keep the same base rate, but change the rate multiplier to 1.25 to get 31,250 for a step rate.</p>
	<p>A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.</p> <p>To set up pay grades, use Pay Grades by Class (P082001).</p> <p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>

<b>Field</b>	<b>Explanation</b>
Grade Step	<p>A code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate.</p> <p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
Rate Multiplier	This number is multiplied by the Base Rate to calculate a new step rate. This is not a stored field.
Next Pay Grade	The next higher pay grade in an employee's progression path.
Next Pay Grade Step	The next pay-grade step in an employee's progression path.

## Setting Up Pay-Range Formulas

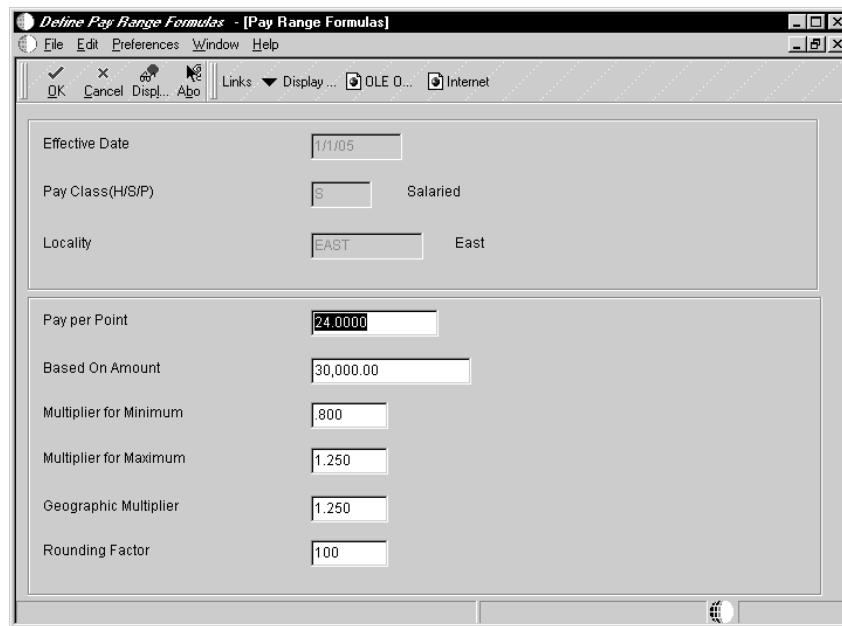
When the pay ranges for your organization's pay grades are based on variable factors, you can set up pay-range formulas that the system uses to automatically calculate pay ranges for each pay grade. These formulas are based on the job evaluation points. In addition, if a job pays more in one region of the country than in another, you can enter a geographic multiplier in the pay-range formula. The system calculates different minimums, midpoints, and maximums for the different areas, based on the minimum, midpoint, and maximum multipliers, as well as the geographic multiplier.

To use pay-range formulas, you must evaluate the jobs within your organization. You evaluate jobs to determine equitable pay ranges for them.

### ► To set up pay-range formulas

From the Job Specifications Setup menu (G05BJ4), choose Define Pay Range Formulas.

1. On Work With Pay Range Formulas, click Add.



2. On Pay Range Formulas, complete the following fields:

- Effective Date
- Pay Class(H/S/P)
- Locality
- Pay per Point
- Based On Amount
- Multiplier for Minimum
- Multiplier for Maximum
- Geographic Multiplier

3. Complete the following optional field and click OK:

- Rounding Factor

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Effective Date	The date on which the record, transaction, or table becomes active or the date from which you want information to appear.

<b>Field</b>	<b>Explanation</b>								
Pay Class(H/S/P)	<p>A code that indicates how an employee is paid. Valid codes are:</p> <table> <tr> <td>Blank</td> <td></td> </tr> <tr> <td>H</td> <td>Hourly</td> </tr> <tr> <td>S</td> <td>Salaried</td> </tr> <tr> <td>P</td> <td>Piecework</td> </tr> </table>	Blank		H	Hourly	S	Salaried	P	Piecework
Blank									
H	Hourly								
S	Salaried								
P	Piecework								
Locality	<p>A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.</p>								
Pay per Point	<p>The amount to be paid for each evaluation point that a job receives. For example, if a job is evaluated to have 150 points and the pay per point is 8, then the total pay from points is 1200 of the currency being used.</p>								
	<p>This amount is added to the Based on Amount to determine the job's pay range midpoint/control point.</p>								
Based On Amount	<p>The baseline amount from which salary pay ranges are calculated. Enter debits with a plus sign (+) and credits with a minus sign (-). Enter a credit, for example, as 5000.01-. You can enter decimals, dollar signs, and commas. The system ignores non-significant characters.</p> <p>The Human Resources system uses this field for the Hay Points Evaluation Method. It is the basic salary from which salary ranges are calculated. The amount in this field is added to the pay per point to determine the job's pay range midpoint/control point.</p>								
Multiplier for Minimum	<p>The number by which a midpoint or control point number is multiplied to determine the minimum amount (data item AAQ1) in a pay range formula calculation. This multiplier should be less than or equal to 1.00 so that the minimum amount is less than the midpoint.</p>								
Multiplier for Maximum	<p>The number by which a midpoint or control point number is multiplied to determine the maximum amount (data item AAQ3) in a pay range formula calculation. This multiplier should be greater than or equal to 1.00 so that the maximum amount is greater than the midpoint.</p>								
Geographic Multiplier	<p>A factor that allows pay ranges to differ by locality (data item SLOC). This number is multiplied by the pay from points amount before that amount is added to the base amount (data item BAA). The pay from points is simply the evaluation points of a job multiplied by the pay per point from a formula. When the pay from points is multiplied by this factor and then added to the base, the result is the midpoint of the pay range.</p>								

Field	Explanation
Rounding Factor	The increment to which a calculated figure is rounded off. For example, a calculated figure of 24,327 is rounded up to 24,330 if the rounding factor is 10, or down to 24,300 if the rounding factor is 100.

## See Also

- *Entering Job Evaluation Information* for information about evaluating the jobs within your organization

## Defining Job Evaluation Factors

To determine equitable pay ranges for the jobs within your organization, you can evaluate jobs. Before you can evaluate jobs, you must define evaluation methods. Typical evaluation methods include the following:

- Degree (Simple Subjective Point System)
- Evalucomp
- Factor comparison
- Point factor
- Hay

For each evaluation method, you must define the factors that you use to gauge the scope of each job. Typical evaluation factors include the following:

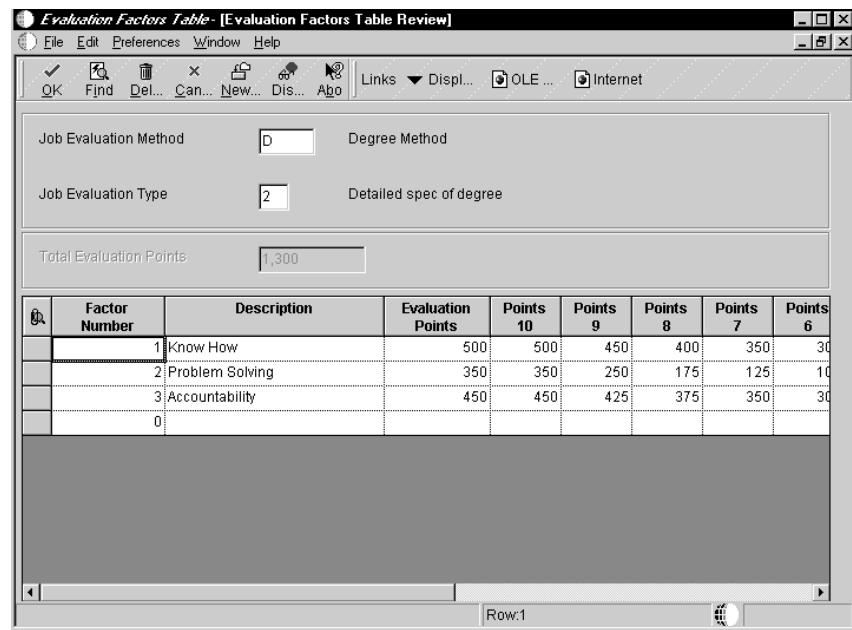
- Problem-solving abilities
- Technical skills
- Working conditions
- Leadership qualities
- Know-how
- Accountability

To enable you to rate and compare jobs, you assign points or degrees to each evaluation factor.

### ► To define job evaluation factors

From the Job Specifications Setup menu (G05BJ4), choose Evaluation Factors Table.

1. On Work With Evaluation Factors Table, click Add.



2. On Evaluation Factors Table Review, complete the following fields and click OK:
  - Job Evaluation Method
  - Job Evaluation Type
  - Factor Number
  - Evaluation Points
  - Description
  - Points 1 through 10

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Job Evaluation Method	<p>A user defined code (08/EM) that specifies the method or grouping that you use to evaluate the jobs within your organization.</p>
	<p>Suggested values are:</p>
	<ul style="list-style-type: none"> <li>blank Simple Subjective Point System</li> <li>E Evalucomp Method</li> <li>F Factor Comparison Method</li> <li>P Point Factor Method</li> <li>H Hay Method</li> </ul>
Job Evaluation Type	<p>A numeric code that determines whether job information is recorded using degrees or points.</p>
	<p>Valid codes are:</p>
	<ul style="list-style-type: none"> <li>1 Simple, subjective assignment of job points by each of the ten user defined evaluation factors.</li> <li>2 Detailed specifications of degree of difficulty or value to each of ten evaluation factors.</li> </ul>
Factor Number	<p>A sequential number that identifies each job evaluation factor. Each job evaluation factor should:</p>
	<ul style="list-style-type: none"> <li>• Distinguish differences between jobs.</li> <li>• Be common to most of the jobs that you are rating. A factor should exist in greater to lesser amounts so that it is easier to measure factors within a job.</li> <li>• Have a maximum allowable number of points for each of the 10 levels of degree.</li> <li>• Not overlap any other factor.</li> <li>• Be accepted by employees and managers.</li> <li>• Be clearly and objectively defined so that all of the people who rate jobs interpret the factor in the same way.</li> </ul>
	<p>For each job evaluation method, define enough factors to ensure that a person can adequately rate the job without being overwhelmed by a large number choices. For example, you might set up the following job evaluation factors for the method, Degree:</p>
	<ul style="list-style-type: none"> <li>• Experience</li> <li>• Problem solving</li> <li>• Accountability</li> </ul>
Description	<p>A user defined name or remark.</p>
Evaluation Points	<p>The number of points calculated for a specific job using any job evaluation method. A job is defined as the combination of job type and job step.</p>
	<p>You can calculate the points manually and enter them at the Job Master Information level, or you can assign points to each individual factor that has been defined within the evaluation method.</p>

Field	Explanation
Points 1	<p>The degree (level of difficulty) awarded to the first factor associated with this job evaluation method. For example, you might have an evaluation method called the degree method that includes the following factors:</p> <ul style="list-style-type: none"> <li>• Know how</li> <li>• Problem-solving skills</li> <li>• Accountability</li> </ul> <p>You could assign the know how factor a degree of 10, the problem-solving skills factor a degree of 9, and the accountability factor a degree of 8.</p>

## Setting Up a Cross-Reference Table by Business Unit

When you define a job, you can enter a benefit group, union code, and workers compensation information for it. Entering this information at the job level simplifies the process of entering employee information because it eliminates the need to enter that information for each employee who is assigned to the job. You can override this default job information for individual employees, if necessary.

In some cases, you might need to override default job information for all of the employees who work in a specific business unit. In this case, you can set up a cross-reference table for the job ID and business unit. For example, assume the following scenario:

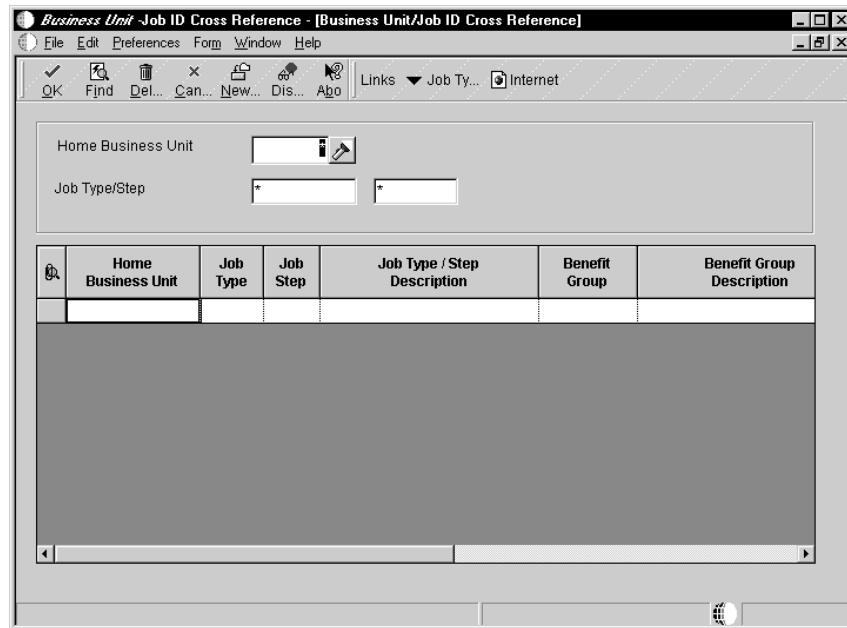
- Your organization has 5000 machinists.
- Of those machinists, 4,500 work in business unit 5, union 1000, and benefit group 100.
- The remaining 500 machinists work in business unit 6, union 1100, and benefit group 200.

To streamline the process of entering job information for employees, you can enter union 1000 and benefit group 100 when you define the job machinist, and then set up a cross-reference table for the machinists in business unit 6.

The system uses the information in the cross-reference table to automatically update the records for the employees in that business unit with the correct union, benefit group, and workers compensation information.

### ► To set up a cross-reference table by business unit

From the Job Specifications Setup menu (G05BJ4), choose Business Unit-Job ID Cross Reference.



1. On Business Unit/Job ID Cross-Reference, complete the following fields:
  - Home Business Unit
2. To define the information that applies to a job for only those employees who work in the business unit that you defined, complete any of the following fields and click OK:
  - Job Type
  - Job Step
  - Benefit Group
  - Union Code
  - WCI Code
  - S C

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

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Field	Explanation
Home Business Unit	The number of the business unit in which the employee generally resides.

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Field	Explanation				
Job Type	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.				
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.				
Benefit Group	The benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.				
Union Code	A user defined name or remark.				
WCI Code	A user defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers compensation insurance reports.				
S C	<p>The subclass code defines any special circumstances associated with the workers compensation insurance (WCI) code that result in multiple rates for the same WCI code. The multiple rates may be due to location, risk, and so forth. The subclass should remain blank if multiple rates do not exist. Default codes are:</p> <table> <tr> <td>Blank</td> <td>There are no special circumstances associated with this code.</td> </tr> <tr> <td>F</td> <td>There are special circumstances associated with this code.</td> </tr> </table>	Blank	There are no special circumstances associated with this code.	F	There are special circumstances associated with this code.
Blank	There are no special circumstances associated with this code.				
F	There are special circumstances associated with this code.				

## Setting Up Job Classification Constants

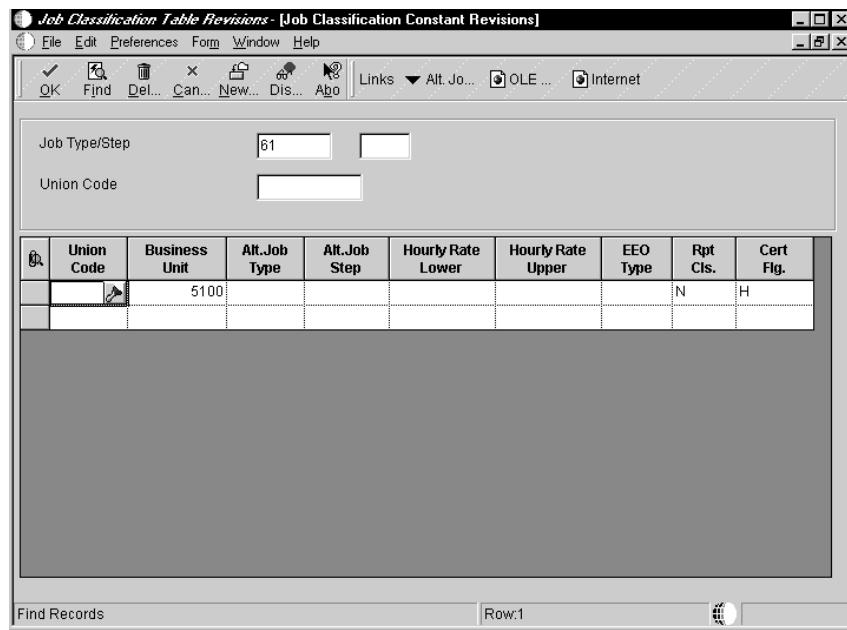
You set up job-classification constants to maintain various classifications of jobs, related to job type, job step, union, and business unit. For U.S. payroll, you can identify combinations of job types and job steps that you want to print on the Certified Payroll Register report to meet taxing authority regulations.

You can also specify alternate job types and job steps to print on the Certified Payroll Register report to meet U.S. taxing authority regulations. Alternate job-type and job-step codes replace the codes for job type and job step that exist in either the Employee Master table (F060116) or the Employee Transaction History table (F0618).

## ► To set up job-classification constants

From the Job Specifications Setup menu (G05BJ4), choose Job Classification Table Revisions.

1. On Work With Job Classification Constant, click Add.



2. On Job Classification Constant Revisions, complete the following fields and click OK:
  - Job Type (Craft) Code
  - Job Step
  - Union Code
  - Business Unit
  - Alt.Job Type
  - Alt.Job Step
  - Hourly Rate Lower
  - Hourly Rate Upper
  - EEO Job
  - Rpt Cls.
  - Cert Flg.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1,

these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Job Type (Craft) Code	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Alt.Job Type	A user defined code (system 06, type G) that identifies a job classification that will replace the job type code on certain reports. A value here replaces the code in the Job Type field.
Alt.Job Step	A user defined code (system 06, type G) that identifies a step within the job classification that will replace the job step code on certain reports. A value here replaces the code in the Job Step field.
Hourly Rate Lower	The minimum hourly rate that an employee can be paid.
Hourly Rate Upper	The maximum hourly rate that an employee can be paid.

<b>Field</b>	<b>Explanation</b>
Rpt Cls.	<p>A code that identifies the type of information an employee with the specified job type and job step can access. Codes are:</p> <ul style="list-style-type: none"> <li>N Employees at the job type/job step do not have access to any information for reporting purposes. This is the default.</li> <li>H Employees at this job type/job step have access to all hours amounts related to those job type/job step codes which have a lower classification than their classifications.</li> <li>D Employees at this job type/job step have access to all dollar amounts related to those job type/job step codes which have a lower classification than their classification.</li> <li>Y Employees at this job type/job step have access to all information related to those job type/job step codes which have a lower classification than their classification.</li> </ul>
EEO Job	<p>A user defined code (07/J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by J.D. Edwards. You can add codes if needed.</p>
Cert Flg.	<p>A code which specifies the type of information to be printed on the Certified Payroll Register for the Job Type and Job Step. The codes are:</p> <ul style="list-style-type: none"> <li>N Do not print any information related to this Job Type/Job Step on the Certified Payroll Register.</li> <li>Y Print all information related to this Job Type/Job Step on the Certified Payroll Register.</li> <li>H Print Hours Only for this Job Type/Job Step on the Certified Payroll Register.</li> </ul>



## Setting Up Pay Rate Table Information

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You set up pay rate table information to simplify the process of associating the same information, such as pay rates, with a group of employees. You must set up pay rate tables if you have chosen pay rate table as your pay rate default source in System Options. The following information is associated with pay rate information:

<b>Pay rate tables</b>	You set up pay rate tables to associate pay rates with a specific group, such as a union.
<b>Union local and job cross-references</b>	You set up local and job cross-references to cross-reference parent unions with local unions.

Setting up pay rate table information consists of the following tasks:

- Setting up pay rate tables
- Revising pay rate tables
- Setting up union local and job cross-references

### Setting Up Pay Rate Tables

You set up pay rate tables to associate pay rates with a specific group of employees. You set up hourly rates by job type and job step. Any amounts that you enter in the pay rate tables can override rates set up in the Employee Master table (F060116). As you enter time for various job types and job steps, the system locates the appropriate hourly rate.

The system uses pay rate tables in conjunction with the time entry programs. You must define a processing option in the appropriate time entry program so that the system uses the pay rate tables.

Setting up pay rate tables allows you to do the following:

- Make rates specific to a job, business unit, or shift
- Define up to five different rates per job type and step
- Create workers compensation codes for each job type and step

- Define a flat burden factor for each job type and step
- Define a recharge billing rate

You can use Union Rates Master Revisions (P059121) to set up and revise pay rates tables. The program allows you to set up or revise a pay rate table one at a time or in groups. The following task allows you to set up pay rate tables in groups. To set up a single pay rate table, you need to find a record on the Work with Union Rates form, and then choose Single Revision from the Row menu.

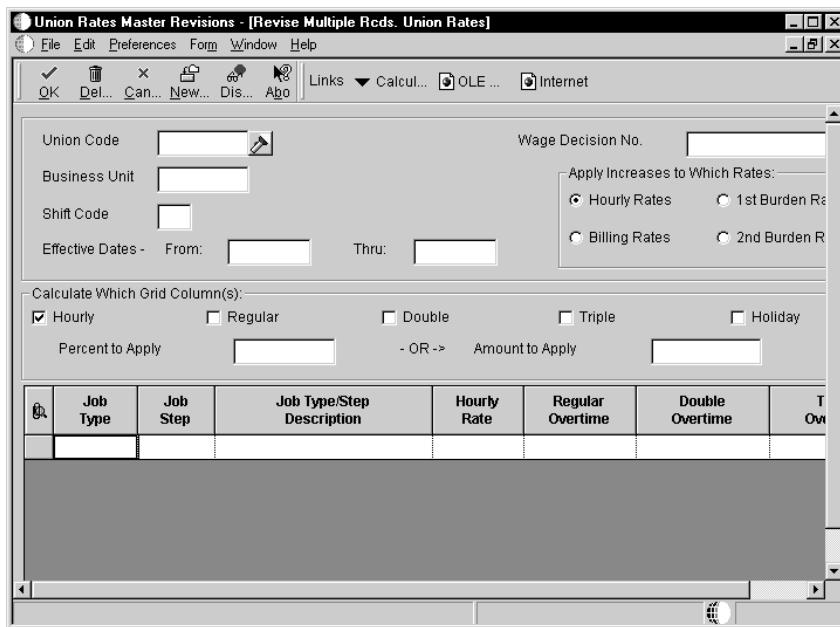
Setting up pay rate tables updates the Employee Master table (F060116) and the Union Rates table (F069126).

### ► To set up pay rate tables

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From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Add.



2. On Revise Multiple Records Union Rates, complete the following fields:

- Union Code
- Effective Dates – From:
- Effective Dates – Thru:
- Job Type
- Job Step

- Hourly Rate

When you complete only the Hourly Rate field, the system uses the pay type multiplier for the overtime rates.

3. Complete the following optional fields:
  - Business Unit
  - Shift Code
  - Wage Decision No
4. Select a group of rates to enter from the following options:
  - Hourly Rates
  - Billing Rates
  - 1st Burden Rates
  - 2nd Burden Rates
5. To enter hourly overtime rates, complete one or more of the following fields:
  - Regular Overtime
  - Double Overtime
  - Triple Overtime
  - Holiday Pay

When you complete only the overtime rate fields, the system does not use the pay type multiplier from Pay Type Revisions.

6. To enter billing rates, complete one or more of the following fields:
  - Billing Rate
  - Billing Regular
  - Billing Double
  - Billing Triple
  - Billing Holiday

When you enter a value for billing rates, the system does not use the pay type multiplier.

7. To enter recharge burden rates, complete one or more of the following fields:
  - Rchg Burden Rate
  - Burden-1 Regular
  - Burden-1 Double

- Burden-1 Triple
- Burden-1 Holiday
- Burden2 Rate
- Burden-2 Regular
- Burden-2 Double
- Burden-2 Triple
- Burden-2 Holiday

8. Complete the following optional fields:

- Piecework Rate
- Wrk Comp Code
- Wrk Comp SubClass
- Labor Dist Multiplier
- Labor Dist Method

9. Repeat steps 2–8 for each record that you want to add to the same union code.

10. When you finish entering records, click OK.

<b>Field</b>	<b>Explanation</b>
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Effective Dates – From:	The date on which an address, item, transaction, or table becomes active or the date from which you want transactions to appear. The system uses this field depending on the program. For example, the date you enter in this field might indicate when a change of address becomes effective, or it could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, and so on.
Effective Dates – Thru:	The date on which the item, transaction, or table becomes inactive or through which you want transactions to appear. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.
Job Type	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.

Field	Explanation
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
Hourly Rate	The employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.
	In the Employee Master table, this is the employee's base hourly rate. In the Union Rates table, this is the straight time rate.
	Note: If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.
Business Unit	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.
	You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.
	Security for this field can prevent you from locating business units for which you have no authority.
	Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.
Shift Code	A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.
	For payroll and time entry:  If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.
	If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.
Wage Decision No	This code is used to reference the government Wage Decision that the contract pay rates fall under.
Regular Overtime	The rate of pay for "regular" overtime.

Field	Explanation
Double Overtime	The rate of pay for “double” overtime.
Triple Overtime	The rate of pay for “triple” time.
Holiday Pay	The rate of pay for “holiday” overtime.
Billing Rate	<p>A rate used for the billing of labor services. This rate is often referred to as the billing or recharge rate. The extended amount based on this rate will be charged to the primary distribution account on the timecard with an offset being made to an account derived from the Accounting Rules table. This rate will not affect the employee’s payroll. To allow billing rates in time entry, you must set the employee’s record type as either 2 or 3 on the Basic Employee Entry form.</p> <p>Enter a rate on any of the following forms to override the rate in the Employee Primary Job table:</p> <ul style="list-style-type: none"> <li>• Pay Rate Information</li> <li>• Employee Labor Distribution</li> <li>• Occupational Pay Rates</li> <li>• Time Entry by Employee</li> <li>• Time Entry by Job or Business Unit</li> <li>• Daily Timecard Entry</li> <li>• Time Entry by Employee with Equipment</li> <li>• Time Entry by Shop Floor Control</li> </ul>
Billing Regular	This is the employee’s recharge overtime hourly rate as retrieved, entered or calculated during time entry.
Billing Double	This is the employee’s recharge doubletime hourly rate as retrieved, entered or calculated during time entry.
Billing Triple	This is the employee’s recharge triple time hourly rate as retrieved, entered or calculated during time entry.
Billing Holiday	This is the employee’s recharge holiday hourly rate as retrieved, entered or calculated during time entry.
Rchg Burden Rate	An hourly rate to be used when charging ‘burden’ associated with the actual billing (recharge) amounts.
Burden-1 Regular	The rate of billing for “regular” overtime.
Burden-1 Double	The rate of billing for “double” time.
Burden-1 Triple	The rate of billing for “triple” time.
Burden-1 Holiday	The rate of billing for “holiday” time.
Burden2 Rate	The rate to be applied to the ‘variable’ portion of burden.
Burden-2 Regular	The burden rate for “regular” overtime.
Burden-2 Double	The burden rate for “double” time.
Burden-2 Triple	The burden rate for “triple” time.
Burden-2 Holiday	The burden rate for “holiday” time.

Field	Explanation
Piecework Rate	The rate paid for the type of component (piece) produced. If you enter a rate in this field, this rate overrides the rate in the Employee Master table.
Wrk Comp Code	A user defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers compensation insurance reports.
Wrk Comp SubClass	The subclass code defines any special circumstances associated with the workers compensation insurance (WCI) code that result in multiple rates for the same WCI code. The multiple rates may be due to location, risk, and so forth. The subclass should remain blank if multiple rates do not exist. Default codes are: Blank There are no special circumstances associated with this code. F There are special circumstances associated with this code.
Labor Dist Multiplier	A multiplier to load direct labor costs with burden. For example, a factor of 1.32 loads every dollar of labor cost with 32 cents worth of burden.
Labor Dist Method	Controls whether the labor costs include a flat burden for payroll taxes and benefits. Valid values are: 0 The flat burden factor is always 1.0000, so the resulting amount for the flat burden is zero. 1 The flat burden factor is always greater than or equal to 1.0000, so the labor costs include a flat burden.

## Revising Pay Rate Tables

You can use the Union Rates Master Revisions program (P059121) to revise pay rate tables. You can revise pay rate tables one at a time or in groups. To revise a single pay rate table, you need to locate a record on the Work with Union Rates form, and then choose Single Revision from the Row menu.

You can revise pay rate tables in groups using either of two methods:

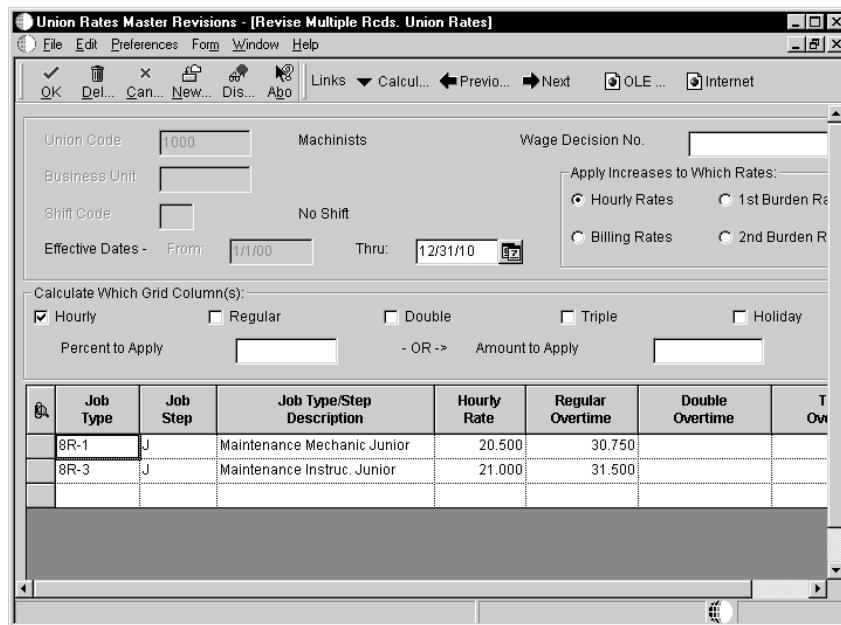
- Revising pay rate tables manually
- Revising pay rate tables by calculation

Revising pay rate tables updates the Employee Master table (F060116) and the Union Rates table (F069126).

## ► To revise pay rate tables manually

From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Find. Then choose Revise Multiple from the Row menu.



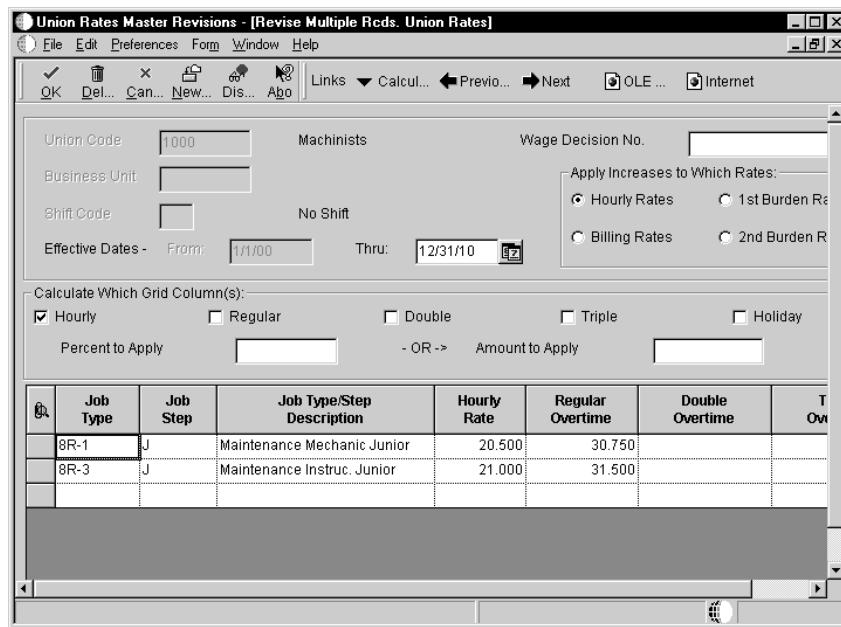
2. On Revise Multiple Records Union Rates, review the following fields and change as necessary:
  - Effective Dates – Thru:
  - Job Type
  - Job Step
3. Change the following optional field, if needed:
  - Wage Decision No
4. Select a group of rates to revise by clicking one of the following options:
  - Hourly Rates
  - Billing Rates
  - 1st Burden Rates
  - 2nd Burden Rates
5. To revise hourly rates, change one or more of the following fields:
  - Hourly Rate

- Regular Overtime
  - Double Overtime
  - Triple Overtime
  - Holiday Pay
6. To revise billing rates, change one or more of the following fields:
- Billing Rate
  - Billing Regular
  - Billing Double
  - Billing Triple
  - Billing Holiday
7. To enter recharge burden rates, change one or more of the following fields:
- Rchg Burden Rate
  - Burden-1 Regular
  - Burden-1 Double
  - Burden-1 Triple
  - Burden-1 Holiday
  - Burden2 Rate
  - Burden-2 Regular
  - Burden-2 Double
  - Burden-2 Triple
  - Burden-2 Holiday
8. Complete the following optional fields:
- Piecework Rate
  - Wrk Comp Code
  - Wrk Comp SubClass
  - Labor Dist Multiplier
  - Labor Dist Method
9. To save the revisions, click OK.
10. To revise records for the next union code, choose Next and repeat steps 2–9 for each record you want to revise.

► **To revise pay rate tables by calculation**

From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Find. Then choose Revise Multiple from the Row menu.



2. On Revise Multiple Records Union Rates, review the following fields and change as necessary:
  - Effective Dates – Thru:
  - Job Type
  - Job Step
3. Revise the following optional field, if needed:
  - Wage Decision No
4. Select a group of rates to which to apply the calculation by clicking one of the following options:
  - Hourly Rates
  - Billing Rates
  - 1st Burden Rates
  - 2nd Burden Rates
5. Choose the grid columns to calculate.
6. Complete one of the following fields and click Calculate:

- Percent to Apply
  - – OR -> Amount to Apply
7. Complete the following optional fields:
- Piecework Rate
  - Wrk Comp Code
  - Wrk Comp SubClass
  - Labor Dist Multiplier
  - Labor Dist Method
8. To save the revisions, click OK.
9. To revise records for the next union code, choose Next and repeat steps 2–9 for each record you want to revise.

## Setting Up Union Local and Job Cross-References

You set up union local and job cross-references to cross-reference parent unions with local unions. You use these tables when a parent union has members working for a local union and those members must be paid the local union's wage rate and receive the corresponding benefits. By cross-referencing one union's (local or parent) job to another union, you ensure that the system uses the correct rates and benefits to calculate payroll.

The cross-reference tables are specific to business units and jobs and provide for the retrieval of hourly rates and group DBAs. If you define these tables, you do not have to change an employee's union information during time entry. The system substitutes the employee's union and obtains the related local union.

You can also set up cross-references between local units of the union.

### Before You Begin

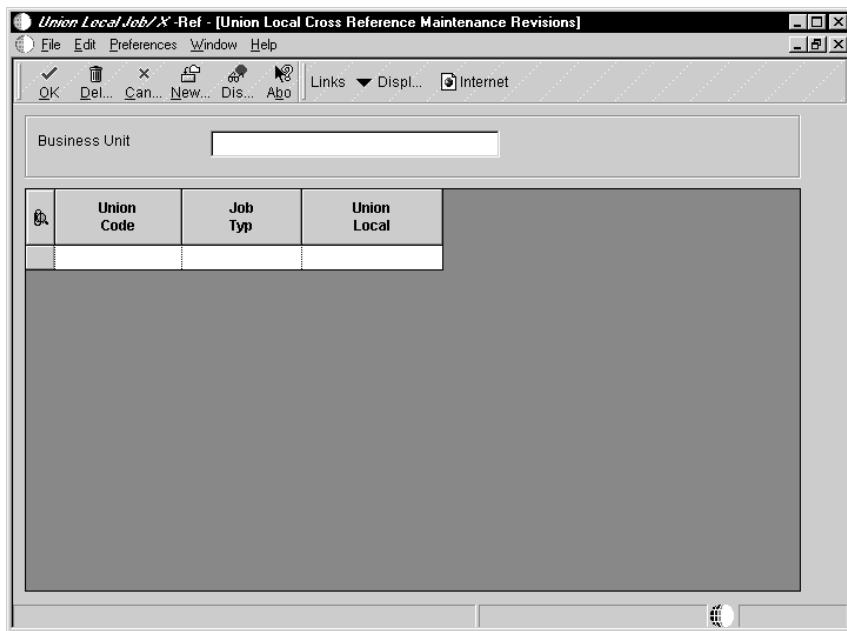
- Define both the parent and local unions in the system. See *User Defined Codes for HR and Payroll Foundation*.
- Define the pay rates and group DBAs for the local union that has the job. See *Setting Up Pay Rate Table Information*, *Setting Up Earnings Information*, and *Setting Up Group Plan DBAs*.

### **To set up union local and job cross-references**

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From the Rate Derivation Setup menu (G05BRD4), choose Union Local Job/X-Ref.

1. On Work With Union Local Cross Reference Maintenance, click Add.



2. On Union Local Cross Reference Maintenance Revisions, complete the following fields:
  - Business Unit
  - Union Code
  - Union Local
3. Complete the following optional field and click OK:
  - Job Typ

---

<b>Field</b>	<b>Explanation</b>
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>

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Field	Explanation
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Union Local	A local unit of a union.
Job Typ	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.



# Setting Up Earnings Information

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You set up earnings information to define the types of pay that your employees receive. Earnings information consists of the following rates and tables:

**Shift rate differentials**

You set up shift rate differentials to add a flat dollar or percentage amount to an employee's hourly rate when the employee works a shift that receives an additional amount of pay per hour.

**Occupational pay rates**

You set up occupational pay rates for employees who perform various job types and have different hourly rates for each job type.

**Pay type cross-reference tables**

You set up pay type cross-reference tables to indicate valid pay types by job type and job step.

Setting up earnings consists of the following tasks:

- Setting up shift-rate differentials
- Setting up occupational pay rates
- Setting up pay type cross-reference tables

## Setting Up Shift-Rate Differentials

A shift rate differential is a flat dollar or percentage amount added to an employee's hourly rate. You set up shift rate differential codes to assign them to employees who receive additional compensation for shift work.

You assign shift differentials to user defined shift codes (06/S). You can also assign business units and union codes to shift differentials. When you define a shift differential, you must set effective dates for the table. The system compares the effective dates to the work dates you enter in time entry.

A shift rate differential can be either a flat dollar amount or a percentage of the employee's hourly rate. The system uses a flat dollar amount or a percentage shift differential with one of the following methods:

- The first method is hourly rate plus the shift differential, multiplied by the pay type multiplier and then multiplied by the hours worked.
- The second method is hourly rate multiplied by the pay type multiplier plus the shift differential and then multiplied by the hours worked.

The difference between the two methods is significant only when a multiplier other than 1 is entered.

These methods are associated with the shift code that you set up. You also associate these methods with pay types when you set up pay types. To have the system use the shift differential method associated with the pay type when you enter a timecard, you must set up shift codes and leave the shift differential method blank. When a shift code is entered on a time entry form, the system uses the shift differential method associated with the pay type from the Pay Type table (F069116) if it finds a blank shift differential method (in the Shift table F069246). The system also uses the shift differential method associated with the pay type when you don't enter a shift code.

Use shift code information to ensure that an employee is paid the correct amount for working on a shift with a rate differential. Use the following guidelines for using shift code information:

- If an employee always works a shift for which a shift rate differential is applicable, include the shift code in the employee's master record.
- If an employee occasionally works a different shift, you can override the information on the applicable time card.

### See Also

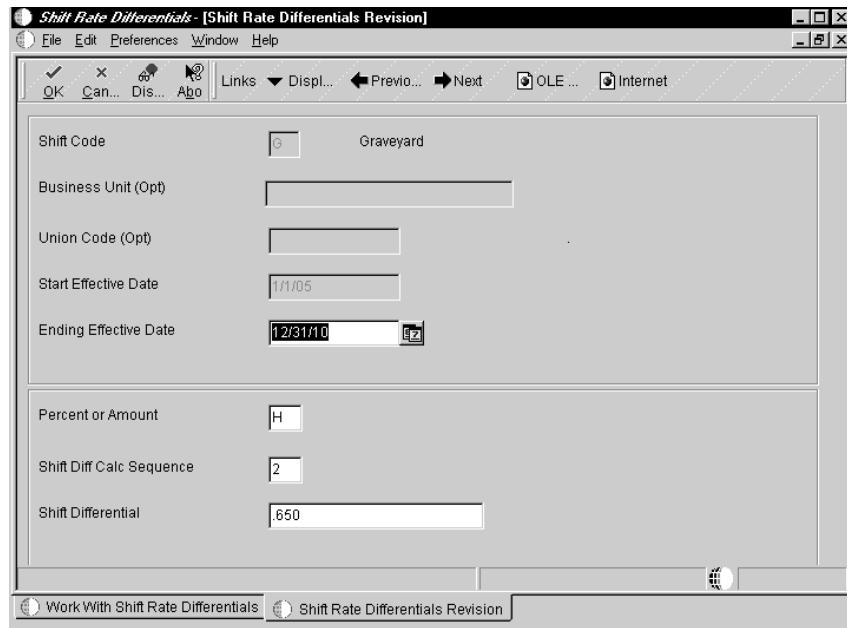
- *Entering Timecards for Employees* or *Entering Timecards for Employees Using Speed Time Entry*

#### ► **To set up shift-rate differentials**

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From the Rate Derivation Setup menu (G05BRD4), choose Shift Rate Differentials.

1. On Work With Shift Rate Differentials, click Add.



2. On Shift Rate Differentials Revision, complete the following fields:
  - Shift Code
  - Start Effective Date
  - Ending Effective Date
  - Percent or Amount
  - Shift Diff Calc Sequence
  - Shift Differential
3. Complete the following optional fields:
  - Business Unit (Opt)
  - Union Code (Opt)
4. Click OK to save the record.

Field	Explanation				
Shift Code	<p>A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.</p>				
	<p>For payroll and time entry:</p>				
	<p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p>				
	<p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.</p>				
	<p>..... <i>Form-specific information</i> .....</p>				
	<p>The list of codes is provided from the user defined code list 06/SH. When you enter this field on a timecard, the system provides values for the Shift Differential Method and the Shift Differential Amount fields as associated in the Shift Table (F069246). If the shift differential method was set up as blank for the entered shift code, (on Shift Rate Differentials P059241) the system uses the shift differential method from the entered pay type in the Pay Type table (F069116), as set up in PDBA Setup P059241.</p>				
	<p>If you leave this field blank, the system uses the shift differential method from the entered pay type in the Pay Type table (F069116).</p>				
Start Effective Date	<p>The date on which the record, transaction, or table becomes active or the date from which you want information to appear.</p>				
Ending Effective Date	<p>The date on which the record, transaction, or table becomes inactive or the date through which you want information to appear.</p>				
Percent or Amount	<p>A code that indicates whether the corresponding Shift Differential field contains an hourly rate or a percentage.</p>				
	<p>Valid values are:</p>				
	<table> <tr> <td data-bbox="719 1488 752 1543">H</td> <td data-bbox="801 1488 1307 1543">The amount in the Shift Differential field is added to the hourly rate.</td> </tr> <tr> <td data-bbox="719 1554 752 1588">%</td> <td data-bbox="801 1554 1372 1660">The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.</td> </tr> </table>	H	The amount in the Shift Differential field is added to the hourly rate.	%	The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.
H	The amount in the Shift Differential field is added to the hourly rate.				
%	The amount in the Shift Differential field is a percentage of the hourly rate and is added to the hourly rate.				

Field	Explanation
Shift Diff Calc Sequence	<p>A code that specifies how the system should calculate shift differential.</p>
	1 The pay type multiplier is applied to the shift differential: Gross = (rate + shift differential) x (multiplier) x hours.
	2 The pay type multiplier is applied only to the hourly rate and does not include the shift differential: Gross = (rate x multiplier) + (shift differential) x hours.
Blank	<p>The system follows the shift differential method that is associated with the pay type from the Pay Type table (F069116).</p>
	<p>The multiplier is the pay rate multiplier from the Pay Type table (F069116). When the pay rate is derived from the Union Rate table, the multiplier is assumed to be 1 as it is built into the table. In this case, all methods produce the same result.</p>
	<i>..... Form-specific information .....</i>
	<p>When you enter the Shift Code field on a timecard, the system provides values for the Shift Differential Method and the Shift Differential Amount fields as associated in the Shift Table (F069246). If the shift differential method was set up as blank for the entered shift code, (on Shift Rate Differentials P059241) the system retrieves the shift differential method from the entered pay type in the Pay Type table (F069116), as set up in PDBA Setup P059241.</p>
Shift Differential	<p>An additional rate, expressed in dollars or percent, added to an employee's hourly rate, depending on the shift worked. This rate can be applied in one of two ways, as defined by the Shift Differential Calculation Sequence (data item CMTH).</p>
Business Unit (Opt)	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p>
	<p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p>
	<p>Security for this field can prevent you from locating business units for which you have no authority.</p>
	<p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>

Field	Explanation
Union Code (Opt)	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.

## Setting Up Occupational Pay Rates

You set up occupational pay rates for employees who perform various job types and have different hourly rates for each job type. Pay rates are specific to an employee. They can be specific to a business unit and union for that employee.

To revise multiple occupational pay rates, choose a record on Work with Occupational Pay Rates and choose Multiple Pay Rates from the Row menu.

### Time Entry Considerations

- |   |   |
|---|---|
| <b>Using occupational pay rates in time entry</b> | To use the occupational pay rate in time entry, you must enter the associated job type from the Occupational Pay Rates table on the timecard. |
|---|---|

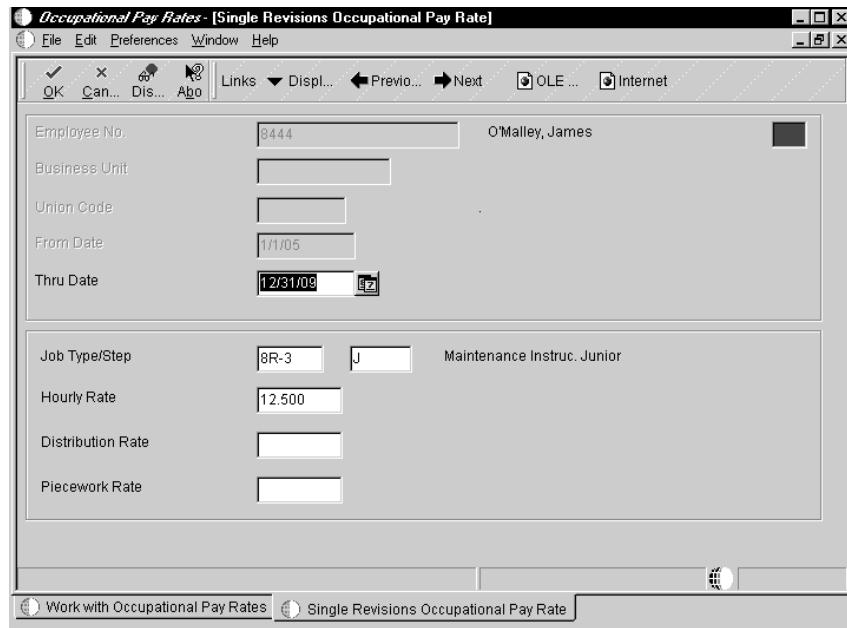
### See Also

- *Overriding an Hourly Rate for an Employee* to understand how the system derives an hourly rate

#### ► **To set up occupational pay rates**

From the Rate Derivation Setup menu (G05BRD4), choose Occupational Pay Rates.

1. On Work with Occupational Pay Rates, click Add.



2. On Single Revisions Occupational Pay Rate, complete the following fields:
  - Employee Identification
  - From Date
  - Thru Date
  - Job Type
3. Complete the following optional fields:
  - Business Unit
  - Union Code
  - Job Step
  - Hourly Rate
  - Distribution Rate
  - Piecework Rate
4. Click OK.

Field	Explanation
Employee Identification	This field may hold the employee number, TAX ID or Alternate number. The value this field holds, depends on the employee number mode setup in the Payroll Constants for Company 00000.
From Date	The date on which the record, transaction, or table becomes active or the date from which you want information to appear.

<b>Field</b>	<b>Explanation</b>
Thru Date	The date on which the record, transaction, or table becomes inactive or the date through which you want information to appear.
Job Type	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Hourly Rate	<p>The employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.</p> <p>In the Employee Master table, this is the employee's base hourly rate. In the Union Rates table, this is the straight time rate.</p> <p>Note: If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.</p>

Field	Explanation
Distribution Rate	<p>A rate used for the billing of labor services. This rate is often referred to as the billing or recharge rate. The extended amount based on this rate will be charged to the primary distribution account on the timecard with an offset being made to an account derived from the Accounting Rules table. This rate will not affect the employee's payroll. To allow billing rates in time entry, you must set the employee's record type as either 2 or 3 on the Basic Employee Entry form.</p> <p>Enter a rate on any of the following forms to override the rate in the Employee Primary Job table:</p> <ul style="list-style-type: none"> <li>• Pay Rate Information</li> <li>• Employee Labor Distribution</li> <li>• Occupational Pay Rates</li> <li>• Time Entry by Employee</li> <li>• Time Entry by Job or Business Unit</li> <li>• Daily Timecard Entry</li> <li>• Time Entry by Employee with Equipment</li> <li>• Time Entry by Shop Floor Control</li> </ul>
Piecework Rate	The rate paid for the type of component (piece) produced. If you enter a rate in this field, this rate overrides the rate in the Employee Master table.

## Setting Up Pay Type Cross-Reference Tables

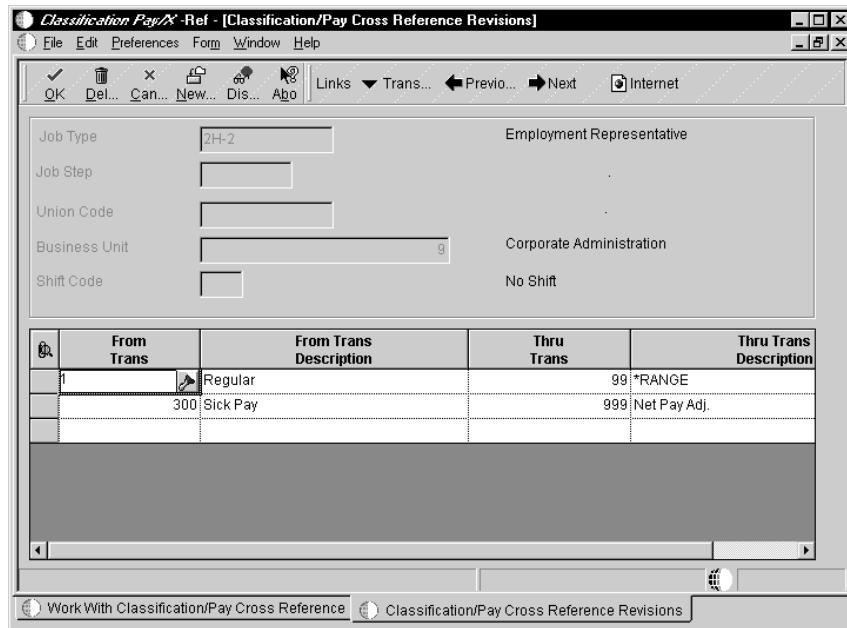
You set up pay type cross-reference tables to indicate valid pay types by job type and job step. For example, use these tables to prevent a salaried person from receiving overtime pay or a temporary employee from receiving holiday pay.

To verify pay types against the pay type cross-reference tables, you must set the appropriate processing options in the time entry programs.

### ► **To set up pay type cross-reference tables**

From the Rate Derivation Setup menu (G05BTRD4), choose Classification Pay/X-Ref.

1. On Work With Classification/Pay Cross Reference, click Add.



2. On Classification/Pay Cross Reference Revisions, complete the following fields:
  - Job Type
  - From Trans
  - Thru Trans
3. Complete the following optional fields:
  - Job Step
  - Union Code
  - Business Unit
  - Shift Code
4. Click OK to save the record.

<b>Field</b>	<b>Explanation</b>
Job Type	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
From Trans	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.

Field	Explanation
Thru Trans	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the ending number in the range that is the basis of the calculation.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Business Unit	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.
	You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.
	Security for this field can prevent you from locating business units for which you have no authority.
	Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.
Shift Code	A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.
	For payroll and time entry:
	If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.
	If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.



# Setting Up Tax Information

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Tax amounts and some federal and state insurance amounts are calculated by a third-party software package called Quantum for Payroll Tax. Quantum for Payroll Tax is a product made by Vertex, Inc. that integrates with the J.D. Edwards Payroll system. The Payroll system passes information such as the taxing authority, taxable wages, exemptions, and supplemental wages to Quantum for Payroll Tax, and that system calculates each employee's tax.

Setting up tax records consists of the following tasks:

- Setting up tax area information
- Setting up corporate tax IDs

## Setting Up Tax Area Information

Before using the J.D. Edwards Payroll system to process a payroll, you must set up tax area information.

If you are not using the J.D. Edwards Payroll system, setting up tax area information is not required for any system functions. However, you might want to set up tax areas so that you can transfer this information to your payroll service provider. You can set a processing option on the employee entry forms that controls whether tax area information is required when you enter employee records.

In the J.D. Edwards Payroll system, payroll tax amounts are calculated by a third-party software package called Quantum for Payroll Tax. Quantum for Payroll Tax is a product made by Vertex, Inc. J.D. Edwards Payroll system passes information such as the taxing authority, taxable wages, exemptions, and supplemental wages to Quantum for Payroll Tax.

You set up tax areas for the locations where employees live and work, and for the taxes that need to be withheld. Quantum for Payroll Tax performs the calculations based on the information that you set up. This system calculates the employee-paid amounts even if you do not set up the tax area information.

### Before You Begin

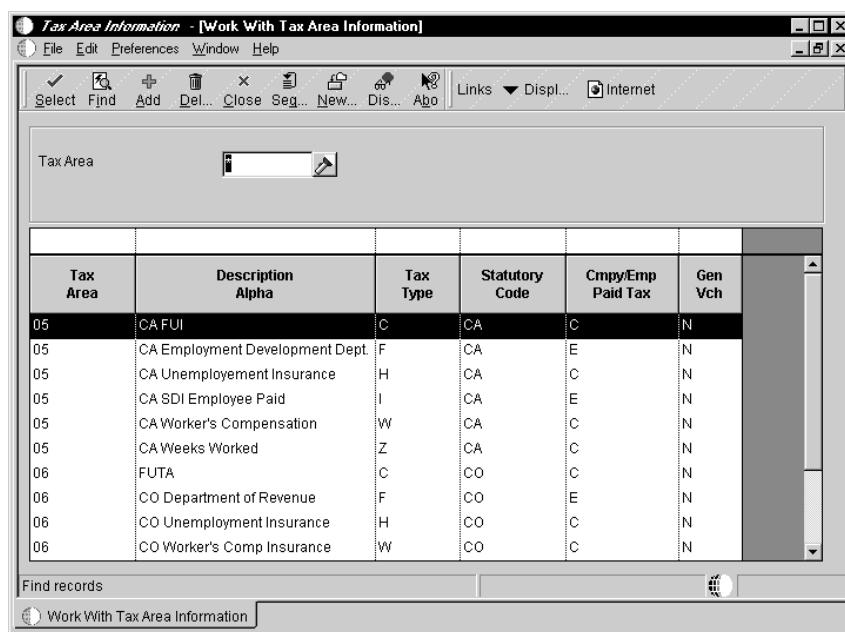
- Install Quantum for Payroll Tax.

- Set up statutory codes in UDC 06/SC. See *Understanding User Defined Codes*.
- Review the information about tax area codes in the global solutions guide for your country.

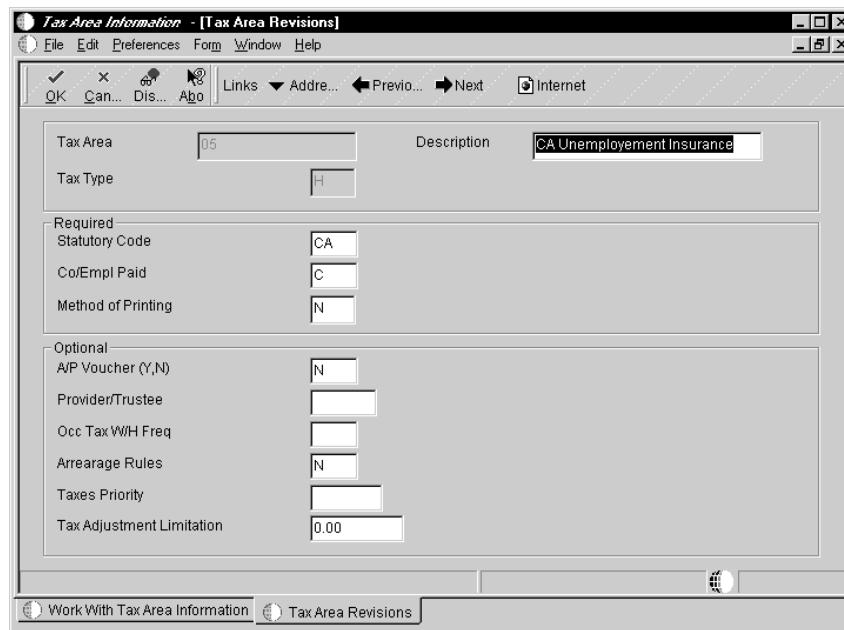
### ► To set up tax area information

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From the Taxes and Insurance Setup menu (G07BPTI4), choose Tax Area Information.



1. On Work With Tax Area Information, click Add.



2. On Tax Area Revisions, complete the following fields:
  - Tax Area
  - Tax Type
  - Description
  - Co/Empl Paid
  - Method of Printing
3. If the tax area is a province, state, county, city, or a local area, complete the following field:
  - Statutory Code
4. If you are integrating Payroll with Accounts Payable and you need to activate vouchering for this tax type, complete the following field:
  - A/P Voucher (Y,N)
5. To specify a payee for the voucher, complete the following field:
  - Provider/Trustee
6. Complete any of the following optional fields and click OK:
  - Occ Tax W/H Freq
  - Arrearage Rules
  - Taxes Priority
  - Tax Adjustment Limitation

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to B8.1, these

system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

<b>Field</b>	<b>Explanation</b>
Tax Area	<p>A code that identifies a geographical location and the tax authorities for the employee's work site. Authorities include both employee and employer statutory requirements. In the payroll-tax calculation software made by Vertex, the tax-area code is synonymous with GeoCode. To determine the valid codes for your location, refer to the documentation for the tax-calculation software that you are using.</p> <p>For WorldSoftware: If you are using the Time Accounting system without either the Payroll or Human Resources systems, the system does not calculate taxes. However, you must enter a value in this field before you can exit the form. You use the Tax Area Information form on the Additional Constants and Tables menu to set up a tax area.</p>
Tax Type	<p>A user defined code (06/TX) that identifies the type of payroll tax being processed.</p> <p>Refer to the associated user defined code records for the current descriptions of these codes.</p> <p>The values and meanings associated with this user defined code are preset by J.D. Edwards. You should not alter the values or their meanings.</p>
Description	<p>Describes data items. Enter text in upper and lower case. The system uses this field to search for similar data items. To enter an alpha description, follow these conventions:</p> <ul style="list-style-type: none"> <li>Dates – Begin all Date fields with Date</li> <li>Amounts – Begin all Amount fields with Amount</li> <li>Units – Begin all Unit, Quantity, and Volume fields with Units</li> <li>Name – Begin all 30-byte description fields with Name</li> <li>Prompt – Begin any Y/N prompting field with Prompt</li> <li>Address Number – Begin all address numbers (employee, customer, owner) with Address Number</li> </ul> <p>..... <i>Form-specific information</i> .....</p> <p>If you are entering state or provincial taxes, J.D. Edwards recommends starting your descriptions with the two-letter state or province abbreviation. This naming convention provides you with an easier search because the system groups all taxes with the same abbreviation together.</p>

Field	Explanation
Co/Empl Paid	<p>A code that specifies whether the payroll tax associated with the tax authority is paid by the company, as an expense, or by the employee, as a deduction (withholding). Codes are:</p> <ul style="list-style-type: none"> <li>C Company Paid</li> <li>E Employee withheld</li> </ul>
Method of Printing	<p>A code that identifies whether the PDBA is to be printed on the paystub or whether it is to be printed on a payment that is separate from other PDBAs.</p> <p>Valid values for pay types and payroll taxes include:</p> <ul style="list-style-type: none"> <li>Y Print on paystub (default)</li> <li>S Print separate payment (one item per payment)</li> <li>C Print separate payment (C types combined)</li> <li>N Do not print on paystub</li> </ul> <p>Valid values for DBAs include:</p> <ul style="list-style-type: none"> <li>Y Print as total deductions (default)</li> <li>S Print separate payment (one item per payment)</li> <li>C Print separate payment (include detail)</li> <li>N Do not print on paystub</li> <li>I Print individual DBA codes</li> <li>T Print by DBA print group</li> </ul> <p>The separate payment feature is not available for any payroll taxes being withheld from the employee's payment.</p>
Statutory Code	<p>A code that specifies the two-character or three-character state or province code that prints on statutory reports such as W-2s and T4s.</p> <p>For example, on W-2s and T4s, instead of printing 06 which might be the taxing authority for the state of Colorado, the system prints the statutory code CO.</p> <p>Enter in an alpha code from UDC table 07/SC.</p>
A/P Voucher (Y,N)	<p>A code used to determine whether the system should generate a voucher for the DBA, tax, or wage attachment during the final update phase of the payroll processing cycle. Valid codes are:</p> <ul style="list-style-type: none"> <li>N No, do not generate a voucher</li> <li>Y Yes, generate a voucher</li> </ul>
Provider/Trustee	<p>The address book number for the supplier who receives the final payment.</p> <p>In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.</p> <p>For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.</p>

Field	Explanation
Occ Tax W/H Freq	This code is used to designate if the occupational head tax is to be withheld monthly (M), quarterly (Q), or annually (A).
Arrearage Rules	A code indicating the method the system uses to back off payroll taxes when the employee is in a negative pay situation. Valid codes are: P      The tax can be reduced as much as needed, either partially (to the stated limit) or in full. N      The tax can not be reduced. Q      The tax can be reduced as much as needed, and the amount is placed in arrears.  When left blank the system enters the default value N.
Taxes Priority	If an employee's gross pay does not cover payroll taxes, a code in this field tells the system in what order it should back out (reverse) the deduction of the payroll taxes.  Valid codes are 0001 through 9999. The system starts with the highest code. For example, the system backs out 9999 before 0001.
Tax Adjustment Limitation	The maximum amount of payroll tax backed off net pay in order to meet the 'Minimum Check' requirements.

## See Also

- *Understanding Accounts Payable Integration* in the *Payroll Guide* for more information about creating vouchers for payroll taxes and liabilities

## Setting Up Corporate Tax IDs

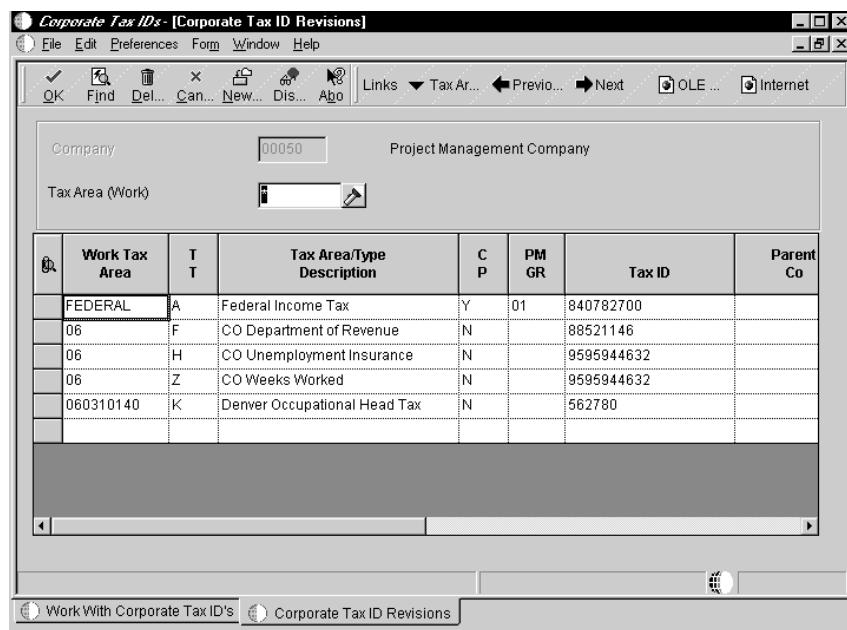
You must set up a corporate tax ID for each taxing authority to which you report. You set up corporate tax ID codes for each company so that the system can store employee tax history for reporting purposes.



### To set up corporate tax IDs

From the Taxes and Insurance Setup menu (G07BRPTI4), choose Corporate Tax IDs.

1. On Work with Corporate Tax IDs, click Add.



2. On Corporate Tax ID Revisions, complete the following fields:

- Company
- Work Tax Area
- T T
- Tax ID

If you have a line for tax type H, you must have a line for tax type Z with the same tax ID.

3. For U.S. federal taxes, enter a single line for all federal taxes using tax type A.
4. If you have more than one company that you include under the same federal tax ID, complete the following fields:
  - C P
  - PM GR
5. Complete the following optional field:
  - Parent Co
6. Click OK.

<b>Field</b>	<b>Explanation</b>
Company	<p>A code that identifies a specific organization, fund, entity, and so on. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p>
	<p>Note: You can use Company 00000 for default values, such as dates and automatic accounting instructions. You cannot use Company 00000 for transaction entries.</p>
Work Tax Area	<p>A code that identifies a geographical location and the tax authorities for the employee's work site. Authorities include both employee and employer statutory requirements. In the payroll-tax calculation software made by Vertex, the tax-area code is synonymous with GeoCode. To determine the valid codes for your location, refer to the documentation for the tax-calculation software that you are using.</p>
	<p>For WorldSoftware: If you are using the Time Accounting system without either the Payroll or Human Resources systems, the system does not calculate taxes. However, you must enter a value in this field before you can exit the form. You use the Tax Area Information form on the Additional Constants and Tables menu to set up a tax area.</p>
T T Tax Area/Type	<p>A user defined code (06/TX) that identifies the type of payroll tax being processed.</p>
	<p>Refer to the associated user defined code records for the current descriptions of these codes.</p>
	<p>The values and meanings associated with this user defined code are preset by J.D. Edwards. You should not alter the values or their meanings.</p>
C P	<p>A Yes or No field which reflects whether the company is part of a paymaster group for purposes of U.S. federal tax limits. Valid codes are:</p>
	<p>Y      Company is part of a paymaster group. This allows an employee to have wages in more than one company within the paymaster group, yet be subject to only one annual limitation for the purpose of calculating taxes.</p>
	<p>N      Company is not part of a paymaster group. This is the default value.</p>
	<p>If you enter a Y in this field, you must enter a code in the PMGR (Paymaster Group Code) field.</p>

Field	Explanation
PM GR	<p>A code that identifies which paymaster group the company resides. This code enables the Payroll system to group multiple companies together to check for limitations on unemployment and FICA taxes.</p> <p>If you specify a common paymaster, you must specify a paymaster group code.</p>
Parent Co	<p>The address book number of the parent company. The system uses this number to associate a particular address with a parent company or location. For example:</p> <ul style="list-style-type: none"> <li>• Subsidiaries with parent companies</li> <li>• Branches with a home office</li> <li>• Job sites with a general contractor</li> </ul> <p>This address must exist in the Address Book Master table (F0101) for validation purposes. Any value you enter in this field updates the Address Book Organization/Structure table (F0150) for the blank structure type.</p> <p>The value you enter in the Parent Number field updates the Address Organization Structure Master table (F0150) if the Structure Type field is blank.</p> <p>..... <i>Form-specific information</i> .....</p> <p>For payroll year-end reporting, to report multiple companies with the same tax ID under one parent company, enter the address number for the parent (reporting) company for all child companies as well as for the parent company.</p>



## **Understanding Master Business Functions**

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Several J.D. Edwards systems access centralized programs called master business functions. A master business function (MBF) is an interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables.

Master business functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. They contain logic that ensures the integrity of adding, updating, and deleting information from databases.

A master business function helps to standardize data entry information across related programs. For example, a large company might have employees enter their time from multiple sites and sources.

Master business functions are most commonly used for the following situations:

- You accept records from a third-party source.
- Multiple programs are updating the same table.

To maximize efficiency when creating timecards for all employees, you can set up processing options for master business functions to customize default fields and valid values for all time entry programs across the company. You can set up processing options to define the following functions for a set of programs that the master business function supports:

- Determining data dictionary default values
- Verifying valid values
- Updating tables with field information from multiple records

Processing options for master business functions are attached to version ZJDE001, which is provided by J.D. Edwards. J.D. Edwards recommends using this version as the default version for all your entry programs.

**Note:** If you need to create different versions for other data entry programs, contact your system administrator. For more information about how to set up versions, see *Creating a Batch Version* in the *OneWorld Foundation Guide*.



## **Setting Up MBF Processing Options for Time Entry**

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The HR and Payroll Foundation system has one master business function, Time Entry MBF (P050002A), which interacts with all time entry programs.

You need to set up processing options for the time-entry master business function to define default values, valid values, and functions for time entry programs.

**Caution:** J.D. Edwards recommends that you set up these processing options one time only. Changing these processing options might completely change necessary business functions for your time entry system.

The interactive version of the master business function, ZJDE0001, has security set to restrict access by certain users. An error occurs if you try to access the version while security is turned on. Your system administrator must turn off version security before you can access the processing options. After you have set up the appropriate values for the processing options, the system administrator needs to turn on security again for the version.

After setting up the processing options for P050002A, you need to choose the default version (ZJDE0001) of the master business function in the processing options for Time Entry by Individual (P051121), Speed Time Entry (P051121), and Self-Service Time Entry (P051191). The processing options for the master business function are attached to the default version ZJDE0001, which is provided by J.D. Edwards. J.D. Edwards recommends using this version as the default version for all your time entry programs. Using another version can cause certain time entry processes to run incorrectly. Contact your system administrator if you need to use a different version.

### **See Also**

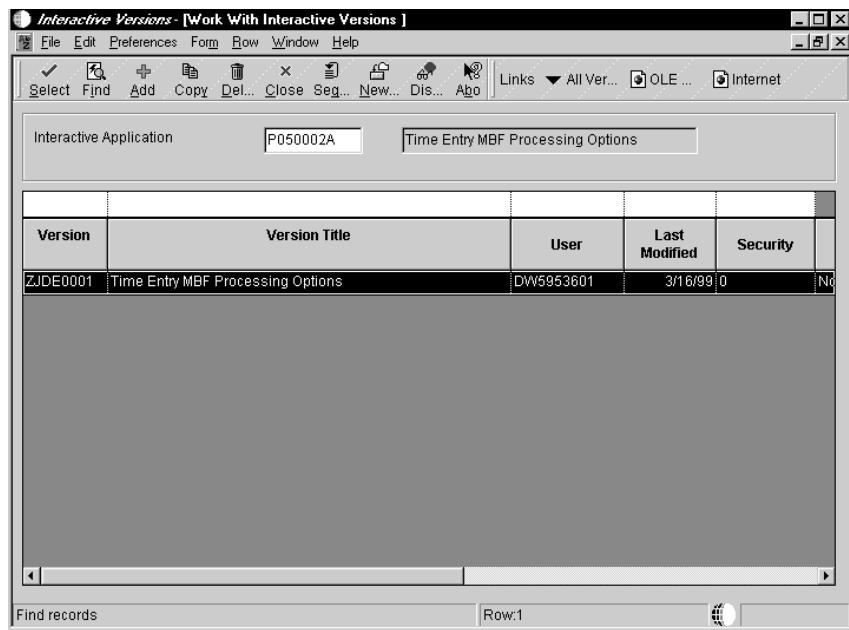
- *Understanding Master Business Functions*

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 **To set up MBF processing options for Time Entry**

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From the System Administration Tools menu (GH9011), choose Interactive Versions.



1. On Work With Interactive Versions, type P050002A in the following field and click Find:
  - Interactive Application
2. Choose the Time Entry MBF Processing Options record, and then choose Processing Options from the Row menu.

## Processing Options for Time Entry Master Business Function

### Pay Rates Tab

Use these processing options to specify how the system retrieves employee's pay rates for time entry. You can specify the tables that you want the system to search to retrieve pay rates and whether you want the system to use the highest pay rate found or the standard pay rate.

#### 1. Pay Rate

Use this processing option to specify the tables that you want the system to search to retrieve employees' pay rates for time entry. Valid values are:

- Blank Use pay rates from the Employee Master table (F060116).  
 E      Include pay rates from the Employee Pay Rates table (F060146).  
 U      Include pay rates from the Union Rates table (F069126).

When you choose option (E), the system searches the Employee Pay Rates table first. If no rate exists for an employee in this table, the system uses the rate entered in the Employee Master table.

When you choose option (U), the system searches the Union Rates table first. If an employee has no rate entered in this table, the system searches for a rate in the Employee Pay Rates table. If no rate exists for the employee in the Employee Pay Rates table, the system uses the rate entered in the Employee Master table.

### 2. Highest Rate

Use this processing option to specify whether you want the system to use the standard pay rate or the highest pay rate that it finds when it performs the search that you specified in the Pay Rate processing option. Valid values are:

- 0     Use the standard pay rate.
- 1     Use the highest pay rate found.

## Pay Types Tab

These processing options specify the pay types to process, optional cross-references to job type and step, optional pay type descriptions, and optional automatic labor distribution.

### 1. Union Table - Pay Type Codes

Use this processing option to specify the pay types to process.

If you are loading pay rates from the Union Rates table (F069126), enter only pay type codes associated with the entries you made in the Union Rates table. If you entered regular or premium amounts in the Union Rates table, enter their associated pay type codes here.

If you are loading pay rates from the Employee Pay Rates table (F060146), enter a pay type code for Regular only.

NOTE: If you have entered pay type codes in the Regular, Double, Triple, or Holiday fields, the Time Entry program retrieves the rates from the Union Rates table before applying overrides such as shift differential. If the Time Entry program does not find premium amounts in the Union Rates table, but you entered pay type codes in Regular, Double, Triple, or Holiday fields, the program applies the Pay Type Multiplier before applying Shift Differential Overrides.

### 2. Job Type and Step Cross-Reference

Use this processing option to validate the Pay Type field with the job type and step from the Classification and Pay Cross-Reference table (F06932). Valid values are:

- 0     Do not validate the Pay Type field with the Pay Type Cross-Reference table.
- 1     Validate the Pay Type field with the Pay Type Cross-Reference table.

### **3. Pay Type Description**

Use this processing option to load the Pay Type Description field automatically. You can use this option to reduce data entry. The system loads the Pay Type Description from the Employee Master table (F060116) into the Explanation field (YTEXR) in the Employee Transaction Detail table (F06116). Valid values are:

- 0     Do not load the Pay Type Description field automatically.
- 1     Load the Pay Type Description field automatically.

### **4. Split Time**

Use this processing option to specify whether to split time automatically. The system splits time according to the percentages specified in the Labor Distribution Instructions (F06016) or Position Account Distribution Instructions (F081012) tables. The total percentages of hours must equal 100%. Valid values are:

- 0     Do not split time automatically.
- 1     Split time automatically.

## **Equipment Tab**

These processing options allow you to charge employee time against specific equipment.

### **1. Equipment Worked On**

Use this processing option to load the value for the Equipment Worked On field (EQWO) automatically from the referenced work order. Valid values are:

- 0     Do not load the Equipment Worked On field automatically.
- 1     Load the Equipment Worked On field automatically.

### **2. Zero Billing Rate**

Use this processing option to specify whether to use the Zero Billing Rate when you charge employee time against specific equipment. Valid values are:

- 0     Do not use the Zero Billing Rate.
- 1     Use the Zero Billing Rate.

## **Batches Tab**

This processing option specifies batch numbering options.

### 1. Batch Number

Use this processing option to specify whether the system assigns batch numbers automatically from next numbers.

J.D.Edwards recommends allowing the system to assign batch numbers automatically. You can override the batch number the system assigns. Allowing the system to assign batch numbers disables the Get Batch Number form exit.

When you do not assign batch numbers automatically, you must either enter a batch number manually or use the Get Batch Number form exit to retrieve a batch number.

Valid values are:

- 0     Do not assign batch numbers automatically.
- 1     Assign batch numbers automatically.

## Employee Tab

This processing option specifies whether to update the check route code on the employee master record.

### 1. Check Route Code

Use this processing option to specify whether the system will update the check route code on the employee master record with the value entered on the timecard. Valid values are:

- 0     Update the employee master record only if the check route code is blank.
- 1     Always update the employee master record.
- 2     Do not update the employee master record.



# **Understanding Workflow Setup**

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Enterprise Workflow Management is an electronic messaging system that automates tasks by using an e-mail-based process flow across a network. For the HR and Payroll Foundation system, the following tasks can be Workflow based:

- Changing an employee's salary
- Terminating an employee
- Approving requisitions
- Requesting a verification-of-employment letter
- Reviewing upcoming employee reviews by supervisor
- Setting up information for new employees
- Approving W-4 forms

This guide documents all processes that Workflow performs for the HR and Payroll Foundation system. However, you can deactivate certain Workflow processes to meet your business needs. For example, if your company does not pay vacation accruals when an employee is terminated, and you are using Workflow to terminate an employee, you can deactivate the Workflow process that automatically pays the employee's vacation accruals.

Workflow setup includes one or more of the following tasks:

- Setting up recipients and recipient rules
- Previewing MailMerge documents
- Verifying processes in the Process Master

## **Setting Up Recipients and Recipients Rules**

Setting up recipients and recipient rules determines message routing for certain Workflow approvals and notifications. For example, you can set up Workflow to notify one person or a list of people when you terminate an employee. See *Working with Distribution Lists* and *Adding Recipient Rules* in the *Enterprise Workflow Management Guide*.

This task applies only to Workflow processes that might require more than one person for approvals. For certain Workflow tasks, you might only need to set a processing option to specify one recipient. For example, with the self-service

W-4 program (P053030), you set a processing option to determine the person who is to receive and approve all completed W-4 forms.

## Previewing MailMerge Documents

Some Workflow processes can produce a Microsoft Word, MailMerge document. The following MailMerge letters are preset. However, you can modify them to meet your business needs:

- Congratulatory letter
- Verification-of-employment letter
- COBRA and HIPAA letters

To review and revise the letters, use MailMerge Workbench (P980014). If you need to modify the letters, see *Mailmerge Workbench* in the *OneWorld Foundation Guide*.

The following MailMerge document is also available. However, you should not need to revise it:

- W-4 form

## Verifying Processes in the Process Master

A Workflow process might include one or more subprocesses. For example, three subprocesses make up the Workflow process for setting up new employees. The three processes are listed in the Process Master program (P98800) as EESETUP01-Employee setup approval, EESUTSK03-Get task approval, and EESUTSK01-Employee task setup.

As part of Workflow setup, you should verify that each subprocess for a Workflow process is activated. See *Activating or Deactivating a Workflow Process* in the *Enterprise Workflow Management Guide*.

## User Defined Information Setup

Before you can use any features of your Human Resources Management system, you need to define critical information that the system uses for processing. You set up some of this information to meet the specific needs of your organization. Such information is called user defined information.

User defined information consists of the following:

<b>User defined codes</b>	Set up user defined codes to customize your system to meet your specific business needs.
<b>Supplemental data</b>	Set up supplemental data to track detailed information about employees, applicants, requisitions, and jobs. You can track virtually any type of information that your organization needs. Supplemental data is not required by the system.

User defined information setup includes the following tasks:

- Understanding user defined codes
- Setting up supplemental data

Setting up supplemental data is optional.





## Understanding User Defined Codes

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Many fields throughout the HR and Payroll Foundation system accept only user defined codes. You define the codes that go in these fields 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, 08/JG represents system 8 (Human Resources) and user-defined code type JG (Job Groups). User defined code tables define the codes that are valid for the fields in your system that accept user defined codes. If you enter a code that is not valid for a field, the system displays an error message. For example, in the Job Group field, you can enter only those codes included in user defined code table 08/JG.

You can access all user defined code tables through a single user defined code form. After you choose the user defined code form from a menu, you can change the system code and user defined code type to access any user defined code table. The system stores user defined codes in the User Defined Codes table (F0005).

You can print a list of all user defined code tables to review. To do this, 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 might need to set up some additional user defined codes that are specific to the countries in which you do business. You can also use category codes and user defined date codes to enter additional user defined information that might be necessary for your business needs.

### See Also

- *User Defined Codes* in the *OneWorld Foundation Guide* for detailed instructions on setting up user defined codes
- The global solutions guide for your country for information about country-specific user defined codes

## User Defined Codes for HR and Payroll Foundation

### Accomplishment Type (05/AT)

You use accomplishment type codes to specify a type of accomplishment. Examples include industry certification, degree completed, or training completed.

### Bank Transit (06/BC)

You use bank transit codes to identify an employee's financial institution. Banks might refer to this code as the ABA or payment routing number. This number can be obtained from the employee's check or deposit slip. It is located between the MICR colons (:) at the bottom of the check.

For U.S. banks, the bank transit number contains 9 digits. If this number does not contain nine digits, you must contact the employee's financial institution to obtain the correct number. For Canadian banks, this number contains 8 digits. Therefore, Canadian clients must enter the bank transit number with a leading zero.

If you change this number for an employee, the system creates a prenote for the employee's next auto deposit.

### Based On Date (08/BO)

You use based on date codes to define the date that you want to use to calculate the completion date of employee setup tasks.

### Benefit Enrollment Events (08/BE)

You use event codes to denote a benefits enrollment event such as marriage, divorce, or birth of a child.

### Change Reason (06/T)

You use change reason codes to indicate the reason that an employee's record changed. For example, you can enter the reason that you are recommending a salary or rate change.

**Note:** If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item.

## **Check Route (06/CR)**

You use check route codes to specify the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.

## **Competency Change Reason (05/CH)**

You use competency change reason codes to indicate the reason why an employee competency goal was changed. For example, you might enter a new goal for an employee after he or she has reached the current goal. Therefore, you would enter a competency change reason of “Goal Obtained.”

## **Competency Type (05/CY)**

You use competency type codes to represent a competency table, or category, for which you can track employee competencies. Valid values for competency type codes are:

- 01 – Training
- 02 – Skill
- 03 – Accomplishment
- 04 – Certification
- 05 – Degree
- 06 – Language
- 07 – Goal

The values in this user defined code table are hard coded and cannot be changed. Therefore, each of the competencies that you track must pertain to one of these competency types. Adding additional values to this list requires system customization.

## **Default Autopay Type (06/20)**

You use default autopay type codes to designate the default pay type that the system uses to generate automatic payments in those instances in which the system does not use the employee labor distribution instructions. If you leave this field blank, the system uses pay type 001.

## **Delegate Authorization Type (08/AY)**

You use delegate authorization type codes to specify the type of authorization given to a delegate. Valid values for delegate authorization type codes are:

- 01 – Approving

- 02 – Reporting
- 03 – Status Change
- 04 – Appraisal
- 05 – Managers Workbench

The values in this user defined code table are hard coded and cannot be changed.

### EEO Job (06/J)

You use EEO job codes to specify classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by J.D. Edwards. You can add codes if needed.

### Employee Benefit Status (06/EA)

You use benefit status codes to specify employee actions, such as new hire or rehire, for which the system searches as it tests for benefits eligibility. An \* indicates that the guidelines refer to all employee actions not otherwise specified.

Do not change the codes that are hard coded, such as A (Active) and X (Terminated). These are required codes in the system.

### Employee Setup Action (08/S3)

You use employee setup action codes to define the event that should occur during the new-employee setup workflow process. New hire, Rehire, Transfer, and Relocation are hard coded. Rehire, Transfer, and Relocation codes cannot be used until a future release.

### Employee Setup Status (08/S1)

You use employee-setup status codes to indicate the status of the entire employee-setup workflow process. Changing the setup status triggers the specific event associated with the status. For example, the system can display a W status if Workflow is waiting for a manager's approval. The system displays the status for the employee setup process on the Work With Employee Setup form (W08710C) and in the Employee tab area of the Employee Setup Entry form (W08710G).

These codes are hard coded in the system and should not be changed.

The following are explanations of the status codes and the sequence that the system might use to change them depending on how your processing options are set up:

- P – Pending. An assigned setup process begins with this status. You can make changes or delete the process if needed.
- W – Waiting for Approval. The system sets the process to this status when the process is initiated and if your processing options for Employee Setup are set to require a process approval.
- V – Approved. The system sets the process to this status when it obtains a process approval.
- 2 – Rejected. The system sets the process to this status when the process is rejected.
- A – Active. The system sets the process to this status when the process is initiated and no approval is required. You cannot cancel the process when it is changed to an Active status.

### **Employment Status (06/ES)**

You use employment status codes to specify an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. Sample valid values include the following:

- Blank – Full-time regular.
- 1 – Full-time temporary
- 2 – Part-time temporary
- 3 – Part-time regular
- 4 – Seasonal
- 5 – Casual

### **Ethnic (06/M)**

You use ethnic codes to designate minority classifications according to the U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity Occupational Group (EEOG) standards. The predefined codes that J.D. Edwards provides are hard coded. The system uses these codes to generate EEO reports and to compile Canadian Employment Equity information. Do not change these predefined codes. You can add codes, if necessary.

### **French Language PDBA (06/LF)**

You use French language PDBA codes to specify the French equivalent of the English text that prints on an employee's pay stub as the PDBA description. If the employee is set up as a French language employee, the system will use the PDBA description from this table on the pay stub.

## **Gap Reason (08/GN)**

You use gap reason codes to indicate the reason that a gap snapshot was taken. For example, for gap snapshot taken at the end of each fiscal year, you could use a reason code of Fiscal Year. You might also take a gap snapshot if major organizational changes occur, in which case you could use a reason code of Organizational Changes.

## **Goal Type (05/GT)**

You use goal type codes to define the type of goal that an employee is working towards. For example, you might define a goal type for receiving certification or for moving to the next pay grade.

## **Institution (05/IC)**

You use institution codes to identify the educational institution from which an employee receives a degree or training.

## **Investment Group (06/AI)**

You use investment group codes to indicate the grouping to be used when you balance accruals for investing in various funds. For “split” investments, the total deduction must total 100% of the amount specified. For example, an employee has a 401(k) deduction that he or she has elected to split three ways:

- 10%
- 20%
- 70%

These splits are three additional DBAs. To ensure that the three splits (or accruals) total 100%, you must:

- Use the same accrual investment group code for all three
- Ensure that the total of the individual percentages is 100
- Not use the accrual investment group code on the DBA upon which the splits are based
- Verify that the split DBAs have no effect on net or gross
- Verify that the split DBAs are not cash benefits

## **Job Evaluation Method (08/EM)**

You use job evaluation method codes to specify the method or grouping that you use to evaluate the jobs within your organization. Suggested values are:

- Blank – Simple Subjective Point System
- E – Evalucomp Method
- F – Factor Comparison Method
- P – Point Factor Method
- H – Hay Method

### **Job Group (08/JG)**

You use job group codes to create groupings of similar jobs that are associated as a unit. Groupings can be based on functions within the organization, job duties, tasks and responsibilities, job evaluation methods to be used, or similarity in pay philosophy. Typical job units are clerical/administrative, technical, engineering, scientific and professional, factory jobs, middle-management, and executive.

Consider dividing up groups into separate populations based on the differences between exempt and nonexempt employees according to the rules and regulations of the Fair Labor Standards Act (FLSA). For example, consider assigning all your managers to the Managers job group.

### **Job Status Change Reason (08/JC)**

You use job-status change reason codes to indicate why job information was changed. For example, you might want to indicate that job information was changed because the job is no longer active.

### **Job Status (08/JS)**

You use job status codes to indicate whether a job is currently active or inactive.

### **Licensing Body (05/LB)**

You use licensing body codes to represent the name of the organization that grants a professional license or certification.

### **Locality (06/SL)**

You use locality codes to define the different salary localities within an organization. For example, an employee working in the East Coast locality might receive a higher salary than an employee doing the same job in the Midwest locality.

## **Marital Status (06/MS)**

You use marital status codes to specify an employee's federal marital status as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.

## **Pay Frequency (06/PF)**

You use pay frequency codes to indicate how often an employee is paid. Codes are:

- B – Biweekly
- W – Weekly
- S – Semimonthly
- M – Monthly
- A – Annually
- C – European Annualized

The system uses the value in the Description-2 field on User Defined Codes to calculate the amount per pay period for a salaried employee.

## **Pay Status (06/PS)**

You use pay status codes to indicate whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from payroll processing.

To process an employee's last check, the pay status must contain a numeric code. After the system processes the check through final update, you can change the pay status to an alphabetic code.

## **Pay Type/Print Method Category (06/PC)**

You use pay type/print method codes to specify the pay type categories that you want to use. Examples of pay type categories that you might want to use are:

- Regular pay
- Overtime
- Certified pay types (for reporting on the Certified Payroll Register)

### Record Type (05/RT)

You use record type codes to indicate the type of resource for which you are entering competency information. Values in this list are hard coded and should not be changed. Valid record type codes include:

- 01 – Employee
- 02 – Asset (such as equipment)

### Report Category (08/RP)

You use report category codes to group reports that you run using the Manager's Self-Service Workbench. Examples of report category codes that you might set up include payroll reports, government reports, or requisition reports.

### Renewal (05/RC)

You use renewal codes to indicate the requirements that an employee must complete to renew a license or certification.

### Salutation (06/SA)

You use salutation codes to identify the proper title for a given employee. Examples of salutation codes are Mr., Ms., and Dr.

### Shift (06/SH)

You use shift codes to identify daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard. If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time. If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.

### Source (08/SS)

You use source codes to identify the source of salary information. Typically, this code refers to the source of salary information that you are using to make comparisons to salaries within your organization. Typical source codes might include trade publications or industry surveys.

## **Spending Account Type (06/FS)**

You use spending account type codes to define which type of spending account, if any, is associated with a pay type. Example of spending account type codes that you might use are:

- MED – Medical expenses spending account (where the annual amount is accrued on Jan 1 or the beginning of the year).
- DCR – Dependent care expenses (where accrual of available funds is on a pay period by pay period basis).

## **Status (05/CR)**

You use status codes to identify the status of an employee with regard to a particular competency. For example, you can specify a status of fluent, read only, or speak only for a language competency.

## **Status Change Type (08/S4)**

You use status change type codes to identify the type of status change being processed using the Manager's Self-Service Workbench.

## **Statutory (06/SC)**

You use statutory codes to specify the two-character or three-character state or province code that prints on statutory reports such as W-2s and T4s. For example, on W-2s, instead of printing 06, the Geocode for the state of Colorado, the system prints the statutory code CO.

## **Suffix (06/SF)**

You use suffix codes to identify the credentials for a given employee. Some examples of suffix codes are Phd, MD, and CPA.

## **Supplemental Data UDCs**

You use supplemental data UDCs to track information about employees, applicants, requisitions, and jobs that is not already tracked in the system. Although supplemental data can be completely user defined, J.D. Edwards has created several UDCs to assist you in entering supplemental data information. If appropriate for your business needs, you might want to set up the following UDCs:

- Appraisal Type (08/TY)
- Authority Steps (08/AU)
- Company Property (08/CC)

- Drug Testing (08/TD)
- Education (08/ED)
- Educational Emphasis (08/EE)
- Employer Testing (08/TS)
- Grievance Type (08/GR)
- Interview Process (08/IP)
- Language Skills (08/LA)
- Licenses Held (08/LI)
- Miscellaneous Skills (08/SM)
- Performance Appraisal (08/AP)
- School Attending (08/SH)
- Skills (08/SK)
- Training (08/TG)

### **Team (05/TM)**

You can use team codes to create groups of employees. Examples of codes that you might use include Team 1 or Team A, or you could name teams after the supervisor, for example, Team Smith or Team Allen.

### **Training Provider (05/PR)**

You use training provider codes to identify a person or institution that provides training to employees.

### **Training Reason (05/TN)**

You use training reason codes to define the reason that an employee takes training courses.

### **Training Type (05/TY)**

You use training type codes to categorize the types of training that employees take. Examples of training type codes include classroom training, computer-based training, and correspondence training.

### **Type of Increase Next Review (06/RV)**

You use type of increase next review codes to define the next type of salary or wage review due for an employee. Examples of type of increase next review codes that you might want to use are:

- Annual review
- Semiannual review
- Performance review
- Salary review

### Type of Structure (00/TS)

You use structure type codes to identify different types of organizational structures. Each structure that you create can have a different hierarchy. Examples of codes that you might set up are financial and responsibility structures.

### Union (06/UN)

You use union codes to identify the union or plan in which the employee or group of employees works or participates.

### User Defined Competency Description (08/UD)

You use user-defined competency description codes to help an end user understand or work with job competencies. These codes are attached to individual job competencies. You can have several job competency descriptions for a single job competency. For example, you might have a description for employees, a description for managers, and a description for HR professionals.

### Verification Method Codes (05/VM)

You use verification method codes to identify the method that you are using to verify employee competency levels.

### Work Schedule Codes (05A/WS)

You use work schedule codes to identify a particular schedule that an employee might work. For example, if an employee works four ten-hour days each week, you might use code 410 to identify his or her schedule.

### Worker's Compensation Insurance (00/W)

You use worker's compensation codes to represent different classifications for worker's compensation insurance. Worker's compensation codes are used to associate employees or groups of employees with their worker's compensation insurance rate. This code should correspond to the classifications on your periodic worker's compensation insurance reports.

## Setting Up Supplemental Data

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Supplemental data is any type of information that you want to track that is not already provided for by the system. It can include information about employees, such as their education or experience, or information unique to your business requirements, such as information about foreign languages spoken.

You can track supplemental data in the following J.D. Edwards systems:

- Address Book
- General Accounting
- Human Resources
- Payroll
- Asset Management (equipment)
- Fixed Assets
- Work Orders (engineering orders)
- Inventory

The way that you set up and maintain supplemental data is the same for all of these systems.

With each of these systems, J.D. Edwards provides one or more supplemental databases that you can use to track related types of supplemental data. The HR and Payroll Foundation system contains a supplemental database for each of the following:

- Employees (E)
- Jobs (J)
- Applicants (A)
- Requisitions (R)

You can set up any supplemental database so that the information that you enter appears in the language of your choice.

When setting up supplemental data, you define the types of supplemental information that you want to track in each of the supplemental databases. For example, in the job database, you can track job descriptions and requirements. In the employee and applicant databases, you can track job skills, education, and work experience.

To simplify working with supplemental information, you might choose to make some types of supplemental data consistent across multiple databases. For example, if you track job skills for employees, you can also track job skills for applicants. Making these supplemental data types consistent allows you to do the following:

- Simultaneously search for both applicants and employees that have specific job skills
- Transfer a hired applicant's supplemental data to the employee database

You can also transfer supplemental information from one data type to another within the same database. You might need to transfer supplemental data in cases in which you change the name of a data type or when you decide to divide the information in one data type into multiple data types.

To set up supplemental data, complete the following tasks:

- Set up supplemental databases

This task is optional.

- Set up language overrides for supplemental data

This task is optional.

- Define types of supplemental data

- Set up cross-reference tables for supplemental data

- Transfer supplemental data

## Setting Up Supplemental Databases

To designate an area of your system where you store related types of supplemental data, you set up a supplemental database. For a system in which you need to track only a few types of supplemental data, you might choose to store all of your supplemental data types in one database. For a system in which you need to track many types of supplemental data that you use for a variety of purposes, you can set up multiple supplemental databases and organize related data types within those databases.

The demonstration data that comes with your J.D. Edwards system includes the supplemental databases listed below. You cannot change these database codes or their setup parameters.

**Employee (E)**

Database key field is Employee (address) Number.

**Applicant (A)**

Database key field is Applicant (address) Number.

**Job (J)**

Database key fields are:

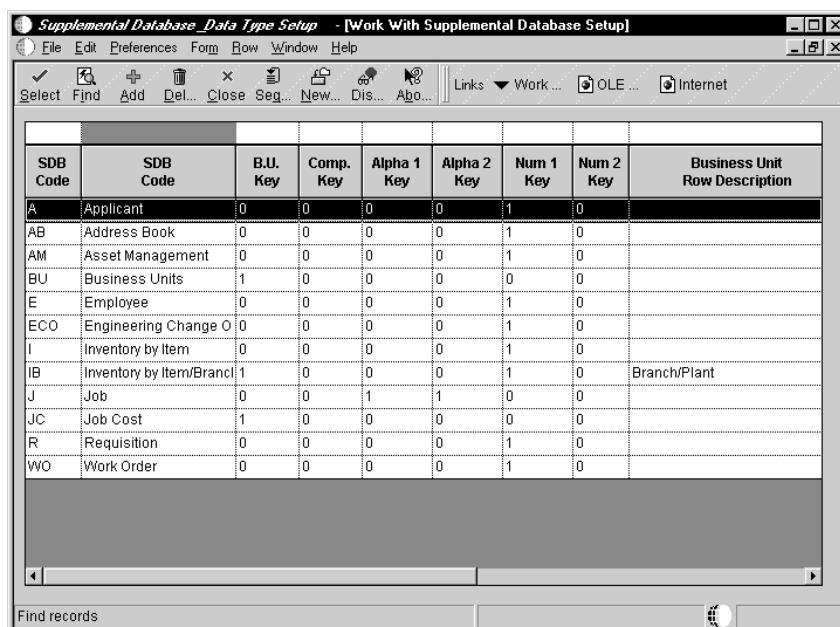
- Job Type
- Job Step

**Requisition (R)**

Database key field is Requisition number.

### ► To set up supplemental databases

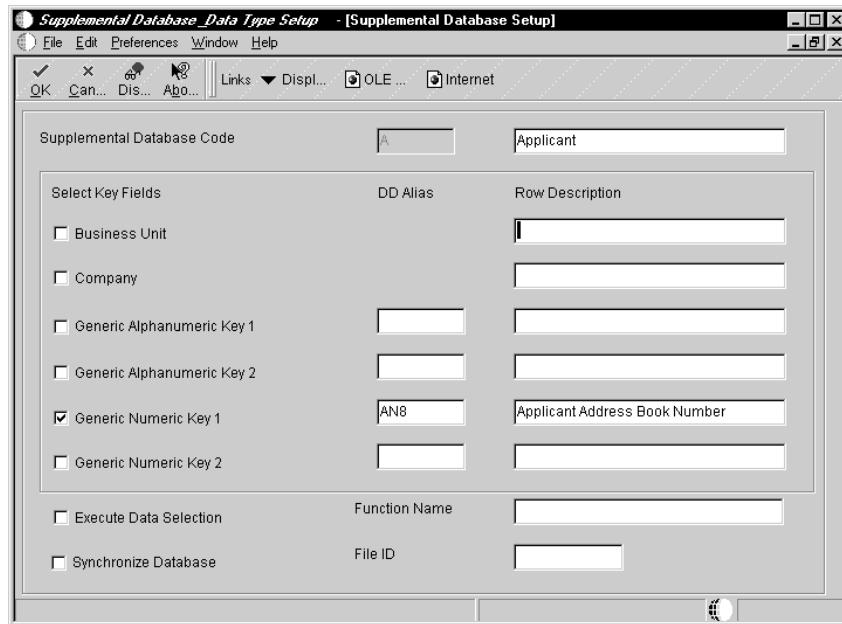
From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database & Data Type Setup.



The screenshot shows a Windows application window titled "Supplemental Database Data Type Setup - [Work With Supplemental Database Setup]". The window has a menu bar with File, Edit, Preferences, Form, Row, Window, Help, and a toolbar with standard icons like New, Open, Save, and Delete. Below the toolbar is a grid of data rows. The columns are labeled: SDB Code, SDB Code, B.U. Key, Comp. Key, Alpha 1 Key, Alpha 2 Key, Num 1 Key, Num 2 Key, and Business Unit Row Description. The data rows include:

SDB Code	SDB Code	B.U. Key	Comp. Key	Alpha 1 Key	Alpha 2 Key	Num 1 Key	Num 2 Key	Business Unit Row Description
A	Applicant	0	0	0	0	1	0	
AB	Address Book	0	0	0	0	1	0	
AM	Asset Management	0	0	0	0	1	0	
BU	Business Units	1	0	0	0	0	0	
E	Employee	0	0	0	0	1	0	
ECO	Engineering Change O	0	0	0	0	1	0	
I	Inventory by Item	0	0	0	0	1	0	
IB	Inventory by Item/Branch	1	0	0	0	1	0	Branch/Plant
J	Job	0	0	1	1	0	0	
JC	Job Cost	1	0	0	0	0	0	
R	Requisition	0	0	0	0	1	0	
WO	Work Order	0	0	0	0	1	0	

1. On Work With Supplemental Database Setup, click Add.



2. On Supplemental Database Setup, complete the following fields:
  - Supplemental Database Code
  - Row Description
3. To specify that this database will be used in conjunction with a corresponding database in a J.D. Edwards WorldSoftware system, complete the following fields:
  - Synchronize Database
  - File ID
4. To specify the key field for the employee, applicant, or requisition supplemental database, complete the following field:
  - SDB Numeric Key Flag 1
  - Generic Numeric Key 2
5. To specify the key field for the job supplemental database, complete the following fields:
  - SDB Alpha Key Flag 1
  - SDB Alpha Key Flag 2
6. To override the default label for any of the key fields that you specified, enter a row description for those fields.

<b>Field</b>	<b>Explanation</b>
Supplemental Database Code	A code that you use to set up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills. The supplemental database code is used only in the OneWorld version of the Supplemental Database.
Synchronize Database	An indicator that determines whether a supplemental database should be synchronized between OneWorld and WorldSoftware systems. Except for supplemental database codes I (inventory by item) and IB (inventory by item/branch), free-form generic text is not passed from one system to the other system.
	Only records are synchronized between the two systems. If you create a new database code or a new data type, you must manually enter the database code or data type into both the OneWorld system and the WorldSoftware system.
File ID	The number of a specific table. For example, the General Ledger Master table name is F0901. See the Standards Manual on the programmers' menu for naming conventions.
Generic Numeric Key 1	An indicator that specifies whether the system uses the data you enter for Numeric 1 as a key field for supplemental data.
	<i>Form-specific information</i>
	If you select Generic Numeric Key 1, you must enter a valid data dictionary alias in the corresponding DD Alias (SAL3) field. Before you can use a data dictionary item alias, you must set up the alias in UDC Valid Numeric Aliases (00/S1).
	When you select Generic Numeric Key 1, and you enter a valid alias, the field appears with the data dictionary name as a key field on the Work With Supplemental Data form. If you enter data in the corresponding Row Description (SBD3) field, the data you enter appears as the key field name on the Work With Supplemental Data form.

<b>Field</b>	<b>Explanation</b>
Generic Numeric Key 2	<p>An indicator that specifies whether the system uses the data you enter for Numeric 2 as a key field for supplemental data.</p> <p>..... <i>Form-specific information</i> .....</p>
Generic Alphanumeric Key 1	<p>If you select Generic Numeric Key 2, you must enter a valid data dictionary alias in the corresponding DD Alias (SAL4) field. Before you can use a data dictionary item alias, you must set up the alias in UDC Valid Numeric Aliases (00/S1).</p> <p>When you select Generic Numeric Key 2, and you enter a valid alias, the field appears with the data dictionary name as a key field on the Work With Supplemental Data form. If you enter data in the corresponding Row Description (SBD4) field, the data you enter appears as the key field name on the Work With Supplemental Data form.</p>
Generic Alphanumeric Key 1	<p>An indicator that specifies whether the system uses the data you enter for Alphanumeric 1 as a key field for supplemental data.</p> <p>..... <i>Form-specific information</i> .....</p>
Generic Alphanumeric Key 1	<p>If you select Generic Alphanumeric Key 1, you must enter a valid data dictionary alias in the corresponding DD Alias (SAL1) field. Before you can use the data dictionary alias, you must set up the alias in UDC Valid Alphanumeric Aliases (00/S2).</p> <p>When you select Generic Alphanumeric Key 1, and you enter a valid alias, the field appears with the data dictionary name as a key field on the Work With Supplemental Data form. If you enter data in the corresponding Row Description (SBD1) field, the data you enter appears as the key field name on the Work With Supplemental Data form.</p>

Field	Explanation
Generic Alphanumeric Key 2	<p>An indicator that specifies whether the system uses the data you enter for Alphanumeric 2 as a key field for supplemental data.</p> <p>..... <i>Form-specific information</i> .....</p> <p>If you select Generic Alphanumeric Key 2, you must enter a valid data dictionary alias in the corresponding DD Alias (SALA2) field. Before you can use the data dictionary alias, you must set up the alias in UDC Valid Alphanumeric Aliases (00/S2).</p> <p>When you select Generic Alphanumeric Key 2, and you enter a valid alias, the field appears with the data dictionary name as a key field on the Work With Supplemental Data form. If you enter data in the corresponding Row Description (SBD2) field, the data you enter appears as the key field name on the Work With Supplemental Data form.</p>

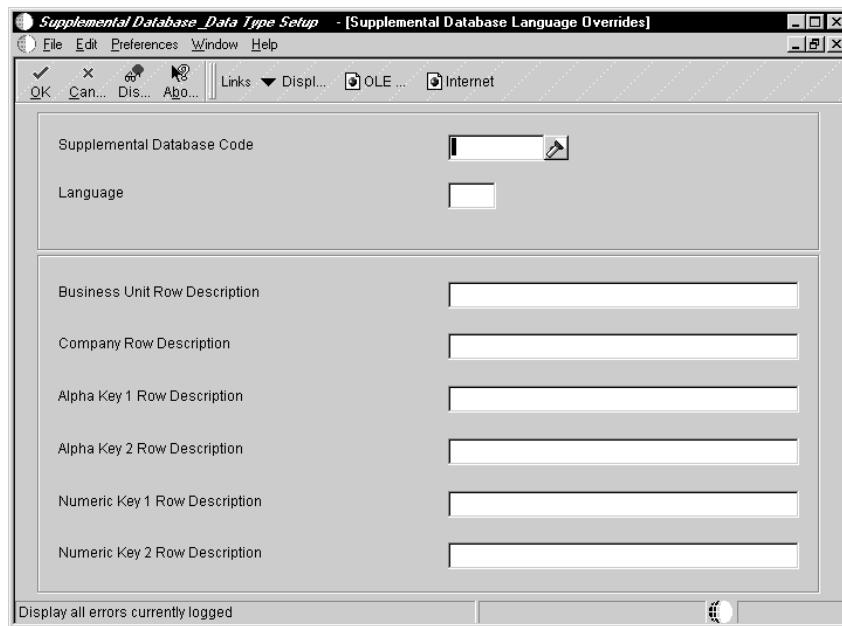
## Setting Up Language Overrides for Supplemental Data

To enable users to enter and view supplemental information in a foreign language, you set up language overrides. Language overrides allow you to write and view your database descriptions in the language that you specify. For example, you can assign a Spanish language code and enter a business unit or company description in Spanish. You can later view the supplemental database information in Spanish by selecting the Spanish language code.

### ► To set up language overrides for supplemental data

From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database & Data Type Setup.

1. On Work With Supplemental Database Setup, from the Form menu, choose Work with Language Pre (Work with Language Preferences).
2. On Work With Language Overrides, click Add.



3. On Supplemental Database Language Overrides, complete the following fields:
  - Supplemental Database Code
  - Language
4. Complete any of the following optional fields:
  - Business Unit Row Description
  - Company Row Description
  - Alpha Key 1 Row Description
  - Alpha Key 2 Row Description
  - Numeric Key 1 Row Description
  - Numeric Key 2 Row Description
5. Click OK.

Field	Explanation
Supplemental Database Code	A code that you use to set up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills. The supplemental database code is used only in the OneWorld version of the Supplemental Database.
Language Description	A user defined name or remark.

Field	Explanation
Business Unit Row Description	A field that enables you to override the default description for Business Unit in the Supplemental Database inquiry and entry programs. If you leave this field blank, the system uses the default description from the data dictionary.
Company Row Description	A field that enables you to override the default description for the Document Company in the Supplemental Database inquiry and entry programs. If you leave this field blank, the system uses the default description from the data dictionary.
Alpha Key 1 Row Description	A field that enables you to override the default description for the data dictionary alias you entered as a key field for the Supplemental Database inquiry and entry programs. If you leave this field blank, the system uses the default description from the data dictionary.
Alpha Key 2 Row Description	A field that enables you to override the default description for the data dictionary alias you entered as a key field for the Supplemental Database inquiry and entry programs. If you leave this field blank, the system uses the default description from the data dictionary.
Numeric Key 1 Row Description	A field that enables you to override the default description for the data dictionary alias you entered as a key field for the Supplemental Database inquiry and entry programs. If you leave this field blank, the system uses the default description from the data dictionary.
Numeric Key 2 Row Description	A field that enables you to override the default description for the data dictionary alias you entered as a key field for the Supplemental Database inquiry and entry programs. If you leave this field blank, the system uses the default description from the data dictionary.

## Defining Types of Supplemental Data

You define types of supplemental data to specify categories of supplemental information and the specific information that you want to track for each category. Typical types of supplemental information include the following:

- Employee skills and education levels
- Job responsibilities
- Applicant qualifications
- Requisition requirements

Depending on your specific requirements, you can set up a supplemental data type in any of the following formats, or display modes:

<b>Narrative format</b>	A form on which you enter free-form text
<b>Code format</b>	A form that contains fields of data in which you enter specific types of information
<b>Program format</b>	An option that allows you to access a specific program and version number

Defining types of supplemental data includes the following tasks:

- Defining supplemental data types in narrative format
- Defining supplemental data types in code format
- Defining supplemental data types in program format

### **Defining Supplemental Data Types in Narrative Format**

Narrative format allows you to enter information in free-form text. You might want to use the narrative format for entering the following types of information:

- Employee performance appraisals
- Applicant interview notes
- Job descriptions

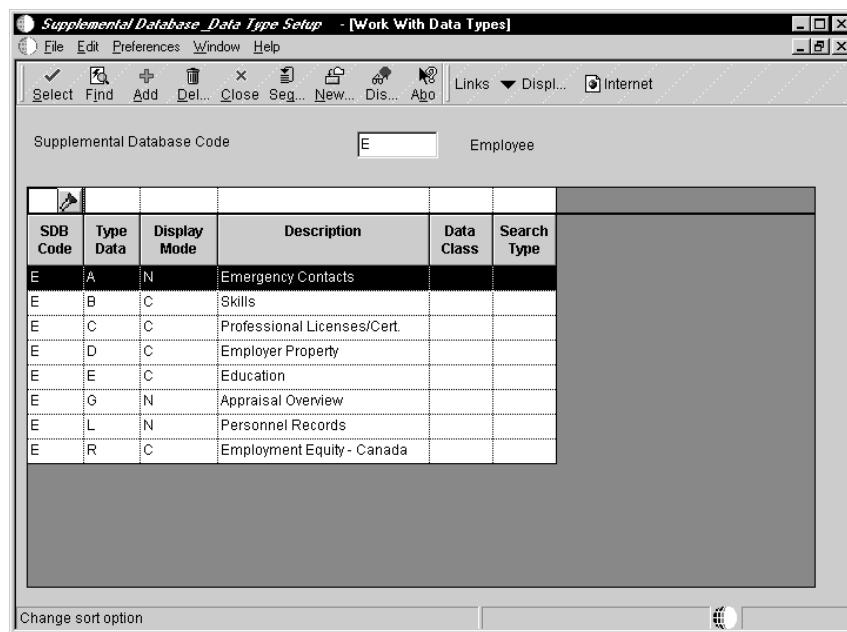


#### **To define supplemental data types in narrative format**

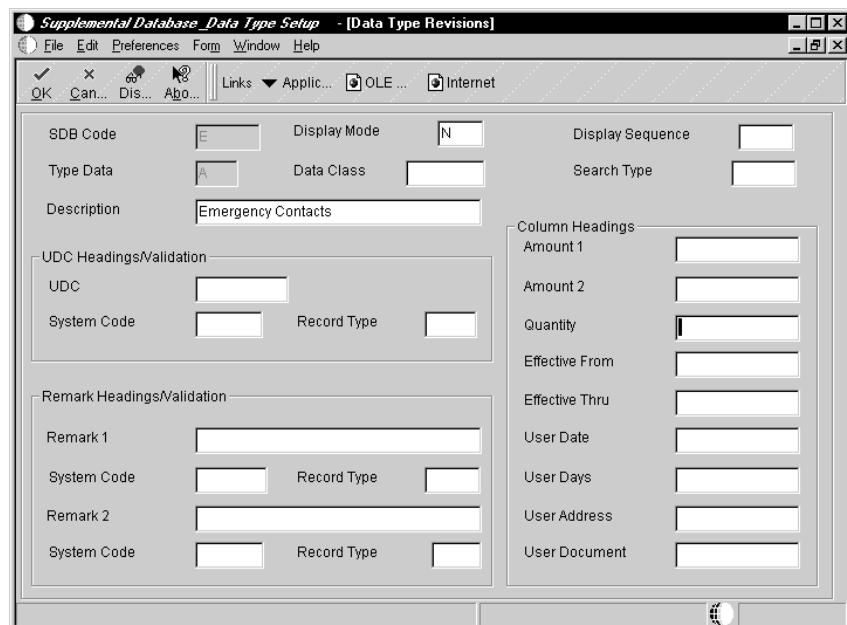
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From the HRM Setup menu (G05BSD4), choose Supplemental Database & Data Type Setup.

1. On Work With Supplemental Database Setup, click Find.
2. Choose the supplemental database for which you need to define data types and choose Work With Data Type (Work With Data Types) from the Row menu.



3. On Work With Data Types, click Add.



4. On Data Type Revisions, enter N in the following field:

- Display Mode

5. Complete the following fields:

- Display Sequence
- Type Data
- Data Class

- Search Type
- Description

Field	Explanation
Display Mode	<p>A code that specifies the format of a data type. This code determines the display mode for supplemental data. Valid codes are:</p> <p>C      Code format, which displays the form for entering code-specific information. These codes might be associated with the User Defined Codes (F0005) table.</p> <p>N      Narrative format, which displays the form for entering narrative text.</p> <p>P      Program exit, which allows you to exit to the program you specified in the Pgm ID field.</p> <p>M      Message format, which displays the form for entering code-specific information. The system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.</p> <p>..... <i>Form-specific information</i> .....</p> <p>This is a required field for setting up any data type.</p>
Display Sequence	<p>A number that reorders a group of records on the form.</p> <p>..... <i>Form-specific information</i> .....</p> <p>This is an optional field for setting up data types. You can specify a display sequence number for each data type. When you use the Work With Supplemental Data form, the data types appear in the order you specified.</p>
Type Data	<p>A code that you assign to supplemental data so that you can group data by categories.</p> <p>..... <i>Form-specific information</i> .....</p> <p>This is a required field for setting up any data type. You can use an existing data type, or you can create a new data type by entering one or two characters for the code.</p>

Field	Explanation														
Data Class	<p>A user defined code (00/CL) that identifies a group of data types in the Central Information File.</p> <p>..... <i>Form-specific information</i> .....</p>														
Search Type	<p>This is an optional field for setting up any data type. Data classifications must be set up in UDC Data Classifications (00/CL) before you can use them.</p>														
	<p>Complete this field if you want to categorize your data types by the kind of information they contain. For example, if you have both narrative and code format data types that contain information about products purchased, you might want to assign the same data classification to both of these data types.</p>														
Description	<p>A user defined code (01/ST) that identifies the kind of address book record that you want the system to select when you search for a name or message. Examples include the following:</p>														
	<table> <tbody> <tr><td>E</td><td>Employees</td></tr> <tr><td>X</td><td>Ex-employees</td></tr> <tr><td>V</td><td>Suppliers</td></tr> <tr><td>C</td><td>Customers</td></tr> <tr><td>P</td><td>Prospects</td></tr> <tr><td>M</td><td>Mail distribution lists</td></tr> <tr><td>T</td><td>Tax authority</td></tr> </tbody> </table>	E	Employees	X	Ex-employees	V	Suppliers	C	Customers	P	Prospects	M	Mail distribution lists	T	Tax authority
E	Employees														
X	Ex-employees														
V	Suppliers														
C	Customers														
P	Prospects														
M	Mail distribution lists														
T	Tax authority														
	<p>..... <i>Form-specific information</i> .....</p> <p>This is an optional field for setting up any data type. Search types must be set up in UDC Search Type (01/ST) before you can use them.</p>														
	<p>A user defined name or remark.</p>														

## Defining Supplemental Data Types in Code Format

Code format requires you to enter information in specific fields on the form. You might want to use the code format for the following information:

- Language skills
- Training completed
- Employee appraisal details

To standardize data entry and enable you to report on supplemental data, you can associate the following columns in a code format data type with a user defined code table:

- Code Title
- Remark 1

- Remark 2

You can use either existing user defined code tables (such as 06/G, Job Types) or you can create new user defined code tables. When you create new tables, you must use system codes ranging from 55 to 59 (inclusive). You cannot create a new table for any other system codes.

### **Example: Setting Up a Code Format Data Type**

When you define a code format data type, you specify a code title and, typically, a related date. You can also associate the code title with a user defined code table. The following example shows how to set up a code format data type that you use to track employee training. The data type is associated with a user defined code table that you have already set up.

Define the following information:

- Code title - Type (types of training you track)
- Date from title - Trng Dte (date training was completed)
- Amount 1 title - Costs (amount of training costs)
- System code - 55 (system code for the user defined code table that you set up for the training type)
- Record type - TG (record type for the user defined code table that you set up for the training type)

#### **Before You Begin**

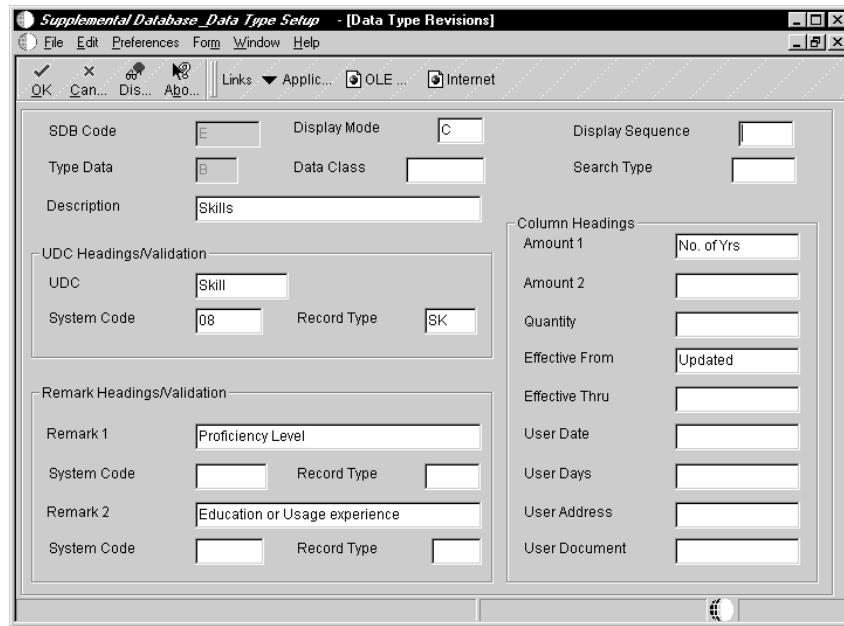
- Set up any new user defined code tables that you plan to associate with code format data types. See *User Defined Codes* in the *OneWorld Foundation Guide*.

#### **► To define supplemental data types in code format**

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From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database & Data Type Setup.

1. On Work With Supplemental Database Setup, click Find.
2. Choose the supplemental database for which you need to enter data types and choose Work with Data Type (Work with Data Types) from the Row menu.
3. On Work With Data Types, click Add.



4. On Data Type Revisions, enter C in the following field:
  - Display Mode
5. Complete the following fields:
  - Display Sequence
  - Type Data
  - Data Class
  - Search Type
  - Description
6. To specify the information that you want to track for this data type, complete the following fields:
  - Amount 1
  - Effective From
7. To associate a user defined code table with the code title, complete the following fields in the UDC Headings/Validation group:
  - UDC
  - Product Code
  - Record Type
8. To enter additional information for the data type, complete any of the following optional fields and click OK:
  - Remark 1
  - System Code (the field below Remark 1)

- Record Type (the field below Remark 1)
- Remark 2
- System Code (the field below Remark 2)
- Record Type (the field below Remark 2)
- Amount 2
- Effective Thru

<b>Field</b>	<b>Explanation</b>
Display Mode	<p>A code that specifies the format of a data type. This code determines the display mode for supplemental data. Valid codes are:</p> <p>C      Code format, which displays the form for entering code-specific information. These codes might be associated with the User Defined Codes (F0005) table.</p> <p>N      Narrative format, which displays the form for entering narrative text.</p> <p>P      Program exit, which allows you to exit to the program you specified in the Pgm ID field.</p> <p>M      Message format, which displays the form for entering code-specific information. The system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.</p> <p>..... <i>Form-specific information</i> .....</p> <p>This is a required field for setting up any data type.</p>
Display Sequence	<p>A number that reorders a group of records on the form.</p> <p>..... <i>Form-specific information</i> .....</p> <p>This is an optional field for setting up data types. You can specify a display sequence number for each data type. When you use the Work With Supplemental Data form, the data types appear in the order you specified.</p>
Type Data	<p>A code that you assign to supplemental data so that you can group data by categories.</p> <p>..... <i>Form-specific information</i> .....</p> <p>This is a required field for setting up any data type. You can use an existing data type, or you can create a new data type by entering one or two characters for the code.</p>

<b>Field</b>	<b>Explanation</b>														
Data Class	<p>A user defined code (00/CL) that identifies a group of data types in the Central Information File.</p> <p>..... <i>Form-specific information</i> .....</p>														
Search Type	<p>This is an optional field for setting up any data type. Data classifications must be set up in UDC Data Classifications (00/CL) before you can use them.</p>														
	<p>Complete this field if you want to categorize your data types by the kind of information they contain. For example, if you have both narrative and code format data types that contain information about products purchased, you might want to assign the same data classification to both of these data types.</p>														
Description	<p>A user defined code (01/ST) that identifies the kind of address book record that you want the system to select when you search for a name or message. Examples include the following:</p>														
	<table> <tbody> <tr><td>E</td><td>Employees</td></tr> <tr><td>X</td><td>Ex-employees</td></tr> <tr><td>V</td><td>Suppliers</td></tr> <tr><td>C</td><td>Customers</td></tr> <tr><td>P</td><td>Prospects</td></tr> <tr><td>M</td><td>Mail distribution lists</td></tr> <tr><td>T</td><td>Tax authority</td></tr> </tbody> </table>	E	Employees	X	Ex-employees	V	Suppliers	C	Customers	P	Prospects	M	Mail distribution lists	T	Tax authority
E	Employees														
X	Ex-employees														
V	Suppliers														
C	Customers														
P	Prospects														
M	Mail distribution lists														
T	Tax authority														
	<p>..... <i>Form-specific information</i> .....</p> <p>This is an optional field for setting up any data type. Search types must be set up in UDC Search Type (01/ST) before you can use them.</p>														
Effective From	<p>The title of a supplemental data column that relates to a date. For example, a possible column heading for the date field linked to a data type for education might be Graduation.</p>														
	<p>..... <i>Form-specific information</i> .....</p> <p>Data you enter in the Effective From (alias GDC5) field overrides the Effective Date (alias EFT) column heading name in the detail area on the General Description Entry form.</p>														
	<p>This is an optional field for setting up supplemental data types in code format.</p>														

<b>Field</b>	<b>Explanation</b>
Amount 1	<p>The title of a supplemental data column that relates to an amount. For example, if the data type relates to bid submittals, the heading could be Bid Amounts. This column contains statistical or measurable information.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>Data you enter in the Amount 1 (alias GDC1) field overrides the User Defined Amount (alias AMTU) column heading name in the detail area on the General Description Entry form.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>
UDC	<p>The title of a supplemental data column that relates to a user defined code. For example, if the supplemental data type relates to the educational degrees of employees (BA, MBA, PHD, and so on), the heading could be Degree. This column contains user defined codes.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>Data you enter in the UDC (alias GDC1) field overrides the UDC (alias KY) column heading name in the detail area on the General Description Entry form. You can set up this field as a generic field or as a field that is associated with user defined codes.</p> <p>If you leave the corresponding Product Code (alias SY) and Record Type (alias RT) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the UDC (alias KY) column.</p> <p>If you complete the corresponding System Code (alias SY1) and Record Type (alias TR1) fields, then on the General Description Entry form, the system validates the data you enter in the data entry field for the UDC (alias KY) column.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>

<b>Field</b>	<b>Explanation</b>
Product Code	<p>A user defined code (98/SY) that identifies a J.D. Edwards system.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>The Product Code (alias SY) and Record Type (alias RT) fields work together to associate a UDC table with the UDC (alias GDC1) field. The system uses the UDC table to verify data that you enter in the UDC (alias KY) field on the General Description Entry form.</p>
	<p>For example, if you enter 08 in the Product Code (alias SY) field and SK in the Record Type (alias RT) field, then on the General Description Entry form, the data you enter in the UDC (alias KY) field must exist in the Human Resources system (08), UDC table Skills (SK).</p>
	<p>If you leave the Product Code (alias SY) and Record Type (alias RT) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the UDC (alias KY) column.</p>
	<p>This is an optional field for setting up supplemental data types in code format.</p>
Record Type	<p>A code that identifies the table that contains user defined codes. The table is also referred to as a UDC type.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>The Record Type (alias RT) and Product Code (alias SY) fields work together to associate a UDC table to the UDC (alias GDC1) field. The system uses the UDC table to verify data that you enter in the UDC (alias KY) field on the General Description Entry form.</p>
	<p>For example, if you enter 08 in the Product Code (alias SY) field and SK in the Record Type (alias RT) field, then on the General Description Entry form, the data you enter in the UDC (alias KY) field must exist in the Human Resources system (08), UDC table Skills (SK).</p>
	<p>If you leave the Record Type (alias RT) and Product Code (alias SY) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the UDC (alias KY) column.</p>
	<p>This is an optional field for setting up supplemental data types in code format.</p>

<b>Field</b>	<b>Explanation</b>
Remark 1	<p>The title of a supplemental data column.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Data you enter in the Remark 1 (alias GDC3) field overrides the Remark (alias RMK) column heading in the detail area on the General Description Entry form. You can set up this field as a generic field or as a field that is edited against a UDC table.</p> <p>If you leave the corresponding System Code (alias SY1) and Record Type (alias RT1) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the Remark (alias RMK) column.</p> <p>If you complete the corresponding System Code (alias SY1) and Record Type (alias RT1) fields, then on the General Description Entry form, the system validates the data you enter in the data entry field for the Remark (alias RMK) column.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>
System Code	<p>A user defined code (98/SY) that identifies a J.D. Edwards system.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The System Code (alias SY1) and Record Type (alias RT1) fields work together to associate a UDC table with the Remark 1 (alias GDC3) field. The system uses the UDC table to verify data that you enter in the Remark (alias RMK) field on the General Description Entry form.</p> <p>For example, if you enter 08 in the System Code (alias SY1) field and SK in the Record Type (alias RT1) field, then on the General Description Entry form, the data you enter in the Remark (alias RMK) field must exist in the Human Resources system (08), UDC table Skills (SK).</p> <p>If you leave the System Code (alias SY1) and Record Type (alias RT1) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the Remark (alias RMK) column.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>

Field	Explanation
Record Type	<p>A code that designates the type of record. Most often, the code is used to obtain records in the User Defined Codes (F0005) table. The code is defined in the User Defined Code Types (F0004) table.</p> <p>..... <i>Form-specific information</i> .....</p>
Remark 1	<p>The Record Type (alias RT1) and System Code (alias SY1) fields work together to associate a UDC table with the Remark 1 (alias GDC3) field. The system uses the UDC table to verify data that you enter in the Remark (alias RMK) field on the General Description Entry form.</p>
Remark 2	<p>For example, if you enter 08 in the System Code (alias SY) field and SK in the Record Type (alias RT) field, then on the General Description Entry form, the data you enter in the Remark (alias RMK) field must exist in the Human Resources system (08), UDC table Skills (SK).</p> <p>If you leave the Record Type (alias RT1) and System Code (alias SY1) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the Remark (alias RMK) column.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>
Remarks Line 2	<p>The title of a supplemental data column.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Data you enter in the Remark 2 (alias GDC4) field overrides the Remarks Line 2 (RMK2) column heading in the detail area on the General Description Entry form. You can set up this field as a generic field or as a field that is edited against a UDC table.</p> <p>If you leave the corresponding System Code (SY2) and Record Type (RT2) fields blank, then on the General Description Entry form, the system accepts any data (within the size constraints) that you enter in the data entry field for the Remarks Line 2 (alias RMK2) column.</p> <p>If you complete the corresponding System Code (SY2) and Record Type (RT2) fields, then on the General Description Entry form, the system validates the data you enter in the data entry field for the Remarks Line 2 (alias RMK2) column.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>

<b>Field</b>	<b>Explanation</b>
System Code	<p>A code used to designate the system number. See UDC 98/SY.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The System Code (alias SY2) and Record Type (alias RT2) fields work together to associate a UDC table to the Remark 2 (alias GDC4) field. The system uses the UDC table to verify data that you enter in the Remarks Line 2 (alias RMK2) field on the General Description Entry form.</p> <p>For example, if you enter 08 in the System Code (alias SY2) field and SK in the Record Type (alias RT2) field, then on the General Description Entry form, the data you enter in the Remarks Line 2 (alias RMK2) field must exist in the Human Resources system (08), UDC table Skills (SK).</p> <p>If you leave the System Code (alias SY2) and Record Type (alias RT2) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the Remarks Line 2 (alias RMK2) column.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>
Record Type	<p>A code that designates the type of the record. Most often, it is used to obtain records in the User Defined Codes (F0005) table. The code is defined in the User Defined Code Types (F0004) table.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The Record Type (alias RT12) and System Code (alias SY2) fields work together to associate a UDC table with the Remark 2 (alias GDC4) field. The system uses the UDC table to verify data that you enter in the Remarks Line 2 (alias RMK2) field on the General Description Entry form.</p> <p>For example, if you enter 08 in the System Code (alias SY2) field and SK in the Record Type (alias RT2) field, then on the General Description Entry form, the data you enter in the Remarks Line 2 (alias RMK2) field must exist in the Human Resources system (08), UDC table Skills (SK).</p> <p>If you leave the Record Type (alias RT2) and System Code (alias SY2) fields blank, then on the General Description Entry form, you can enter any data in the data entry field for the Remarks Line 2 (alias RMK2) column heading blank.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>

<b>Field</b>	<b>Explanation</b>
Amount 2	<p>The title of a supplemental data column that relates to an amount. For example, if the data type relates to stock options, the heading could be Strike Price. This column contains statistical or measurable information.</p> <p>..... <i>Form-specific information</i> .....</p>
Effective Thru	<p>Data you enter in the Amount 2 (alias GDC7) field overrides the User Defined Amount #2 (alias AMTV) column heading name in the detail area on the General Description Entry form.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>
Effective Thru	<p>The title of a supplemental data column that relates to a date. For example, if you set up a record type for professional licenses, a possible column title for the date field might be Expires.</p> <p>..... <i>Form-specific information</i> .....</p>
Effective Thru	<p>Data you enter in the Effective Thru (alias GDC6) field overrides the Ending Date (alias EFTE) column heading name in the detail area on the General Description Entry form.</p> <p>This is an optional field for setting up supplemental data types in code format.</p>

## Defining Supplemental Data Types in Program Format

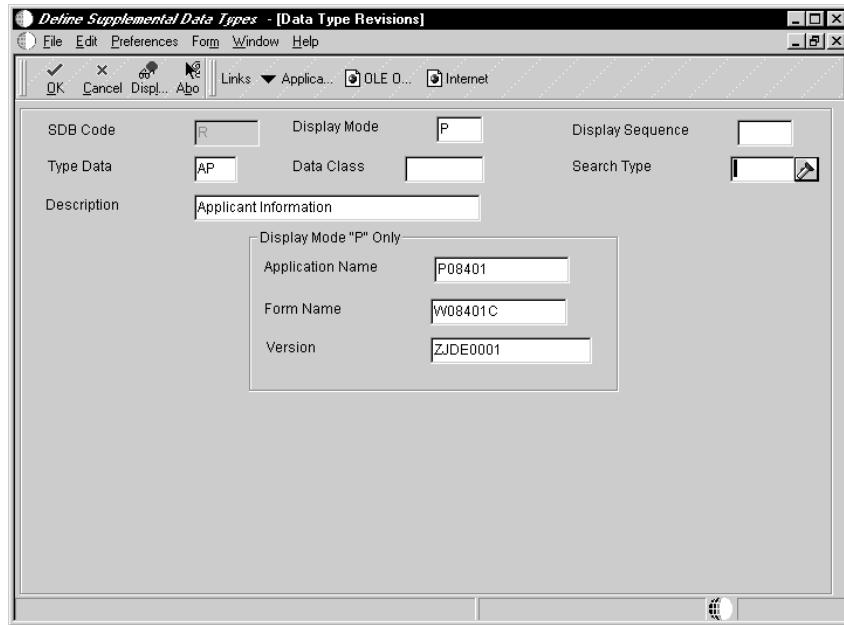
Program format allows you to access a specific program and version number from a supplemental data type. Instead of customizing menus, you can set up supplemental data types to access the forms that you use most often. Setting up supplemental data types in this manner allows you to access these forms from a single menu selection, which saves you time and streamlines your data entry tasks.

### ► To define supplemental data types in program format

From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Database & Data Type Setup.

1. On Work With Supplemental Database Setup, click Find.
2. Choose the supplemental database for which you need to enter data types and choose Work with Data Type from the Row menu.
3. On Work With Data Types, click Add.
4. On Data Type Revisions, type P in the following field:

- Display Mode



5. Complete the following fields:
  - Display Sequence
  - Type Data
  - Data Class
  - Search Type
6. To specify the program that you want this data type to access, complete the following fields:
  - Application Name
  - Form Name
7. Complete the following optional field and click OK:
  - Version

Field	Explanation
Display Mode	<p>A code that specifies the format of a data type. This code determines the display mode for supplemental data. Valid codes are:</p>
	C      Code format, which displays the form for entering code-specific information. These codes might be associated with the User Defined Codes (F0005) table.
	N      Narrative format, which displays the form for entering narrative text.
	P      Program exit, which allows you to exit to the program you specified in the Pgm ID field.
	M      Message format, which displays the form for entering code-specific information. The system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.
	<i>Form-specific information</i>
	This is a required field for setting up any data type.
Display Sequence	<p>A number that reorders a group of records on the form.</p>
	<i>Form-specific information</i>
	This is an optional field for setting up data types. You can specify a display sequence number for each data type. When you use the Work With Supplemental Data form, the data types appear in the order you specified.
Type Data	<p>A code that you assign to supplemental data so that you can group data by categories.</p>
	<i>Form-specific information</i>
	This is a required field for setting up any data type. You can use an existing data type, or you can create a new data type by entering one or two characters for the code.
Data Class	<p>A user defined code (00/CL) that identifies a group of data types in the Central Information File.</p>
	<i>Form-specific information</i>
	This is an optional field for setting up any data type. Data classifications must be set up in UDC Data Classifications (00/CL) before you can use them.
	Complete this field if you want to categorize your data types by the kind of information they contain. For example, if you have both narrative and code format data types that contain information about products purchased, you might want to assign the same data classification to both of these data types.

<b>Field</b>	<b>Explanation</b>														
Search Type	<p>A user defined code (01/ST) that identifies the kind of address book record that you want the system to select when you search for a name or message. Examples include the following:</p> <table style="margin-left: 20px;"> <tr><td>E</td><td>Employees</td></tr> <tr><td>X</td><td>Ex-employees</td></tr> <tr><td>V</td><td>Suppliers</td></tr> <tr><td>C</td><td>Customers</td></tr> <tr><td>P</td><td>Prospects</td></tr> <tr><td>M</td><td>Mail distribution lists</td></tr> <tr><td>T</td><td>Tax authority</td></tr> </table> <p style="text-align: right;">..... <i>Form-specific information</i> .....</p> <p>This is an optional field for setting up any data type. Search types must be set up in UDC Search Type (01/ST) before you can use them.</p>	E	Employees	X	Ex-employees	V	Suppliers	C	Customers	P	Prospects	M	Mail distribution lists	T	Tax authority
E	Employees														
X	Ex-employees														
V	Suppliers														
C	Customers														
P	Prospects														
M	Mail distribution lists														
T	Tax authority														
Application Name	The ID that the system uses to call an application.														
Form Name	<p>The name of an executable program.</p> <p style="text-align: right;">..... <i>Form-specific information</i> .....</p> <p>Enter the system name of a form that is associated with an application. To determine the system name of a form, open the form and choose About OneWorld from the Help menu.</p>														
Version	<p>A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.</p>														

## Setting Up Cross-Reference Tables for Supplemental Data

To save time and reduce typing errors, you can set up your system to automatically transfer a terminated employee's supplemental data to the applicant database. An example of a terminated employee whose supplemental database you might transfer is a seasonal employee that you terminate at the end of the season and intend to rehire next season.

Transferring supplemental data in this manner makes it easy to maintain consistent data throughout the processes of hiring applicants and terminating employees.

When you set up the cross-reference table, observe the following guidelines:

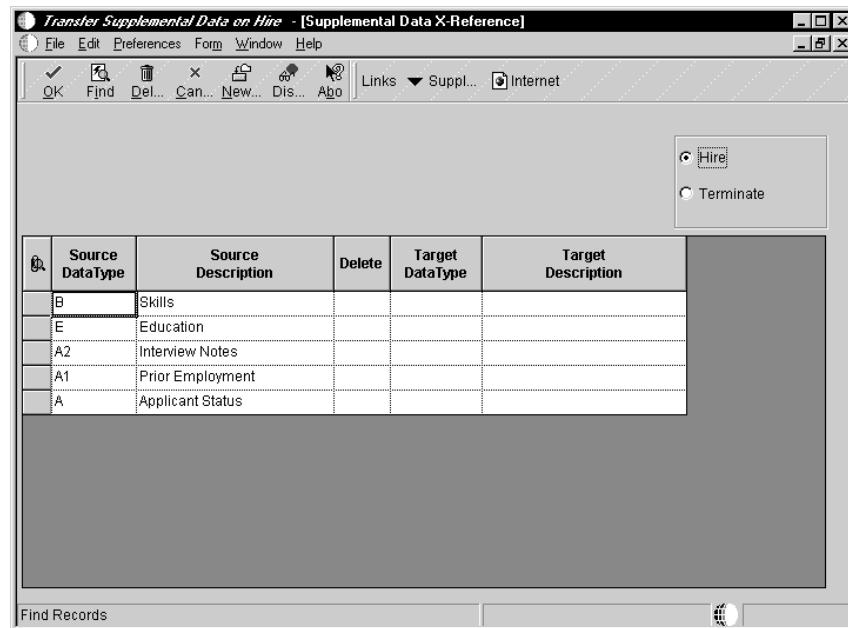
- The format (code or narrative) of each data type that you want to transfer must be the same in both databases
- For code format data types, the source data type and target data type codes must be the same
- The user defined code tables that are associated with code format data types must be the same in both databases

For example, if you have a data type, Prior Employment, in the applicant database that is associated with table 07/G, you can cross-reference it with the data type Prior Employment in the employee database, provided that the data type also uses table 07/G. When you transfer supplemental data for a terminated employee, you can choose to save a copy of the data in the employee database or delete the information from the employee database and store it only in the applicant database.

**Note:** You must have the Recruitment Management module to transfer supplemental data for terminated employees.

### ► To set up cross-reference tables for supplemental data

From the Supplemental Data Setup menu (G05BSD4), choose Transfer Supplemental Data on Hire.



1. On Supplemental Data X-Reference, click either of the following options:

- Hire

- Terminate
2. Complete the following fields and click OK:
    - Type Data
    - Delete (Y)
    - Type Data – Employee

<b>Field</b>	<b>Explanation</b>
Hire	<p>The type of cross-reference table to be used for transferring profile data between the employee and applicant supplemental databases.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>H When you hire an applicant, transfer applicant profile data to the employee supplemental database.</li> <li>T When you terminate an employee, transfer employee profile data to the applicant supplemental database.</li> </ul>
Terminate	<p>The type of cross-reference table to be used for transferring profile data between the employee and applicant supplemental databases.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>H When you hire an applicant, transfer applicant profile data to the employee supplemental database.</li> <li>T When you terminate an employee, transfer employee profile data to the applicant supplemental database.</li> </ul>
Source DataType	A code that you assign to supplemental data so that you can group data by categories.
Delete	<p>A code that defines whether supplemental data should be deleted from the applicant database when it is moved to the employee database. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Yes, move the applicant supplemental data to the employee database and delete the data from the applicant database.</li> <li>N No, do not delete the supplemental data from the applicant database. Instead, make a copy of the supplemental data and move the copy to the employee database.</li> <li>blank The same as N.</li> </ul>

Field	Explanation
Target DataType	A code you define and use to categorize data within a specific database. The code is often an abbreviation for the data it represents. For example, CC could represent company cars, and EC could represent emergency contacts.  You define these codes using the Define Types of Data screen.

## Processing Options for Transfer Supplemental Data on Hire/Termination

### Versions

1. Enter a '1' to transfer supplemental data on hire, enter a '2' to transfer data on terminate.

## Transferring Supplemental Data

After defining types of supplemental data, you can transfer data from one data type within a database to another. If you change the data type code for a type of supplemental data, you can use this program to transfer data from the old data type to the new one. For example, if you have a data type S, for skills, that contains employee information, and you need to change its data type code to SK, you can use this program to move employee information from data type S to data type SK.

Transferring supplemental data saves you time and reduces typing errors. You can transfer data by doing either of the following:

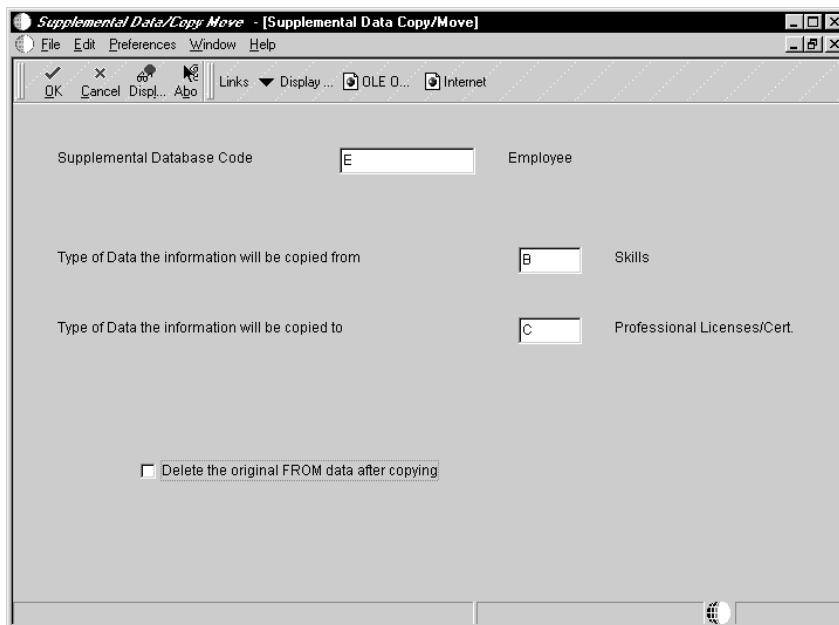
- Copying the information, which retains it in one data type and transfers it to another
- Moving the information, which deletes it from one data type and transfers it to another

### Before You Begin

- Verify that the data type in the database you are copying from and the data type in the database you are copying to are the same.

## ► To transfer supplemental data

From the Supplemental Data Setup menu (G05BSD4), choose Supplemental Data Copy and Move.



1. On Supplemental Data Copy and Move, complete the following fields:
  - Supplemental Database Code
  - Type of Data the information will be copied from
  - Type of Data the information will be copied to
2. To move the information without retaining it in the current data type, click the following option, and then click OK:
  - Delete the original FROM data after copying

Field	Explanation
Supplemental Database Code	A code that you use to set up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills. The supplemental database code is used only in the OneWorld version of the Supplemental Database.
Type of Data the information will be copied from	A code that you assign to supplemental data so that you can group data by categories.

Field	Explanation
Type of Data the information will be copied to	A code that you assign to supplemental data so that you can group data by categories.
Delete the original FROM data after copying	This is used in the Translation Constant File (F8900) to determine whether to translate all menus or just the A's menus.



## PDBA Setup

You set up pay types to categorize various employee earnings to direct labor to different accounts in the general ledger. You set up deductions, benefits, and accruals (DBAs) to automate the process of subtracting monies, calculating benefits, and tracking accruals when you run a payroll cycle. Pay types and DBAs are referred to as PDBAs. PDBA setup includes the following tasks:

- Setting up pay types
- Understanding deductions, benefits, and accruals
- Setting up calculation-table information
- Setting up deductions, benefits, and accruals
- Setting up advanced DBAs
- Setting up deductions for wage attachments
- Reviewing the basis of calculation hierarchy





## Setting Up Pay Types

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You set up pay types to categorize various employee earnings to direct labor to different accounts in the general ledger. You can define up to 999 different pay types, using the range of numbers 001 to 999. For example, most companies need to set up different pay types for holiday, sick, and vacation pay or for personal leave pay.

Setting up pay types also allows you to do the following:

- Define how different pay types are used when you compute employee pay
- Assign automatic pay methods for autopay employees
- Define a pay type to be tax exempt
- Define information to be printed on 1099 and W-2 forms for the associated pay type for U.S. payroll
- Define whether hours and dollar amounts should be passed to the general ledger

You can also attach a media object to a pay type for explanatory notes or other information. If you attach a text media object to the pay type, the first two lines of text that you enter appear on reports that include the pay type description.

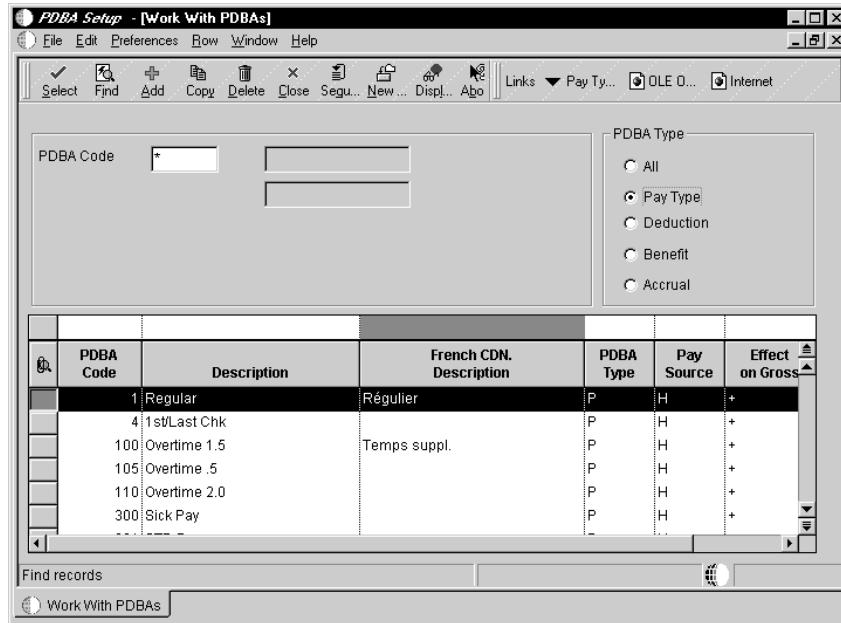
When you set up a basic pay type, you define the minimum amount of information that the system needs to perform the calculation.

### Before You Begin

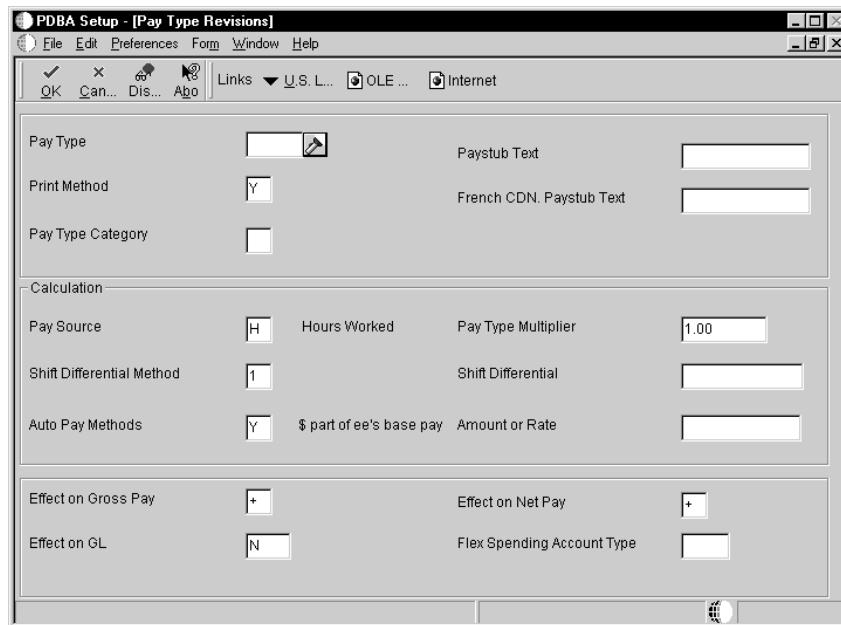
- Set up user defined codes (07/FS).
- Review how to add text to a pay type. See *Media Object Attachments* in the *OneWorld Foundation Guide*.

## ► To set up a pay type

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

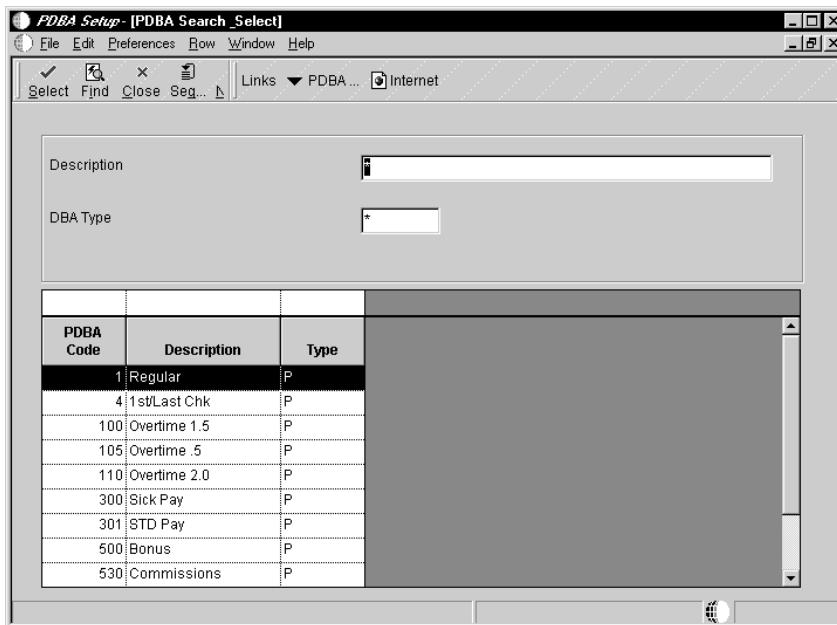


1. On Work With PDBAs, click the Pay Type option in the PDBA Type area and click Add.



2. On Pay Type Revisions, click the Search button in the following field to review a pay type before setting one up:

- Pay Type



3. On PDBA Search and Select, choose a pay type and then choose PDBA Recap from the Row menu.
4. On Pay Type Recap, review the pay type information, and then click Cancel.

The PDBA Search and Select form appears.

5. Click Close.

The system displays the Pay Type Revisions form again.

6. On Pay Type Revisions, complete the following fields:
  - Pay Type
  - Paystub Text
  - Pay Type Category
  - Effect on GL
7. To define how you want to calculate the pay type, complete the following fields:
  - Pay Source
  - Pay Type Multiplier
  - Shift Differential Method
  - Shift Differential
  - Auto Pay Methods

8. To override the hourly rate, complete the following field:
  - Amount or Rate
9. To define how the pay type affects an employee's pay, complete the following fields:
  - Effect on Gross Pay
  - Effect on Net Pay
10. For tax exempt pay types, choose Tax Exemptions from the Form menu, and enter \* in the following field:
  - Tax Type 01
11. To assign a category code to a pay type, choose Category Codes from the Form menu and assign as many category codes as needed.
12. Click OK.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Pay Type	A code that defines the type of pay, deduction, benefit, or accrual.  Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.
Paystub Text	The text that you want the system to print on the employee's paystub.  For the Time Accounting system: The Time Accounting system does not create paychecks. However, this field is required to complete the form. Generally, the information you enter in this field is a description of the PDBA.
Pay Type Category	A user defined code (07/PC) that specifies the pay type categories you want to use: <ul style="list-style-type: none"><li>• For regular pay</li><li>• To generate overtime</li><li>• For reporting purposes on the Certified Payroll Register (U.S. only).</li></ul>

Field	Explanation
	<p>A code that indicates whether the system writes journal entries from the Payroll system to the general ledger, and the method to use. Valid values are:</p> <ul style="list-style-type: none"> <li>H     Write only hours to the general ledger. This code is valid for generating timecard journals. The code should not be used when journals are generated through the pay cycle.</li> <li>M     Do not write monetary amounts or hours to the general ledger. Do not calculate workers' compensation and general liability.</li> <li>N     Write monetary amounts and hours to the general ledger.</li> <li>Y     Write only monetary amounts to the general ledger.</li> <li>W     Do not write monetary amounts or hours to the general ledger, but calculate workers' compensation and general liability. Workers' compensation and general liability amounts will be written to the general ledger</li> </ul>
Pay Source	A user defined code (07/PB) that defines the value upon which the system bases the employee's pay. H, hours worked, is the default value. Other valid values exist for tip and piecework processing, and for Canadian lump-sum amounts, irregular commissions, and bonuses. Use E, estimated pay, for an advance pay interim check. The Interim Check program (Format 2) automatically deletes this type of timecard so that you can enter the actual time when it is known.
Pay Type Multiplier	A factor by which the base hourly rate is multiplied to obtain the actual payment hourly rate. For example, you could use 1.5 to designate time-and-one-half for overtime pay. 0 (zero) is not a valid multiplier. The default value is 1.00.

<b>Field</b>	<b>Explanation</b>
Shift Differential Method	<p>A code that specifies how the system should calculate shift differential.</p> <ul style="list-style-type: none"> <li>1      The pay type multiplier is applied to the shift differential: Gross = (rate + shift differential) x (multiplier) x hours.</li> <li>2      The pay type multiplier is applied only to the hourly rate and does not include the shift differential: Gross = (rate x multiplier) + (shift differential) x hours.</li> </ul>
Blank	<p>The system follows the shift differential method that is associated with the pay type from the Pay Type table (F069116).</p>
	<p>The multiplier is the pay rate multiplier from the Pay Type table (F069116). When the pay rate is derived from the Union Rate table, the multiplier is assumed to be 1 as it is built into the table. In this case, all methods produce the same result.</p>
Shift Differential	<p>An additional rate, expressed in dollars or percent, added to an employee's hourly rate, depending on the shift worked. This rate can be applied in one of two ways, as defined by the Shift Differential Calculation Sequence (data item CMTH).</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>Enter a monetary amount in this field. The system does not calculate percentage amounts for shift differentials that you enter at the pay type level.</p>

Field	Explanation
Auto Pay Methods	<p>A code that determines how the system treats this pay type when computing automatically generated pay (typically for salaried employees). It also identifies supplemental pay. Valid codes are:</p> <ul style="list-style-type: none"> <li data-bbox="780 382 1372 477">Y      The dollars with this pay type are part of the employee's base pay, for example, regular, holiday, sick, and vacation pay.</li> <li data-bbox="780 481 1405 576">N      The dollars with this pay type are in addition to the employee's base pay, for example, overtime pay and time off without pay.</li> <li data-bbox="780 580 1421 673">S      The hours with this pay type are subtracted from the employee's base pay at standard rate and added back at the entered pay rate.</li> <li data-bbox="780 677 1405 857">B      The dollars with this pay type are in addition to the employee's base pay and are treated as supplemental pay for taxation purposes, for example, bonuses, commissions, and payoffs. Canadian bonuses, irregular commissions, and lump sums use auto pay method B.</li> <li data-bbox="780 861 1405 925">C      The hours or dollars entered using this pay type override all autopay instructions.</li> </ul>

## For World:

If multiple jobs are used, a Y in this field might cause the pay type to be paid in addition to the regular pay. For example, if the job code, job step, home business unit, or position have been overridden in time entry, and if multiple active jobs exist for the employee, and if the overridden information does not match an existing active job record, this system processes pay types with the Auto Pay Method set to Y as additional pay. J.D. Edwards recommends that you always use a pay type with N in this field when paying someone for work in addition to their regular pay. This ensures that the system processes the pay type the same in multiple-job or single-job situations.

If your company docks employees' pay when they take leave in excess of what has been earned, you should have pay type 997 set up as the pay type to dock pay. Enter N as the autopay method for this pay type.

If your company attaches contract calendars to employees to accumulate wages, you should have pay type 996 set up as the pay type to accumulate wages. Enter C as the autopay method for this pay type.

<b>Field</b>	<b>Explanation</b>
Amount or Rate	<p>A value that is either a percentage, a monetary amount, or an hourly rate, depending on where it is used:</p> <ul style="list-style-type: none"> <li>1 For a deduction, benefit, or accrual, the meaning of this value depends on the method of calculation. The method determines whether the deduction is a flat monetary amount, a percentage, or a multiplication rate. Table method DBAs, depending on which table method they use, can either use this amount in the calculation or ignore it. If there are exceptions to the table calculation, you can override the table code in the detail area, set up a flat monetary DBA amount, or override the amount with a one-time override for a timecard.</li> <li>2 For a pay type, amounts entered in this field override the hourly rate.</li> </ul>
Tax Type 01	<p>You can specify up to 15 tax types for which the respective payroll tax is not to be computed for a pay, deduction, or benefit code.</p> <p>If you enter * in the first element of this list, no taxes are computed.</p>
Effect on Gross Pay	<p>A code that indicates whether the pay type is added to, subtracted from, or does not affect the employee's gross pay.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>+ Pay type will be added to the employee's gross pay</li> <li>- Pay type will be subtracted from the employee's gross pay</li> <li>blank Pay type will not have an effect on the employee's gross pay</li> </ul> <p>A pay type should not have a negative effect on gross pay. If you set up a pay type to have a negative effect on gross or net pay, gross-to-net errors appear on the Payroll Register. J.D.Edwards recommends that you set up a deduction instead of a pay type that would have a negative effect on gross pay.</p> <p>When you set up a pay type with no effect on gross pay and a positive effect on net pay, do not create a separate check. Creating a separate check will cause a gross-to-net error.</p>

Field	Explanation
Effect on Net Pay	<p>A code that indicates whether the pay type is added to, subtracted from, or does not affect the employee's net pay.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>+ Pay type will be added to the employee's net pay</li> <li>- Pay type will be subtracted from the employee's net pay</li> <li>blank Pay type will not have an effect on the employee's net pay</li> </ul> <p>A pay type should not have a negative effect on net pay. If you set up a pay type to have a negative effect on gross or net pay, gross-to-net errors appear on the Payroll Register. J.D.Edwards recommends that you set up a deduction instead of a pay type that would have a negative effect on gross pay.</p> <p>When you set up a pay type with no effect on gross pay and a positive effect on net pay, do not create a separate check. Creating a separate check will cause a gross-to-net error.</p>
Flex Spending Account Type	<p>Defines which type of spending account is being used. An example of a spending account type setup might be:</p> <ul style="list-style-type: none"> <li>MED Medical expenses spending account (where the annual amount is accrued on Jan 1 or year begin).</li> <li>DCR Dependent care expenses (where accrual of available funds is on a pay period by pay period basis).</li> </ul>



# **Understanding Deductions, Benefits, and Accruals**

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You set up deductions, benefits, and accruals (DBAs) to automate the process of subtracting money from an employee's paycheck, calculating employee benefits, and tracking accruals when you run a payroll cycle.

## **Deductions**

Deductions represent monetary amounts, excluding taxes, withheld from an employee's earnings.

You set up deductions to automate the process of subtracting monies when you run a payroll cycle.

## **Benefits**

Benefits represent amounts that the company funds for additional employee compensation. A benefit can be cash or non-cash, either taxable or nontaxable. Benefit information can be passed to the general ledger to track burden.

You set up benefit DBAs to automate the process of calculating benefits when you run a payroll cycle.

## **Accruals**

Accruals represent a number of paid hours that the company funds as additional employee compensation. Usually, an employee accrues a certain number of hours per pay period.

The system can carry over from year to year accrued remaining balances, such as available vacation and sick time.

The following topics provide conceptual information about DBAs:

- A comparison of benefits and accruals
- Determining how to set up DBAs
- Calculating DBAs

## **A Comparison of Benefits and Accruals**

To determine whether a DBA should be set up as a benefit or an accrual, consider the following:

- Benefits might or might not affect gross or net pay.
- Accruals have no effect on an employee's gross or net pay.

## Determining How to Set Up DBAs

Before you set up deductions, benefits, and accruals for your company, consider the functions that you want the DBA to perform:

- Which method should the system use to calculate the DBA?
- When will the system calculate the DBA?
- What are the effective dates for the DBA?
- Should the system pass the information to the general ledger?
- Do you want to base the calculation for the DBA on another DBA or on a pay type?
- Should the deduction arrear in a negative pay situation?
- Should an accrual balance roll over into the next year?
- Should taxes be calculated for this DBA?
- Do you want to set up limits for the DBA?
- Is the DBA mandatory or voluntary?

Determining how to set up DBAs consists of the following tasks:

- Assigning DBA codes
- Assigning DBAs to employees

### Assigning DBA Codes

When you set up DBAs, you assign each DBA a numeric transaction code. Because the numeric transaction codes 001–999 are reserved for pay types, use the numeric transaction codes 1000–9999 to define up to 9000 DBAs.

J.D. Edwards recommends that you group similar DBAs by function. For example, you might group all long-term disability deductions and assign numbers within a range, leaving some numbers available for later additions, as follows:

- 1220 - Long-term disability insurance coverage at 66 2/3 percent
- 1222 - Long-term disability insurance coverage at 50 percent

DBAs are not specific to one company. You can use DBAs across different companies.

### Assigning DBAs to Employees

To assign DBAs to employees, you can do any of the following:

- You can set up a DBA for all employees.
- You can enroll an employee in benefit plans, and the system automatically assigns the employee DBAs associated with those benefit plans.
- You can assign specific DBAs to a single employee.
- For one time only, you can enter a DBA in time entry for the current payroll.

The system does not limit the number of DBAs that you can assign to each employee.

You can define the amount of a DBA as follows:

- When you set up the DBA
- At the group level
- At the employee level
- During time entry

You can override the amount at any level in time entry for any given payroll. The amount at the employee level overrides the DBA setup.

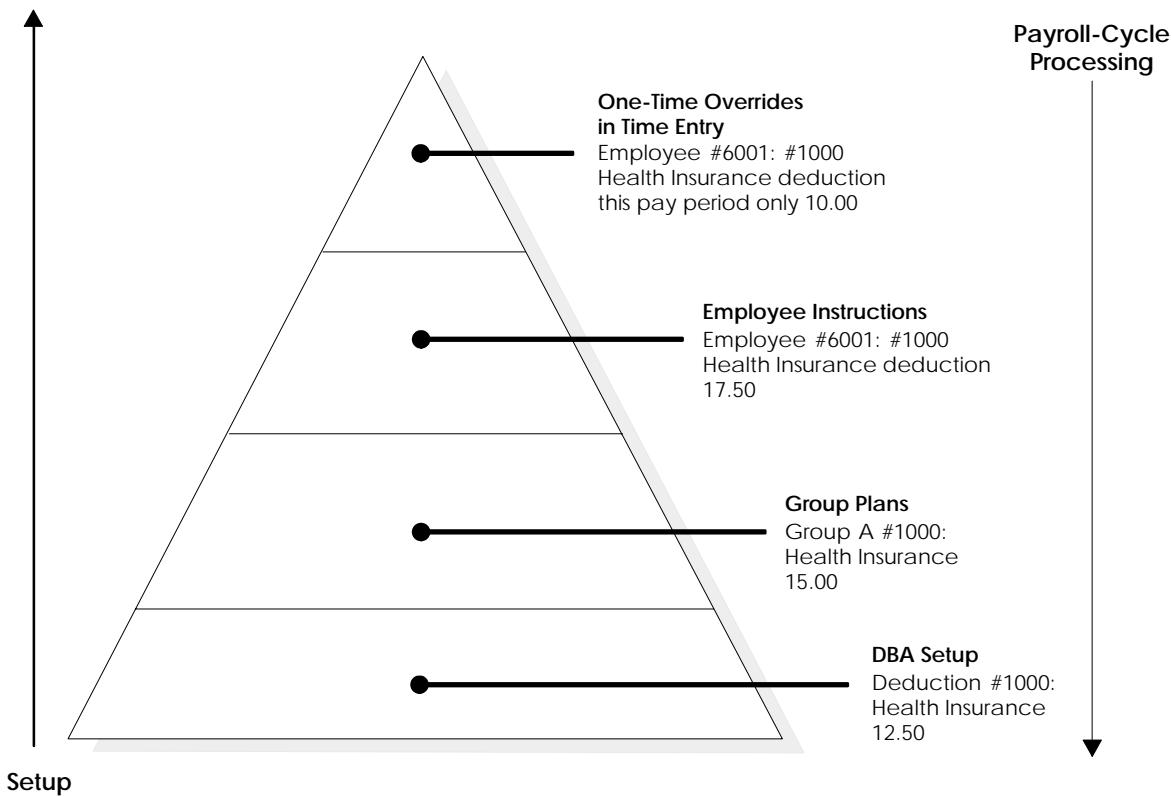
#### Example: DBA Amounts as a One-Time Override

An employee has a health insurance deduction included in the assigned benefit plan. If the employee is hired in the middle of the pay period, you can enter a prorated amount in time entry for the first pay period. The system deducts the regular amount for health insurance in subsequent pay periods.

#### See Also

- *Entering Employee Instructions* and *Overriding DBA Amounts One Time* for information about assigning DBAs

The following graphic illustrates the order that you use to set up DBAs and the order that the system uses to process DBAs:



When processing payroll, the system first calculates DBAs that have been entered as one-time overrides in time entry. For example, if you entered a DBA in an employee's DBA instructions for three pay periods, the system would calculate the DBA in the DBA instructions and not the amount for the same DBA as entered in DBA setup.

## Calculating DBAs

The system can use different methods to calculate DBAs. The methods used to calculate DBAs include the following:

- Flat monetary amounts
- Percentages of gross pay
- Calculation tables with criteria that vary from employee to employee

Unlike the DBAs that the system calculates by flat monetary amounts and percentages, you can override a DBA at the employee level that is based on a calculation table, but this is not recommended. A DBA based on a calculation table has a table-method code attached to the DBA that tells the system how to calculate the DBA. The system will not recognize another method to calculate a DBA when a table-method code is attached to the DBA.

### Example: DBA Calculations

DBA calculations can be based on values, such as gross pay, hours, pieces, salary, month-to-date, or year-to-date earnings. You might set up the following:

- Flat monetary amount for health insurance with a deduction of 12.50 per pay period
- Percentage deduction of 4 percent per pay period to be used for a retirement savings plan
- Calculation table using the following variables to determine an employee's annual vacation accrual:
  - 40 hours if employed 1–2 years
  - 80 hours if employed 3–5 years
  - 120 hours if employed 6–99 years

### See Also

- *Setting Up Deductions, Benefits, and Accruals*
- *Setting Up Group Plan DBAs*



## Setting Up Calculation-Table Information

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You can set up table-method DBAs to calculate DBAs based on various table calculations. A table-method DBA is a calculation table that has a table-method code attached to it to tell the system how to calculate the DBA.

You set up calculation tables to define the parameters that the system uses to calculate DBAs. After setting up your calculation tables, you attach tables to a DBA by defining the appropriate table method when you set up a DBA.

Setting up DBA calculation-table information includes the following tasks:

- Setting up calculation tables
- Attaching calculation tables to DBAs

## Setting Up Calculation Tables

You set up calculation tables to define the parameters for calculating DBAs that are based on variable values. You define valid ranges and amounts that are a function of certain table method codes.

Calculation tables contain user defined information to help define your standard DBA methods of calculation. Calculation tables provide calculations based on values that vary from employee to employee.

When you define a calculation table, you must first determine what the calculation is based on, such as any of the following factors:

- Age
- Annual salary
- Months of service
- Hours worked in a pay period

After you have defined the calculation table, you must determine the appropriate method of calculation. The method of calculation indicates what the ranges in the table represent, such as age ranges or salary ranges. The methods of calculation are attached to the following numeric codes defined in user defined code list 06/DM:

0 - Withholding periods

- 1 - Salary range
- 2 - Date range
- 3 - Age range (calculated by date of birth)
- 4 - Hours worked
- 5 - Pieces produced
- 6 - Variable months
- 7 - Workers Comp. Insurance
- 8 - Gross pay
- 9 - Age (calculated as of the date that you enter in the Employee Age field on the Personal form)

For example, to base a DBA on employee age, you can use code 3 or code 9 for the method of calculation.

### Before You Begin

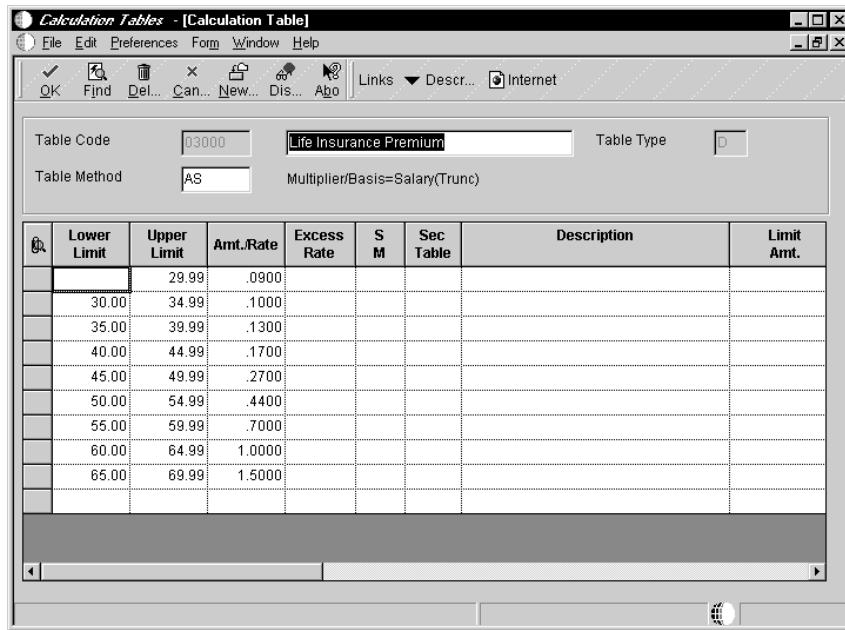
- Choose a table method from user defined code list 06/DM that is appropriate as a method of calculation. Read the descriptions to find a method that describes how you want the system to perform the calculation.

### ► **To set up calculation tables**

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose Calculation Tables.

1. On Work With Calculation Tables, click Add.



2. On Calculation Table, complete the following fields:
  - Table Code
  - Table Type
  - Table Method
3. To define the parameters of the calculation table, complete the following fields:
  - Lower Limit
  - Upper Limit
  - Amt./Rate
4. Complete the following optional fields and click OK:
  - Excess Rate
  - S M
  - Sec Table
  - Limit Amt.
  - Amt./Rate 2
  - Additional Rate
5. Repeat steps 2–4 to define all the parameters that are needed for the calculation table.

**Note:** You do not need to include a line in the calculation table for zero amounts. For example, if vacation time is not earned in the first year of employment, you do not need to include that year on the first line of the calculation table. The first line could start with 2.00 as the lower limit.

<b>Field</b>	<b>Explanation</b>
Table Type	<p>A code that defines the purpose of the table. Valid values are:</p> <ul style="list-style-type: none"> <li>D      The system uses the table to calculate DBAs.</li> <li>R      The system uses the table to determine limits for rolling over sick and vacation accruals.</li> </ul>
Table Code	<p>A numeric code that identifies this table in the Table table (F069026).</p>
Table Method	<p>A code that specifies the method the system uses to calculate the DBA.</p>
Amt./Rate	<p>The amount or rate the system uses to calculate a DBA. When you enter 1, 2, 3, 4, 5, or 6 as the method of calculation, you must enter a value in this field to use in the calculation in conjunction with the basis table.</p> <p>For example, if you create a calculation table for vacation rollovers and enter 80 in this field, any amount that exceeds 80 does not roll over to the following year. An employee might have 92 hours of available vacation at the end of the year, but the employee loses 12 hours of vacation and begins the new year with 80 hours of vacation.</p>
Upper Limit	<p>The upper or maximum amount to compare.</p>
Lower Limit	<p>The lower or minimum amount to compare.</p>
Additional Rate	<p>The rate to be used in the calculation of the transaction, via the table setup. The amount specified here overrides any other rate which might be retrieved through the standard hierarchy for Accrual, Benefit, or Deduction calculation.</p>
Amt./Rate 2	<p>The amount or rate to be used in the calculation of an Accrual, Benefit or Deduction. This field is used when the 'Method' of calculation specifies either 1, 2, 3, 4, 5, or 6 and therefore a specific basis table is being retrieved for the ultimate calculation of the transaction.</p>

Field	Explanation
Limit Amt.	<p>The maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.</p>
	<p>NOTE: For the Payroll system, this field can represent either an initial annual limitation or a final limitation in a year:</p>
	<ul style="list-style-type: none"> <li>• If the Annual (Level 1) field is not blank, this amount represents the first level of the yearly limitation. The value in Annual (Level 2) represents the final limitation.</li> <li>• If an annual limit is specified on a DBA calculation table, the annual limit from the table will take precedence over annual limits defined at the master DBA or employee levels.</li> </ul>
Sec Table	<p>A code which specifies the method under which the DBA is to be calculated.</p> <p>This calculation table serves as the secondary calculation table for the system. You must enter a code in this field if you enter a code in the secondary method field.</p>
S M	<p>A user defined code (07/DS) that indicates which method the system uses to calculate DBAs.</p>
Excess Rate	<p>A rate that the system applies to the amounts that exceed the table defined amount.</p>

## See Also

- *Setting Up Rollover Information for DBAs*
- *Appendix A: DBA Table Methods Quick Reference*

## Attaching Calculation Tables to DBAs

After you set up your calculation tables, attach a calculation table to the DBA by entering the table code on DBA Setup.

Although you can attach the same calculation table to more than one DBA, if you are attaching only one calculation table to one DBA, J.D. Edwards recommends that you make the table code the same as the DBA code for convenience.

► **To attach calculation tables to DBAs**

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, to designate whether this is a deduction, benefit, or accrual, click the corresponding DBA type and click Add.
2. On Basic DBA Information, complete the following fields:
  - Method of Calculation
  - Table Code
3. Complete the remaining steps for setting up a DBA.

See *Setting Up Essential DBA Information*.

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<b>Field</b>	<b>Explanation</b>												
Method of Calculation	<p>A user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The method values are pre set by J.D. Edwards. If you use methods 0 – 6, 8, 9, or G, you must also enter a value in the Table Code field.</p> <p>For wage attachments use one of the following methods:</p> <table style="margin-left: 20px;"> <tr><td>C</td><td>Wage assignment (child support and maintenance)</td></tr> <tr><td>G</td><td>Garnishment</td></tr> <tr><td>K</td><td>Loan</td></tr> <tr><td>L</td><td>Tax levy</td></tr> <tr><td>A</td><td>Fees</td></tr> <tr><td>%</td><td>Interest</td></tr> </table>	C	Wage assignment (child support and maintenance)	G	Garnishment	K	Loan	L	Tax levy	A	Fees	%	Interest
C	Wage assignment (child support and maintenance)												
G	Garnishment												
K	Loan												
L	Tax levy												
A	Fees												
%	Interest												
Table Code	The table used if the calculation requires table values.												

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## **Setting Up Deductions, Benefits, and Accruals**

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You typically set up deductions, benefits, and accruals (DBAs) only if you are using the J.D. Edwards Payroll system. You might set up DBAs without the Payroll system if you have a customized interface with a payroll service bureau.

You set up DBAs to automate the process of subtracting monies, calculating benefits, and tracking accruals when you run a payroll cycle. You must set up DBAs before you can assign them to employees.

If you are using the HR-Benefits module, you must also set up DBAs before you can enroll employees in benefit plans. You must also set up one or more DBAs for each benefit plan. When you enroll employees in benefit plans, the system automatically applies the appropriate DBAs to the DBA instructions for the employee, based on the DBA code.

Setting up deductions, benefits, and accruals includes the following tasks:

- Setting up essential DBA information
- Setting up group plan DBAs
- Setting up tax status for a deduction
- Setting up tax status for a benefit
- Setting up rollover information for DBAs
- Setting up limits for tax-deferred compensation deductions
- Setting up category codes for DBAs
- Setting up a DBA based on another DBA

**Note:** You can set up many different types of DBAs. The tasks listed above do not encompass every possible scenario, but are examples of typical DBAs that you might set up for your company.

## Setting Up Essential DBA Information

When setting up essential DBA information, you define the minimum amount of information that the system needs to perform the calculation. Typically, you will want to calculate essential DBA information in one of three ways:

### **Monetary amount**

You set up a monetary amount to subtract a specific amount of money from the pay for the designated pay periods.

For example, an employee enrolls in the health care plan provided by the company, which requires a deduction of 5.00 USD each pay period. You might also set up a deduction for union dues.

### **Percentage rate**

You set up a percentage rate DBA to calculate a percentage of gross pay.

For example, the DBA might designate that 1 percent of gross pay should be deducted for United Way or another charitable fund.

### **Calculation tables**

You set up calculation tables for DBAs that are calculated by a formula. The calculation table defines the parameters that the system uses to calculate the DBAs.

When setting up essential DBA information, you can do one of the following:

- Define the actual amount or rate to calculate
- Omit the actual amount or rate to calculate

If you omit the actual monetary amount or the percentage rate information during setup, you can enter it when you assign the DBA at the employee or timecard level.

After setting up a DBA for which you have entered an amount or rate, you periodically might need to update that amount or rate. For example, when you set up a DBA for a medical deduction, you can enter the premium amount. A year later, when the medical plan carrier raises its premiums, you must update the premium amount for the DBA.

## Determining the Basis of Calculation for a DBA

The system must have a value on which to base the calculation for each DBA. This is called the basis of calculation.

You set up a basis of calculation for a DBA to define the base value that the system uses to calculate the DBA during payroll processing. A DBA can be based on pay types, on another DBA, or on a combination of both pay types and DBAs (PDBAs). To define the base value, you must list one or more PDBA for each DBA that you create.

To determine which PDBA codes to assign to the DBAs that you set up, consider the following:

- If you base a DBA on another DBA, both the From PDBA Type field and the Thru PDBA Type field must contain the same code (the code for the basis DBA).
- If you base a DBA on all pay types, enter code 1 in the From PDBA Type and code 999 in the Thru PDBA Type field.
- If you base the DBA on a selected group of pay types, include only those pay types in the From PDBA Type and Thru PDBA Type fields. For example, if you base a DBA on all pay types except 801, enter 1 in the From PDBA Type field and 800 in the Thru PDBA Type field on the first line. On the second line, enter 802 in the From PDBA Type field and 999 in the Thru PDBA Type field.

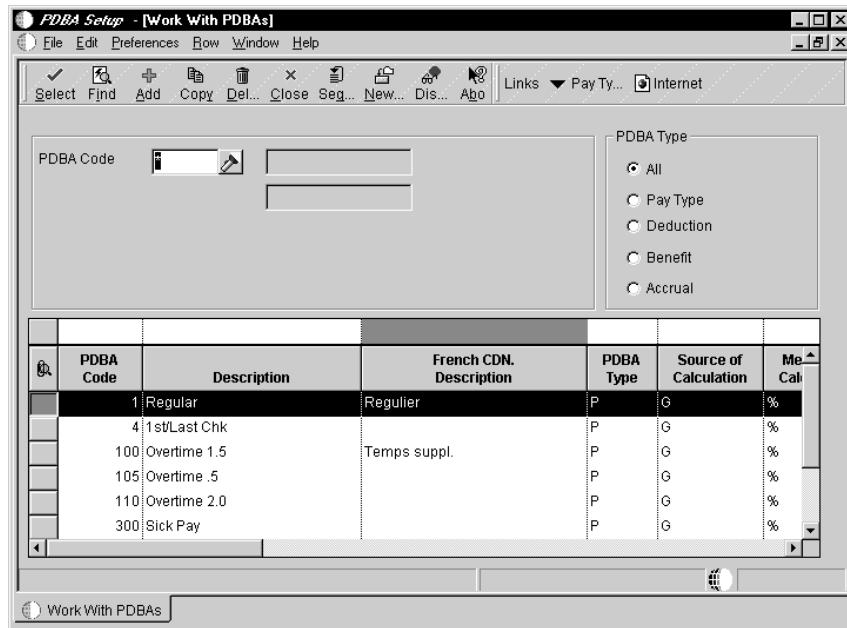
Setting up essential DBA information includes the following tasks:

- Setting up basic DBA information
- Setting up general accounting and arrearage information
- Setting up the basis of calculation
- Adding text to a DBA

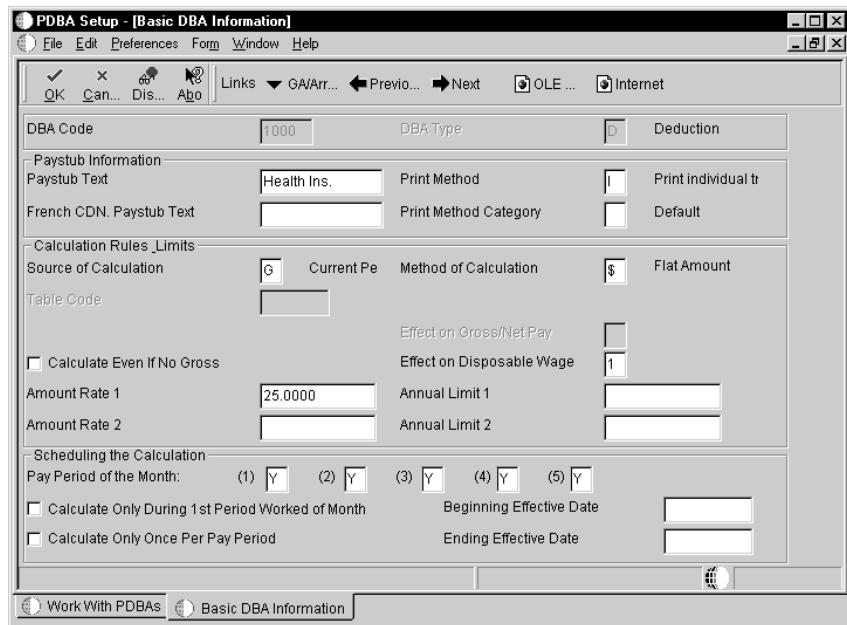
### ► **To set up basic DBA information**

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

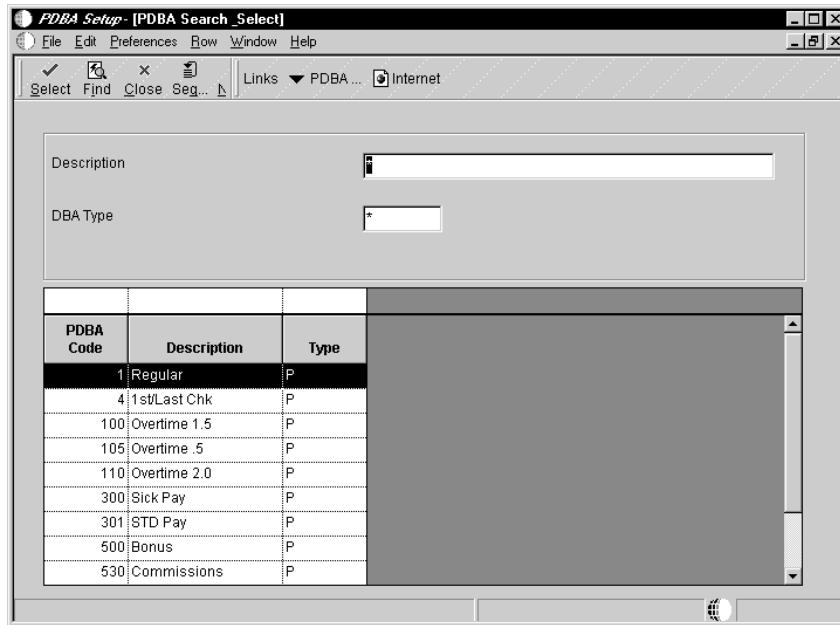


1. On Work With PDBAs, click an option in the PDBA Type area to designate whether you are adding a deduction, benefit, or accrual and click Add.



2. On Basic DBA Information, click the visual assist in the following field to review a deduction, benefit, or accrual before setting one up:

- PDBA Code



3. On PDBA Search and Select, choose a DBA and then choose PDBA Recap from the Row menu.
  4. On DBA Recap, review the DBA information, and then click Cancel.
- The PDBA Search and Select form appears.
5. Click Close.
- The system displays the Basic DBA Information form again.
6. To define paystub text and whether DBA information prints on paystubs, complete the following fields:
    - Paystub Text
    - French CDN. Paystub Text
    - Print Method
    - Print Method Category
  7. To define calculation rules and limits, complete the following fields:
    - Source of Calculation
    - Method of Calculation
    - Calculate Even If No Gross
  8. To designate the effect of a benefit on the employee's income, complete the following field:
    - Effect on Gross/Net Pay

9. To designate the effect of a deduction on the employee's disposable wages, complete the following field:
  - Effect on Disposable Wage
10. To apply the same amount or rate to all employees who are assigned the DBA, complete the following field:
  - Amount Rate 1
11. To assign a maximum amount to withhold or accrue in a year, complete the following field:
  - Annual Limit 1
12. To apply a secondary rate and limit after the first annual limit has been reached, complete the following fields:
  - Amount Rate 2
  - Annual Limit 2
13. To schedule the DBA calculation, complete one or more of the following fields and click OK:
  - Pay Period of the Month: 1–5
  - Calculate Only During 1st Period Worked of Month
  - Calculate Only Once Per Pay Period
  - Beginning Effective Date
  - Ending Effective Date

After you complete these steps, complete the steps to set up general accounting and arrearage information.

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

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Field	Explanation
DBA Type	A code used to distinguish between the following types of payroll entries: <p>P      Time Cards (Earnings) D      Deductions withheld B      Benefit (both cash and non cash) A      Accrual of sick, vacation, compensation, and so forth</p> <p>Note: These codes may only be changed by J.D. Edwards</p> <p>If you enter an * in this field the system displays all four types of PDBAs.</p>

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<b>Field</b>	<b>Explanation</b>
DBA Code	A code that defines the type of pay, deduction, benefit, or accrual.  Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.
Paystub Text	The text that you want the system to print on the employee's paystub.  For the Time Accounting system: The Time Accounting system does not create paychecks. However, this field is required to complete the form. Generally, the information you enter in this field is a description of the PDBA.
French CDN. Paystub Text	The text that you want the system to print on the employee's paystub.  For the Time Accounting system: The Time Accounting system does not create paychecks. However, this field is required to complete the form. Generally, the information you enter in this field is a description of the PDBA.
Print Method	A code that identifies whether the PDBA is to be printed on the paystub or whether it is to be printed on a payment that is separate from other PDBAs.  Valid values for pay types and payroll taxes include: Y Print on paystub (default) S Print separate payment (one item per payment) C Print separate payment (C types combined) N Do not print on paystub  Valid values for DBAs include: Y Print as total deductions (default) S Print separate payment (one item per payment) C Print separate payment (include detail) N Do not print on paystub I Print individual DBA codes T Print by DBA print group  The separate payment feature is not available for any payroll taxes being withheld from the employee's payment.
Print Method Category	A user defined code (07/PC) that specifies the pay type categories you want to use: <ul style="list-style-type: none"> <li>• For regular pay</li> <li>• To generate overtime</li> <li>• For reporting purposes on the Certified Payroll Register (U.S. only).</li> </ul> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> A user defined code (06/PC) that categorizes PDBAs, and prints the category on the pay stub. You can have more than one PDBA for each category. For example, V for overtime, might include time and a half and doubletime.

Field	Explanation												
Source of Calculation	<p>A user defined code (07/DB) that specifies the basis of a deduction, benefit, or accrual. When the system calculates the gross amount for disposable net wages, it does not use the basis of calculation. The gross amount includes all earnings that have a positive effect on the gross and net payment.</p>												
	<p>For wage attachments use one of the following codes:</p> <table> <tr> <td>1-8</td> <td>Garnishment, tax levy, wage assignment (child support and maintenance)</td> </tr> <tr> <td>R</td> <td>Loan, interest</td> </tr> <tr> <td>0</td> <td>Fees</td> </tr> </table>	1-8	Garnishment, tax levy, wage assignment (child support and maintenance)	R	Loan, interest	0	Fees						
1-8	Garnishment, tax levy, wage assignment (child support and maintenance)												
R	Loan, interest												
0	Fees												
Method of Calculation	<p>A user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p>												
	<p>The method values are pre set by J.D. Edwards. If you use methods 0 – 6, 8, 9, or G, you must also enter a value in the Table Code field.</p>												
	<p>For wage attachments use one of the following methods:</p> <table> <tr> <td>C</td> <td>Wage assignment (child support and maintenance)</td> </tr> <tr> <td>G</td> <td>Garnishment</td> </tr> <tr> <td>K</td> <td>Loan</td> </tr> <tr> <td>L</td> <td>Tax levy</td> </tr> <tr> <td>A</td> <td>Fees</td> </tr> <tr> <td>%</td> <td>Interest</td> </tr> </table>	C	Wage assignment (child support and maintenance)	G	Garnishment	K	Loan	L	Tax levy	A	Fees	%	Interest
C	Wage assignment (child support and maintenance)												
G	Garnishment												
K	Loan												
L	Tax levy												
A	Fees												
%	Interest												
Calculate During Pre-Payroll	<p>A code specifying whether a benefit or accrual is calculated during pre-payroll processing. Valid codes are:</p> <table> <tr> <td>Y</td> <td>Yes, calculate during pre-payroll processing.</td> </tr> <tr> <td>N</td> <td>No, calculate during the journal entry step of the payroll cycle.</td> </tr> </table>	Y	Yes, calculate during pre-payroll processing.	N	No, calculate during the journal entry step of the payroll cycle.								
Y	Yes, calculate during pre-payroll processing.												
N	No, calculate during the journal entry step of the payroll cycle.												
	<p>In general, all benefits and accruals are calculated during the processing of journal entries because they do not affect the gross-to-net calculation. However, certain benefits, such as group life insurance and the corresponding excess life insurance benefit, must be calculated in pre-payroll because they affect the gross-to-net calculation.</p>												
	<p>If you want the benefit or accrual to print on the employee's paystub, use Y and complete the Method of Printing field.</p>												

<b>Field</b>	<b>Explanation</b>
Effect on Gross/Net Pay	<p>This field is used to indicate the effect a benefit has on gross and net income. Valid codes are:</p> <ul style="list-style-type: none"> <li>1 Non-cash benefit that is non-taxable. The benefit will not have an effect on gross or net income (journal entry only).</li> <li>2 Cash benefit that is taxable. The benefit will be added to both gross and net income.</li> <li>3 Non-cash benefit that is taxable. The benefit will be added to gross income and has no effect on net income. (No effect on net income other than the tax withheld.)</li> <li>4 Cash benefit that is non-taxable. There is no effect on gross income and the benefit will be added to net income.</li> </ul>
Calculate Even If No Gross	<p>This code is used to determine whether a DBA will be calculated when there is no gross pay. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y This deduction is calculated when there is no gross pay.</li> <li>N This deduction is not calculated when there is no gross pay.</li> </ul> <p>NOTE: Even if the employee has no gross pay, payroll processing always calculates the DBA if:</p> <ul style="list-style-type: none"> <li>• Source of Calculation = G</li> <li>• Method of Calculation = A</li> <li>• Calculate if No Gross = Y</li> </ul> <p>The system puts the amount in arrears, if specified, and either creates an overpayment for a deduction or calculates it if it is a benefit or accrual.</p>
Effect on Disposable Wage	<p>This code designates whether a DBA is subtracted from gross to determine an employee's disposable wages. Valid codes are:</p> <ul style="list-style-type: none"> <li>1 Voluntary. These deductions are subtracted from gross to determine disposable wages for deductions with a Source of Calculation of 1, 5, and 7.</li> <li>2 Mandatory. These deductions are subtracted from gross to determine disposable wages for deductions with Source of Calculation of 1, 2, 4, 5, 6, and 7.</li> </ul>

<b>Field</b>	<b>Explanation</b>
Amount Rate 1	<p>A value that is either a percentage, a monetary amount, or an hourly rate, depending on where it is used:</p> <p>1 For a deduction, benefit, or accrual, the meaning of this value depends on the method of calculation. The method determines whether the deduction is a flat monetary amount, a percentage, or a multiplication rate. Table method DBAs, depending on which table method they use, can either use this amount in the calculation or ignore it. If there are exceptions to the table calculation, you can override the table code in the detail area, set up a flat monetary DBA amount, or override the amount with a one-time override for a timecard.</p> <p>2 For a pay type, amounts entered in this field override the hourly rate.</p>
Annual Limit 1	<p>The maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.</p> <p>NOTE: For the Payroll system, this field can represent either an initial annual limitation or a final limitation in a year:</p> <ul style="list-style-type: none"> <li>• If the Annual (Level 1) field is not blank, this amount represents the first level of the yearly limitation. The value in Annual (Level 2) represents the final limitation.</li> <li>• If an annual limit is specified on a DBA calculation table, the annual limit from the table will take precedence over annual limits defined at the master DBA or employee levels.</li> </ul>
Amount Rate 2	<p>The second amount or rate associated with a deduction, benefit, or accrual. Because many DBA types require multiple tiers, two levels of Amount (Rate) exist. The system uses the first level, Amount (Rate) 1, until the annual limit is reached. Then, the second level, Amount (Rate) 2, begins the next time the employee is paid. Amount (Rate) 2 continues until the second annual limit is reached.</p> <p>This field works in conjunction with the annual limit fields.</p> <p>The rate you enter in this field supersedes any other table rate for an employee, except for one-time overrides during time entry.</p>

<b>Field</b>	<b>Explanation</b>
Annual Limit 2	<p>The maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.</p> <p>NOTE: This field represents the second level annual limitation. It is used when there is an initial limitation and a corresponding rate, which is followed up by a new rate and a final limitation. This field can not be used independently. There must always be a value in the Annual (Level 1) field.</p>
Pay Period of the Month:	<p>A code designating the pay period in which the system calculates the DBA or auto deposit. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y      Take the DBA or auto deposit during the current period.</li> <li>N      Do not take the DBA or auto deposit during the current period.</li> <li>*      Take the DBA or auto deposit only during the first pay period of each month that the employee works based on the ending date of this month's pay period.</li> <li>blank   Continue to look for a code at the lower level. The system searches for DBA or auto deposit rules first at the employee level, then at the group level, and finally at the DBA master level. If the field is blank at all levels, the system does not calculate the DBA or auto deposit in that period.</li> <li>M      Use this value only in the field for a fifth period to calculate the benefit during the special, or manual, timecard post. M applies only to benefits based on gross hours or dollars. An M implies a Yes for a weekly withholding frequency. You should not use this value for any DBA with B in the Method of Calculation field.</li> </ul>
Calculate Only Once Per Pay Period	A code that indicates whether the deduction, benefit, or accrual should be calculated only once in a pay period if the employee receives more than one check.
Beginning Effective Date	The date on which the record, transaction, or table becomes active or the date from which you want information to appear.
Ending Effective Date	The date on which the record, transaction, or table becomes inactive or the date through which you want information to appear.



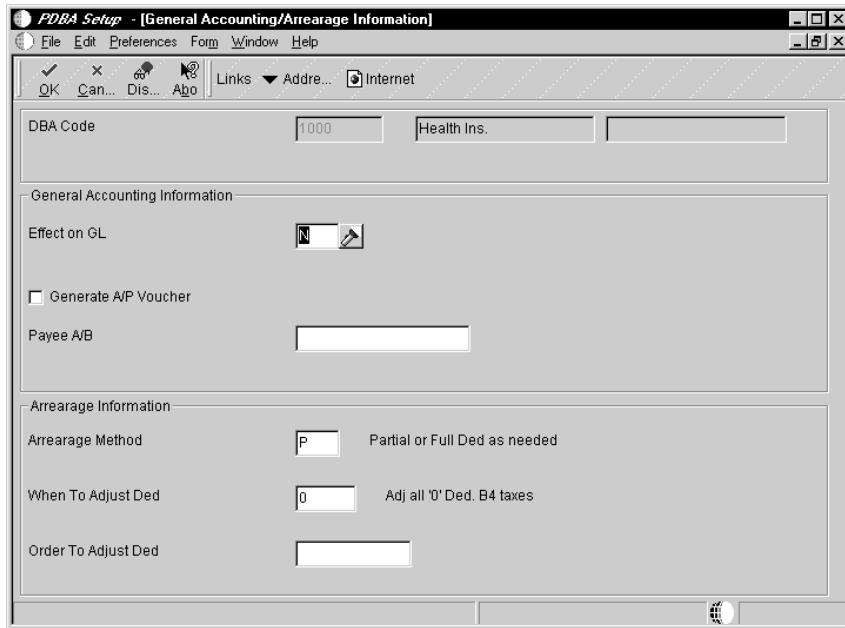
### To set up general accounting and arrearage information

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

After you complete the steps to set up basic DBA information, you must set up general accounting and arrearage information.

1. On Basic DBA Information, choose GA/Arrearage Info from the Form menu.



2. On General Accounting/Arrearage Information, complete the following field:
  - Effect on GL
3. To enter arrearage information for deductions, complete the following fields:
  - Arrearage Method
  - When To Adjust Ded
  - Order To Adjust Ded
4. If you are integrating the Payroll system with the Accounts Payable system and you need to activate vouchering for this DBA, complete the following field:
  - Generate A/P Voucher
5. To specify a payee for the voucher, complete the following field:
  - Payee A/B

When you specify a payee, you should also select Generate A/P Voucher. If Generate A/P Voucher is not selected, the system might create an invalid journal entry.

6. Click OK.

After you complete the steps to set up general accounting and arrearage information, you must set up the basis of calculation.

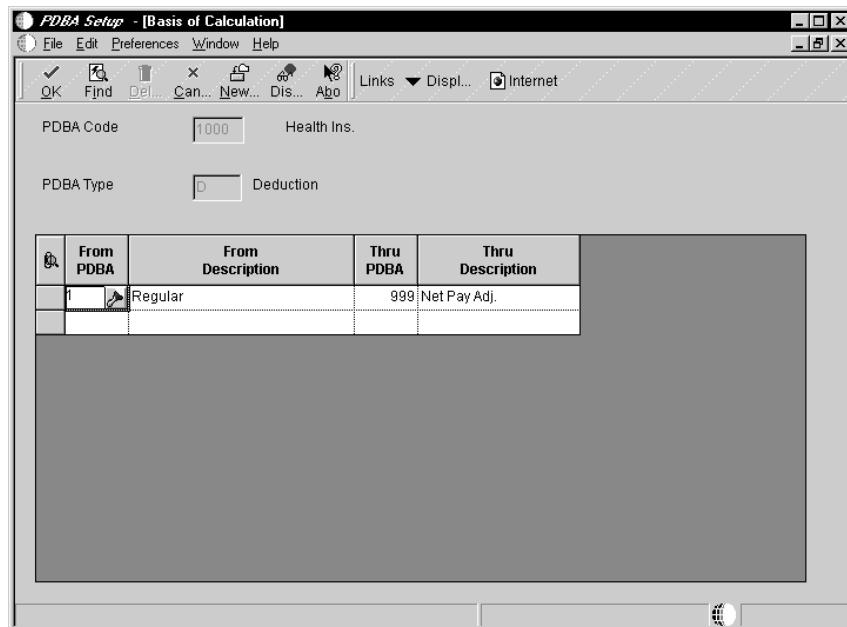
<b>Field</b>	<b>Explanation</b>
Effect on GL	<p>A code that you use to indicate whether you want the system to write journal entries from the Payroll system to the general ledger, and the method you want to use.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>N      Write only dollars to the general ledger</li> <li>M      Do not write dollars or hours to the general ledger. Use this value to track accruals in employee payroll history and the dollars to be omitted from the general ledger.</li> </ul>
Generate A/P Voucher	<p>A code used to determine whether the system should generate a voucher for the DBA, tax, or wage attachment during the final update phase of the payroll processing cycle. Valid codes are:</p> <ul style="list-style-type: none"> <li>N      No, do not generate a voucher</li> <li>Y      Yes, generate a voucher</li> </ul>
Payee	<p>The address book number for the supplier who receives the final payment.</p> <p>In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.</p> <p>For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p> <p>For fund allocations, this is the address book number of the investment program.</p>
Arrearage Method	<p>A code indicating how to adjust deductions when the employee is in a negative pay situation. Valid codes are:</p> <ul style="list-style-type: none"> <li>P      Do a partial or full deduction as needed. This is the default.</li> <li>F      Do a full reduction or none at all.</li> <li>N      Do not reduce.</li> <li>Q      Same as code P. Place the amount in arrears, but do not apply the limits when collecting the arrearage.</li> <li>R      Same as code P. Place the amount in arrears and apply the limits when collecting the arrearage.</li> <li>G      Same as code F. Place the amount in arrears, but do not apply the limits when collecting the arrearage.</li> <li>H      Same as code F. Place the amount in arrears and apply the limits when collecting the arrearage.</li> </ul>

Field	Explanation
When To Adjust Ded	A code that indicates when to adjust (back out) deductions. Valid values are: 0     Adjust deductions marked with 0 before payroll taxes 1     Adjust deductions marked with 0, then those marked with 1 before payroll taxes 2     Adjust payroll taxes before the deductions marked with 2
Order To Adjust Ded	If an employee's gross pay does not cover deductions, a code in this field tells the system in what order it should satisfy deductions. Valid codes are 0001 through 9999. The system starts with the highest code. For example, 9999 is deducted before 0001.

### ► To set up the basis of calculation

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

You set up a basis of calculation for a DBA to define the base value that the system uses to calculate the DBA during payroll processing. A DBA can be based on pay types, on another DBA, or on a combination of both pay types and DBAs (PDBAs). To define the base value, you must list one or more PDBAs for each DBA that you create.



1. On Basis of Calculation, to include all pay types (1–999) for calculating the DBA, exit the Basis of Calculation form without making any entries.

The system enters 1 in the From PDBA field and 999 in the Thru PDBA field.

2. To limit the PDBAs, complete the following fields with the range of pay types that you want included in the calculation:
  - From PDBA
  - Thru PDBA
3. Click OK.

If the Basis of Calculation form contains only one row of values, you cannot delete that row. Every DBA must have a basis of calculation.

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Field	Explanation
From PDBA	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.
Thru PDBA	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the ending number in the range that is the basis of the calculation.

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### ► **To add text to a DBA**

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, choose the DBA.
2. From the Row menu, choose Attachments.
3. On Media Objects, choose New, and then Text from the File menu.
4. Enter the text and choose Save & Exit from the File menu.

### See Also

- *Media Object Attachments* in the *OneWorld Foundation Guide*

## Setting Up Group Plan DBAs

You set up group plan DBAs to designate that deductions, benefits, or accruals apply to groups of employees. You identify each group plan by a user-defined DBA code, such as a union code. You can further define group plans with additional qualifying criteria, such as any of the following:

<b>Business unit</b>	The plan applies only for work performed at a particular business unit or job location.
<b>Job type</b>	The plan applies only to employees working in a certain job type.
<b>Job step</b>	The plan applies only to employees in a certain job step within a job type.
<b>Date range</b>	The plan applies if the pay period dates fall within the date range that you define. For example, you could use this criterion to establish plans with built-in rate increases that you base on effective dates.

### Before You Begin

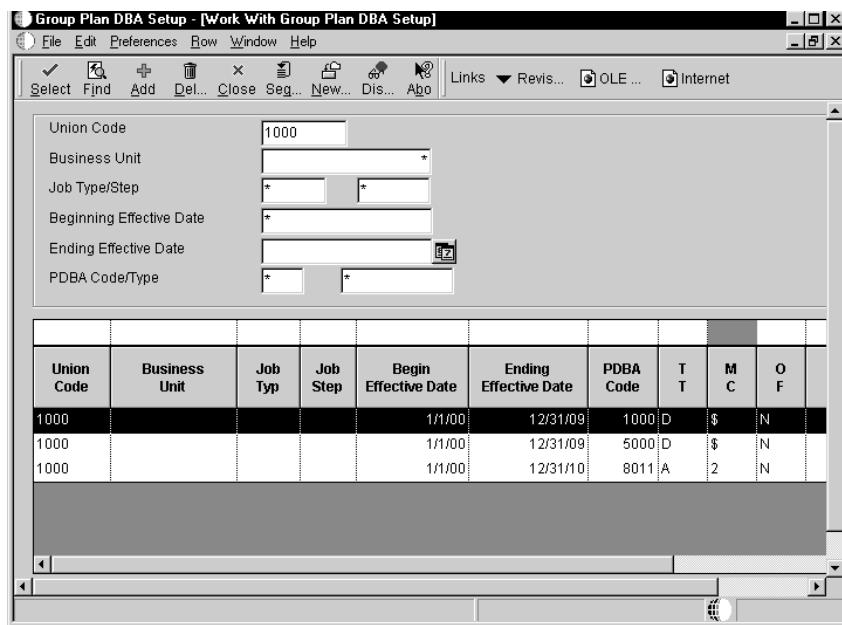
- Set your processing option to specify whether you are setting up single or multiple group plans. Depending on the value that you enter, the system displays either the Revision Multiple Group Plan DBA Setup form or the Revise Single Group Plan DBA Setup form.

### ► To set up group plan DBAs

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From the PDBA Setup menu (G05BD4), choose Group Plan DBA Setup.

1. On Work With Group Plan DBA Setup, click Add.



2. On either Revision Multiple Group Plan DBA Setup or Revise Single Group Plan DBA Setup, complete the following fields:
  - Union Code
  - Beginning Effective Date
  - Ending Effective Date
  - PDBA Code/Type
3. Complete the following optional fields:
  - Job Typ
  - Job Step
  - T T
  - Pay Str Date
  - Pay Stop Date
  - Business Unit
  - M C
  - Explanation Alpha Name
4. If you are integrating the Payroll system with the Accounts Payable system and you need to activate vouchering for this group plan, complete the following field:
  - A/P Voucher (Y,N)
5. To specify a payee for the voucher, complete the following field:
  - Provider/Trustee

- 
6. Click OK.

Field	Explanation
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Beginning Effective Date	<p>The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.</p> <p>You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).</p> <p>..... <i>Form-specific information</i> .....</p> <p>Enter the date an instruction starts, for example, the date the system should start a deduction.</p> <p>The start date must be less than or equal to the timecard date. To start a DBA at the beginning of a pay cycle, make the start date equal to the first day of the pay cycle. For example, if the pay cycle runs from 10/01 to 10/15, start the DBA on 10/01.</p> <p>If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.</p> <p>For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.</p> <p>For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.</p>

Field	Explanation
Ending Effective Date	<p>The date that an employee should no longer be included in a payroll cycle, or the date that an employee stops participating in the company's benefit plans. You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT.</p>
	<p>This date may also be the date that a deduction, benefit, or accrual instruction stops.</p> <p style="text-align: center;">..... <i>Form-specific information</i> .....</p>
	<p>The stop date must be less than the timecard date. To stop a DBA before the next pay cycle, make the stop date one day prior to the first day of the next pay cycle. For example, if the pay cycle runs from 10/01 through 10/15, set the DBA stop date as 9/30.</p>
	<p>If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.</p>
	<p>For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.</p>
	<p>For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.</p>
PDBA Code/Type	<p>A code that indicates whether the deduction, benefit, or accrual should be calculated only once in a pay period if the employee receives more than one check.</p>
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p>
	<p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p>
	<p>Security for this field can prevent you from locating business units for which you have no authority.</p>
	<p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>

<b>Field</b>	<b>Explanation</b>
Job Type/Step	You associate pay and benefit information with a job type when you define jobs on Job Entry and Evaluation (P08001). Certain pay and benefit information that you associate with a job type defaults in the Employee Entry forms when you are adding a new employee to the database.
T T	<p>A code used to distinguish between the following types of payroll entries:</p> <ul style="list-style-type: none"> <li>P Time Cards (Earnings)</li> <li>D Deductions withheld</li> <li>B Benefit (both cash and non cash)</li> <li>A Accrual of sick, vacation, compensation, and so forth</li> </ul> <p>Note: These codes may only be changed by J.D. Edwards If you enter an * in this field the system displays all four types of PDBAs.</p>
Pay Str Date	<p>The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.</p> <p>You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).</p> <p>..... <i>Form-specific information</i> .....</p> <p>Enter the date an instruction starts, for example, the date the system should start a deduction.</p> <p>The start date must be less than or equal to the timecard date. To start a DBA at the beginning of a pay cycle, make the start date equal to the first day of the pay cycle. For example, if the pay cycle runs from 10/01 to 10/15, start the DBA on 10/01.</p> <p>If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.</p> <p>For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.</p> <p>For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.</p>

Field	Explanation
Pay Stop Date	<p>The date that an employee should no longer be included in a payroll cycle, or the date that an employee stops participating in the company's benefit plans. You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT.</p>
	<p>This date may also be the date that a deduction, benefit, or accrual instruction stops.</p>
	<p>..... <i>Form-specific information</i> .....</p>
	<p>The stop date must be less than the timecard date. To stop a DBA before the next pay cycle, make the stop date one day prior to the first day of the next pay cycle. For example, if the pay cycle runs from 10/01 through 10/15, set the DBA stop date as 9/30.</p>
	<p>If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.</p>
	<p>For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.</p>
	<p>For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.</p>
M C	<p>A user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.</p>

## Processing Options for Group Plan DBA Setup (P059101)

### Default Tab

Use this processing option to specify whether you want a Single Revisions form or a Multiple Revisions form. The default value (1) is the Multiple Revisions form.

#### 1. Choose Revisions Form

Use this processing option to specify whether the system should display the Single Revisions form or the Multiple Revisions form. Valid values are:

Blank Single Revisions form  
1 Multiple Revisions form

## Setting Up Tax Status for a Deduction

You set up tax information for a deduction so that the system properly calculates any taxes that must be withheld from an employee's pay as a result of the deduction. For example, you might need to specify that a deduction is exempt from federal withholding tax, but not from state withholding tax.

In some cases, you might need to indicate that a deduction is exempt from one or more types of taxes. For example, a deduction might be exempt from federal withholding tax, but not from state withholding tax.

**Caution:** Do not change taxable status for any DBA in the middle of the year. Previously calculated taxable amounts and taxes do not automatically change if the taxable status changes. You must enter an end date to the current DBA and create a new DBA with the new taxable status. If necessary, add the new DBA to your employee DBA instructions, using an appropriate start date.

### See Also

- The *U.S. Payroll Year-End Processing Guide* for the current year to review important considerations for DBAs during year-end processing

#### ► To set up tax status for a deduction

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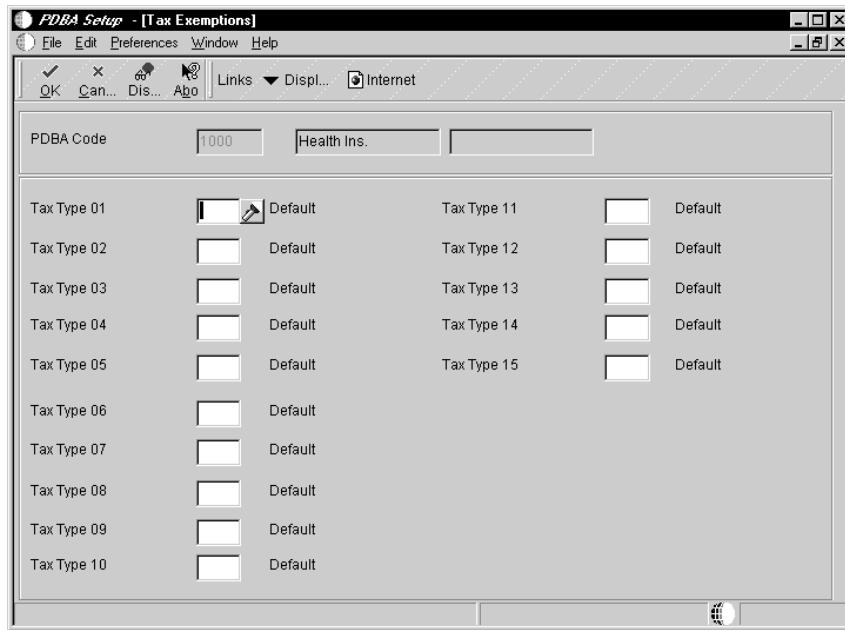
From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

3. To designate the deduction as exempt from one or more taxes, choose Tax Exemptions from the Form menu.

The Tax Exemptions form appears, on which you can enter up to 15 different tax types.



4. On Tax Exemptions, complete one or more of the following fields and click OK:
- Tax Type 01  
through
  - Tax Type 15

<b>Field</b>	<b>Explanation</b>
Tax Type 01	You can specify up to 15 tax types for which the respective payroll tax is not to be computed for a pay, deduction, or benefit code.  If you enter * in the first element of this list, no taxes are computed.

## Setting Up Tax Status for a Benefit

You set up tax information for a benefit so that the system properly calculates any taxes that must be withheld from an employee's pay as a result of the benefit. In some cases, you might need to identify a benefit, such as a company-paid life insurance policy, as a taxable cash benefit.

When you set up a benefit, you must indicate its effect on employees' gross and net pay. You must identify the benefit as one of the following:

<b>Nontaxable cash benefit</b>	You set up a nontaxable cash benefit when the employer is providing a benefit to the employee that does not affect the employee's gross income. The cash benefit is added to the employee's net income as a net pay adjustment. An example of a nontaxable cash benefit is a moving allowance below the taxable minimum.
<b>Nontaxable non-cash benefit</b>	You set up nontaxable non-cash benefits when the employer is providing a benefit to the employee that is not taxed and is not transferrable to cash, such as company-paid health insurance. The employee is not taxed for this benefit.
<b>Taxable cash benefit</b>	You set up a taxable cash benefit when the employer is providing a benefit to the employee that is taxed and is in the form of cash. An example of a taxable cash benefit is a reimbursement for moving expenses.
<b>Taxable non-cash benefit</b>	You set up a taxable non-cash benefit when the employer is providing a benefit to the employee that is taxed and is not transferrable to cash. The benefit is added to an employee's gross pay, but it has no impact on the employee's net pay other than the tax withheld. An example of a taxable non-cash benefit is the use of a company car.

**Caution:** Do not change taxable status for any DBA in the middle of the year. Previously calculated taxable amounts and taxes do not automatically change as the taxable status changes. You must enter an end date to the current DBA and create a new DBA with the new taxable status. Add the new DBA to your group plan and employee level DBAs with an appropriate start date.

### ► To set up tax status for a benefit

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, click Benefit and then click Add.
2. On Basic DBA Information, complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

3. To specify the tax status for the benefit, complete the following fields and click OK.
  - Effect on Gross/Net Pay
  - Calculate Even If No Gross

Field	Explanation
Effect on Gross/Net Pay	This field is used to indicate the effect a benefit has on gross and net income. Valid codes are: <ul style="list-style-type: none"><li>1 Non-cash benefit that is non-taxable. The benefit will not have an effect on gross or net income (journal entry only).</li><li>2 Cash benefit that is taxable. The benefit will be added to both gross and net income.</li><li>3 Non-cash benefit that is taxable. The benefit will be added to gross income and has no effect on net income. (No effect on net income other than the tax withheld.)</li><li>4 Cash benefit that is non-taxable. There is no effect on gross income and the benefit will be added to net income.</li></ul>
Calculate Even If No Gross	This code is used to determine whether a DBA will be calculated when there is no gross pay. Valid codes are: <ul style="list-style-type: none"><li>Y This deduction is calculated when there is no gross pay.</li><li>N This deduction is not calculated when there is no gross pay.</li></ul> <p>NOTE: Even if the employee has no gross pay, payroll processing always calculates the DBA if:</p> <ul style="list-style-type: none"><li>• Source of Calculation = G</li><li>• Method of Calculation = A</li><li>• Calculate if No Gross = Y</li></ul> <p>The system puts the amount in arrears, if specified, and either creates an overpayment for a deduction or calculates it if it is a benefit or accrual.</p>

## Setting Up Rollover Information for DBAs

Employees can earn or hold balances for some DBAs that the system must carry over, or roll over, from one year to the next. When you set up the DBA, you

must enter rollover information so that the system can calculate the balance to roll over.

The system rolls over DBAs that have any of the following:

- Remaining balances
- Remaining periods
- An inception-to-date limit
- An annual carryover limit
- Deduction amounts due
- Arrearages

For most types of DBAs, such as a retirement plan benefit and a medical plan deduction, the system carries forward year-end balances when you run the standard year-end rollover programs.

A common practice is to roll over vacation and sick time balances from one year to the next. You can set up vacation and sick DBAs in either of the following ways:

- When an employee accrues time that becomes available at a later date, you set up two DBAs. The first DBA accrues the time. The second DBA tracks the amount of that accrued time that is available to the employee.
- When an employee may take time as it is earned, you set up a single DBA to track accrued, or available, time.

Either of these scenarios might also involve a limit to the number of hours that an employee can carry forward into the following year.

Entering rollover information for DBAs includes the following tasks:

- Creating rollover calculation tables for DBAs
- Setting up rollover information for DBAs

### **Example: Limits on Vacation or Sick-Leave Rollover**

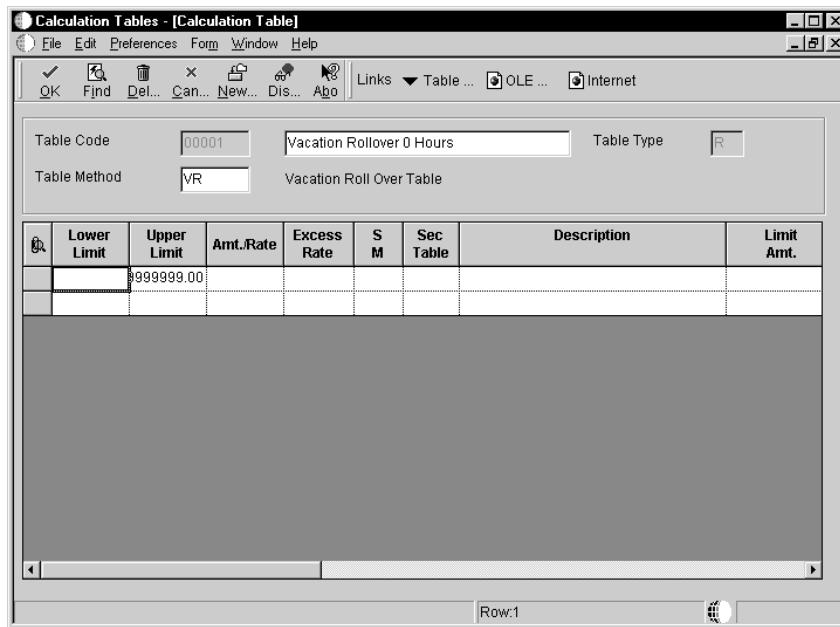
Your vacation or sick-leave policy might state that employees cannot carry forward more than 80 hours from one year to the next.

To administer this policy, you set up a rollover calculation table that allows only 80 hours to roll over into the following year. When using the two-DBA setup to track sick or vacation time, the rollover calculation table is associated with the DBA that tracks available time. The available amount might include a beginning balance from a prior year.

The system compares the balance to the limit on the table. Any amount over the limit is not rolled over into the new year.

Alternatively, your organization's vacation or sick-leave policy might state that employees cannot carry forward hours from one year to the next. To administer this policy, you define zero as the limit in the rollover calculation table.

**Note:** When you enter zero in either of the limit fields or in the Amount/Rate field on the calculation table, the field appears blank. However, the system does use the zero amounts to process rollover calculations.



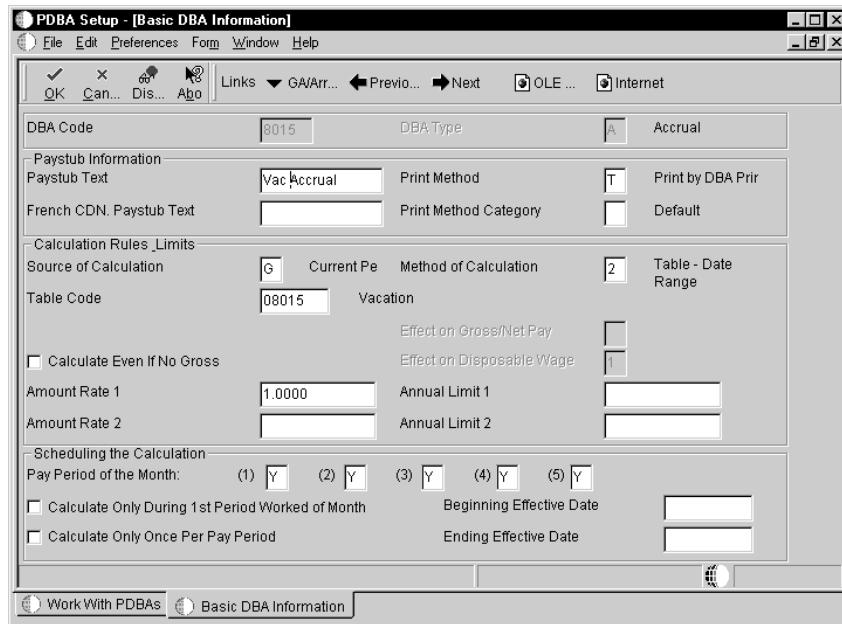
### Example: Vacation Rollover for Time Not Immediately Available

Your vacation policy might state the following:

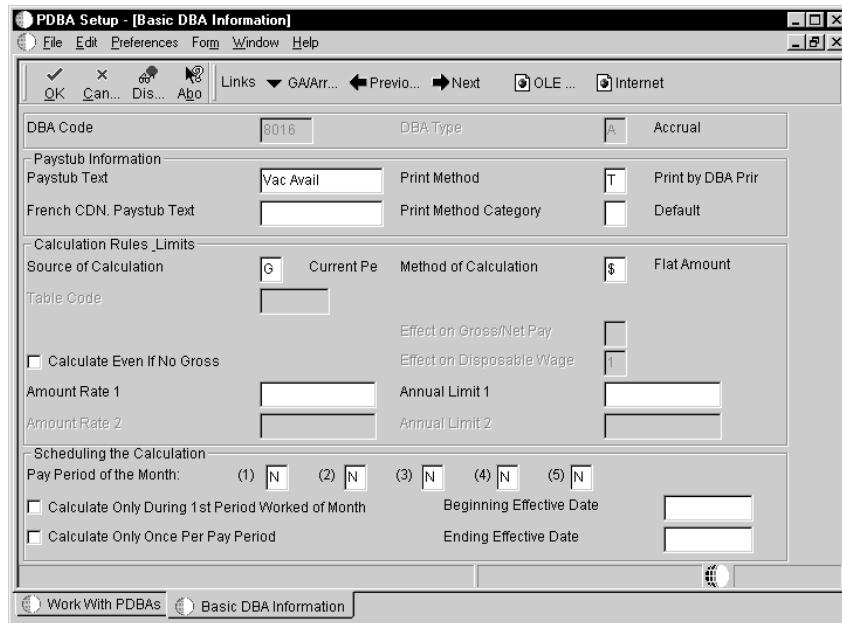
- Employees accrue vacation time at the rate of four to ten hours per month based on years of employment.
- Employees may take vacation time in the calendar year following the year in which it was earned.

To administer this vacation policy, you would set up the following:

- A pay type (such as 815, Vacation Pay) that tracks the vacation time that an employee takes.
- An accrual (such as 8015, Vacation) that tracks the vacation time that an employee earns. The accrued time rolls over to a second DBA that tracks the available vacation time. Accrued time is not available until it rolls over.



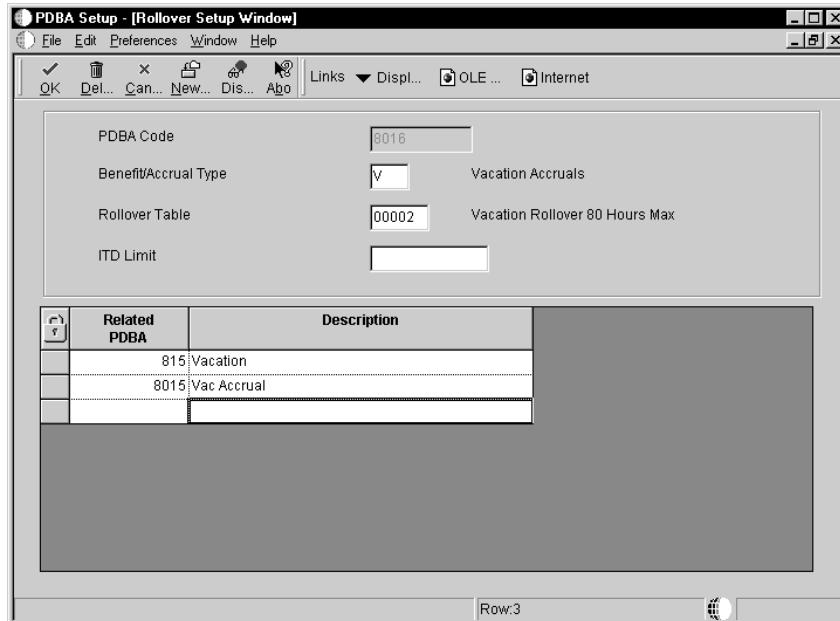
- An accrual (such as 8016, Vacation Available) that tracks the vacation time that is available to the employee.



When you set up accrual 8016, Vacation Available, you would enter the following rollover information:

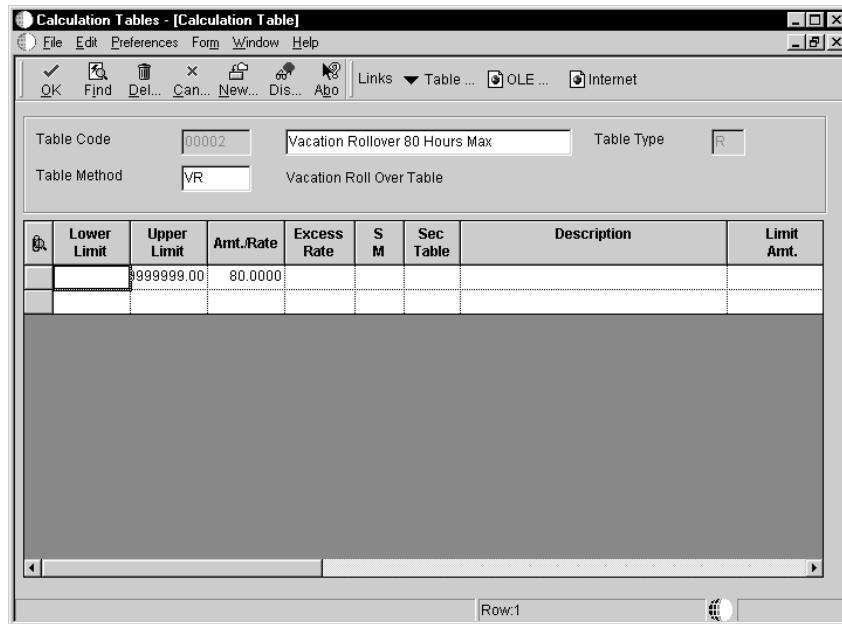
- In the Bnft/Accrl Type field, enter V (Vacation Pay).
- In the Rollover Table field, enter the table code of the rollover table that you just created so that no more than the specified amount rolls over.

- In the Related PDBA field, enter the number of the pay type used for vacation pay.
- In the next Related PDBA field, enter the DBA number of the accrual that represents accrued but not yet available hours.



The upper and lower limits in the rollover calculation table represent an employee's months of service. To include all employees in this table, use 0.00 as the lower limit and 999999.99 as the upper limit.

The table also specifies any limit to the amount of vacation time that the employee can carry over into the next year. This example allows 80 hours to be carried over to the next year.



When you run the rollover program, the system calculates the balance to roll over by adding the accumulated and available balances, subtracting the vacation time that has been taken, and limiting the carryover amount so that it does not exceed the amount entered in the rollover calculation table.

You would not enter any information on the Rollover Setup Window for accrual 8015.

**Note:** You can create as many pay types and accruals as you need. For example, you can have many accrual DBAs that roll to a single available DBA. You can also have many pay types that are related to a single available DBA.

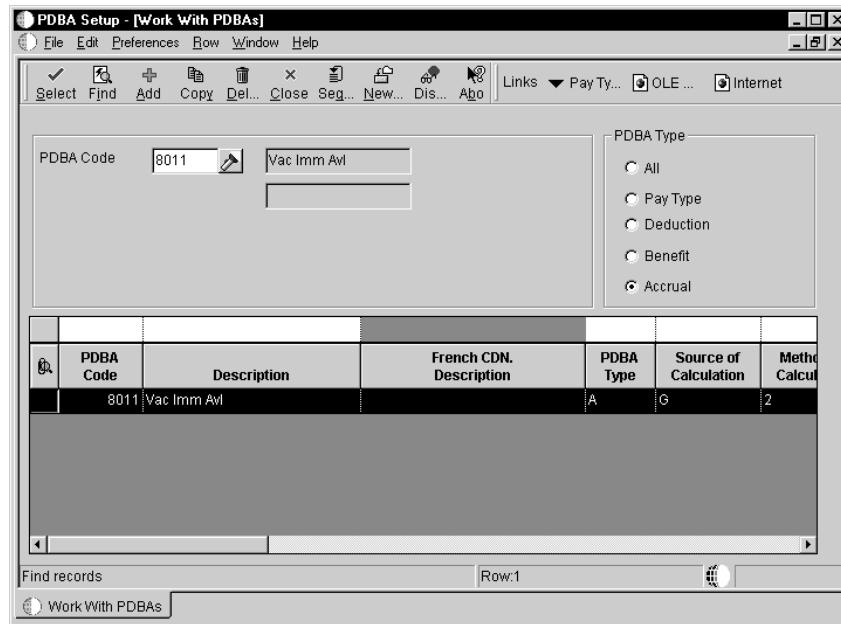
### Example: Vacation Rollover for Time Immediately Available

Your vacation policy might state the following:

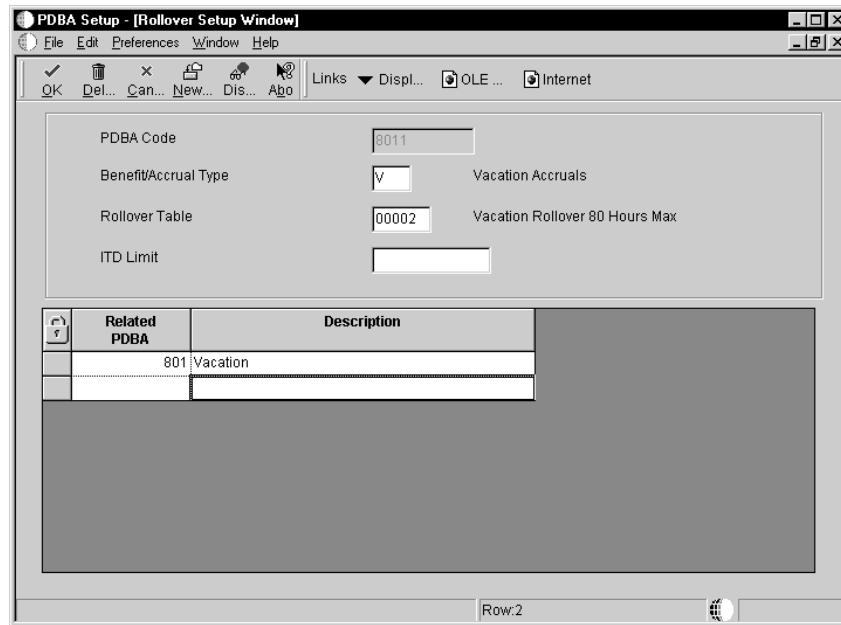
- Employees may take vacation time as it is earned.
- Employees accrue vacation time at the rate of four to ten hours per month based on years of employment.
- Employees cannot roll over more than 80 hours to the next year.

To administer this vacation policy, you would set up the following:

- A pay type (such as 811, Vacation Pay) that tracks the vacation time that an employee takes
- An accrual (such as 8011, Vacation) that tracks the vacation time that an employee earns

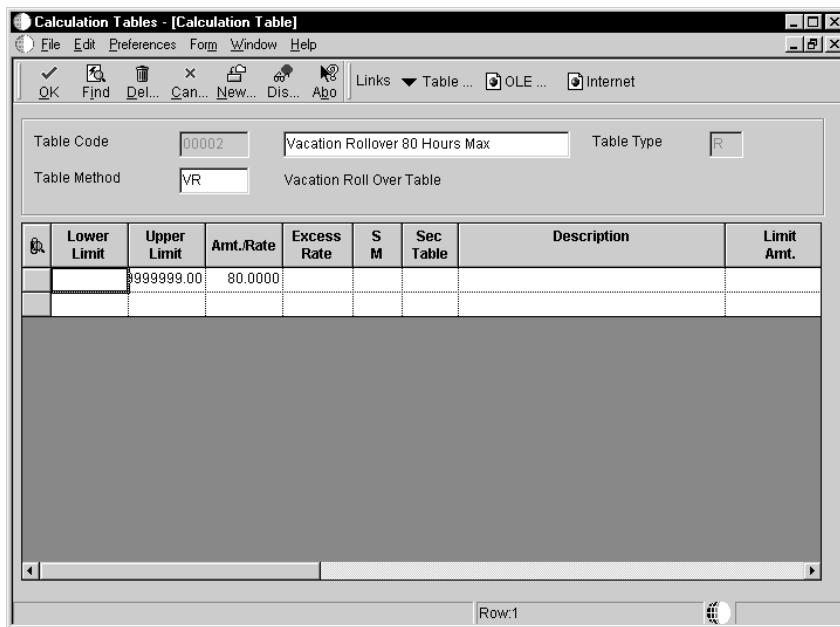


When you set up accrual 8011, you would set up the following rollover information:



- In the Benefit/Accrual Type field, enter V (Vacation Pay).
- In the Rollover Table field, enter the table code of the rollover table that you just created so that no more than the specified amount rolls over.
- In the Related PDBA field, enter the number of the pay type used for vacation pay (811).

- In the next Related PDBA field, enter pay type 811 as the pay type, which the system uses to calculate the balance for accrual 8011.



- Set up a rollover calculation table to associate with DBA 8011 that specifies a limit to the amount of vacation time that an employee can carry over from one year to the next.

When you run the rollover program, the system calculates the balance to roll over by subtracting the vacation time taken from the vacation time earned, and limiting the carryover amount to the limit specified in the rollover calculation table.

## Before You Begin

- Set up the pay types that you will use to calculate balances for DBAs that require rollover information.

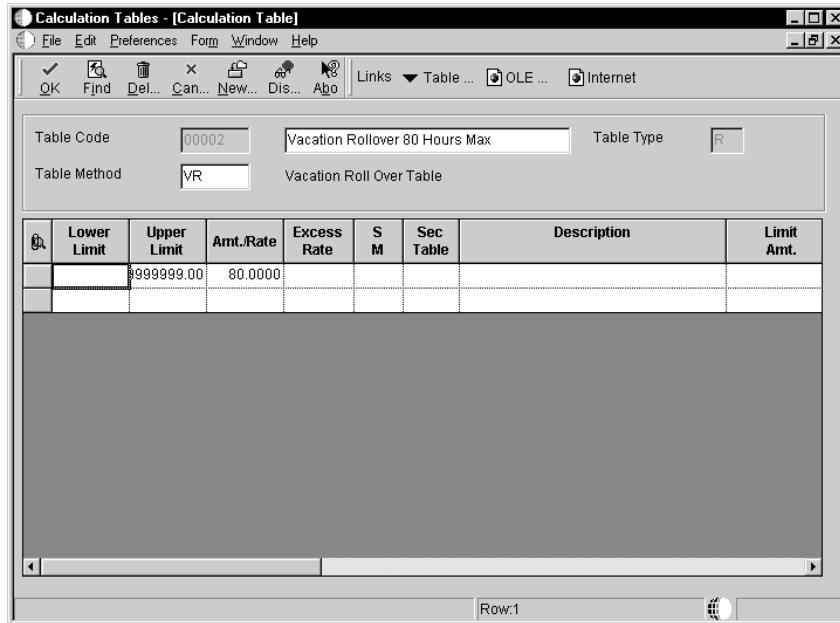
### ► To create rollover calculation tables for DBAs

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose Calculation Tables.

1. On Work With Calculation Tables, click Add.
2. On Calculation Table, enter R in the following field:
  - Table Type
3. Complete the following field:

- Table Code



4. Enter VR in the following field:
  - Table Method
5. Enter the number of months of service from the original hire date in the following fields:
  - Lower Limit
  - Upper Limit
6. Complete the following field to specify the carryover limit and click OK:
  - Amt./Rate

<b>Field</b>	<b>Explanation</b>
Table Type	A code that defines the purpose of the table. Valid values are: D      The system uses the table to calculate DBAs. R      The system uses the table to determine limits for rolling over sick and vacation accruals.
Table Code	A numeric code that identifies this table in the Table table (F069026).
Table Method	A code that specifies the method the system uses to calculate the DBA.
Lower Limit	The lower or minimum amount to compare.
Upper Limit	The upper or maximum amount to compare.

Field	Explanation
Amt./Rate	<p>The amount or rate the system uses to calculate a DBA. When you enter 1, 2, 3, 4, 5, or 6 as the method of calculation, you must enter a value in this field to use in the calculation in conjunction with the basis table.</p> <p>For example, if you create a calculation table for vacation rollovers and enter 80 in this field, any amount that exceeds 80 does not roll over to the following year. An employee might have 92 hours of available vacation at the end of the year, but the employee loses 12 hours of vacation and begins the new year with 80 hours of vacation.</p>

### See Also

- *Setting Up Calculation-Table Information*

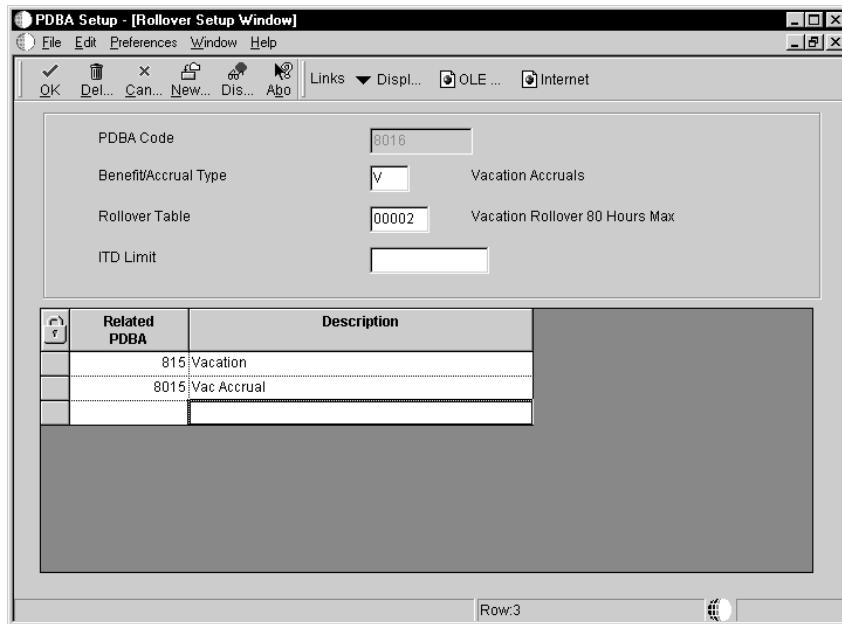
### **To set up rollover information for DBAs**

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA setup.

1. On Work With PDBAs, complete the steps for setting up basic DBA information for an accrual.

See *Setting Up Essential DBA Information*.

2. Choose Rollover Setup from the Row menu.
3. On Rollover Setup, enter the table code for the rollover calculation table that you created to define carryover limits.



4. Complete the following fields and click OK:

- Benefit/Accrual Type
- Rollover Table
- Related PDBA

**Note:** You do not need to enter additional rollover information for a wage-attachment DBA. Wage-attachment balances are inception-to-date and do not need to be rolled over.

<b>Field</b>	<b>Explanation</b>
Benefit/Accrual Type	A user defined code (07/SV) that specifies whether the benefit or accrual type is sick, vacation, holiday, leave, or other. The system uses this code to print sick and vacation accrual balances on the payment stub.
Rollover Table	The identification number of the rollover table that the system uses to limit the amount rolled over for an accrual.  For example, you can base the limit on an employee's months of service. You can set up the table so that an employee with 0 through 12 months can roll over up to 40 hours at year end and an employee with 13 through 999 months can roll over up to 80 hours.
Related PDBA	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.

## Setting Up Limits for Tax-Deferred Compensation Deductions

You set up a tax-deferred compensation deduction when you are deducting an amount from the employee's pay for a compensation program that defers taxes until the funds are distributed or until the funds are removed from the plan. In many cases, the government imposes limits on contributions to tax-deferred compensation plans. Your organization might also impose a limit on contributions to these plans. To simplify the process of administering a tax-deferred compensation plan, you can set up the deduction for the plan so that the system stops taking the deduction as soon as a limit is reached.

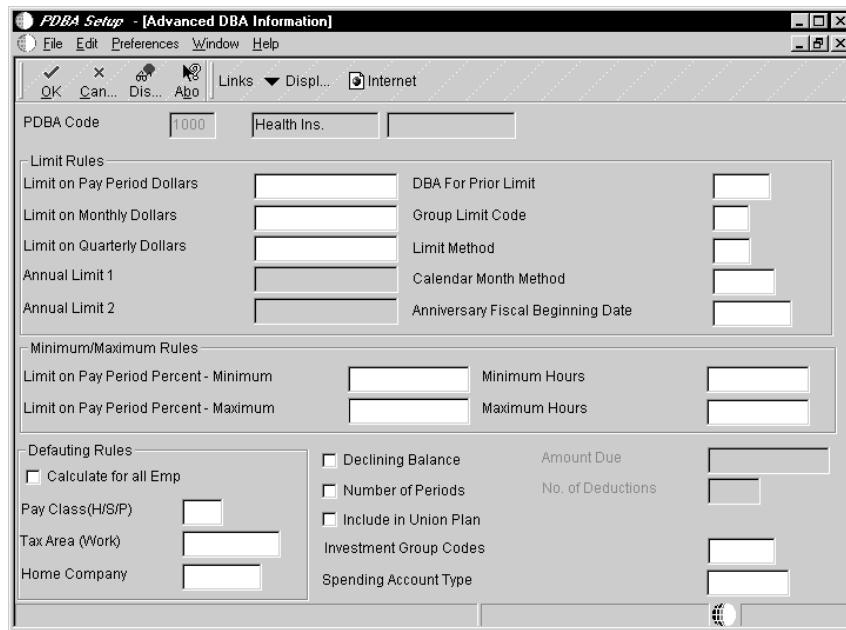
### Before You Begin

- Set up a tax-deferred compensation deduction. See the global solutions guide for your country for instructions.

### ► To set up limits for a tax-deferred compensation deduction

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, click the following option and then click Find:
  - Deduction
2. Choose a record in the detail area and then click Select.
3. On Basic PDBA Information, choose Advanced DBA Information from the Form menu.



4. On Advanced DBA Information, complete any of the following fields to set up limit rules:
  - Limit on Pay Period Dollars
  - Limit on Monthly Dollars
  - Limit on Quarterly Dollars
  - DBA For Prior Limit
  - Group Limit Code
  - Limit Method
  - Calendar Month Method
5. To set up minimum and maximum rules, complete any of the following fields and click OK:
  - Limit on Pay Period Percent – Minimum
  - Limit on Pay Period Percent – Maximum
  - Minimum Hours
  - Maximum Hours

**Caution:** Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

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Field	Explanation
Limit on Pay Period Dollars	The maximum amount that can be withheld or accrued in a pay period for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.
Limit on Monthly Dollars	The maximum amount that can be withheld or accrued in a month for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.
Limit on Quarterly Dollars	The maximum amount that can be withheld or accrued in a quarter for a deduction or benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.

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Field	Explanation
DBA For Prior Limit	<p>A code that identifies another DBA whose limit must be met first before this DBA calculates. For example; deduction 1400 has an annual limit of \$2,000.00. After this limit is met, deduction 1500 begins calculation and withholding.</p> <p>The DBA number of the predecessor must be lower than the successor's number.</p>
Group Limit Code	<p>Specify a code common to all deduction or benefits that share the same limitations (for example, pay period dollar amount or percentage, monthly, annual, and so on). The system takes these limits from the first deduction encountered in the group and withholds for all deductions until the limit is reached for the aggregate.</p> <p>Example:</p> <ul style="list-style-type: none"> <li>Deduction 6400, Group A, Annual Limit = \$1000, No Pay Period Limit</li> <li>Deduction 6430, Group A, No Annual or Pay Period Limit</li> <li>Deduction 7700, Group A, No Annual or Pay Period Limit</li> <li>Deduction 9400, Group B, No Annual or Pay Period Limit</li> <li>Deduction 7550, Group B, No Annual Limit, Pay Period Limit = \$50</li> </ul> <p>For this example, the system looks at the deductions assigned to Group A, and applies a \$1000 annual limit for all three deductions. The system continues to take the deductions from an employee's paycheck until a total of \$1000 has been deducted between all entities in Group A for the year. For deductions in Group B, the system deducts no more than \$50 per pay period between for the two deductions.</p> <p>When you enter a value in Split Deduction Flag for an employee who has multiple families, you must enter a group limit code.</p>

<b>Field</b>	<b>Explanation</b>
Limit Method	<p>A code that indicates which history file the system uses for DBA limits. Valid values are:</p> <ul style="list-style-type: none"> <li>Blank The system applies monthly, quarterly and annual limits to calendar month history. The system stores fiscal and anniversary history by pay period ending date. (default)</li> <li>1 The system applies monthly, quarterly and annual limits to payroll month history. Use this method for retirement plans such as 401(k) or RRSP. The system stores fiscal and anniversary history by check date.</li> <li>2 The system applies monthly and quarterly limits to calendar month history. It applies annual limits to fiscal and anniversary history. It stores fiscal and anniversary history by pay period ending date.</li> <li>3 The system applies monthly and quarterly limits to payroll month history. It applies annual limits to fiscal and anniversary history. The system stores fiscal and anniversary history by check date.</li> </ul>
Calendar Month Method	<p>This method determines how the system stores transition months for calendar month history. Transition months occur when the pay period crosses into another month. Valid codes are:</p> <ul style="list-style-type: none"> <li>blank This is the default. If timecards exist for both months, the system prorates DBAs to the pay period ending date and the last day of the previous month.</li> <li>1 The system allocates DBAs to the pay period ending date.</li> </ul>
Limit on Pay Period Percent – Maximum	The maximum percentage of pay that the calculated deduction or benefit amount may not exceed. This percentage works in conjunction with the dollar limits of the deduction or benefit, so whichever limit is reached first stops the calculation. For accrual transactions, this field represents an hour's limit.
Limit on Pay Period Percent – Minimum	The minimum percentage amount that can be specified for the DBA. The amount of the transaction can never be less than this minimum.
Minimum Hours	The minimum number of hours worked or pieces produced in order for a DBA to be calculated. If the number of hours worked or pieces produced is less than this amount, the system assumes zero hours when it calculates the DBA. The system uses this field only if the method of calculation is H or I.

Field	Explanation
Maximum Hours	The maximum number of hours worked or pieces produced that a DBA can be based on. If the actual hours worked or pieces produced are greater than the specified maximum, the system bases the calculation on the maximum. The system uses this field only if the method of calculation is H or I.

## Setting Up Category Codes for DBAs

You set up category codes for DBAs as a way to group DBAs for reporting purposes that might be necessary for your organization. You use category codes to track and store information about DBAs that is not tracked and stored by other fields in the DBA setup. You can use category codes 1 through 10 for these purposes.

### See Also

- *UDCs, UDC Types, and Category Codes* in the *OneWorld Foundation Guide*

#### ► To set up category codes for DBAs

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, to designate whether this is a deduction, benefit, or accrual, click the corresponding DBA type and click Add.
2. On Basic DBA Information, complete the applicable steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

3. Choose Category Codes from the Form menu.
4. On Category Codes Revisions, you can enter up to ten different category codes. Complete one or more of the Category Code fields and click OK:

Field	Explanation
Category Code 1	This is a Payroll system category code for Deductions, Benefits and Accruals. You may define the use and description of this code to fit the needs of your organization.

## Setting Up a DBA Based on Another DBA

You set up a DBA based on another DBA to use a value that has already been calculated (from the based-on DBA) to calculate the DBA that you are setting up. For example, you set up an employer match benefit for a retirement plan that is based on a retirement plan deduction that has already been set up to deduct a certain amount from an employee's pay.

If DBAs are based on other DBAs, you must assign numbers to those transactions accordingly. The system calculates DBAs in numeric order, from low to high. For example, if your company matches an employee's contribution to a retirement plan based on payroll deductions, the DBA code for the employee's payroll deduction must be the lower number of the two so that the system calculates it before calculating the matching DBA.

### ► To set up a DBA based on another DBA

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, to designate whether this is a deduction, benefit, or accrual, click the corresponding DBA type and click Add.
  2. On Basic DBA Information, complete the steps for setting up essential DBA information.
- See *Setting Up Essential DBA Information*.
3. Choose Basis of Calculation from the Form menu.
  4. On Basis of Calculation, complete the following fields with the DBA code that the DBA is based on:
    - From PDBA
    - Thru PDBA
  5. Click OK.

---

Field	Explanation
From PDBA	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.
Thru PDBA	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the ending number in the range that is the basis of the calculation.

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## Setting Up Advanced DBAs

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You can set up many different types of DBAs. The following tasks are examples of some advanced DBAs that you might set up for your company. These tasks do not include every possible scenario, but represent some typical situations in which you need a DBA to perform a specialized function.

Setting up advanced DBAs includes the following tasks:

- Setting up an advance deduction
- Setting up a deduction DBA to adjust negative pay
- Setting up a deduction DBA for overpayment
- Setting up a DBA to calculate if no gross pay

Some organizations grant employees loans, or cash advances, from their future earnings. For example, on the 10th of the month, an employee might request a 100.00 advance. If you grant the employee the advance, you need to deduct 100.00 from the payment that the employee receives on the 15th of the month. You can set up an advance deduction to deduct the cash advance from the employee's payment.

You can set up several types of DBAs to manage situations in which an employee's net pay is less than zero. The Payroll system does not print payments for amounts that are less than zero. For example, some employees, such as commissioned sales people, might have a pay period in which they have no gross earnings, or they do not have enough gross earnings to pay for all of their deductions. To track employees' pay and deductions in these instances, you can set up a deduction that adjusts negative net pay, or you can set up an overpayment deduction that allows you to take the missed deductions in future pay periods, when the employee has enough earnings to pay for them. You can also set up a DBA to calculate even in pay periods when an employee has no gross earnings.

### Setting Up an Advance Deduction

You set up an advance deduction for an employee to pay back a dollar amount advanced by the employer against an employee's earnings. An advance deduction DBA allows you to set up a declining balance that is active until the amount due equals zero.

► **To set up an advance deduction**

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

3. From the Form menu, choose Advanced DBA Information.
4. On Advanced DBA Information, complete the following field:
  - Amount Due
5. To continue this deduction until the value in the Amount Due field equals zero, click the following option:
  - Declining Balance
6. To define the number of pay periods for which the deduction will be taken, complete the following fields:
  - No. of Deductions
  - Number of Periods
7. Review the value in the following field:
  - Calculate for all Emp
8. Click OK.

---

Field	Explanation
Amount Due	The balance or amount due on an open invoice or voucher.  In the Address Book Master file (F0101) this is a memo amount field used to determine if a particular order exceeds a credit limit. See Order Processing system.

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Field	Explanation
Declining Balance	<p>A code that indicates whether you want the system to use the Amount Due at the DBA, group, or employee level to determine whether to use the specified deduction in a payroll cycle.</p>
	<p>Clicking on the field enables the Amount Due field to continue the deduction until the amount is zero. When you choose this field, you must also enter a value in the Amount Due field, otherwise the system considers the deduction to be cleared or inactive.</p>
	<p>If you do not click on this field, the Amount Due will not be used with the specified deduction.</p>
	<p>For advance deductions, you must click this field.</p>
	<p>..... <i>Form-specific information</i> .....</p>
For World:	<p>Y Yes, use the Amount Due field and continue this deduction until the amount due is zero.      N No, do not use the Amount Due field with this deduction.</p>
No. of Deductions	<p>The number of periods a deduction or benefit should be taken. The system automatically decreases this number by one for each period taken.</p>
	<p>You must enter a value in this field if you automate the Number of Periods field.</p>
	<p>For World: You must enter a value in this field if you entered Y (Yes) in the Use Number of Periods field (located on the DBA Additional Information window, accessed from the DBA Setup form).</p>

<b>Field</b>	<b>Explanation</b>
Number of Periods	<p>When you set up a DBA that is not a wage attachment deduction, use this field to indicate whether you want the system to read the Number of Periods field to determine if this DBA should be included in the payroll cycle. If you enter a Y, the number of periods must be entered in the No. of Deductions field or the system considers the DBA to be inactive.</p>
	<p>When you set up a wage attachment DBA, leave this field blank. Use the Employee Wage Attachment Entry form to enter the number of periods for which the deduction should be taken.</p>
	<p>For One World valid values are:</p>
	<p>Click on the field if you want the system to read the Number of Periods field and continue the DBA only until the amount due is zero.</p>
	<p>Blank Do not read the Number of Periods field for this DBA.</p>
	<p>For World, valid values are:</p>
	<p>Y Yes, read the Number of Periods field and continue this DBA only until the amount due is zero.</p>
	<p>N No, do not read the Number of Periods field for this DBA.</p>
	<p>Blank Do not read the Number of Periods field for this DBA.</p>
Calculate for all Emp	<p>A code that specifies whether the DBA is required.</p>
	<p>For advance deductions, this field must be set to N (no).</p>
	<p>When you enter Y (Yes) in this field, the system automatically processes the DBA for all qualifying employees. When this field is set to Y, you reduce the information that you must maintain for DBAs that you set up for plans or employees because it is not necessary to define the DBA at any level other than the DBA setup level.</p>
	<p>To define qualifying employees, complete the following fields on Advanced DBA Information:</p>
	<ul style="list-style-type: none"> <li>• Employee Pay Class – (SALY)</li> <li>• Tax Area - (TARA)</li> <li>• Home Company - (HMCO)</li> </ul>
	<p>A blank in any of these fields will include all employees.</p>
	<p>NOTE: The system also uses Tax Area (TARA) and Home Company (HMCO) as screening criteria for DBAs that are not required. If either of these two fields contain data, regardless of whether Calculate for All Employees is set to Y (yes), the system uses the tax areas and home companies to qualify employees for the DBA.</p>

## Setting Up a Deduction DBA to Adjust Negative Pay

If an employee's gross pay does not cover the amounts to be deducted, the system adjusts deduction amounts to increase the net pay to zero. The system does not allow negative net pay situations. You can set up deductions to control this adjustment process. Depending on the deduction's arrearage rule, one of the following occurs:

- The system adjusts the deduction either partially or for the full amount.
- The system puts the adjusted amount in arrears and makes the adjustment the next time that the employee is paid.

The system adjusts negative pay in different ways depending on the arrearage method that you use:

### P, blank, F

When all or part of the deduction cannot be taken and you have set up the DBA with one of these arrearage methods, the system:

- Reduces the deduction.
- Does *not* hold the amounts over to collect them in a future payroll. That is, the DBA is not placed in arrears.

Amounts not taken appear on the Deductions Not Taken report, which the system generates during pre-payroll processing.

### Q, R, G, H

When all or some part of the deduction cannot be taken and you have set up the DBA with one of these arrearage methods, the system:

- Reduces the deduction.
- Attempts to collect the amounts in a future payroll. That is, the DBA is placed in arrears.

Amounts not taken appear on the Deduction Arrearage report, which the system generates during pre-payroll processing.

**Note:** The system will not create journal entries for adjusted and arreared amounts until the deduction is actually withheld. The system posts only the actual amounts deducted as journal entries.

## Example: Payroll Calculations to Adjust Negative Pay

The When to Adjust Deductions field and the Order to Adjust Deductions field allow you to determine the sequence that the system uses to deduct the DBAs:

<u>Gross Deductions</u>	<u>DBA Code</u>
Union	#3000
Health	#1000
Savings	#2000
401(k)	#7000
Advance	#9000
Taxes	
<hr/>	
Negative Net Pay	

<u>Gross Deductions</u>	<u>DBA Code</u>
Union	#3000
Health	#1000
Savings	#2000
RRSP	#7700
Advance	#9000
Taxes	
<hr/>	
Negative Net Pay	

The system adjusts the DBAs in the following order if the When to Adjust Deductions field is 0 (default) and the Order to Adjust Deductions field is blank:

1st – #9000 Advance  
2nd – #7000 401(k)  
3rd – #3000 Union  
4th – #2000 Savings  
5th – #1000 Health  
Last – Taxes

1st – #9000 Advance
2nd – #7700 RRSP
3rd – #3000 Union
4th – #2000 Savings
5th – #1000 Health
Last – Taxes

When net pay goes below zero or minimum pay, the system adjusts deductions in a high to low order, from DBA code 9999 to DBA code 1000. For example, DBA #8611 would be adjusted before #5322. You can override the order by using the When to Adjust Deductions and Order to Adjust Deductions fields.

These two fields allow you to control how the deductions are adjusted. You can group deductions into three groups so that one group is adjusted before the other two. You can also assign priority numbers within each group.

In this example, you want the Savings and 401(k) or RRSP adjusted (not deducted) before the Advance, Union dues, and Health. Therefore, assign Savings and 401(k) or RRSP a value of 0 in the When to Adjust Deductions field. Assign Advance, Union dues, and Health a value of 1.

The following example illustrates the sequence of adjustments that the system will use to bring the payment balance to zero:

<u>Gross Deductions</u>	<u>DBA Code</u>	<u>When to Adjust Deductions</u>
Union	#3000	1
Health	#1000	1
Savings	#2000	0
401(k)	#7000	0
Advance	#9000	1
Taxes		
<hr/>		
Negative Net Pay		
1st	#7000 (0)	401(k)
2nd	#2000 (0)	Savings
3rd	#9000 (1)	Advance
4th	#3000 (1)	Union
5th	#1000 (1)	Health
6th	Taxes	

<u>Gross Deductions</u>	<u>DBA Code</u>	<u>When to Adjust Deductions</u>
Union	#3000	1
Health	#1000	1
Savings	#2000	0
RRSP	#7700	0
Advance	#9000	1
Taxes		
<hr/>		
Negative Net Pay		
1st	#7700 (0)	RRSP
2nd	#2000 (0)	Savings
3rd	#9000 (1)	Advance
4th	#3000 (1)	Union
5th	#1000 (1)	Health
6th	Taxes	

Company policy might be to deduct the advance from the employee's pay before taxes are deducted. The government will make up any tax inequity with this employee at year end, but the company might not be able to retrieve the advance amount if the company no longer employs the individual. Enter 2 in the When to Adjust Deductions field for the Advance. The sequence of adjustments follows:

1st -	#7000 (0)	401(k)
2nd -	#2000 (0)	Savings
3rd -	#3000 (1)	Union
4th -	#1000 (1)	Health
5th -	Taxes	
6th -	#9000 (2)	Advance

1st -	#7700 (0)	RRSP
2nd -	#2000 (0)	Savings
3rd -	#3000 (1)	Union
4th -	#1000 (1)	Health
5th -	Taxes	
6th -	#9000 (2)	Advance

This example illustrates how the codes in the When To Adjust and Order to Adjust fields would work for one employee. When you set up your DBAs, you must consider how these codes impact all employees using these deductions.

### ► To set up a deduction DBA to adjust negative pay

---

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

3. On General Accounting/Arrearage Information, complete the following fields and click OK:
  - Arrearage Method
  - When To Adjust Ded
  - Order To Adjust Ded
  
4. On Basis of Calculation, complete the following fields and click OK:
  - From PDBA
  - Thru PDBA

---

<b>Field</b>	<b>Explanation</b>
Arrearage Method	<p>A code indicating how to adjust deductions when the employee is in a negative pay situation. Valid codes are:</p> <ul style="list-style-type: none"> <li>P     Do a partial or full deduction as needed. This is the default.</li> <li>F     Do a full reduction or none at all.</li> <li>N     Do not reduce.</li> <li>Q     Same as code P. Place the amount in arrears, but do not apply the limits when collecting the arrearage.</li> <li>R     Same as code P. Place the amount in arrears and apply the limits when collecting the arrearage.</li> <li>G     Same as code F. Place the amount in arrears, but do not apply the limits when collecting the arrearage.</li> <li>H     Same as code F. Place the amount in arrears and apply the limits when collecting the arrearage.</li> </ul>
When To Adjust Ded	<p>A code that indicates when to adjust (back out) deductions. Valid values are:</p> <ul style="list-style-type: none"> <li>0     Adjust deductions marked with 0 before payroll taxes</li> <li>1     Adjust deductions marked with 0, then those marked with 1 before payroll taxes</li> <li>2     Adjust payroll taxes before the deductions marked with 2</li> </ul>
Order To Adjust Ded	If an employee's gross pay does not cover deductions, a code in this field tells the system in what order it should satisfy deductions. Valid codes are 0001 through 9999. The system starts with the highest code. For example, 9999 is deducted before 0001.
From PDBA	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.

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Field	Explanation
Thru PDBA	The number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the ending number in the range that is the basis of the calculation.

## Setting Up a Deduction DBA for Overpayment

The system cannot write a payment for a negative amount. Therefore, when an employee's net pay drops below zero and stays below zero, even after all adjustments have been made, the system creates an overpayment. The overpayment amount is the amount needed to bring net pay back to zero. The system treats this amount like an advance to the employee and subtracts the amount from the employee's future pay until the overpayment is repaid.

The system uses a DBA to collect the overpayment. Whenever the system creates an overpayment for an employee, it assigns the DBA to the employee's DBA instructions and displays the amount on the payroll register. J.D. Edwards ships the Payroll system with DBA 9997 as the DBA for overpayments. You can set up a different DBA number for overpayments if you want to use 9997 for other purposes.

### Before You Begin

- Verify that the overpayment processing option on the payroll workbench is set to DBA 9997.
- Assign an account number for DBA 9997 (or the DBA that you want to use for overpayments) in the credit liabilities table in your AAIs to avoid accounting errors. If you use a DBA code other than 9997, you need to set the overpayment processing option on the payroll workbench to the DBA code that you are using.

### ► To set up a deduction DBA for overpayment

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter 9997 in the following field:
  - DBA Code
3. Enter Overpayment in the following field:
  - Paystub Text
4. Complete the steps for setting up an advanced deduction.

See *Setting Up Essential DBA Information*.

Field	Explanation
DBA Code	A code that defines the type of pay, deduction, benefit, or accrual. Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.
Paystub Text	The text that you want the system to print on the employee's paystub.  For the Time Accounting system: The Time Accounting system does not create paychecks. However, this field is required to complete the form. Generally, the information you enter in this field is a description of the PDBA.

## Setting Up a DBA to Calculate If No Gross Pay

You can set up the system to calculate a DBA to calculate even if no gross pay exists. For example, you can set up a DBA to calculate a benefit when an employee is on a leave of absence.

You might also set up the system to calculate a deduction and place the amount in arrears to be withheld the next payroll cycle. The deduction is included on the Deduction Arrearage report during pre-payroll processing.

### ► **To set up a DBA to calculate if no gross pay**

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, click Deduction or Benefit and then click Add.
2. To calculate the DBA even if the employee has no gross pay, click Calculate Even If No Gross on Basic DBA Information.
3. Enter \$ in the following field:
  - Method of Calculation
4. Complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

5. For a deduction, enter one of the arrearage values in the following field on General Accounting/Arrearage Information and click OK:

- Arrearage Method

Field	Explanation														
Method of Calculation	<p>A user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The method values are pre set by J.D. Edwards. If you use methods 0 – 6, 8, 9, or G, you must also enter a value in the Table Code field.</p> <p>For wage attachments use one of the following methods:</p> <table style="margin-left: 20px;"> <tr><td>C</td><td>Wage assignment (child support and maintenance)</td></tr> <tr><td>G</td><td>Garnishment</td></tr> <tr><td>K</td><td>Loan</td></tr> <tr><td>L</td><td>Tax levy</td></tr> <tr><td>A</td><td>Fees</td></tr> <tr><td>%</td><td>Interest</td></tr> </table>	C	Wage assignment (child support and maintenance)	G	Garnishment	K	Loan	L	Tax levy	A	Fees	%	Interest		
C	Wage assignment (child support and maintenance)														
G	Garnishment														
K	Loan														
L	Tax levy														
A	Fees														
%	Interest														
Arrearage Method	<p>A code indicating how to adjust deductions when the employee is in a negative pay situation. Valid codes are:</p> <table style="margin-left: 20px;"> <tr><td>P</td><td>Do a partial or full deduction as needed. This is the default.</td></tr> <tr><td>F</td><td>Do a full reduction or none at all.</td></tr> <tr><td>N</td><td>Do not reduce.</td></tr> <tr><td>Q</td><td>Same as code P. Place the amount in arrears, but do not apply the limits when collecting the arrearage.</td></tr> <tr><td>R</td><td>Same as code P. Place the amount in arrears and apply the limits when collecting the arrearage.</td></tr> <tr><td>G</td><td>Same as code F. Place the amount in arrears, but do not apply the limits when collecting the arrearage.</td></tr> <tr><td>H</td><td>Same as code F. Place the amount in arrears and apply the limits when collecting the arrearage.</td></tr> </table>	P	Do a partial or full deduction as needed. This is the default.	F	Do a full reduction or none at all.	N	Do not reduce.	Q	Same as code P. Place the amount in arrears, but do not apply the limits when collecting the arrearage.	R	Same as code P. Place the amount in arrears and apply the limits when collecting the arrearage.	G	Same as code F. Place the amount in arrears, but do not apply the limits when collecting the arrearage.	H	Same as code F. Place the amount in arrears and apply the limits when collecting the arrearage.
P	Do a partial or full deduction as needed. This is the default.														
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G	Same as code F. Place the amount in arrears, but do not apply the limits when collecting the arrearage.														
H	Same as code F. Place the amount in arrears and apply the limits when collecting the arrearage.														



## Setting Up Deductions for Wage Attachments

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Before you can enter wage attachment information for employees, you must set up a deduction for each type of wage attachment. Setting up a deduction for a wage attachment is similar to setting up any other kind of deduction. Therefore, only the unique considerations for each type of wage attachment deduction are discussed here.

Setting up deductions for wage attachments includes the following tasks:

- Setting up a garnishment deduction
- Setting up a fee deduction
- Setting up a tax levy deduction
- Setting up a wage assignment deduction

Wage attachment payments are deducted from an employee's disposable wage (disposable earnings). An employee's disposable wage is the amount that remains after all payments that are required by law have been deducted from the employee's gross wages.

These required payments include:

- Federal income tax
- Social Security tax
- Medicare tax
- State income tax
- State unemployment insurance
- State disability insurance
- State employee retirement systems
- Local and county taxes
- Any other applicable state requirements

Special considerations for a wage attachment deduction include the following:

**Effect on disposable wage** For a wage attachment that is required by law, you should indicate that the attachment is a mandatory deduction when you specify its effect on disposable wage.

**Calculation once per pay period** Typically, you set up the system to calculate a wage attachment deduction only once per pay period. Therefore, if an employee receives a payment (such as a bonus) in addition to a regular payment, the wage attachment payment is deducted only from the regular payment.

**Accounts payable integration** If your Payroll system is integrated with the J.D. Edwards Accounts Payable system, you can set up a wage attachment DBA to generate vouchers.

See *Setting Up Voucher Information for DBAs* in the *Payroll Guide*.

**Declining balances** When you set up a wage attachment deduction, set the Declining Balance field to N (No). The system uses the method of calculation to calculate the declining balance.

**Amount due** Because wage attachment balances typically vary by employee, you should not enter an amount due for a wage attachment DBA. Instead, you enter the amount due when you assign wage attachments to individual employees.

See *Entering Wage Attachments for Employees* in the *Payroll Guide*.

**Negative pay situations** You can set up wage attachment deductions to adjust or be placed in arrears in a negative-pay situation. When an employee does not earn enough in a pay period to pay the deduction, the system can place the deduction in arrears.

See *Setting Up a Deduction DBA to Adjust Negative Pay*.

You set up a garnishment deduction to deduct court-ordered payments resulting from nonpayment of personal debts or overdue child support. The debts on which these imposed payments are based are already past due.

In some cases, you might need to associate fees with a wage attachment. For example, your organization might charge fees for administering garnishments.

You set up a tax levy deduction to deduct court-ordered payments for back taxes that the employee owes.

You set up a wage assignment deduction to deduct ongoing debts, including child support and maintenance, from an employee's earnings.

## Setting Up a Garnishment Deduction

You set up a garnishment deduction to deduct court-ordered payments resulting from nonpayment of personal debts or overdue child support. The debts on which these imposed payments are based are already overdue. Because each deduction must match the court orders, you might need to set up separate deductions for different employees.

### Before You Begin

- Set up the tables that the system uses to calculate garnishments. See *Setting Up Garnishment Tables* in the *Payroll Guide*.

### ► To set up a garnishment deduction

---

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter a numeric code from 1 to 7 in the following field:
  - Source of Calculation
3. Enter G in the following field:
  - Method of Calculation
4. Enter the attachment table number for your garnishment tables in the following field:
  - Table Code
5. Complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

## Setting Up a Fee Deduction

In some cases, you might need to associate fees with a wage attachment. For example, your organization might charge employees administrative fees for maintaining garnishments.

You set up deductions for fees, and you base those deductions on the deductions for which you are collecting the fees. Fees do not apply to tax levies.

A fee deduction must have a higher DBA number than the deduction on which it is based. For example, you can base fee deduction 1120 on garnishment deduction 1104. You can base a fee deduction on only one deduction.

Therefore, even when you charge the same fee for garnishments as for wage assignments, you must set up two fee deductions. Base one fee deduction on the garnishment deduction, and base the other fee deduction on the wage assignment deduction. You specify the based-on deduction number in the basis of calculation for the fee deduction.

When you define a wage attachment for an employee, you assign the fee deduction number to the associated wage attachment.



### To set up a fee deduction

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter 0 (zero) or R in the following field:
  - Source of Calculation
3. Enter \$ or % in the following field:
  - Method of Calculation
4. Complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

5. On Basis of Calculations, complete the following fields for the wage attachment deduction for which you are collecting the fee and click OK:
  - From PDBA
  - Thru PDBA

## Setting Up a Tax Levy Deduction

You set up a tax levy deduction to deduct court-ordered payments for back taxes that the employee owes. You set up a tax levy deduction in the same way that you set up any other type of deduction.

### Before You Begin

- Set up exemption tables. See *Setting Up Exemption Tables for Tax Levies* in the *Payroll Guide*.

### ► To set up a tax levy deduction

---

From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work with PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter a numeric code from 1 to 7 in the following field:
  - Source of Calculation
3. Enter L in the following field:
  - Method of Calculation
4. From the Form menu, choose Advanced DBA Information.
5. On Advanced DBA Information, verify that the following option is inactive:
  - Declining Balance

The wage attachment program calculates the remaining balance for the tax levy.

6. Complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

## Setting Up a Wage Assignment Deduction

You set up a wage assignment deduction to deduct ongoing debts, including child support and maintenance, from employees' earnings.

The courts typically rule that child support has priority over other types of wage attachments. This means that if an employee did not earn enough in a pay period to pay for all deductions, the child support deduction should be the last deduction to be adjusted.

To give the child support deduction first priority, assign it a lower DBA number than the numbers that you enter for other deductions. During payroll-cycle processing, the system adjusts (backs out) deductions in numerical order, beginning with the highest-numbered deduction. For example, deduction 1001 would be adjusted (backed out) before 1000.

You set up a wage assignment deduction in the same way that you set up any other type of deduction.

► **To set up a wage assignment deduction**

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose PDBA Setup.

1. On Work With PDBAs, click Deduction and then click Add.
2. On Basic DBA Information, enter a numeric code from 1 to 8 in the following field:
  - Source of Calculation
3. Enter C in the following field:
  - Method of Calculation
4. Complete the steps for setting up essential DBA information.

See *Setting Up Essential DBA Information*.

## Reviewing the Basis of Calculation Hierarchy

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You must enter a basis of calculation for any DBA that you set up. You can enter a pay type, another DBA, or a combination of PDBAs as the basis of calculation for a DBA. You can set up based-on relationships that are relatively complex, thus making it difficult to remember how specific DBAs are used.

To easily review the bases of calculation for multiple DBAs, review the basis of calculation hierarchy. This hierarchy graphically depicts the reporting relationships between PDBAs, even those DBAs that are based on multiple DBAs. For example, a typical hierarchy for 401(k) DBAs shows the following:

- The employer match DBA is based on the employee contribution DBA
- The employee contribution DBA is based on pay types 1 through 999

### ► To review the basis of calculation hierarchy

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From the Pay/Deductions/Benefits Setup menu (G05BD4), choose Basis of Calculations Hierarchy.

1. On Basis of Calculation Hierarchy, complete the following field and then click Find:
  - DBA Code
2. Review the information that appears and then click Close.

Field	Explanation
DBA Code	A code that defines the type of pay, deduction, benefit, or accrual.  Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.



## Automatic Accounting Instructions for Payroll and Time Accounting

You set up automatic accounting instructions (AAIs) to assign account numbers to journal entries. These account numbers allow the system to distribute labor and equipment billings, payroll disbursement, and actual burden journal entries to specified accounts in the general ledger.

During the payroll cycle, the system creates a journal entry of every calculation for every employee. These calculations include salary and wage expenses, burden, cash disbursements, and liabilities. You can create journal entries for labor and equipment billings and accruals for payrolls that cross accounting periods. After the journal entries are created and assigned account numbers, the system summarizes the entries and passes them to the general ledger.

You can set up rules to summarize journal entries. For example, because full detail exists in payroll, you might not need full detail in the general ledger. You can set up rules to summarize account ranges and business units.

AAIs for Payroll and Time Accounting includes the following:

- Setting up AAIs for payroll and time accounting
- Understanding intercompany settlements
- Setting up intercompany settlements in HR and Payroll Foundation

### When to Create Journal Entries

The system can create journal entries during any of the following processes:

- A regular payroll cycle.
- The processing of interim checks in a regular payroll cycle.
- The generation of journal entries for timecards using the Time Entry system. You can also generate journal entries for timecards when you need to post in-between payroll cycles.

If you are using J.D. Edwards Payroll, the system initially creates pro forma journal entries during the journal entry step of the payroll cycle. The pro forma journal entries are created in the Payroll Journal table (F063951), and at that time they become part of the Payroll system.



During the final update, the system posts actual journal entries to the Account Ledger table (F0911). At this time, the journal entries are part of the General Accounting system.

If you are using the Time Entry system, the system creates journal entries when you generate journal entries for timecards (R052901). You can then review, revise, and approve journal batches for posting to the general ledger.

## See Also

- *Processing Journal Entries* for information about generating journal entries for timecards
- *Processing Pro Forma Journal Entries* in the *Payroll Guide* for information about journal entries created during the payroll entry step of the payroll cycle

## The General Ledger Account Structure

The system uses the standard business-unit object-subsidiary and subledger account structure. The general ledger account structure is composed of two parts:

- Where - business unit
- What - account number

Business unit is a 12-character, alphanumeric field that is the lowest level of organizational reporting. Each business unit is assigned to a company and can be associated with 20 category codes for higher level reporting. For example:

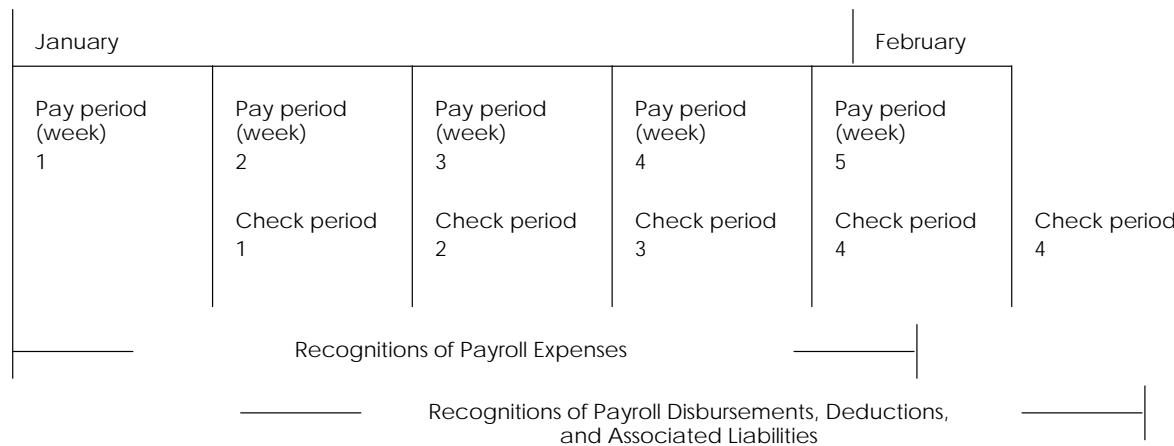
- Department
- Branch
- Asset (revenue and maintenance expense)

The account number identifies whether the account is an asset, liability, or expense. The account number contains two parts:

- Object account, a 6-character, alphanumeric field that is required on all journal entries.
- Subsidiary, an 8-character, alphanumeric field that is optional on journal entries. For example, use this field to identify an employee number, equipment number, or asset number.

## Dates That You Associate with Journal Entries

The following chart shows the timing relationships that are important to payroll journal entries:



The following definitions are important in understanding payroll and time accounting journal entries:

**General ledger date**

The date that the system can use for posting to the proper general ledger. The table that defines date ranges for each accounting period is in the Date Fiscal Patterns table (F0008) for the General Accounting system.

For payroll, the system always uses the G/L date.

For stand-alone time accounting, the system uses either the G/L date or the system date as setup in the processing options for Generate Timecard Journals (R052901).

**Pay period ending date**

The last day of the pay period, as defined in your Master Pay Cycles.

**Payment date**

The payment date of the pay period, as defined in your Master Pay Cycles.

**Work date**

The actual date entered on a timecard.

**Transition period**

Any pay period that has working days in two accounting periods.

<b>Accounting period ending date</b>	The last day of the general accounting period.
<b>Cost period</b>	The pay period that can be used with the creation of payroll journal entries for a transition period. Journal entries for those timecards with work dates that fall into the preceding accounting period are assigned a general ledger date equal to the last day of the preceding accounting period. Journal entries for those timecards with work dates in the succeeding period are assigned a general ledger date equal to the pay period ending date in pre-payroll processing.
<b>Override date</b>	When defined in the journal entries step of the payroll cycle, the date that is used as the general ledger date for all payroll journals.

## Payroll Journal Entries

When journal entries are created in the payroll cycle, the system assigns a general ledger date using a date associated with the payroll, such as pay period ending date or payment date. You define the general ledger date to be used for labor distribution and burden journals (T2, T3, T4, and T5) in the payroll journal entries step of the payroll cycle. Cash disbursement and liability journals (T1 and T7) use the payment date as the general ledger date. The accrual factor, a method for allocating a percentage of the T1s, T2s, and T3s back to a prior month, creates an accrual entry (T6).

The Pay Cycle Review tracks your choice of general ledger date for labor distribution to reference when you submit the next payroll.

You can define an override date when you submit the journal entry creation job. The override date that you define becomes the general ledger date for all journal entries created for all document types.

You can also use an accrual factor to allocate a portion of your T1, T2, and T3 entries back to a prior month. For example, if 40% of the pay period occurs in one month, and 60% of the pay period occurs in the next month, you can enter an accrual factor of 40 to accrue 40% of the T1, T2, and T3 journal entries to the previous month and 60% to the current month. Journal entries that are generated for the previous month use the ending date of that month and entries generated for the current month use the pay period ending date. When you use an accrual factor to create journal entries, the system generates T6 journal entries.

## Time Accounting Journal Entries

When you use the Time Entry system to create journal entries, you define in the processing options for Generate Timecard Journals (R052901) whether the

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system uses the general ledger date or the system date for posting journal entries.

You can also use this process to post timecards between payroll cycles.

### **Example: Payroll Journal Entry**

The following example of a Payroll Cycle Journal is based on the following simple payroll:

1. Employee: Home Company = 1, Home Business Unit = 25, Union = 1000
2. Time Card: 01/28/98 (Pay Code 001) 1,000 USD
3. Payroll Taxes and Insurance (P.T.I.): FICA (Tax Type D & E) 70 USD
4. Payroll Taxes and Insurance (P.T.I.): UIC (Tax Type CC & CD) 70 USD
5. Deductions: Savings Bond (Ded Code 2000) 50 USD
6. Benefits: Union 1000 (Ben Code 6000) 30 USD
7. Payment Date: 02/05/98

Date	Account	Description	DR	CR
<b>Labor Distribution Journals</b>				
01/28/98	1.4205	Wages Payable		1000
01/28/98	25.8115	Labor Expenses	1000	
			1000	1000
<b>Actual Burden Journals</b>				
01/28/98	25.8146	Union Fringe	30	
01/28/98	25.8135	FICA Burden	70	
01/28/98	25.8135	UIC Burden	70	
01/28/98	1.4333.FR	Burden Clearing – Fringe		30
01/28/98	1.4333.TX	Burden Clearing – Tax		140
			170	170
<b>Disbursement Journals</b>				
02/05/98	1.4205	Wages Payable	1000	
02/05/98	1.1110.PAY	Cash in Bank		880
02/05/98	1.4316	Savings Bonds	50	
02/05/98	1.4332	Union Fringe	30	
02/05/98	1.4212.EE	FICA Employee		70
02/05/98	1.4212.ER	FICA Employer		70
02/05/98	1.4212.EE	UIC Employee	70	
02/05/98	1.4212.ER	UIC Employer		70
02/05/98	1.4333.FR	Burden Clearing – Fringe	30	
02/05/98	1.4333.TX	Burden Clearing – Tax		70
			1100	1100

## Codes That Are Used to Identify Journal Entries

When the system creates a journal entry for the general ledger, it codes the journal entry with a document type and reference number. The document type is a two-character code that classifies journal entries into one of seven document types:

- Type T1 - Payroll disbursement
- Type T2 - Labor distribution and flat burden
- Type T3 - Actual burden
- Type T4 - Labor billing distribution
- Type T5 - Equipment distribution

- 
- Type T6 - Payroll accruals and deferrals
  - Type T7 - Payroll vouchers

For release B73.3.1, you can create journal entries for the following document types:

**Document types for payroll**

- T1 Payroll disbursement
- T2 Payroll labor distribution
- T3 Actual burden
- T4 Labor billing distribution
- T5 Equipment distribution
- T6 Payroll accruals and deferrals
- T7 Payroll vouchers

**Document types for time accounting**

- T2 Payroll labor distribution
- T3 Actual burden (when you calculate monthly benefits)
- T4 Labor billing distribution
- T5 Equipment distribution

The reference number, composed of journal type and the general ledger date, or another date used on journal entries, further identifies the source of each journal entry within a document type.

The reference number of a journal entry becomes the Reference 2 value in the actual Account Ledger table (F0911).

### **Document Type T1 - Payroll Disbursement Journal Entries**

Document type T1 contains all journal entries associated with the writing of payments. The journal entries include cash-in-bank, relief of accrued wages, deduction, tax and benefit liabilities, and burden clearing entries.

The system creates T1 journal entries in the payroll cycle only.

All T1 journal entries carry the same general ledger date, that is, the payment date or the override date.

The specific journal types used for these journal entries include the following:

<b>AL</b>	Accrued liabilities (deductions, benefits)
<b>AT</b>	Accrued liabilities (taxes)
<b>AW</b>	Accrued wages – debit entry
<b>CF</b>	Burden offset (clearing) – Fringe – debit entry
<b>CT</b>	Burden offset (clearing) – Taxes – debit entry
<b>DA</b>	Auto-deposit amount
<b>DP</b>	Printed computer payments
<b>IC</b>	Intercompany settlements

### Document Type T2 - Labor Distribution Journal Entries

The system creates journal entries for document type T2 directly from timecards for labor expenses and associated offsets for accrued wages. You can also generate journal entries to allocate an estimated or flat burden expense.

The system creates T2 journal entries during the payroll cycle or when you generate timecard journal entries using the Time Entry system.

Four possible general ledger dates exist for journal entries created during the payroll cycle:

<b>Work date</b>	The general ledger date is the work date on the timecard.
<b>Period ending</b>	The general ledger date is the pay period ending date.
<b>Cost period</b>	The cost period can be used with the creation of payroll journal entries for a transition period. Journal entries for those timecards with work dates falling into the preceding accounting period are assigned a general ledger date equal to the last day of the preceding accounting period. Journal entries for those timecards with work dates in the succeeding period are assigned a general ledger date equal to the pay period ending date in pre-payroll processing.

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<b>Override date</b>	You provide an override date when you submit the journal entry creation job. The date that you define becomes the general ledger date for all journal entries.
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If you are using Payroll, define which general ledger date to use for T2s in the payroll journal entry step of the payroll cycle. When you generate timecard journal entries using the Time Entry system, you must specify whether the system uses the general ledger date or the system date in the processing options for the Generating Timecard Journal Entries program.

The specific journal types used for labor distribution journal entries are as follows:

<b>AW</b>	Accrued wages – credit entry
<b>FB</b>	Flat burden expense – debit entry
<b>FC</b>	Flat burden offset (Clearing) – credit entry
<b>LD</b>	Labor distribution straight time – debit entry
<b>PR</b>	Labor distribution premium time – debit entry
<b>IC</b>	Intercompany settlements

## Document Type T3 - Actual Burden Journal Entries

The system calculates company-paid payroll taxes, insurance, and benefits on an employee-by-employee basis. These expenses are collectively referred to as burden. Actual burden journal entries are created when the employee burden expenses are allocated to expense accounts based on the individual timecards entered for each employee.

The system generates journal entries for document type T3 during either the payroll cycle or when you generate timecard journal entries using the Time Entry system.

Actual burden journal entries carry the same general ledger date as the associated labor expense.

The specific journal entry types used for actual burden journal entries are the following:

<b>BF</b>	Fringe burden (benefits and accruals) – debit entry
<b>BT</b>	Payroll tax and insurance burden (PTI) – debit entry
<b>CF</b>	Burden offset (clearing) – Fringe – credit entry
<b>CT</b>	Burden offset (clearing) – Taxes – credit entry
<b>IC</b>	Intercompany settlements

## Document Type T4 - Labor Billing Distribution Journal Entries

Document type T4 journal entries are for labor billings, also known as recharge, and associated revenue offsets.

You use T4 labor billings for the following:

- |                           |  |
|---------------------------|--|
| <b>Billing internally</b> | For example: <ul style="list-style-type: none"><li>Charging other departments for maintenance people</li><li>Charging a supervisor's billing rate to a job</li></ul> |
| <b>Billing externally</b> | For example, service billing for consulting services   |

The system creates these journal entries from the billing rate value. To create T4s for an associated timecard, you must set the Record Type field (originally set up in the Employee Master table) on the timecard to one of the following settings:

- 2 (Payroll and recharge processing)
- 3 (Recharge processing only)

The system creates journal entries for labor billing distribution from timecards during the payroll cycle or when you generate timecard journal entries using the Time Entry system.

Four possible general ledger dates exist for journal entries created during the payroll cycle:

- |                               |   |
|-------------------------------|---|
| <b>Work date</b>              | The general ledger date is the work date on the timecard. |
| <b>Pay period ending date</b> | The general ledger date is the pay period ending date.    |

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**Cost period** The cost period can be used with the creation of payroll journal entries for a transition period. Journal entries for those timecards with work dates falling into the preceding accounting period are assigned a general ledger date equal to the last day of the preceding accounting period. Journal entries for those timecards with work dates in the succeeding period are assigned a general ledger date equal to the pay period ending date in pre-payroll processing.

**Override date** You can provide an override date when you submit the journal entry creation job. The date that you define becomes the general ledger date for all journal entries.

If you are using the Payroll system, define which general ledger date to use for T4s in the payroll journal entry step of the payroll cycle. When you generate timecard journal entries using the Time Entry system, you must specify whether the system uses the general ledger date or the system date in the processing options for the Generating Timecard Journal Entries program.

The specific journal types used for labor billing distribution journal entries are as follows:

<b>RD</b>	Labor billing (recharge) distribution – debit entry
<b>RO</b>	Labor billing (revenue) offset – credit entry
<b>IC</b>	Intercompany settlements

## Document Type T5 - Equipment Distribution Journal Entries

Document type T5 journal entries designate billings associated with the use of equipment and the offsets for equipment revenue.

The system creates journal entries for equipment distribution from timecards. Equipment distribution journal entries can be generated during either the payroll cycle or when you generate timecard journal entries using the Time Entry system.

Four possible general ledger dates exist for journal entries created during the payroll cycle:

**Work date** The general ledger date is the work date on the timecard.

**Pay-period ending date** The general ledger date is the pay period ending date.

**Cost period** You can use the cost period with the creation of payroll journal entries for a transition period. The system assigns a general ledger date equal to the last date of the preceding accounting period for journal entries for those timecards with work dates that fall into the preceding accounting period. The system assigns a general ledger date equal to the pay period ending date in pre-payroll processing for journal entries for those timecards with work dates that fall in the succeeding accounting period.

**Override date** You can provide an override date when you submit the journal entry creation job. The date that you define becomes the general ledger date for all journal entries.

If you are using the Payroll system, define which general ledger date to use for T5s in the payroll journal entry step of the payroll cycle. When you generate timecard journal entries using the Time Entry system, you must specify whether the system uses the general ledger date or the system date in the processing options for Generating Timecard Journal Entries.

The specific journal entry types used for equipment distribution journal entries are the following:

**ED** Equipment billing distribution – debit entry

**EO** Equipment billing (revenue) offset – credit entry

Set up the credit entry in the equipment AAIs. See *Working with AAIs for Equipment Billing* in the *Equipment Billing Guide*.

## Document Type T6 - Payroll Accruals and Deferrals

The Payroll system allows you to specify an accrual factor for transition pay periods instead of using the cost-period option of creating payroll journal entries. Through the use of this feature, you can use the accrual factor to accrue a portion of payroll expenses in the previous month and defer the expense to the following month. Prior period entries are made to the last day of the prior accounting period.

The journal entry types for T6 are the same as those for T2, T3, T4, and T5.

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The system creates journal entries for document-type T6 during the payroll cycle. Enter the accrual factor (percentage) in the journal entries step of the payroll cycle.

The accrual entries have a general ledger date that is equal to the last date of the prior accounting period. The reference number is equal to the journal entry type plus the original general ledger date.

The deferred entries have a general ledger date that is equal to the date of the original entries.

## **Document Type T7 - Payroll Vouchers**

Document-type T7 journal entries designate accounts payable vouchers.

Document-type T7s are created during the payroll cycle. All T7 journal entries carry the same general ledger date, which is the payment date.

The specific journal-entry types used for payroll voucher journal entries are the following:

**AL** Accrued liabilities – Credit entry

**AT** Accrued taxes – Credit entry

No AAIs exist for T7s. The account numbers are assigned the same way that T1 account numbers are assigned.

## **Example: Journal Entry with Document and Journal-Entry Types**

The following example of a payroll-cycle journal entry is based on the following simple payroll conditions:

- Employee: Home Company = 1, Home Business Unit = 25, Union = 1000
- Timecard: 01/28/98 (Pay Code 001) \$1,000
- Payroll Taxes and Insurance (P.T.I.): FICA (Tax Type D & E) \$70
- Deductions: Savings Bond (Ded Code 2000) \$50
- Benefits: Union 1000 (Ben Code 6000) \$30
- Payment Date: 02/05/98

Type	Journal-Entry Type	Date	Account	Description	DR	CR	Menu Sel.
<b>Type T2 – Labor Distribution Journal Entries</b>							
<b>Type T2 – Labour Distribution Journal Entries</b>							
T2	AW	01/28/98	1.4205	Wages Payable		1000	7
T2	LD	01/28/98	25.8115	Labor Expenses	1000		2
				Labor Expenses			
					1000	1000	
<b>Type T3 – Actual Burden Journal Entries</b>							
T3	BF	01/28/98	25.8146	Union Fringe	30		3
T3	BT	01/28/98	25.8135	FICA Burden	70		3
T3	CF	01/28/98	1.4333.FR	Burden Clearing – Fringe	30		7
T3	CT	01/28/98	1.4333.TX	Burden Clearing – Tax	70		7
					100	100	
<b>Type T1 – Disbursement Journal Entries</b>							
T1	AW	02/05/98	1.4205	Wages Payable	1000		7
T1	DA	02/05/98	1.1110.PAY	Cash in Bank		880	4
T1	AL	02/05/98	1.4316	Savings Bonds		50	5
T1	AL	02/05/98	1.4332	Union Fringe		30	5
T1	AT	02/05/98	1.4212.EE	FICA Employee		70	5
T1	AT	02/05/98	1.4212.ER	FICA Employer		70	5
T1	CF	02/05/98	1.4333.FR	Burden Clearing – Fringe	30		7
T1	CT	02/05/98	1.4333.TX	Burden Clearing – Tax	70		7
					1100	1100	

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## The Search Criteria That the System Uses

Company 00000 is the default company in all of the AAI tables. Always start by setting up generic entries in Company 00000. Such entries provide a source for default accounts for all of the various types of journal entries. After you complete table entries for Company 00000, you can set up other companies. Entries for other companies should only be exceptions to the generic rules set up under Company 00000.

Every AAI table includes the Journal Type field, which contains one or more codes identifying the type of journal entry. Each table has a hard-coded set of journal types. Rules for some journal types must be set up. Other rules are optional.

Each time the system creates a journal entry, it follows a hierarchy of search criteria to determine which distribution account to debit or credit. The system begins the search with basic data related to the type of accounting entry, referred to as the search argument. The system creates a search argument from the system data, such as the timecard, and searches the accounting rules tables for the table entry that best matches the search argument information.

On the first search, the system uses data appropriate for that table and looks for a match on all fields in the search criteria section of the form (the entire search argument). Then, one by one, the system drops elements from the search argument until it finds a matching table entry. At the lowest level, the system tries to match only the journal type. In addition, you can have a line in an accounting instruction table that has no search criteria other than the journal type. This is the default line.

The system first searches the rules for a specific company. If it finds no applicable rules (matches) for that company, it continues with the rules for Company 00000.



## **Setting Up AAIs for Payroll and Time Accounting**

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You set up automatic accounting instructions (AAIs) for Payroll and Time Accounting to automatically assign account numbers to the journal entries created in the system. You are setting up a series of rules for the system to use to charge time, labor, and equipment billing to certain accounts.

You can set up AAIs for each company and for the default company (Company 00000). It is important to set up AAIs for Company 00000 first so that the system can use these AAIs if it cannot find AAIs for a specific company. However, you cannot set up a business unit for Company 0000 because each business unit can be attached to a different company.

The rules are flexible and changeable within the payroll cycle. For example, labor distribution account numbers can be assigned by company, business unit, group (union), job type, job step, and pay type. You can also define instructions for labor distribution at the employee level for certain employees that need separate instructions.

In addition to defining instructions in the separate AAI tables, you can also set up rules for how the system summarizes journal entries.

Every AAI table includes the Journal Type field, which contains one or more codes identifying the type of journal entry. Each table has a hard-coded set of journal types. Rules for some journal types must be set up. Other rules are optional.

Setting up AAIs for Payroll and Time Accounting consists of the following tasks:

- Setting up AAIs for labor, billings, and equipment distribution
- Setting up AAIs for burden and premium labor distribution
- Setting up company burden rules
- Setting up business unit burden rules
- Setting up AAIs for cash-in-bank account distribution
- Setting up AAIs for liabilities
- Setting up AAIs for labor billings
- Setting up AAIs for accruals and clearing

- Setting up journal summarization rules
- Entering default journal types

Each task includes search criteria that the system uses to locate specific account numbers.

Depending on how you set your processing options, you can either set up and edit multiple AAIs using the multiple edit format or set up and edit a single AAI using the single edit format.

## Setting Up AAIs for Labor, Billings, and Equipment Distribution

You set up AAIs for direct labor, billings, and equipment distribution to define accounts for transactions related to labor, labor billing (recharge), and the use of equipment. You do this by defining search criteria for employee or timecard information and the account number information for the system to use in making the labor, billings, and equipment journal entries. All of these transactions are related directly to timecard entries.

You can set up AAIs separately for each company. Always set up generic instructions in Company 00000 first. When searching for AAIs, the system searches for a specific company. If it finds no AAIs for the specific company, it uses the AAIs defined for Company 00000.

The minimum information needed to set up an AAI is the Journal Type field. When you set up direct labor, billings, and equipment distribution AAIs, the following are the minimum setup requirements for Journal Type:

<b>Payroll labor distribution (LD)</b>	This is required if you are using employee hourly and salary rates.
<b>Labor billing distribution (RD)</b>	This is required if you are using billing (recharge) rates.
<b>Equipment distribution (ED)</b>	This is required if you are using equipment rates.

The system accesses this AAI table during time entry as well as during pre-payroll when it creates timecards for autopay employees. The system uses the values from the timecard, which obtains the values from the Employee Master table, other sources, or the overrides that you supply. You use these search criteria fields to assign account numbers based on the specific timecard information.

**Note:** If you enter an account number in an AAI table, you must first set up that account number in your chart of accounts. When you enter timecards for employees, the system allows you to enter any account number that is set up in your chart of accounts, regardless of whether the account is set up in your AAI tables. When you run the journal entries step of the payroll-cycle process, you will receive errors on your Journal Batch Proof Report for any timecards that contain account numbers that were not set up in the AAI tables. You must either change the account number on the timecard to reflect an account number that is set up in the AAI table, or you must add the account number to the AAI table. After you make the account number corrections, you must reprocess the timecards through pre-payroll.

## Search Criteria for Labor Distribution

The system uses certain fields as search criteria to determine a valid account for distribution of labor, billings, and equipment entries. The system searches the following AAIs for a specific company:

1. On the first pass, the system compares the time entry record's business unit, union, job type, job step, and pay type to the search criteria defined in the AAI for labor distribution and attempts to match the AAI search criteria to the appropriate journal type.
2. On each successive pass the system drops a value and uses a different combination of data fields for the search criteria.
3. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example identifies the search criteria that the system uses to match information from the timecard for a specific company:

Business Unit	Union	Job Type	Job Step	Pay Type	Journal Type
100	3000	CARP	APPR	1	LD
100	3000	CARP	APPR		LD
100	3000	CARP		1	LD
100	3000	CARP			LD
100	3000			1	LD
100	3000				LD
100		CARP	APPR	1	LD
100		CARP	APPR		LD
100		CARP		1	LD
100		CARP			LD
100				1	LD
100					LD
	3000	CARP	APPR	1	LD

	3000	CARP	APPR		LD
	3000	CARP		1	LD
	3000	CARP			LD
	3000			1	LD
	3000				LD
		CARP	APPR	1	LD
		CARP	APPR		LD
		CARP		1	LD
		CARP			LD
				1	LD
					LD

The following example identifies additional search criteria that the system can use to match information from the timecard for Company 00000:

1. On the first pass, the system compares the time entry record's business unit, union, job type, job step, and pay type to the rule's search criteria and attempts to match these search criteria fields to the appropriate journal type.
2. On each successive pass, the system drops a value and uses a different combination of data fields as search criteria.
3. Finally, if no matches exist in the rules for the specific company, the system searches the rules for the default journal type, LD.

Business Unit	Union	Job Type	Job Step	Payment Type	Journal Type
	3000	CARP	APPR	1	LD
	3000	CARP	APPR		LD
	3000	CARP		1	LD
	3000	CARP			LD
	3000			1	LD
	3000				LD
		CARP	APPR	1	LD
		CARP	APPR		LD
		CARP		1	LD
		CARP			LD
				1	LD
					LD

## Before You Begin

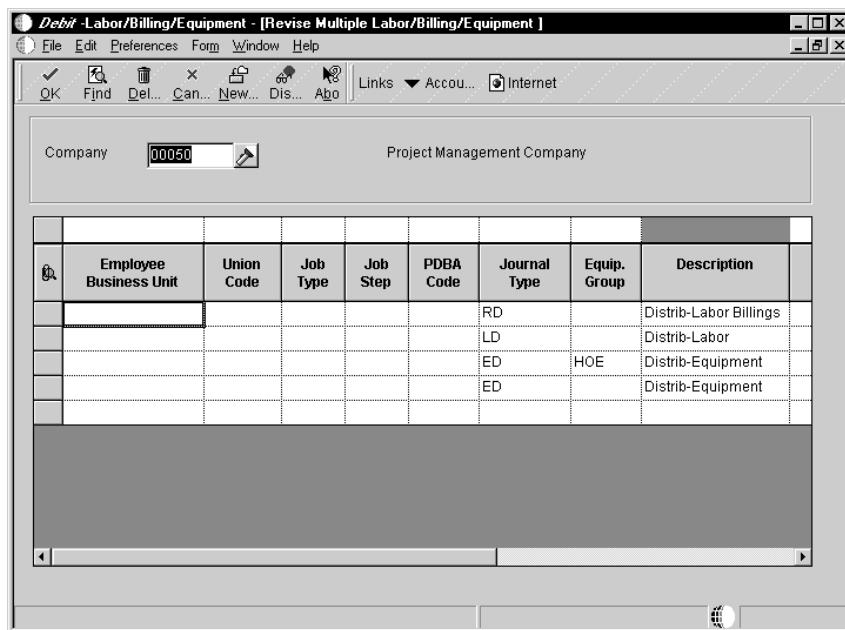
- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are

adding single or multiple accounts. This task demonstrates setting up multiple accounts.

### ► To set up AIs for labor, billings, and equipment distribution

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit - Labor/Billing/Equipment.

1. On Work With Accounting JE Rules - Labor/Billings/Equipment, click Add.



2. On Revise Multiple Labor/Billing/Equipment, complete the following fields:
  - Company
  - Journal Type
  - Obj Acct
3. Complete the following optional fields:
  - Employee Business Unit
  - Union Code
  - Job Type
  - Job Step
  - PDBA Code
  - Business Unit
  - Sub

4. Click OK to save the record.

Field	Explanation
Journal Type	A code that represents the type of transaction for which an account is to be derived.
Obj Acct	The portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories. For example, dividing labor into regular time, premium time, and burden.
	Note: If you are using a flexible chart of accounts and the object account is set to 6 digits, J.D. Edwards recommends that you use all 6 digits. For example, entering 000456 is not the same as entering 456, because if you enter 456, the system enters three blank spaces to fill a 6-digit object.
Employee Business Unit	Identifies the Business Unit the system searches to determine the accounting distribution. When defining the default rules (Company 00000), leave the Business Unit blank for the system to retrieve the Business Unit number entered on the Employee timecard, or from the Employee's Home Business Unit.
	You can use the Skip to Business Unit field to specify the Business Unit to be displayed first in the lower part of the screen.
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Job Type	You associate pay and benefit information with a job type when you define jobs on Job Entry and Evaluation (P08001). Certain pay and benefit information that you associate with a job type defaults in the Employee Entry forms when you are adding a new employee to the database.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
PDBA Code	A code that defines the type of pay, deduction, benefit, or accrual.
	Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

Field	Explanation
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Sub	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.

## See Also

- *Entering Default Journal Types*

## Processing Options for Labor/Billing/Equipment

### Default

1. Enter a '1' for the program to use the Multiple Entry form when selecting a record or when the ADD button has been pressed. When left blank, the program will use the Single Entry form when a selection has been made or when the ADD button has been pressed.

---

## Setting Up AAIs for Burden and Premium Labor Distribution

You set up AAIs to define accounts for actual burden, flat burden, and premium time transactions for labor distribution. You can choose a hierarchy method that controls the search criteria that the system uses to search for accounts.

You can set up AAIs separately for each company. Always set up generic instructions in Company 00000. The system searches for a specific company first. If it finds no instructions for the specific company, it searches for Company 00000.

Burden is defined as the direct expenses that a company incurs for an employee in addition to wages. These expenses include the following:

- Payroll taxes and insurance (PTI) – Company-paid taxes and insurance, such as workers compensation insurance
- Fringe benefits – Company-paid benefits, such as health insurance and company contributions to a 401(k) or RRSP plan

### **Flat burden considerations**

Flat burden:

- Is an estimate that is a predetermined percentage of an employee's gross wages. This estimate is approximate to actual burden costs.
- Distributes the expense in the same amount throughout the entire year.
- Can be calculated per employee, union, or business unit for each timecard during time entry.
- Is not calculated for lump sum amounts.
- Is a median calculation of actual burden for the year.

### **Actual burden considerations**

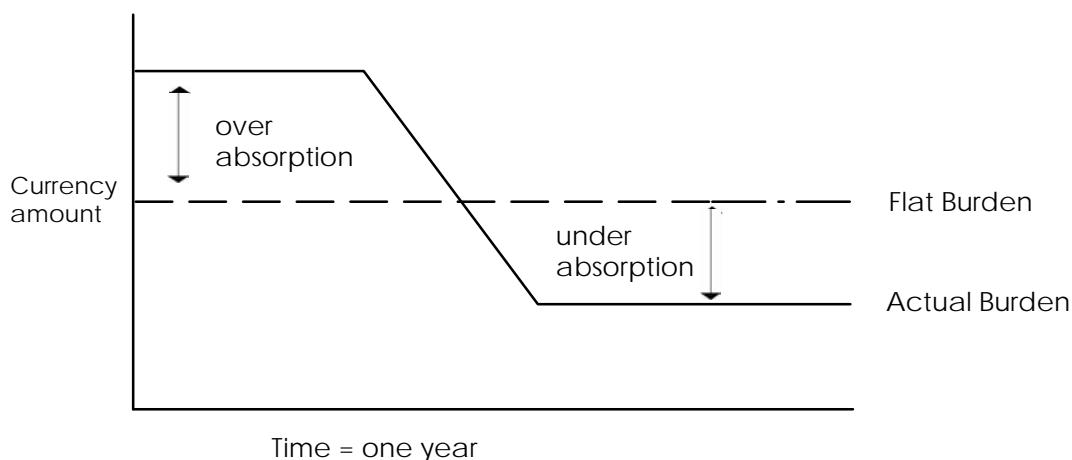
Actual burden:

- Is heavier at the beginning of the year until limits are reached. Examples are FICA, FUI, SUI, and SDI in the U.S.
- Can be turned on and off by company to complete the calculation.

### **Burden considerations for the Time Accounting system**

The Time Accounting system calculates flat burden instead of actual burden.

The following graphic illustrates how expenses are distributed throughout an entire year according to flat burden and actual burden:



When you set up flat burden distribution debit instructions, you must, at a minimum, include the following Journal Type code:

- FB - Flat burden

When you set up premium labor debit instructions, you must, at a minimum, include the following Journal Type code:

- PR - Payroll premium labor distribution

You can have the system split the premium portion of overtime and create separate journal entries for straight time versus premium time. See *Setting Up Company Burden Rules*.

When you set up actual burden distribution debit instructions, you must, at a minimum, include the following default Journal Type codes:

- BF - Burden fringe benefits for actual burden

Use this Journal Type for the burden fringe benefits that you do not want to distribute separately. The system uses the account number associated with this Journal Type when it does not find an entry for a specific fringe benefit.

- BT - Burden taxes for actual burden

Use this Journal Type for the burden taxes that you do not want to distribute separately. The system uses the account number associated with this Journal Type when it does not find an entry for a specific tax.

## Search Criteria for Burden Fringe

The system uses certain fields as search criteria to determine a valid account for the distribution of burden fringe entries. The system searches the following AAIs for a specific company:

1. On the first pass, the system compares the time entry record's business unit, object, subsidiary, PDBA code, and journal type to the search criteria defined in the AAI for burden fringe, and attempts to match the AAI search criteria to the appropriate journal type.
2. On the second pass, the system searches for business unit, object, subsidiary, and journal type.
3. On each successive pass, the system drops a value and uses a different combination of data fields for the search criteria. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example illustrates the ways that the system can match information from a timecard for a specific company for burden fringe:

Timecard Business Unit	Timecard Object	Timecard Subsidiary	PDBA Code	Journal Type
1	1340	02200	1000	
1	1340	02200		BF
1	1340		1000	
1	1340			BF
	1340		1000	
	1340			BF

The following list illustrates the ways that the system can match information from a timecard for Company 00000.

Timecard Business Unit	Timecard Object	Timecard Subsidiary	PDBA Code	Journal Type
	1340	02200	1000	
	1340	02200		BF
	1340		1000	
	1340			BF
	00000		1000	
	00000			BF

### Before You Begin

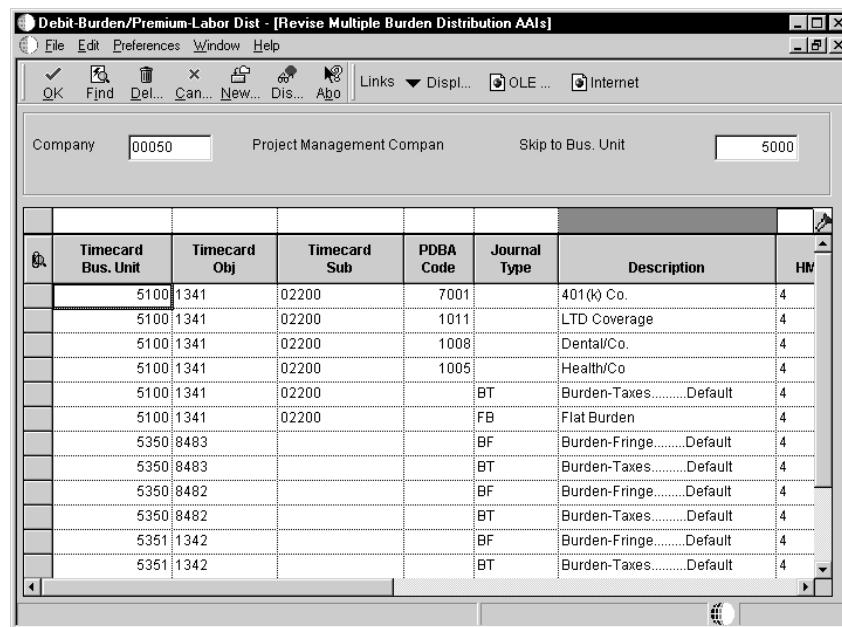
- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are

adding single or multiple accounts. This task demonstrates setting up multiple accounts.

### ► To set up AIs for burden and premium labor distribution

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit - Burden/Premium-Labor Distribution.

1. On Work With Burden Distribution AIs, click Add.



2. On Revise Multiple Burden Distribution AIs, complete the following fields:

- Company
- PDBA Code
- HM

The Hierarchy Method entered controls the Business Unit and the Subsidiary values.

- Obj

3. To set up Company 00000, enter 00000 or a valid object in the following field:
  - Timecard Obj
4. To set up a specific company, enter a valid object in the following field:
  - Timecard Obj

5. For tax types and journal types FB and PR, complete the following field:
  - Journal Type
6. For a specific company, complete the following optional field:
  - Timecard Bus. Unit
7. Complete the following optional fields:
  - Timecard Sub
  - Bus Unit
  - Sub
8. Click OK to save the record.

<b>Field</b>	<b>Explanation</b>
HM	<p>This code is used to retrieve the business unit and subsidiary accounts for burden distribution. The following methods available are:</p> <ul style="list-style-type: none"> <li>1     Business unit: Employee Home Business Unit unless a table override exists Subsidiary: No Subsidiary. Subledger/Type: No Subledger or Subledger Type.</li> <li>2     Business unit: Employee Home Business Unit unless a table override exists Subsidiary: Labor Distribution Subsidiary unless a table override. Subledger/Type: Labor Distribution Subledger and Type.</li> <li>3     Business unit: Labor Business Unit unless a table override exists. Subsidiary: No Subsidiary. Subledger/Type: Labor Distribution Subledger and Type.</li> <li>4     Business unit: Labor Business Unit unless a table override exists. Subsidiary: Labor Distribution Subsidiary unless a table override. Subledger/Type: Labor Distribution Subledger and Type.</li> <li>5     Business unit: Employee Home Business Unit unless a table override exists Subsidiary: Labor Distribution Subsidiary unless a table override. Subledger/Type: No Subledger or Subledger Type.</li> <li>6     Business unit: Labor Business Unit unless a table override exists. Subsidiary: Labor Distribution Subsidiary unless a table override. Subledger/Type: No Subledger or Subledger Type.</li> </ul>
Obj	<p>The portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories. For example, dividing labor into regular time, premium time, and burden.</p> <p>Note: If you are using a flexible chart of accounts and the object account is set to 6 digits, J.D. Edwards recommends that you use all 6 digits. For example, entering 000456 is not the same as entering 456, because if you enter 456, the system enters three blank spaces to fill a 6-digit object.</p>

Field	Explanation
Timecard Obj	The object account where labor is posted. All object accounts which might have wages posted to them MUST be entered into this field. This is the major element in determining where the corresponding burden is to be posted. If a business unit is defined, this field represents the unique labor object accounts associated to the job.
Timecard Bus. Unit	Identifies the Business Unit the system searches to determine the accounting distribution. When defining the default rules (Company 00000), leave the Business Unit blank for the system to retrieve the Business Unit number entered on the Employee timecard, or from the Employee's Home Business Unit.  You can use the Skip to Business Unit field to specify the Business Unit to be displayed first in the lower part of the screen.
Timecard Sub	The subsidiary account associated with the labor object account. If both a Labor object and subsidiary account are defined, the combination may determine the burden accounts to be used in creating the distribution. This method will accommodate unconventional coding of the cost codes in a job cost environment, for example, the usage of cost codes to define a type of labor, versus using just the object account.
Sub	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.

## See Also

- *Entering Default Journal Types*

## Processing Options for Burden Distribution AAs

### Defaults

1. Enter a '1' for the program to use the Multiple Entry form when selecting a record or when the ADD button has been pressed. When left blank, the program will use the Single Entry form when a selection has been made or when the ADD button has been pressed.

## Setting Up Company Burden Rules

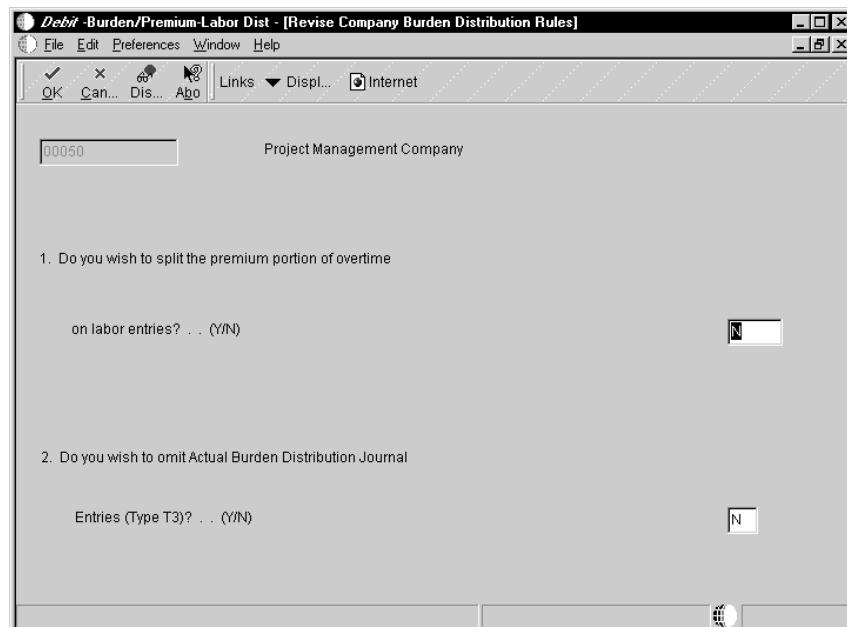
You can set up company burden rules to split the premium portion of overtime into a separate journal entry.

You must set up company burden rules for a specific company. You cannot use Company 00000.

### ► To set up company burden rules

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit - Burden/Premium-Labor Distribution.

1. On Work With Burden Distribution AAIs, complete the following field and click Find:
  - Co
2. From the Row menu, choose CO Burden Rules (Company Burden Rules).



3. On Revise Company Burden Distribution Rules, complete the following fields and then click OK:
  - 1. Do you wish to split the premium portion of overtime on labor entries? . . (Y/N)
  - 2. Do you wish to omit Actual Burden Distribution Journal Entries (Type T3)? . . (Y/N)

<b>Field</b>	<b>Explanation</b>
1. Do you wish to split the premium portion of overtime on labor entries? . (Y/N)	A code which specifies whether the premium portion of overtime earnings is to be separated from 'Regular' earnings for accounting purposes. The valid codes are: Y     The premium portion of overtime earnings will be separated from regular earnings during the Journal Entry step of the Payroll Cycle. N     The premium portion of overtime earnings will NOT be separated from regular earnings; Total earnings will be posted into the same account during the Journal Entry step of the Payroll Cycle.
2. Do you wish to omit Actual Burden Distribution Journal Entries (Type T3)? . (Y/N)	A code that specifies whether the Journal Entry program is to omit creation of Burden Distr. Detail(F0624) records and Distributed Actual Burden Amounts for all companies and business units. The valid values are: Y     Omit the creation of F0624 records and any corresponding Actual Burden journal entries. N     Default to the Business Unit (F069056) level to determine whether any F0624 records are to be created and whether the corresponding Actual Burden journal entries are to be generated.

## Setting Up Business Unit Burden Rules

You can create and store actual burden detail for every timecard. Typically, you need this information for government jobs or for auditing by an outside agency. When you set up business unit burden rules, you define a burden rule that applies to a single business unit. This AAI is useful for tracking detailed cost-plus burden expenses by job and business unit.

If you do not set up burden rules, the system creates T3s but does not write records to the Burden Distribution worktable (F06241).

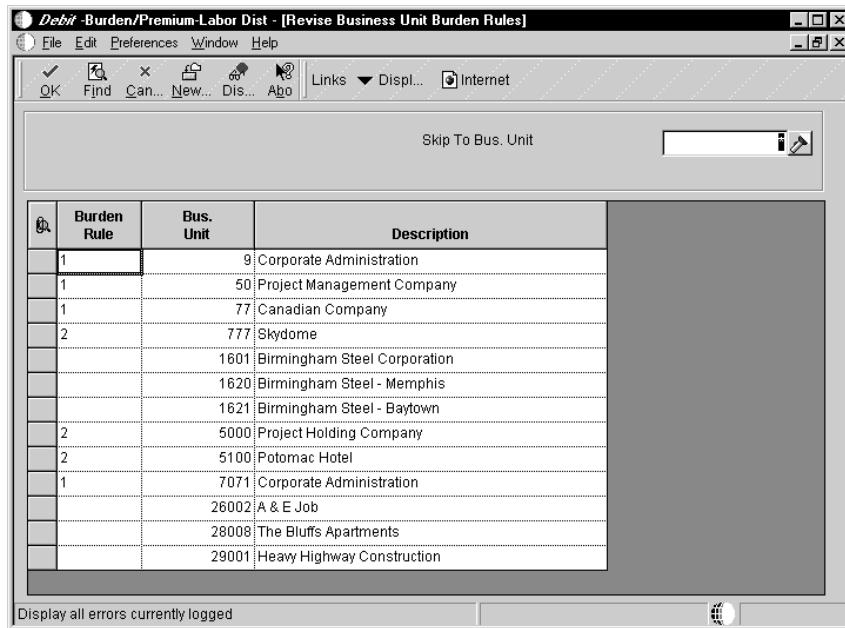
### Before You Begin

- You must set up a business unit in the Business Unit Constants (P059051A) for the business unit that you need to set up burden rules for. See *Setting Up Business-Unit Constants*.

► **To set up business unit burden rules**

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Debit - Burden/Premium-Labor Distribution.

1. On Work With Burden Distribution AAIs, from the Form menu, choose BU Burden Rules (Business Unit Burden Rules).



2. On Revise Business Unit Burden Rules, complete the following field and click OK:
  - Burden Rule

Field	Explanation
Burden Rule	<p>Actual Burden expenses are initially grouped into burden clearing accounts in the T1 section of the payroll journals. The user has the option of relieving these clearing entries and distributing burden expense based on where the direct labor was charged. This distribution of burden expense is done in the T3 section of the payroll journals. The user also has the option of creating a fixed audit trail for how each component of burden was distributed per individual timecard. This detail audit trail is maintained in the F0624 file which is used by the payroll system to produce Job Billing Registers. The rule codes listed below control the process:</p> <ul style="list-style-type: none"> <li>0     Do not create T3 Burden Expense entries for the Business Unit.</li> <li>1     Create T3 Burden Expense entries but not the F0624 audit records.</li> <li>2     Create T3 Burden Expense entries and associated F0624 audit records.</li> <li>3     Same as 1 but reverse out the Flat Burden posted thru the special timecard post.</li> <li>4     Same as 2 but reverse out the Flat Burden posted thru the special timecard post.</li> </ul>

## Setting Up AAIs for Cash-in-Bank Account Distribution

You set up AAIs for cash-in-bank account distribution to define accounts for payroll disbursements. You can define different accounts for the following:

- Cash disbursements
- Computer checks
- Automatic deposits
- Interim manual checks
- Interim computer checks

When you set up cash-in-bank account distribution instructions, you must, at a minimum, set up the default Journal Type DP. You can use other journal types when other types of payments are drawn on different bank accounts.

If you create automatic deposits for interim payments, you must set up Journal Type DD. The Journal Batch Proof report lists payments processed with Journal Type DD as Journal Type DI. These payments are also created in the Account Ledger table (F0911) under Journal Type DI.

The system derives cash-in-bank account number during pre-payroll processing. If your cash account is incorrect, after correcting the cash account, you must rerun pre-payroll.

**Journal Types**

- DA – Automatic deposits
- DC – Currency disbursement (cash)
- DD – Interim automatic deposits
- DI – Interim computer checks
- DM – Interim manual checks
- DP – Printed computer checks from payroll cycle

The Journal Type represents the type of payment.

**Search Criteria for Cash-in-Bank Account Distribution**

The system uses certain fields as search criteria to determine a valid account for distribution of Cash-in-Bank during pre-payroll processing. The system searches the following AAIs for a specific company:

1. On the first pass, the system compares the time entry record's business unit and journal type to the search criteria defined in the AAI for Cash-in-Bank accounts, and attempts to match the AAI search criteria to the appropriate journal type.
2. On each successive pass, the system locates either the business unit or the journal type.
3. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example illustrates the ways that the system matches the type of payment and the home business unit for a specific company:

Business Unit	Journal Type
1	DA
1	DP
	DA
	DP

The following example illustrates the ways that the system can match the type of payment for Company 00000:

Business Unit	Journal Type
	DA
	DP

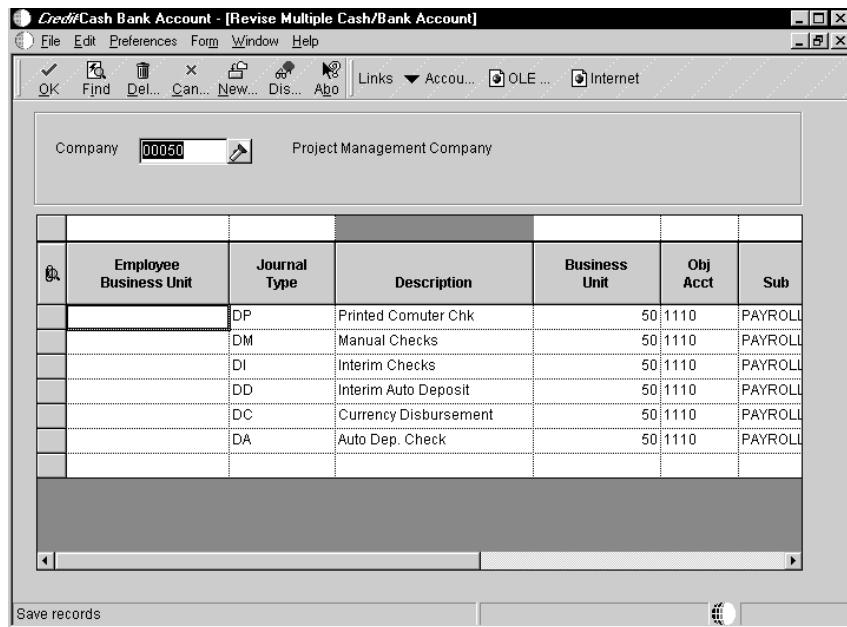
## Before You Begin

- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts.

### ► To set up AAIs for cash-in-bank account distribution

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Credit-Cash/Bank Account.

1. On Work With Accounting JE Rules - Cash/Bank Account, click Add.



2. On Revise Multiple Cash/Bank Account, complete the following fields:
  - Company
  - Journal Type
  - Obj Acct
3. Complete the following optional fields:
  - Business Unit
  - Sub
  - Employee Business Unit
4. Click OK.

<b>Field</b>	<b>Explanation</b>
Company	<p>A code that identifies a specific organization, fund, entity, and so on. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p> <p>Note: You can use Company 00000 for default values, such as dates and automatic accounting instructions. You cannot use Company 00000 for transaction entries.</p>
Journal Type	<p>A code that represents the type of transaction for which an account is to be derived.</p>
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Employee Business Unit	<p>Identifies the Business Unit the system searches to determine the accounting distribution. When defining the default rules (Company 00000), leave the Business Unit blank for the system to retrieve the Business Unit number entered on the Employee timecard, or from the Employee's Home Business Unit.</p> <p>You can use the Skip to Business Unit field to specify the Business Unit to be displayed first in the lower part of the screen.</p>
Obj Acct	<p>The portion of a general ledger account that refers to the division of the Cost Code (for example, labor, materials, and equipment) into subcategories. For example, dividing labor into regular time, premium time, and burden.</p> <p>Note: If you are using a flexible chart of accounts and the object account is set to 6 digits, J.D. Edwards recommends that you use all 6 digits. For example, entering 000456 is not the same as entering 456, because if you enter 456, the system enters three blank spaces to fill a 6-digit object.</p>
Sub	<p>A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.</p>

## See Also

- *Entering Default Journal Types*

## Setting Up AAIs for Liabilities

You set up AAIs for liabilities to define accounts for the payroll disbursements journal.

The minimum setup requirements for journal types when you set up liabilities instructions include the following default journal type codes:

**AL** Accrued liabilities for deductions and benefits

**AT** Accrued liabilities for payroll taxes

## Search Criteria for Liabilities

The system uses certain fields as search criteria to determine a valid account for the distribution of liabilities. The system searches the following AAIs for a specific company:

1. On the first pass, the system compares the time entry record's home business unit PDBA code and journal type to the search criteria defined in the AAI for Liabilities and attempts to match the AAI search criteria to the appropriate journal type.
2. On each successive pass, the system uses the business unit or the journal type.
3. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example illustrates the fields that the system uses as search criteria for a specific company. For tax liabilities, the system matches the journal type and, optionally, the employee's business unit. For PDBA liabilities, the system matches the PDBA code and, optionally, the employee's business unit.

Business Unit	PDBA Code	Journal Type
1		H
1		AT
		H
		AT
1	5000	
1		AL

	5000	
		AL

The following example illustrates the fields that the system uses as search criteria for Company 00000. The system matches the PDBA code, or it uses the default journal type if no match is found.

Business Unit	PDBA Code	Journal Type
		H
		AT
	5000	
		AL

## Understanding Distribution Account Fields for Liabilities

You can override the value, or use one of the following constants in the Subsidiary field so that the system can designate distribution account information. You must have valid general ledger account numbers set up. See *Account Setup* in the *General Accounting Guide*.

- \*STAT - To move the statutory code to the Subsidiary field for a tax. Use \*STAT to charge taxes to specific accounts without having to define each account in the table. For example, the system will use CA for California.
- \*EMP - To move the employee number to the Subsidiary field for a DBA.
- \*PAY - To move the pay or DBA code to the Subsidiary field.
- \*UNION - To move the union code to the Subsidiary field for a DBA.

You can use the following constants in the Subledger field:

- \*SBLE - To move the employee number to the Subledger field.
- \*SBLP - To move the DBA code to the Subledger field.

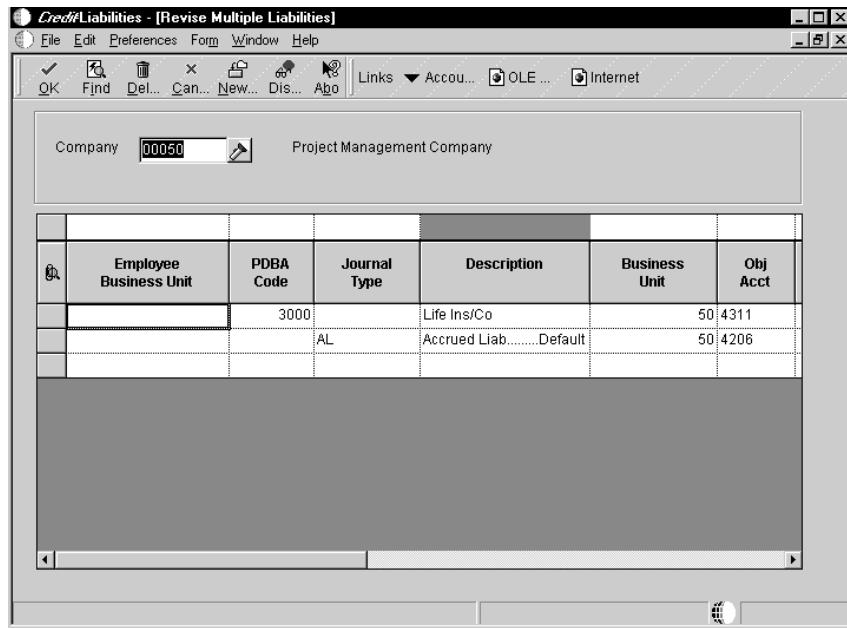
## Before You Begin

- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts.

► **To set up AAIs for liabilities**

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Credit-Liabilities.

1. On Work With Accounting JE Rules-Liabilities, click Add.



2. On Revise Multiple Liabilities, complete the following fields:
  - Company
  - Obj Acct
3. For deductions and benefits, complete the following field:
  - DBA Code
4. For taxes and for AL and AT journal types, complete the following field:
  - Journal Type
5. Complete the following optional fields:
  - Employee Business Unit
  - Business Unit
  - Sub
  - Sub- ledger
  - Sub Type

6. Click OK.

<b>Field</b>	<b>Explanation</b>						
Subledger	A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number or an address book number. If you enter a subledger, you must also specify the subledger type.						
Subledger Type	<p>A user defined code (00/ST) that is used with the Subledger field to identify the subledger type and how the system performs subledger editing. On the User Defined Codes form, the second line of the description controls how the system performs editing. This is either hard-coded or user defined. For example:</p> <table style="margin-left: 40px;"> <tr> <td>A</td> <td>Alphanumeric field, do not edit</td> </tr> <tr> <td>N</td> <td>Numeric field, right justify and zero fill</td> </tr> <tr> <td>C</td> <td>Alphanumeric field, right justify and blank fill</td> </tr> </table>	A	Alphanumeric field, do not edit	N	Numeric field, right justify and zero fill	C	Alphanumeric field, right justify and blank fill
A	Alphanumeric field, do not edit						
N	Numeric field, right justify and zero fill						
C	Alphanumeric field, right justify and blank fill						

## Setting Up AAIs for Labor Billings

You set up AAIs for labor billings to define accounts for labor billing offsets. These offsets are natural credit or revenue entries that offset labor billing charges or debits. Entries for labor billings are generally credit entries.

If your company does not use labor billings, you do not need to set up these AAIs.

For your most common account distribution, you can define a default labor billing rule using the journal type RO with the appropriate account information. The system uses the default rule when it does not find a rule for the specific business unit in a specific company.

### Search Criteria for Labor Billings

The system uses certain fields as search criteria to determine a valid account for the distribution of labor billings. The system searches the following AAIs for a specific company:

1. On the first pass, the system compares the time entry record's home business unit, charge to unit, PDBA code, and journal type to the search criteria defined in the AAI for Labor Billings and attempts to match the AAI search criteria to the appropriate Journal Type.
2. On each successive pass, the system drops a value and uses a different combination of data fields for the search criteria.
3. Finally, if no matches exist in the rules for the specific company, the system searches the rules for the default company (Company 00000).

<b>Home Business Unit</b>	<b>Charge to Unit</b>	<b>PDBA Code</b>	<b>Journal Type</b>
9	501	1	RO
9	501		RO
9		1	RO
9			RO
	501	1	RO
	501		RO
		1	RO
			RO

The following example identifies the fields that the system uses as search criteria to match information from the timecard to the default company (Company 00000):

<b>Home Business Unit</b>	<b>Charge to Unit</b>	<b>PDBA Code</b>	<b>Journal Type</b>
	501	1	RO
	501		RO
		1	RO
			RO

## Before You Begin

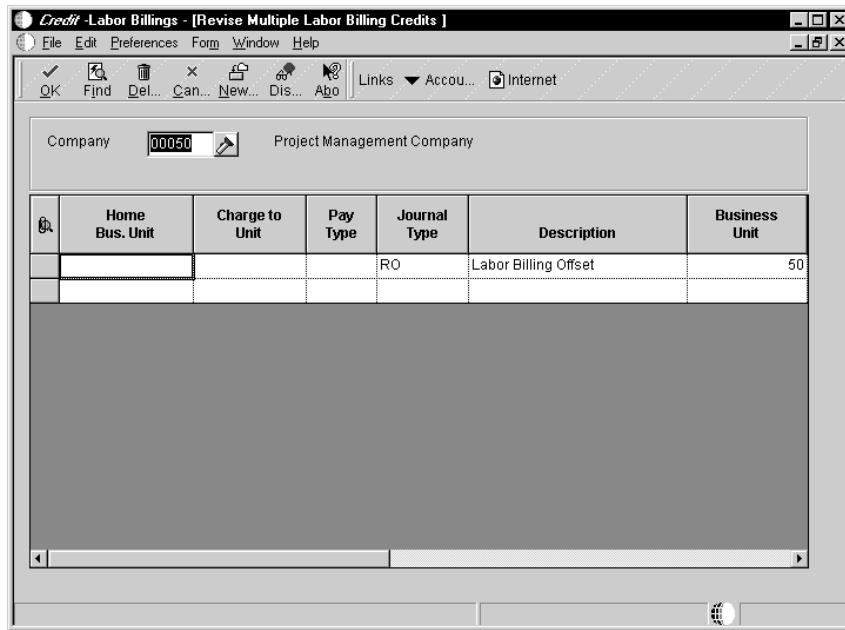
- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts at a time.

### ► **To set up AAIs for labor billings**

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From the Automatic Accounting Instruction Setup menu (G05BT4), choose Credit - Labor Billings.

1. On Work With Accounting JE Rules - Labor Billing Credits, click Add.



2. On Revise Multiple Labor Billing Credits, complete the following fields:
  - Company
  - Journal Type
  - Object Account
3. Complete the following optional fields:
  - Home Bus. Unit
  - Charge to Unit
  - DBA Code
  - Business Unit
  - Sub

The Charge to Unit and Home Business Unit fields allow you to account for billing revenue.

4. Click OK.

## See Also

- *Entering Default Journal Types*

## **Processing Options for Labor Billing Credits**

### **Default**

1. Enter a '1' for the program to use the Multiple Entry form when selecting a record or when the ADD button has been pressed. When left blank, the program will use the Single Entry form when a selection has been made or when the ADD button has been pressed.
- 

## **Setting Up AAIs for Accruals and Clearing**

For the Payroll system, you set up AAIs for accruals and clearing to define accounts for the following:

- Accrued wages (T1, T2)
- Flat burden clearing (T2)
- Recharge flat burden clearing
- Intercompany settlements (T1-T6)
- Actual burden clearing (T1-T3)

For the time accounting process, you set up AAIs for accruals and clearing to define accounts for the following:

- Accrued wages (T2)
- Flat burden clearing (T2)

When you set up the accrued wages account, you must, at a minimum, include the following journal type code:

- AW - Accrued wages for the labor distribution and payroll disbursements journals

When you set up the flat burden clearing account, you must, at a minimum, include the following journal type code:

- FC - Flat burden clearing for the labor distribution journal

When you set up intercompany settlement accounts, you must, at a minimum, include the following journal type code:

- IC - Intercompany settlements for the actual burden expense, labor distribution, and payroll disbursements journals

When you set up the recharge flat burden clearing account, you must, at a minimum, include the following journal type code:

- RC - Recharge burden relief for the actual burden expense and payroll disbursements journals

When you set up actual burden clearing accounts, you must, at a minimum, include the following journal type code:

- CF - Burden clearing fringe for the actual burden expense and payroll disbursements journals
- CT - Burden clearing tax for the actual burden expense and payroll disbursements journals

### Search Criteria for Accruals and Clearing

The system uses certain fields as search criteria to determine a valid account for distribution of accrued wages, flat burden clearing, intercompany settlements, and recharge flat burden clearing. The system searches the following AAIs for a specific company:

1. On the first pass, the system compares the time entry record's business unit and journal type to the search criteria defined in the AAI for Accruals and Clearing and attempts to match the AAI search criteria to the appropriate journal type.
2. On the next pass, the system looks only at journal type.
3. Finally, if no matches exist in the rules for the specific company, the system searches the rules for Company 00000.

The following example identifies the search criteria that the system uses to match information from the timecard for a specific company for clearing tax burden:

Business Unit	PDBA Code	Journal Type
1		H
		H
1		CT
		CT

The following example identifies the search criteria that the system can use to match information from the timecard for Company 00000 for clearing tax burden:

Business Unit	PDBA Code	Journal Type
		H
		CT

The following example identifies the search criteria that the system can use to match information from the timecard for a specific company for clearing fringe burden:

<b>Business Unit</b>	<b>PDBA Code</b>	<b>Journal Type</b>
1	1000	
	1000	
1		CF
		CF

The following example identifies the search criteria that the system can use to match information from the timecard for Company 00000 for clearing fringe burden:

<b>Business Unit</b>	<b>PDBA Code</b>	<b>Journal Type</b>
	1000	
		CF

The following example identifies the search criteria that the system can use to match information from the timecard for a specific company for accrued wages, flat burden clearing, intercompany settlements, or recharge flat burden clearing:

<b>Business Unit</b>	<b>PDBA Code</b>	<b>Journal Type</b>
1		AW, FC, IC, or RC
		AW, FC, IC, or RC

The following example identifies the search criteria that the system can use to match information from the timecard for Company 00000 for accrued wages, flat burden clearing, intercompany settlements, or recharge flat burden clearing:

<b>Business Unit</b>	<b>PDBA Code</b>	<b>Journal Type</b>
		AW, FC, IC, or RC

## **Understanding Distribution Account Fields for Accruals and Clearing**

The following information tells you what values to enter in certain fields to help the system designate detailed account information. See *Account Setup* in the *General Accounting Guide*.

- Business Unit - \*LABOR for FC (flat burden offset) provides the same business unit as labor, not Home Business Unit
- Subsidiary - Override the value or enter \*PAY for DBAs, or \*CO for intercompany settlements
- Subledger - A required field

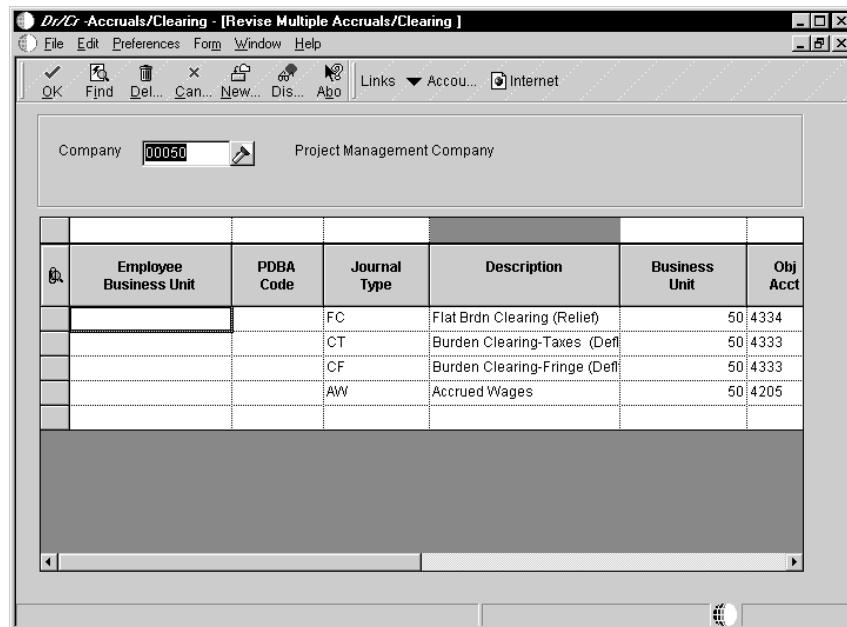
## Before You Begin

- Set up your processing options to add a single account or multiple accounts at a time. You use the same steps to set up AAIs whether you are adding single or multiple accounts. This task demonstrates setting up multiple accounts at a time.

### ► To set up AAIs for accruals and clearing

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Dr/Cr - Accruals/Clearing.

1. On Work With Accounting JE Rules -Accruals/Clearing, click Add.



2. On Revise Multiple Accruals/Clearing, complete the following fields:
  - Company
  - Obj Acct
3. Complete one of the following fields, as appropriate:
  - PDBA Code
  - Journal Type
4. Complete the following optional fields and click OK:
  - Employee Business Unit
  - Business Unit
  - Sub

- Sub- ledger
- Sub Type

### See Also

- *Entering Default Journal Types*

## Setting Up Journal Summarization Rules

You set up journal summarization rules to define how the Payroll system summarizes pro forma journal entries before creating actual journal entries in the general ledger. Summarizing journal entries reduces the number of transactions in the general ledger.

**Note:** If you use the Time Accounting System to generate journal entries, you can define a processing option in the processing options for Generate Timecard Journals program (R052901) to override the journal summarization rules you set up in this task.

Defining journal summarization rules allows you to do the following:

- Summarize journal entries for specific companies and for Company 00000
- Create both summarized and detail journals
- Define up to six different summarization rules for a specific range of object accounts and for a specific business unit

If the system does not find summarization rules for a specific company, it uses those that are set up for Company 00000. If it finds no summarization rules for an account, it assumes full summarization.

Each additional variable (company, business unit, or summarization code) that you define requires additional computer resources, which increases processing time. Therefore, J.D. Edwards recommends that you do the following:

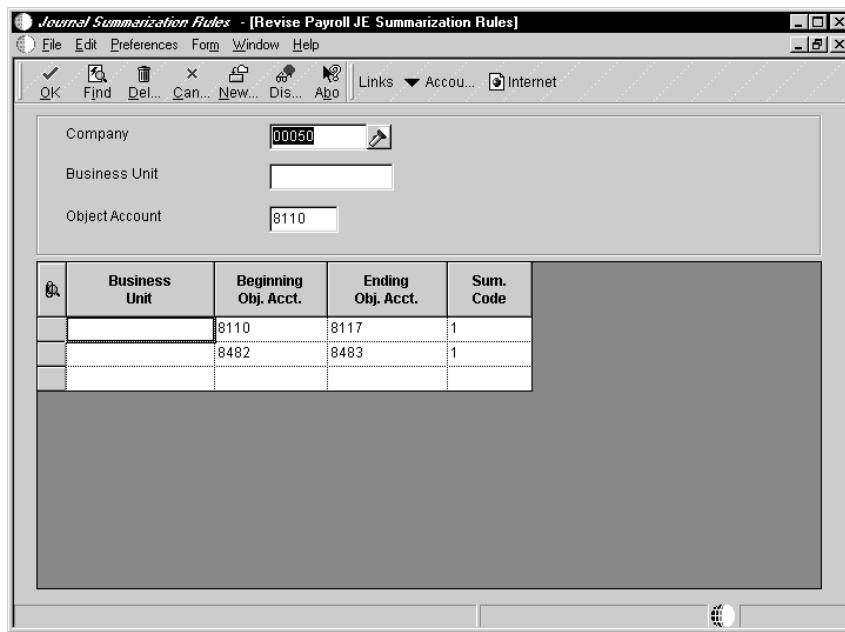
- Set up summarization rules for Company 00000
- Avoid setting up summarization rules at the business unit level
- Define the same summarization code for each object account range when possible

► **To set up journal summarization rules**

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From the Automatic Accounting Instruction Setup menu (G05BT4), choose Journal Summarization Rules.

1. On Work With Payroll Journal Entry Summarization Rules, click Add.



2. On Revise Payroll JE Summarization Rules, complete the following fields:
  - Company
  - Object Account
3. Complete one or more of the following fields and click OK:
  - Business Unit
  - Beginning Obj. Acct.
  - Ending Obj. Acct.
  - Sum Code

---

<b>Field</b>	<b>Explanation</b>
Object Account	The Object account number where summarization is to begin within the Business Unit or Company specified.

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Field	Explanation
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Beginning Obj. Acct.	The Object account number where summarization is to begin within the Business Unit or Company specified.
Ending Obj. Acct.	The Object account number where summarization is to end within the Business Unit or Company specified.

<b>Field</b>	<b>Explanation</b>
Sum Code	<p>The rules tell the system how to summarize the pro forma entries before creating the actual journal entries. The system looks for all documents that have the same value and summarizes them into one journal.</p> <p>Valid codes for rules and journal entry descriptions are:</p> <ul style="list-style-type: none"> <li>1      Full summary : The system looks for the same values for the following: business unit, object, subsidiary, subledger, subledger type, fiscal year, general accounting period number, equipment or asset number, document type and journal reference (See data dictionary item PRJE.)</li> <li>First description in the journal entry – Document description</li> <li>Second description in the journal entry – Blank</li> <li>2      Same as Rule 1 and include pay type</li> <li>First description in the journal entry – Document description</li> <li>Second description in the journal entry – Pay type</li> <li>3      Same as Rule 1 and include pay type, job type, and job step</li> <li>First description in the journal entry – Document description</li> <li>Second description in the journal entry – Pay type</li> <li>4      Same as Rule 1 and include pay type, job type, job step, and employee</li> <li>First description in the journal entry – Employee name</li> <li>Second description in the journal entry – Pay type</li> <li>5      Do not summarize</li> <li>First description in the journal entry – Document description</li> <li>Second description in the journal entry – Time entry comment and pay type</li> <li>6      Do not summarize and include employee name</li> <li>First description in the journal entry – Employee name</li> <li>Second description in the journal entry – Time entry comment and pay type</li> </ul>

## Entering Default Journal Types

Each AAI table can have a default journal type. For example, LD is the default journal type for the labor distribution table. When the timecard or employee criteria do not match up to any instructions, the system uses the instructions assigned to the default journal type. You can use a default journal type for a specific company and for Company 00000.

The following table lists the default journal types:

<b>LD and RD</b>	Use in labor, billings, and equipment distribution tables
<b>PR</b>	Use in premium labor tables
<b>RO</b>	Use in labor billings tables
<b>AW</b>	Use in accrued wages in accruals and clearing tables
<b>IC</b>	Use in intercompany settlements in accruals and clearing tables
<b>BF and BT</b>	Use in actual burden tables
<b>AL and AT</b>	Use in liabilities tables

You can also use a default journal type to indicate that you are missing instructions from a table.

If you set up a default with an invalid account number, the system prints a warning on the Journal Proof report.

### ► To enter default journal types

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From the Automatic Accounting Instruction Setup menu (G05BT4), choose any AAIs form.

1. On any AAIs form, complete the following fields for the default journal type:
  - Journal Type
  - Obj Acct

2. Complete the following optional distribution account fields:
  - Business Unit
  - Sub
3. Click OK.



## **Understanding Intercompany Settlements**

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If your organization consists of multiple companies and your employees sometimes work in companies other than their home companies, intercompany settlements make it possible for you to expense labor to one company and the associated liabilities to the home company.

Intercompany settlements keep the payroll journal entries for each company in balance by document type. These journal entries ensure that each company's net balance equals zero, or that the debits equal the credits.

### **Example: Intercompany Settlements Using Document Type T2**

An employee whose home company is Company 1 works in Company 50, business unit 501. The employee's gross wages are 1,000.00. All liabilities are posted to the home company.

When you have not set up intercompany settlements in the Payroll system, the journal entries for the employee are:

- In balance by document type across all companies
- Out of balance by company
- Out of balance by document type within a company

The document type T2 (labor distribution) journal entries for the employee are the following:

<b>TY</b>	<b>JT</b>	<b>Account</b>	<b>Description</b>	<b>DR</b>	<b>CR</b>
T2	AW	1.4205	Wages Payable	1000	
			Company 1 Total.....	00	1000
T2	LD	501.8115	Labor Expense	1000	
			Company 50 Total.....	1000	00
			Grand Total.....	1000	1000

When you have set up intercompany settlements in the Payroll system, the entries for the employee are:

- In balance by company
- In balance by document type within a company

The document type T2 (labor distribution) journal entries for the employee are the following:

<b>TY</b>	<b>JT</b>	<b>Account</b>	<b>Description</b>	<b>DR</b>	<b>CR</b>
T2	AW	1.4205	Wages Payable		1000
T2	IC	1.1291.00050	Intercompany	1000	
			Company 1 Total.....	1000	1000
T2	LD	501.8115	Labor Expense	1000	
T2	IC	50.1291.00001	Intercompany		1000
			Company 50 Total.....	1000	1000
			Grand Total.....	2000	2000

## How Do You Generate Intercompany Settlements?

To generate intercompany settlements for payroll transactions, your Payroll system must be integrated with the J.D. Edwards General Accounting system. You can set up either of these systems to generate intercompany settlements for payroll transactions. You can choose the method that works best for your environment.

When you use the General Accounting system to generate intercompany settlements, the system processes all of the balancing journal entries through a single hub (main) company. The hub company is the same for all employees. You can designate the hub company in the intercompany constants for the General Accounting system. If you do not designate a hub company, the post program uses the first company that it encounters as the hub company. Therefore, the hub company might not be the employee's home company.

When you use the Payroll system to generate intercompany settlements for payroll transactions, the system creates the balancing entries before journal entries are posted to the general ledger. The Payroll system ignores the intercompany constants for the General Accounting system and designates the employee's home company as the hub (main) company for processing balancing entries.

Intercompany settlements in the Payroll system apply to document types T1, T2, T3, T4, and T6. They do not apply to document types T5 and T7.

# Setting Up Intercompany Settlements in HR and Payroll Foundation

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You use intercompany settlements if your organization consists of multiple companies and your employees sometimes work in companies other than their home companies. When an employee works in a company other than the home company, the home company typically charges the other company for the employee's labor expenses.

Setting up intercompany settlements in the HR and Payroll Foundation system includes the following tasks:

- Verifying your chart of accounts
- Setting up AAIs for intercompany settlements
- Setting up a payroll ID for intercompany settlements

Before you can set up AAIs for intercompany settlements, you should verify that your organization's chart of accounts contains intercompany settlement accounts.

After verifying your chart of accounts, you set up AAIs for intercompany settlements. After you set up AAIs for intercompany settlements, you should create a payroll ID that generates intercompany settlements in the Payroll system rather than in the General Accounting system.

## Before You Begin

- Set up intercompany accounts in your chart of accounts. See *Creating and Updating Your Chart of Accounts* in the *General Accounting Guide*.

## See Also

- *Setting Up Intercompany Settlements* in the *General Accounting Guide*

## Verifying Your Chart of Accounts

Before you can set up AAIs for intercompany settlements, you should verify that your organization's chart of accounts contains intercompany accounts.

All intercompany accounts must use the same object number. The subsidiary (the third part of the account number) can represent either the company from or the company to which intercompany amounts are due.

For example, the following table shows intercompany accounts for companies 1, 7, and 50, where 1291 is the object account for intercompany settlements:

Company 1	Company 7	Company 50
1.1291.00007	7.1291.00001	50.1291.00001
1.1291.00050	7.1291.00050	50.1291.00007

You (or someone in your accounting department) must use the General Accounting system to set up the accounts. Typically, you verify your chart of accounts from the General Accounting system. If you do not have access to the General Accounting system, you can verify your chart of accounts from the AAI tables in the Payroll system. To verify your chart of accounts from the AAI tables, choose the Help function for the business unit, object, or subsidiary fields.

## Setting Up AAIs for Intercompany Settlements

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Dr/Cr-Accruals/Clearing.

You use this AAI table to set up the AAIs for generating intercompany settlements. You define journal types for intercompany settlements so that the system tracks intercompany transactions for each company in your organization. You should set up intercompany settlements for Company 00000 only.

When you set up AAIs for intercompany settlements, you do not enter a business unit. When the system creates journal entries for intercompany accounts, it enters Company 00000, in which the journal entry is created as the business unit.

Proceed to the task *Setting Up AAIs for Accruals and Clearing* to set up AAIs for intercompany settlements.

## Setting Up a Payroll ID for Intercompany Settlements

From the Automatic Accounting Instruction Setup menu (G05BT4), choose Dr/Cr-Accruals/Clearing.

After you set up AAIs for intercompany settlements, you should set up a payroll ID for intercompany settlements. When you use this payroll ID to process a payroll cycle, the Payroll system, rather than the General Accounting system, generates intercompany settlements before posting them to the general ledger.

Use this payroll ID to process payroll for employees who worked in companies other than their home companies. When you process this payroll ID, the system automatically creates balancing journal entries for intercompany settlements.

To set up a payroll ID for intercompany settlements, proceed to the task *Creating a New Payroll ID* in the *Payroll Guide*.



# Appendices



## Appendix A: DBA Table Methods Quick Reference

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Five general, arbitrary categories of DBA table methods are available. The methods are distinguishable by what the DBA method is based on.

Category	Available Calculations
<b>Salary Amounts:</b>	For the salary figure, you can perform one of the following calculations:
<b>Pay Period</b>	
<b>Monthly</b>	<ul style="list-style-type: none"><li>• Table amount x Employee rate</li></ul>
<b>Annual</b>	<ul style="list-style-type: none"><li>• Salary x Employee rate x Table amount</li></ul>
<b>Life Insurance</b>	<ul style="list-style-type: none"><li>• Table amount = actual DBA amount</li></ul>
<b>2nd Life Insurance</b>	<ul style="list-style-type: none"><li>• Hours worked x Table amount</li><li>• Gross earnings x Table amount</li><li>• Salary x Employee rate</li><li>• Result rounded down x Table amount</li><li>• Salary x Employee rate</li><li>• Result rounded up x Table amount</li><li>• Salary x Table amount x Excess rate</li></ul>
<b>Employee's Age:</b>	Based on the employee's age, you can perform one of the following calculations:
	<ul style="list-style-type: none"><li>• Salary x Employee rate x Table amount</li><li>• Salary x Employee rate</li><li>• Result rounded down x Table amount</li><li>• Salary x Employee rate</li><li>• Result rounded up x Table amount</li><li>• Salary x Employee rate</li><li>• Result rounded down / 1000</li><li>• Salary x Employee rate</li><li>• Result rounded up / 1000</li><li>• Salary x Table amount x Excess rate</li></ul>

Category	Available Calculations
<b>Dates:</b>	For each date, you can perform one of the following calculations:
<b>Leave of Absence</b>	
<b>Original Hire</b>	
<b>Participation</b>	
<b>Start</b>	<ul style="list-style-type: none"> <li>• Table amount x Employee rate</li> <li>• Table amount x Employee rate (calculates hours only)</li> <li>• Table amount x Hours worked (can optionally calculate Rate x Hours)</li> <li>• Table amount x Hours worked (calculates hours only)</li> <li>• Table amount x Hours worked</li> <li>• Table amount = actual DBA amount</li> <li>• Table amount x Gross earnings</li> <li>• Annual salary x Table amount x Excess rate</li> <li>• Pay-period salary x Table amount x Excess rate</li> <li>• Monthly salary x Table amount x Excess rate</li> <li>• Life insurance salary x Table amount x Excess rate</li> <li>• 2nd life insurance salary x Table amount x Excess rate</li> </ul>
<b>Amounts:</b>	You can perform various calculations against an employee's pay rate, hours, and gross wages. These calculations include the following:
<b>Hours</b>	
<b>Gross Amount</b>	
<b>Flat Dollar</b>	<ul style="list-style-type: none"> <li>• Average hourly rate</li> <li>• Range from the detail area of the table</li> </ul>
<b>Miscellaneous:</b>	You can use various tables, depending on the following:
<b>Pay-Period Number</b>	
<b>Variable Months</b>	
<b>Excess Life Insurance</b>	<ul style="list-style-type: none"> <li>• Pay-period number for the month</li> <li>• Number of months of history to use as a basis</li> <li>• Group term life insurance premiums</li> </ul>

## Based on Pay-Period Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
EA	Pay-Period Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
EB	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee x Table amount.	3
ED	Pay-Period Salary	Table amount equals the actual amount of the DBA.	1
EH	Pay-Period Salary	The number of hours worked by the employee x Table amount or rate.	1
EP	Pay-Period Salary	Employee's gross earnings for the current period x Table amount or rate.	1
EQ	Pay-Period Salary	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
ER	Pay-Period Salary	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
ES	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
ET	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
EY	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate. The system does not calculate a DBA amount.	3 or 9
EZ	Employee's Age in Years	Employee's pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
E%	Employee's Age or Pay-Period Salary	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

## Based on Monthly Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
NA	Monthly Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
NB	Employee's Age in Years	Employee's monthly salary x amount or rate associated with the employee x Table amount.	3
ND	Monthly Salary	Table amount equals the actual amount of the DBA.	1
NH	Monthly Salary	Number of hours worked by the employee x Table amount or rate.	1
NP	Monthly Salary	Employee's gross earnings for the current period x Table amount or rate.	1
NQ	Monthly Salary	Employee's monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
NR	Monthly Salary	Employee's monthly salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
NS	Employee's Age in Years	Employee's monthly salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
NT	Employee's Age in Years	Employee's monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
NY	Employee's Age in Years	Employee's monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
NZ	Employee's Age in Years	Employee's monthly salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
N%	Employee's Age or Monthly Salary	Employee's monthly salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

## Based on Annual Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
AA	Annual Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
AB	Employee's Age in Years	Employee's annual salary x amount or rate associated with the employee x Table amount.	3
AD	Annual Salary	Table amount equals the actual amount of the DBA.	1
AH	Annual Salary	Number of hours worked by the employee x Table amount or rate.	1
AP	Annual Salary	Employee's gross earnings for the current period x Table amount or rate.	1
AQ	Annual Salary	Employee's annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
AR	Annual Salary	Employee's annual salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
AS	Employee's Age in Years	Employee's annual salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
AT	Employee's Age in Years	Employee's annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
AY	Employee's Age in Years	Employee's annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
AZ	Employee's Age in Years	Employee's annual salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
A%	Employee's Age or Annual Salary	Employee's annual salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

## Based on Life Insurance Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
IA	Life Insurance Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
IB	Employee's Age in Years	Employee's life insurance salary x amount or rate associated with the employee x Table amount.	3
ID	Life Insurance Salary	Table amount equals the actual amount of the DBA.	1
IH	Life Insurance Salary	Number of hours worked by the employee x Table amount or rate.	1
IP	Life Insurance Salary	Employee's gross earnings for the current period x Table amount or rate.	1
IQ	Life Insurance Salary	Employee's life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
IR	Life Insurance Salary	Employee's life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
IS	Employee's Age in Years	Employee's life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
IT	Employee's Age in Years	Employee's life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
IY	Employee's Age in Years	Employee's life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
IZ	Employee's Age in Years	Employee's life insurance salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
I%	Employee's Age or Life Insurance Salary	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

## Based on Second Life Insurance Salary

Table Method	Lower/Upper Ranges Represent	Calculation	Method
FA	2nd Life Insurance Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
FB	Employee's Age in Years	Employee's 2nd life insurance salary x amount or rate associated with the employee x Table amount.	3
FD	2nd Life Insurance Salary	Table amount equals the actual amount of the DBA.	1
FH	2nd Life Insurance Salary	Number of hours worked by the employee x Table amount or rate.	1
FP	2nd Life Insurance Salary	Employee's gross earnings for the current period x Table amount or rate.	1
FQ	2nd Life Insurance Salary	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
FR	2nd Life Insurance Salary	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
FS	Employee's Age in Years	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
FT	Employee's Age in Years	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
FY	Employee's Age in Years	Employee's 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
FZ	Employee's Age in Years	Employee's 2nd life insurance salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
F%	Employee's Age or 2nd Life Insurance Salary	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

## Based on Leave-of-Absence Date

<b>Table Method</b>	<b>Lower/Upper Ranges Represent</b>	<b>Calculation</b>	<b>Method</b>
LA	Months of Service from Leave of Absence	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
LB	Months of Service from Leave of Absence	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
LH	Months of Service from Leave of Absence	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
LI	Months of Service from Leave of Absence	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
LR	Months of Service from Leave of Absence	Table amount x Number of hours worked equalling the DBA amount.	2
L\$	Months of Service from Leave of Absence	Table amount equals the actual amount of the DBA.	2
L%	Months of Service from Leave of Absence	Employee's gross earnings x Table rate percentage.	2
L1	Months of Service from Leave of Absence	Employee's annual salary x Table amount or rate x Excess rate.	2
L2	Months of Service from Leave of Absence	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	2
L3	Months of Service from Leave of Absence	Employee's monthly salary x Table amount or rate x Excess rate in the table.	2
L4	Months of Service from Leave of Absence	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	2
L5	Months of Service from Leave of Absence	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

## **Based on Original Hire Date**

<b>Table Method</b>	<b>Lower/Upper Ranges Represent</b>	<b>Calculation</b>	<b>Method</b>
OA	Months of Service from Original Hire Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
OB	Months of Service from Original Hire Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
OH	Months of Service from Original Hire Date	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
OI	Months of Service from Original Hire Date	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
OR	Months of Service from Original Hire Date	Table amount x Number of hours worked equalling the DBA amount.	2
O\$	Months of Service from Original Hire Date	Table amount equals the actual amount of the DBA.	2
O%	Months of Service from Original Hire Date	Employee's gross earnings x Table rate percentage.	2
O1	Months of Service from Original Hire Date	Employee's annual salary x Table amount or rate x Excess rate.	2
O2	Months of Service from Original Hire Date	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	2
O3	Months of Service from Original Hire Date	Employee's monthly salary x Table amount or rate x Excess rate in the table.	2
O4	Months of Service from Original Hire Date	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	2
O5	Months of Service from Original Hire Date	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

## Based on Participation Date

<b>Table Method</b>	<b>Lower/Upper Ranges Represent</b>	<b>Calculation</b>	<b>Method</b>
PA	Months of Service from Participation Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
PB	Months of Service from Participation Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
PH	Months of Service from Participation Date	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
PI	Months of Service from Participation Date	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
PR	Months of Service from Participation Date	Table amount x Number of hours worked equalling the DBA amount.	2
P\$	Months of Service from Participation Date	Table amount equals the actual amount of the DBA.	2
P%	Months of Service from Participation Date	Employee's gross earnings x Table rate percentage.	2
P1	Months of Service from Participation Date	Employee's annual salary x Table amount or rate x Excess rate.	2
P2	Months of Service from Participation Date	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	2
P3	Months of Service from Participation Date	Employee's monthly salary x Table amount or rate x Excess rate in the table.	2
P4	Months of Service from Participation Date	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	2
P5	Months of Service from Participation Date	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

## **Based on Start Date**

<b>Table Method</b>	<b>Lower/Upper Ranges Represent</b>	<b>Calculation</b>	<b>Method</b>
SA	Months of Service from Start Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
SB	Months of Service from Start Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
SH	Months of Service from Start Date	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
SI	Months of Service from Start Date	Table amount x Number of hours worked equalling hours to accrue x Employee's hourly rate for the DBA amount.	2
SR	Months of Service from Start Date	Table amount x Number of hours worked equalling the DBA amount.	2
S\$	Months of Service from Start Date	Table amount equals the actual amount of the DBA.	2
S%	Months of Service from Start Date	Employee's gross earnings x Table rate percentage.	2
S1	Months of Service from Start Date	Employee's annual salary x Table amount or rate x Excess rate.	2
S2	Months of Service from Start Date	Employee's pay-period salary x Table amount or rate x Excess rate in the table.	2
S3	Months of Service from Start Date	Employee's monthly salary x Table amount or rate x Excess rate in the table.	2
S4	Months of Service from Start Date	Employee's life insurance salary x Table amount or rate x Excess rate in the table.	2
S5	Months of Service from Start Date	Employee's 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

## **Based on Hours Worked**

<b>Table Method</b>	<b>Lower/Upper Ranges Represent</b>	<b>Calculation</b>	<b>Method</b>
HA	Hours Worked	Employee's total wages / Employee's total hours x Table amount or rate.	4
HD	Inception to Date Hours Worked	Table amount equals the actual amount of the DBA.	4
HP	Inception to Date Hours Worked	Employee's hours worked during the current period x Table rate.	4
H1	Hours Worked	Table amount equals the number of hours that the DBA is based on.	4

## Based on Gross Amount

Table Method	Lower/Upper Ranges Represent	Calculation	Method
GA	Gross Amount	Amount or rate associated with the employee x Table amount.	8
GD	Gross Amount	Table amount equals the actual amount of the DBA.	8
GH	Gross Amount	Hours worked x Table amount.	8
GP	Gross Amount	Amount of employee's gross earnings x Table rate.	8
G%	Gross Amount	Amount of employee's gross earnings x Table rate.	3
G@	Gross Amount	Amount of employee's gross earnings x Table rate.	8

## Based on Flat Dollar Amount

Table Method	Lower/Upper Ranges Represent	Calculation	Method
DD	Hours Worked	If possible, use the amount in the table. If employee worked fewer hours, do one of the following: • Calculate days worked • Days worked x Rate in the detail area	4
DH	Hours Worked	If possible, use the amount in the table. If employee worked fewer hours, use Actual hours worked x Rate in the detail area.	4
DL	Employee's Age in Years	Table amount equals the actual amount of the DBA.	3 or 9
DP	Pieces Produced	If possible, use amount in table. If employee produced fewer pieces, use Actual pieces produced x Rate in the detail area.	5

## Based on Pay-Period Number

Table Method	Lower/Upper Ranges Represent	Calculation	Method
WD	Pay-Period Number (1-5)	Days worked (based on number of timecard records) x Table amount or rate.	0
WH	Pay-Period Number (1-5)	Hours worked x Table amount or rate.	0
WP	Pay-Period Number (1-5)	Pieces produced x Table amount or rate.	0
W\$	Pay-Period Number (1-5)	Table amount equals the actual amount of the DBA.	0
W%	Pay-Period Number (1-5)	Gross earnings x Table amount or rate.	0

## **Based on Variable Months**

<b>Table Method</b>	<b>Lower/Upper Ranges Represent</b>	<b>Calculation</b>	<b>Method</b>
MH	Variable Months	The table is a one-line entry indicating how many months back to look at history.  Accumulated hours worked for the number of months specified in the table x Table rate.	6
MI	Variable Months	The table is a one-line entry indicating how many months back to look at history.  Accumulated hours worked for the number of months specified in the table rounded up to the next whole hour x Table rate.	6
MJ	Variable Months	The table is a one-line entry indicating how many months back to look at history.  Accumulated hours worked for the number of months specified in the table rounded down to the next whole hour x Table rate.	6
MP	Variable Months	The table is a one-line entry indicating how many months back to look at history.  Accumulated gross earnings for the number of months specified x Table rate.	6
MR	Variable Months	The table is a one-line entry indicating how many months back to look at history.  Accumulated pieces produced for the number of months specified x Table rate.	6

## **Based on Excess Life Insurance**

<b>Table Method</b>	<b>Lower/Upper Ranges Represent</b>	<b>Calculation</b>	<b>Method</b>
XL	Employee's Age in Years	The maximum amount for data dictionary item #XL1-Hours basis.  Remainder x Table amount.	3 or 9
XC	Employee's Age in Years	The maximum amount for data dictionary item #XLC-Hours basis.  Remainder x Table amount.	3 or 9

## Example: Calculation Table Based on Months of Service

When you set up a calculation table based on months of service, the system uses only whole numbers for the lower and upper limits.

The screenshot shows a software application window titled "Calculation Tables - [Calculation Table]". The window has a menu bar with File, Edit, Preferences, Form, Window, and Help. Below the menu is a toolbar with icons for OK, Find, Del..., New..., Dis..., and Abo. To the right of the toolbar are buttons for Links, Descr., and Internet. The main area contains a table with the following data:

	Lower Limit	Upper Limit	Amt./Rate	Excess Rate	S M	Sec Table	Description	Limit Amt.
		5.99	4.0000					
	6.00	11.99	6.0000					
	12.00	35.99	6.6666					
	36.00	9999999.00	10.0000					

For example, the system reads the limits above as the following:

- 0 to 5
- 6 to 11
- 12 to 35
- 354 to 9,999,999

The system considers the months between the specified date and the payroll date, not the number of days. The system does not convert number of days to months. For example, the system would calculate months of service as follows:

- Start Date = 1/15 and Pay Date = 1/31

The system calculates one month of service. The employee started in January and was paid in January.

- Start Date = 1/15 and Pay Date = 2/15

The system calculates two months of service. The employee started in January and was paid in February.

## Example: Calculation Table Based on Periods Worked

You might want to set up a calculation table based on different amounts based on pay periods worked. For example, you might want to split a 75.00 per month health insurance premium between two pay periods.

The following list shows the information to enter on each line of the calculation table:

<b>Line one for the first pay period</b>	Lower Limit = 1
	Upper Limit = 1
	Amount/Rate = 40
<b>Line two for the second pay period</b>	Lower Limit = 2
	Upper Limit = 2
	Amount/Rate = 35

Based on this calculation, the system deducts 40.00 in the first pay period and 35.00 in the second pay period.



## Appendix B: DBA Troubleshooting

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You should research the following questions when the system does not calculate a DBA as you expect:

1. For whom is the DBA not being calculated? One employee? A group of employees? Everyone?
2. At what level is the DBA assigned? Employee? Union? Required? One-Time Override?

The screenshot shows a Windows application window titled "[060181] - Employee DBA Instructions". The window has a menu bar with "Functions", "Options", "Tools", and "Help". Below the menu is a toolbar with icons for file operations. The main area contains input fields for "Employee No" (7500), "McDougle, Cathy", "Benefit Group" (EXEC), "Job Type" (2H-1), and "Step". There is also a checkbox for "Cleared Items(Y/N)" with the value "98" checked. A "Skip To Code" field is present. The bottom of the window displays a table of benefit codes with columns for O, Code, T, C, Description, Z, Amount/Rate, Dates, and Payee No. The table includes rows for various benefits like FLTD Coverag, Child Suppr, Garnishment, Loan, Interest, etc. At the bottom, there are keyboard shortcuts: Opt: 9=Dlt F4=Detail F5=Acct Master F10=DBA Review F20=Next F24=More, and MW with up and down arrow buttons.

O	Code	T	C	Description	Z	. . . Amount/Rate . . .	Dates . . .	G	Payee No
						Level 1	Start Stop	V	
	1018	D	A	FLTD Coverag			01/01/98	N	
	1102	D	C	Child Suppr		250.0000	07/01/98	Y	
	1104	D	G	Garnishment				N	
	1108	D	K	Loan		80.0000	03/01/98	N	
	1122	D	%	Interest		10.0000		N	
	1511	D	A	FMed100-EE+			01/01/98	N	
	1541	D	A	FDENT1-EE+1			01/01/98	N	
	4598	D	A	FSA-DEP/Ded		100.0000	01/01/98	N	
	4599	D	A	FSA-MED/Ded		100.0000	01/01/98	N	
	4601	A	A	FSA-DEP 125		25.0000	01/01/98	N	
	5062	B	A	FMedical/De			01/01/98	N	
	5502	D	A	FFvision EE+			01/01/98	N	

3. Does the DBA have start or stop dates?

[060181] - Employee DBA Instructions

Functions Options Tools Help

Year: 98  
Cleared Items(Y/N):

Employee No:	7500	McDougle, Cathy
Benefit Group:	EXEC	Job Type: 2H-1
Skip To Code:		

O	Code	T	C	Description	Z	Amount/Rate . . . Level 1	Dates . . . Start Stop	G	Payee No
1018	D	A		FLTDCoverag			01/01/98	N	
1102	D	C		Child Suppr		250.0000	07/01/98	Y	
1104	D	G		Garnishment				N	5557
1108	D	K		Loan		80.0000	03/01/98	N	
1122	D	%		Interest		10.0000		N	
1511	D	A		FMed100-EE+			01/01/98	N	
1541	D	A		FDENT1-EE+1			01/01/98	N	
4598	D	A		FSA-DEP/Ded		100.0000	01/01/98	N	
4599	D	A		FSA-MED/Ded		100.0000	01/01/98	N	
4601	A	R		FSA-DEP 125		25.0000	01/01/98	N	
5062	B	A		FMedical/De			01/01/98	N	
5502	D	A		FVision EE+			01/01/98	N	

Opt: F9=Dlt F4=Detail F5=Acct Master F10=DBA Review F20=Next F24=More MW |

4. What is the value of the Calculate if No Gross field?

[069117] - DBA Setup

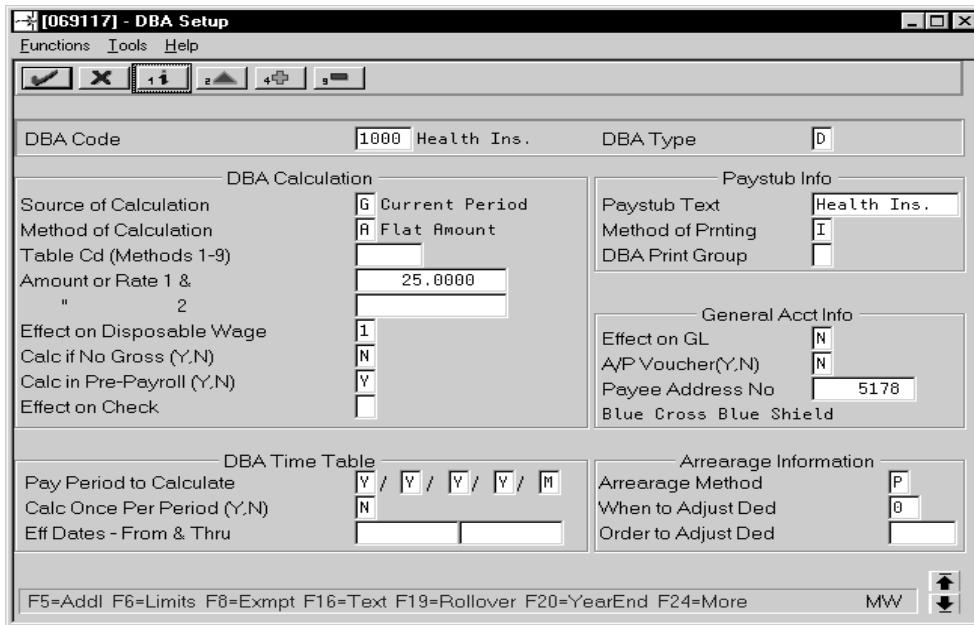
Functions Tools Help

DBA Code: 1000 Health Ins.	DBA Type: D
DBA Calculation	
Source of Calculation: G Current Period	Paystub Info: Paystub Text: Health Ins.
Method of Calculation: A Flat Amount	Method of Printing: I
Table Cd (Methods 1-9):	DBA Print Group: <input type="checkbox"/>
Amount or Rate 1 & 2: 25.0000	General AcctInfo: Effect on GL: N
Effect on Disposable Wage: 1	A/P Voucher(Y,N): N
Calc if No Gross (Y,N): N	Payee Address No: 5178
Calc in Pre-Payroll (Y,N): Y	Blue Cross Blue Shield: <input type="checkbox"/>
Effect on Check: <input type="checkbox"/>	
DBA Time Table	
Pay Period to Calculate: Y / Y / Y / Y / M	Arrearage Information: Arrearage Method: P
Calc Once Per Period (Y,N): N	When to Adjust Ded: 0
Eff Dates - From & Thru: <input type="text"/> <input type="text"/>	Order to Adjust Ded: <input type="text"/>

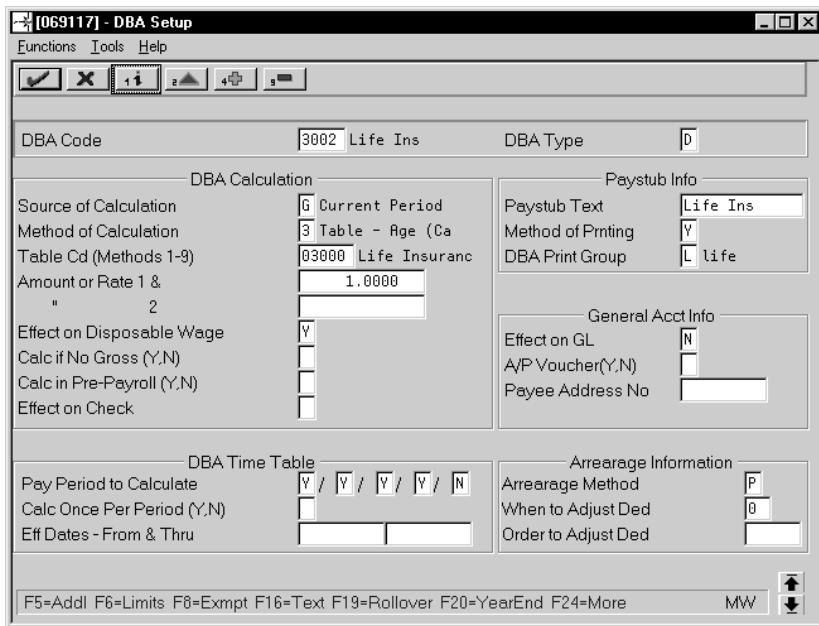
F5=Addl F6=Limits F8=Exempt F16=Text F19=Rollover F20=YearEnd F24=More MW |

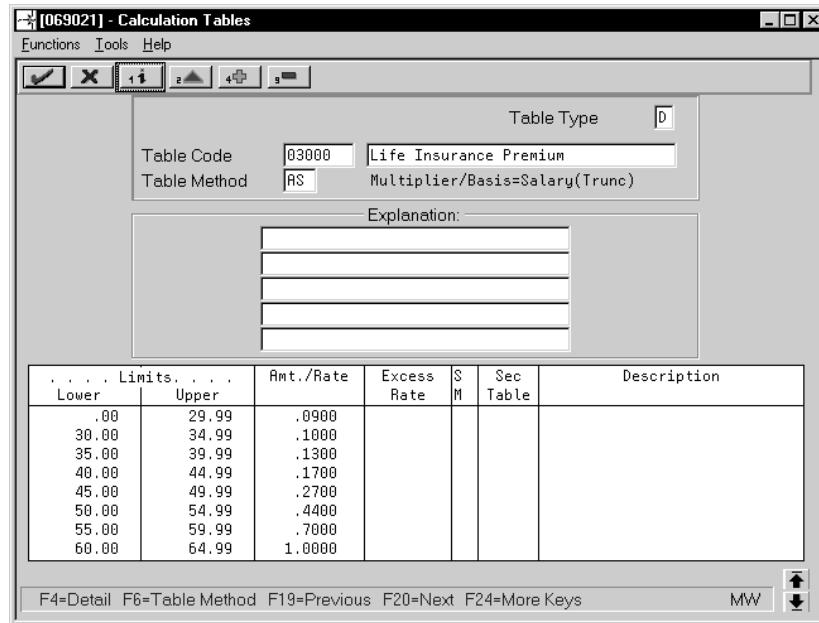
5. Does the employee have gross wages?

6. What is the DBA method? Flat dollar amount? Percentage? Wage attachment?

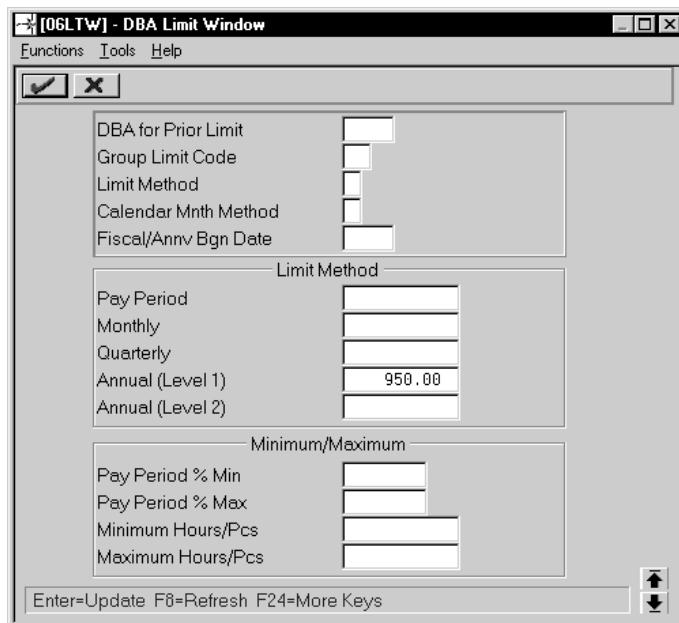


7. Does the DBA use a calculation-table code for its calculation?





8. Does the DBA have limits? If it has a limit, has the limit been met?



9. Are the PDBAs in the Basis of Calculations table correct?

The screenshot shows a software window titled "[069118] - Basis of Calculations". The menu bar includes "Functions", "Tools", and "Help". Below the menu is a toolbar with icons for checkmark, close, undo, redo, and other functions. A status bar at the bottom displays "F15=Index of Transactions", "F24=More Keys", and "MW".

In the center, there is a table for "Deduction/Benefit Code" 1000, labeled "D Health Ins.". The table has two sections: ".....FROM....." and ".....THRU.....".

Type	Description	Type	Description
1	Regular	999	Net Pay Adj.

10. Is the DBA based on another DBA? If so, does the based-on DBA calculate first?
11. Does the DBA have a declining balance? If so, is an amount due?

The screenshot shows a software window titled "[06ADW] - DBA Additional Information". The menu bar includes "Functions", "Tools", and "Help". Below the menu is a toolbar with icons for checkmark, close, and other functions. A status bar at the bottom displays "Enter=Update", "F8=Refresh", and "F24=More Keys".

The window displays various fields for a DBA record:

- Flex Spend Acct Type: [ ]
- 415 Testing Code: [ ]
- 401k/125/RPP/Union: 125 | 125 Plan Deduction
- Investment Group: [ ]
- Incl'd in Union Pln(Y,N): [N]
- COBRA Plan: [1]
- Declining Balance (Y,N): [N]
- Amount Due: [ ]
- Number of Periods (Y,N): [N]
- No. Periods: [ ]
- Calc for All Emp. (Y,N): [N]
- Select by Pay Class: [ ]
- Select by Tax Area: [ ]
- Select by Home Company: [ ]

12. What is the value of the Calculate in Pre-Payroll field?

[069117] - DBA Setup

Functions Tools Help

DBA Code	1000 Health Ins.	DBA Type	D
DBA Calculation		Paystub Info	
Source of Calculation	G Current Period	Paystub Text	Health Ins.
Method of Calculation	R Flat Amount	Method of Prntng	I
Table Cd (Methods 1-9)		DBA Print Group	
Amount or Rate 1 &	25.0000	General Acct.Info	
" 2		Effect on GL	N
Effect on Disposable Wage	1	A/P Voucher(Y,N)	N
Calc if No Gross (Y,N)	N	Payee Address No	5178
Calc in Pre-Payroll (Y,N)	Y	Blue Cross Blue Shield	
Effect on Check			
DBA Time Table		Arrearage Information	
Pay Period to Calculate	Y / Y / Y / Y / M	Arrearage Method	P
Calc Once Per Period (Y,N)	N	When to Adjust Ded	O
Eff Dates - From & Thru		Order to Adjust Ded	

F5=Addl F6=Limits F8=Exempt F16=Text F19=Rollover F20=YearEnd F24=More MW

13. Has the DBA already been calculated for this period?

[069117] - DBA Setup

Functions Tools Help

DBA Code	4001 Med-\$100 ded	DBA Type	D
DBA Calculation		Paystub Info	
Source of Calculation	G Current Period	Paystub Text	Med-\$100 ded
Method of Calculation	R Flat Amount	Method of Prntng	I
Table Cd (Methods 1-9)		DBA Print Group	
Amount or Rate 1 &	9.7500	General Acct.Info	
" 2		Effect on GL	N
Effect on Disposable Wage	N	A/P Voucher(Y,N)	
Calc if No Gross (Y,N)		Payee Address No	
Calc in Pre-Payroll (Y,N)		Arrearage Information	
Effect on Check		Arrearage Method	P
DBA Time Table		When to Adjust Ded	O
Pay Period to Calculate	Y / Y / N / N / N	Order to Adjust Ded	
Calc Once Per Period (Y,N)	N		
Eff Dates - From & Thru			

F5=Addl F6=Limits F8=Exempt F16=Text F19=Rollover F20=YearEnd F24=More MW

14. What is the employee's pay frequency? Biweekly? Semimonthly? Monthly? Weekly?

**[060101] - Employee Entry**

Employee No: 7500 Name: McDougle, Cathy Address Number: 7500  
 Social Sec. No: 261554789 Home Company: 00100  
 Add'l EE No: CM2157 Home Business Unit: 90  
 Name (F/M/L): C Security Bus. Unit: 1  
 Salary: 50,000.00 (A.M.S.B.W) Pay Period Gross: 2,083.33  
 Hourly Rate: 24.038 Date Started: 03/03/1997  
 Billing Rate: Date Orig. Hire Date: 03/03/1997  
 Date Pay Starts: 03/03/1997  
 Date of Birth: 06/18/1962  
 Check Route Code: Job Type/Step: 2H-1 /  
 Tax Area (Res.): 06 Pay Freq/Class: S / S  
 Tax Area (Work): 06 Pay Grade/Step: S6 /  
 Mar Stat(F/S/L): M / M / M Workers Comp: 8810 /  
 Gender: F FLSA Exempt Y/N: Y  
 Category Cd 1 & 2: Benefit Group: EXEC  
 Labor Load Method: 0 Union Code:   
 Flat Bdn. Factor: 1.0000 EEO Job/Ethnic: 001 / 01  
 Std Hrs/Year: 2080.00

F2=Taxes F5=Basic F6=Pay/Tax F15=Labor F16=DBA F21=Auto Dep F24=More MW

15. Which period of the month are you processing?

**[069117] - DBA Setup**

DBA Code: 4001 DBA Type: D  
 DBA Calculation: Current Period  
 Source of Calculation: G  
 Method of Calculation: A Flat Amount  
 Table Cd (Methods 1-9):   
 Amount or Rate 1 & 2: 9.7500  
 Effect on Disposable Wage: N  
 Calc if No Gross (Y,N):   
 Calc in Pre-Payroll (Y,N):   
 Effect on Check:   
 Paystub Info: Paystub Text: Med-\$100 ded  
 Method of Prting: I  
 DBA Print Group:   
 General Acct.Info: Effect on GL: N  
 A/P Voucher(Y,N):   
 Payee Address No:   
 DBA Time Table: Pay Period to Calculate: Y / Y / N / N / N  
 Calc Once Per Period (Y,N):   
 Eff Dates - From & Thru:   
 Arrearage Information: Arrearage Method: P  
 When to Adjust Ded: 0  
 Order to Adjust Ded:   
 F5=Addl F6=Limits F8=Exempt F16=Text F19=Rollover F20=YearEnd F24=More MW

16. What is the value of the DBA Specification Withholding field?  
 17. What payroll processes are you using? Pre-payroll? Interims?  
 18. Does the value in the Period Number field in the pre-payroll parameters correspond to the value in the DBA Specifications Withholding field?

[06210] - Pre-Payroll Processing

Functions Tools Help

<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Year      97 Version      LB200					
Pay Cycle Information:					
Payroll ID	200	Pre-Payroll Processing - Salaried			
Pay Cycle Code	SEMI	Semi-Monthly			
Pay Period Ending Date	12/15/97	* Pay Cycle Count = 1			
Type of Processing	I	Full Pre-Payroll			
Fiscal & Anniv. Rollover					
Detail Information:					
Work Dates .... - From:	12/01/97	- Thru Date : 12/15/97			
Check Date	12/15/97	Deposit Date 12/15/97			
Accelerated Submission	N				
Std Hours: W-	B-	S-	M-	A-	O-
Period No: W-	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Report Selection:					
Payroll Register	XJDE0001	Payroll Register			
Summary Payroll Register	XJDE0001	Print Checks - Chk Route/Name			
Print Paychecks	XJDE0001				
Time & Pay Entry Journal					
Fed Tax Distr Summary					

F5=Add'l Params F6=Submit Job F10=Cycle Constants F24=More MW

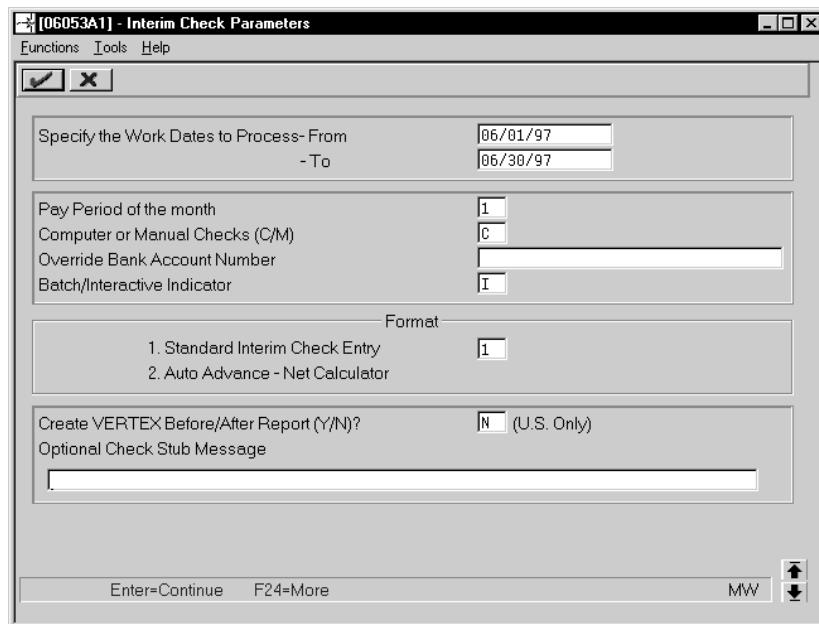
[060181] - DBA Instructions

Functions Options Tools Help

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Year      97		Cleared Items(Y/N) <input type="checkbox"/>										
Employee No 7500 McDougle, Cathy												
Benefit Group: EXEC		Job Type 2H-1		Step								
Skip To Code												
O	Code	T	C	Description	Z . . . Amount/Rate . . .	Level 1	Level 2	. . . Dates . .	Start	Stop	G	Payee No
1108	D K Loan				80.0000			03/01/98			N	
	Group Code				Table Code			Amt Due				
	Prior Limit				Pay Prds-Calc	YYYYYY		Periods				
	Union Code				Job Type			Step				
	Limitations				Explanation Wage Attachment No.	=	10					
	Pay Prds-Calc				Monthly			Qtrly				
	Annual Lvl 1				Annual 2			Period %				

Opt 9=Dlt F4=Detail F5=Acct Master F10=DBA Review F20=Next F24=More MW

19. Does the DBA calculate in a test interim?



20. What is the value of the Z column on the employee's DBA Instructions form?

O	Code	T	C	Description	Z	Amount/Rate	Dates	G	Payee No
						Level 1	Start	Stop	
	1018	D	A	FLTDCoverag			01/01/98		N
	1102	D	C	Child Suppr		250.0000	07/01/98		Y
	1104	D	G	Garnishment					N
	1108	D	K	Loan		80.0000	03/01/98		N
	1122	D	Z	Interest		10.0000			N
	1511	D	R	FMed100-EE+			01/01/98		N
	1541	D	R	FDENT1-EE+1			01/01/98		N
	4598	D	A	FSA-DEP/Ded		100.0000	01/01/98		N
	4599	D	R	FSA-MED/Ded		100.0000	01/01/98		N
	4601	R	A	FSA-DEP 125		25.0000	01/01/98		N
	5062	B	A	FMedical/De			01/01/98		N
	5502	D	R	FVision EE+			01/01/98		N



## Appendix C: Timecard Derivation Sequence

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This appendix lists the sequence that the system uses to derive values for fields on the timecard entry forms.

Item	1	2	3	4	5
Timecard Record Type 1. Payroll 2. Combined 3. Billing	Keyed on timecard	Employee Master (F060116)	Default – 1		
Pay Type	Keyed on timecard	Option – U Union Rate table (F069126)	Option – E Occupational Rate table for Regular Pay Only (F060146)	Labor Distribution table	
Date Worked	Keyed on header of timecard	Defaults to Pay Period Ending for autopay			
Home Company	Keyed on timecard	Employee Master (F060116)			
Home Business Unit	Local Union Override (F0693006)	Keyed on timecard	Employee Master (F060116)		
Union Code for Wages and Reporting	Keyed on timecard	Local Union Override (F0693006)	Employee Master (F060116)		
Job Type	Keyed on timecard	Employee Master (F060116)			
Job Step	Keyed on timecard	Employee Master (F060116)			

<b>Item</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Labor Distribution Account	Keyed on timecard	Employee Labor Distribution Instructions (for autopay employees)	Position Account Instructions (F081012)	AAIs (F06904)	
Billing Distribution (Recharges)	Keyed on timecard	AAIs for any Missing Element RD (F06904)			
Equipment Distribution	Keyed on timecard	AAIs for Object Account ED (F06904)			
Job Location	Keyed on timecard	Business Unit associated with Primary Distribution			
Shift Code	Keyed on timecard	Employee Master (F060116)			
Shift Differential and Method	Keyed on timecard	Shift Differential table \$/HR or % (F069246)	If Shift Code is blank, retrieve from Pay Type table \$/HR (F0690116)		
Hours Worked	Keyed on timecard	Autopay Instructions	Labor Distribution table		
Rate	Keyed on timecard	Option – U Union Rate table (F0609126)	Option – U Occupational Rate table (F060146)	Option – E Occupational Rate table (F060146)	Employee Master (F060116 or F060118)
Base Rate	The derivation of the base rate depends on the derivation of the hourly rate as follows: <ul style="list-style-type: none"> <li>• If the Union Rates table is used, then the base rate is found by dividing the rate derived from the Union Rates table by the pay-type multiplier.</li> <li>• If the Occupation Rates table is used, then the rate from the Occupation Rates table is assumed to be the base rate.</li> <li>• If the hourly rate is manually entered, then the base rate is found by dividing the entered hourly rate by the pay-type multiplier.</li> <li>• If the employee master rate is used, the base rate is the rate from the Employee Master table.</li> </ul>				

## Appendix C: Timecard Derivation Sequence

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<b>Item</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Gross Pay	Entered Lump Sum Amount	Calculated			
Flat Burden %	Employee Master (F060116)	Option – U Use Union Rate table (F069126)	Labor Distribution Business Unit (F0006)		
W/C Insurance	Keyed on timecard	Labor Distribution Account, update in Cost Code Master (F0901)	Employee Labor Distribution Instructions (F06106)	Option – U Union Rate table (F069126)	Employee Master (F060116)
Work Tax Area	Keyed on timecard	Labor Distribution Payroll Business Unit (F0006)	Employee Master (F060116)		
Check Route Code	Keyed on timecard	Employee Master (F060116)			
Equipment Rate Code	Keyed on timecard (F1301)	Distribution Account, update in Cost Code Master (F0901)	Labor Distribution Business Unit, update in Payroll Business Unit or Job Master (F0006)	Rental Rules table (F1302)	
Equipment Rate	Keyed on timecard	Equipment Rate table			
Bank Account	Defined in Pre-payroll processing option	Interim check entry	AAIs		



## **Appendix D: Optional Fields for the Employee Transactions Batch File Table (F06116Z1)**

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The following fields are not required in order to upload timecard information. However, the values uploaded into these fields are passed from system to system. Complete the following optional fields in a custom program:

<b>VLANI (Account Number)</b>	A number that identifies an account in the general ledger. You can use one of the following formats for account numbers: <ul style="list-style-type: none"><li>• Structured account (business unit, object, subsidiary)</li><li>• 25-digit unstructured number</li><li>• 8-digit short account ID number</li><li>• Speed code</li></ul> The first character of the account indicates the format of the account number. You define the account format in the General Accounting Constants program (P000909).
<b>VLMCU (Business Unit)</b>	The value is supplied from the master business function based on labor distribution fields.
<b>VLOBJ (Object Account)</b>	Use either this field, or the VLMCU, VLOBJ, and VLSUB fields.
<b>VLSUB (Subsidiary)</b>	A value that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse, location, or job.  The object account portion of the general ledger account.

<b>VLGMCU (Recharge Business Unit)</b>	For Payroll purposes, a business unit that represents the distribution account where the recharge (billing) amounts are to be posted. The only time that this field is generated is when you are entering a 2 or 3 in the Record Type field for an employee. In this case, the derived distribution account, or entered account, equals this business unit.
<b>VLGOBJ (Recharge Object Account)</b>	For Payroll purposes, the number of the account to which the recharge (billing) amounts are to be posted.
<b>VLGSUB (Recharge Subsidiary)</b>	For Payroll purposes, the number of the account where the recharge (billing) amounts are to be posted.
<b>VLSBL (Subledger)</b>	A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so forth. If you enter a subledger, you must also specify the subledger type. If you complete this field, you must also complete the VLSBLT (Subledger Type) field.
<b>VLSBLT (Subledger Type)</b>	A UDC (00/ST) that is used with the Subledger field to identify the subledger type.
<b>VLWR01 (Phase)</b>	A UDC (00/W1) that indicates the current stage or development for a work order. You can assign a work order to only one phase code at a time.
	This UDC is automatically supplied from the work order field if the speed coding work order entry method is used. See the master business function documentation for more information.
<b>VLMCUO (Chargeout Business Unit)</b>	A business unit that represents the location where the employee worked. It can be used to indicate that an employee worked at this location, but charged the time to another business unit. This field is used for deriving rates from the Union Pay Rate table and it is used exclusively by the Certified Payroll Register.
<b>VLMAIL (Check Route Code)</b>	A UDC (06/CR) that specifies the check routing or mail stop code. This code can be used to sequence the printing of payroll checks to facilitate their handling and delivery.
<b>VLUN (Union Code)</b>	A UDC (06/UN) that represents the union or plan in which the employee or group of employees work or participate.

## Appendix D: Optional Fields for the Employee Transactions Batch File Table (F06116Z1)

<b>VLJBCD (Job Type)</b>	A UDC (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
<b>VLJBST (Job Step)</b>	A UDC (06/GS) that designates a specific step, grade, or salary level within a particular job type. The system uses this field in conjunction with job type to determine pay rates by job.
<b>VLSHFT (Shift Code)</b>	A UDC (06/SI) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percent or amount to the hourly rate on a timecard.
<b>VLSHD (Shift Differential)</b>	An additional rate, expressed in dollars or percent, added to an employee's hourly rate, depending on the shift worked. This rate can be applied in one of two ways as defined by the Shift Differential Calculation Sequence (data item CMTH).
<b>VLDTBT (Date Time Clock Start)</b>	The date and time that the timecard transaction was created.
<b>VLTCDE (Date Time Clock End)</b>	The date and time that the timecard transaction was ended.
<b>VLEQWO (Equipment Worked On)</b>	The ID number for the equipment that an employee maintained or repaired, but did not use. For example, an employee might change the oil in the company dump truck. Use this field to direct labor expenses to this piece of equipment.
<b>VLEQCG (Equipment Worked)</b>	The ID number of the equipment that an employee used to perform a job. For example, an employee might drive a company dump truck or operate a printing press. Use this field to distribute the cost of using the equipment to the proper account in the general ledger.
<b>VLQOBJ (Equipment Object Account)</b>	The object account to which you want the system to distribute equipment utilization charges.
<b>VLERC (Equipment Rate Code)</b>	A UDC (00/RC) that indicates a billing rate, such as DY for daily, MO for monthly, and WK for weekly. You can set up multiple billing rates for a piece of equipment.

<b>VLEQRT (Billing Rate)</b>	The monetary amount for the equipment billing rate. Each equipment item can have numerous billing rates based on the rate code (see Equipment Billing Rate–ERC).
<b>VLEQHR (Equipment Hours)</b>	The number of hours that the equipment was operated. If you leave this field blank, the system uses the hours from employee time entry when you enter an equipment number. If you do not enter employee hours, you must complete this field.
<b>VLEXR (Explanation)</b>	A name or remark that describes a timecard record.
<b>VLP001–VLP004 (Category codes 1–4)</b>	A Payroll system category code for which you can define the use and description to fit the needs of your organization.
<b>VLEPA (Entered Gross Pay)</b>	A lump sum amount, an adjustment amount, or an amount that represents an employee's gross pay. This amount temporarily overrides any pay calculation that the system normally performs.

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