PeopleSoft®

EnterpriseOne Xe
Human Resources
PeopleBook

September 2000

J.D. Edwards World Source Company
7601 Technology Way
Denver, CO 80237

SKU XeEAHR

Table of Contents

Overview

Requisitions

Applicant Information

Position Control

Compensation Management

Safety and Health Administration

Appendices

Index

Overview

Overviews

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

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

Overviews consists of the following:

- Industry Overview
- Human Resources Overview
- Understanding User Defined Codes for Human Resources

Industry Overview

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

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

The industry overview consists of:

- ❑ Industry environment and concepts for human resources
- ❑ Idea to Action: The competitive advantage

Industry Environment and Concepts for Human Resources

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

System Integration

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

Workflow

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

For instance, in order to change an employee's salary in the past, a Compensation Specialist had to route a change request form to the appropriate manager by way of interoffice mail, wait for the manager to approve the change, and reroute the form back to Human Resources, meanwhile leaving several voice mail messages to check on the status. After the Human Resources department received the approved form, the Compensation Specialist could then update the salary change in the HR database. Often, the Compensation

Specialist would need to make retroactive adjustments to compensate the employee for the time lost during the approval process.

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

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

Self-Service

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

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

Flexibility

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

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

Idea to Action: The Competitive Advantage

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

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

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

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

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

Human Resources Overview

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

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

The overview of the Human Resources system consists of the following topics:

- System integration
- Human Resources features
- Tables and descriptions

System Integration

To facilitate data entry for both Payroll and Human Resources users, you enter much human resources-related information into the HR and Payroll Foundation system. This system contains the central database for all of the information that human resources and payroll users typically share. For example, you use the foundation system to track the following information:

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

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

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

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

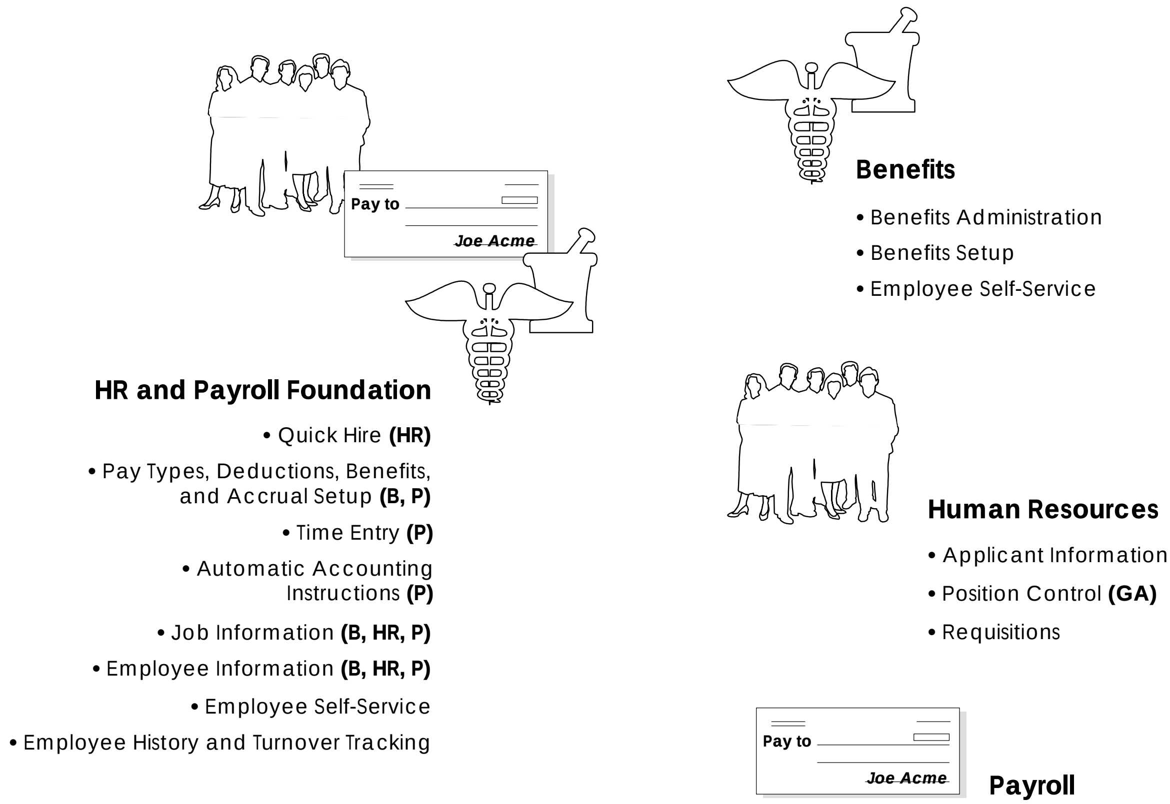
Both human resources and payroll users can enter information into the foundation system. However, to prevent unauthorized access to confidential information, you can set up system security that allows users to access only the information that they need in order to perform their jobs. Typically, your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

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

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

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

HR and Payroll System Integration



Key

B = Integrates with Benefits

HR = Integrates with Human Resources

P = Integrates with Payroll

GA = Integrates with General Accounting

Human Resources Features

In addition to the features included in the HR and Payroll Foundation system, the Human Resources system provides the following features:

- Recruitment process
  - Requisition management
  - Applicant tracking
- Position budget management

- Compensation management
- Benefits administration

See Also

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

Recruitment Process

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

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

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

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

The recruitment process includes requisitions and applicant information.

Requisition Management

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

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

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

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

Applicant Tracking

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

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

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

Position Budget Management

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

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

- Review the approved head count for a position before you create a requisition.
- Track position effective dates and the resulting budget calculations.
- Automatically update position activity when you change an employee record.

- Compare projected salaries through year end with the approved budget for each position.
- Determine year-end costs by developing projections based on hours, salary amounts, head count, or full-time equivalents.
- Track positions and head count by company and department.
- Post position budgets and accounts to the general ledger.

Compensation Management

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

Benefits to HR include the following:

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

Benefits to supervisors include the following:

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

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

Benefits Administration

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

See Also

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

Tables and Descriptions

The Human Resources system uses the following tables:

Address Book Master (F0101) and Address by Date (F0116)	Contains name and address information for all employees and applicants. Employee records have a search type of E, and applicant records have a search type of A.
Employee Master (F060116)	Contains employee information for the Payroll and Human Resources systems.
Job Information (F08001)	Contains information for job ID and for the job evaluation. The job ID is a combination of the job type and job step. (Job steps are levels of advancement within a job type.)
Supplemental Database Types of Data (F00090)	Contains data types and their respective column headings. Use these data types to define the types of supplemental information that you want to track for jobs, employees, applicants, and requisitions.
Supplemental Data (F00092)	Contains multiple values with a specific type of data for individual applicants, employees, jobs, and requisitions.
Requisition Information (F08102)	Contains the definition of the requisition, including requisition status and fiscal year.
Applicant Master (F08401)	Contains applicant information, including applicant status and Equal Employment Opportunity Commission (EEOC) information.
Position Master (F08101)	Contains the position definition, with budget information at the position level.

Position Accounts (F081012)	Contains accounting information, split by account, for a position.
Position Budget Detail (F08111)	Contains position detail at the employee activity level.

Understanding User Defined Codes for Human Resources

Many fields throughout the Human Resources system accept only user defined codes. You can customize fields in your system by setting up user defined codes to meet the needs of your business environment.

User defined codes are stored in tables that relate to a specific system and code type. For example, 08/PC represents system 8 (Human Resources) and user defined code list PC (Budget Status). User defined code tables define which codes are valid for the individual fields in your system. If you enter a code that is not valid for a field, the system displays an error message. For example, in the Budget Status field, you can enter only those codes included in UDC 08/PC.

You can access all user defined code tables through a single user defined code form. After you choose a user defined code form from a menu, you can change the system code and user defined code type to access another user defined code table. The system stores user defined codes in the User Defined Codes table (F0005).

You can also print a list of all user defined code tables to review. To do this, choose Print User Defined Codes from the Job Specifications Setup menu (G05BJ4).

You also might need to set up some additional user defined codes that are specific to the countries in which you do business.

Caution: User defined codes are central to J.D. Edwards systems. You must be thoroughly familiar with user defined codes before you change them.

See Also

- *User Defined Codes* in the *OneWorld Foundation Guide* for complete instructions on setting up user defined codes
- The global solutions guide for your country for country-specific information about user defined codes
- *Understanding User Defined Codes* in the *HR and Payroll Foundation Guide* for a list of additional user defined codes that apply to human resources

User Defined Codes for Human Resources

Applicant Status (08/AS)

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

Approval Type (05/AP)

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

Based Date from Length of Service (08/RW)

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

Branch/Location (01/01)

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

Budget Status (08/PC)

You use budget status codes to indicate the status of position budgets. The system uses the first character in the second description in the user defined code table 08/PC to process approved and closed positions. The position's budget must have an approved status before you can assign it to an employee or to an approved requisition. Positions with a closed budget status are not included when you run Create Next Year's Position Budgets (P081820).

Candidate Status (08/CN)

You use candidate status codes to track the current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from

UDC 08/CN. You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are:

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

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

Compensation Model Types (08/PM)

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

- PUBLIC - A model that can be viewed by the owner of the model as well as other employees
- MASTER - A model that is used for final submission
- PRIVATE - A model that can be viewed only by the owner of the model

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

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

Establishment Search Types (08H/ES)

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

Hazardous Material Codes (08/HM)

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

Input Method Codes (08/RB)

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

Method of Application (08/MA)

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

Occupational Illness (08H5)

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

Occurrence Location (08/H2)

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

Part of Body (08/H4)

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

Pay Type Categories (05/V1)

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

Position Status (08/PL)

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

Requisition Status (08/RS)

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

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

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

Rounding Rule Code (08/RR)

You use rounding rule codes to specify the rounding rule for an increase amount or a prorate amount. If you use prorating in the compensation review, the prorate amount is rounded. Otherwise, the increase amount is rounded.

Setup Subclass (08/T2)

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

Setup Task Status (08/S2)

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

Setup Task Types (08/T1)

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

Requisitions

Requisitions

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

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

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

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

Working with requisitions includes the following tasks:

- ❑ Entering requisition information
- ❑ Working with requisitions
- ❑ Reviewing requisition reports

Entering Requisition Information

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

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

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

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

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

Entering requisition information includes the following tasks:

❑ Entering initial requisition information

❑ Entering supplemental data for requisitions

Entering Initial Requisition Information

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

- Fiscal year
- Home business unit
- Job type

- Job step

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

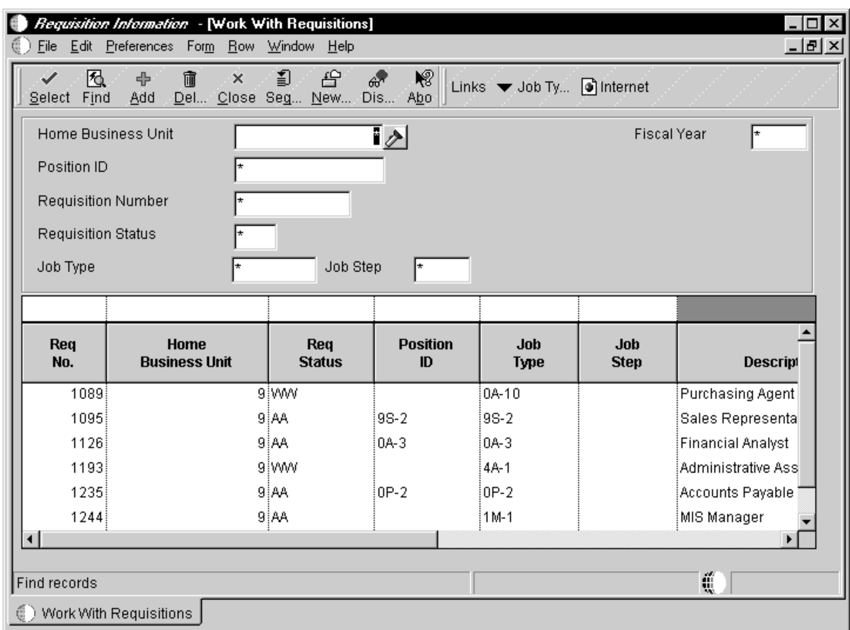
- Text documents
- Scanned images
- Links to other OneWorld applications and to other software packages

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

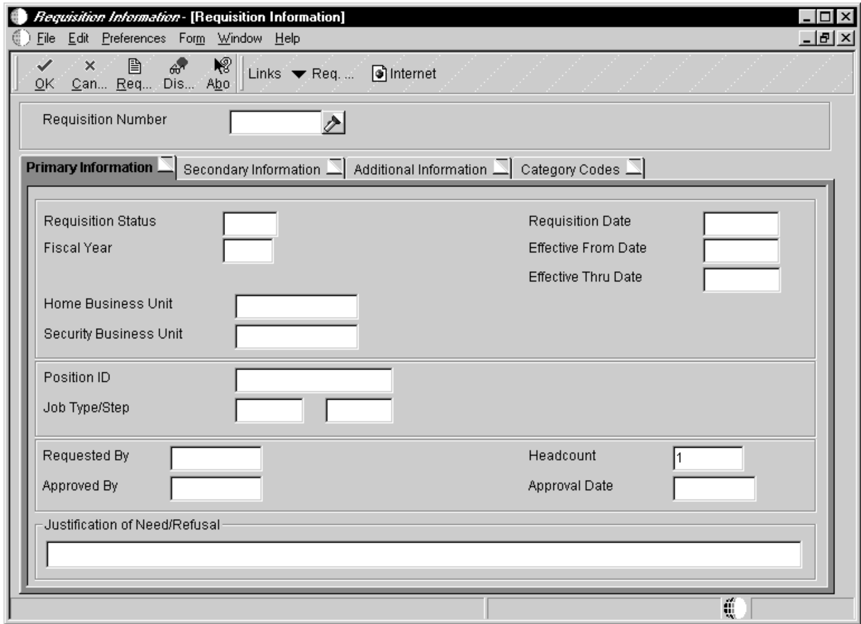
Basic requisition information is the minimum amount of information that you should track. It includes information such as the status of the requisition and the job to which it applies. Additional information includes optional items such as pay information and information that is unique to your organization.

▶ To enter initial requisition information

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



1. On Work With Requisitions, click Add.



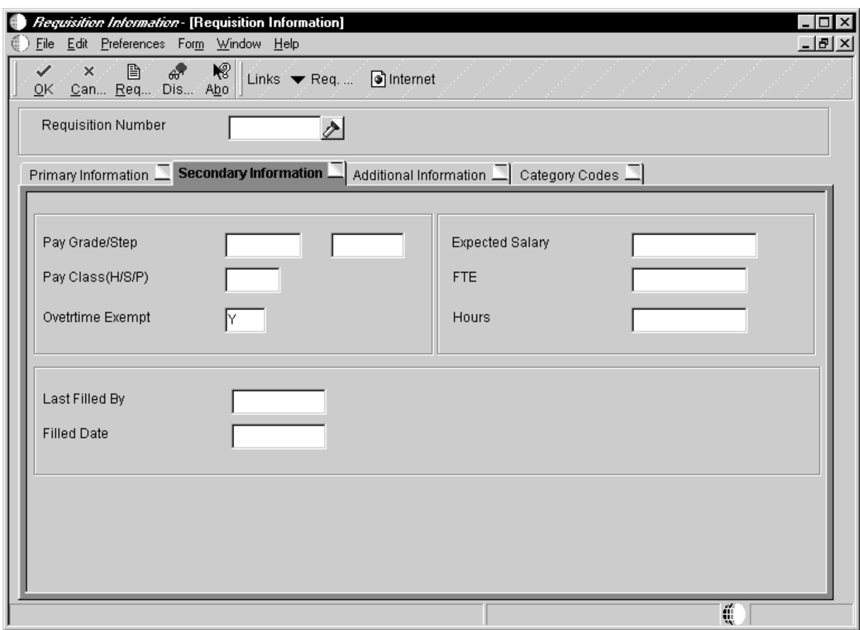
2. On Requisition Information, complete the following field to assign a specific requisition number:
   - Requisition Number

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

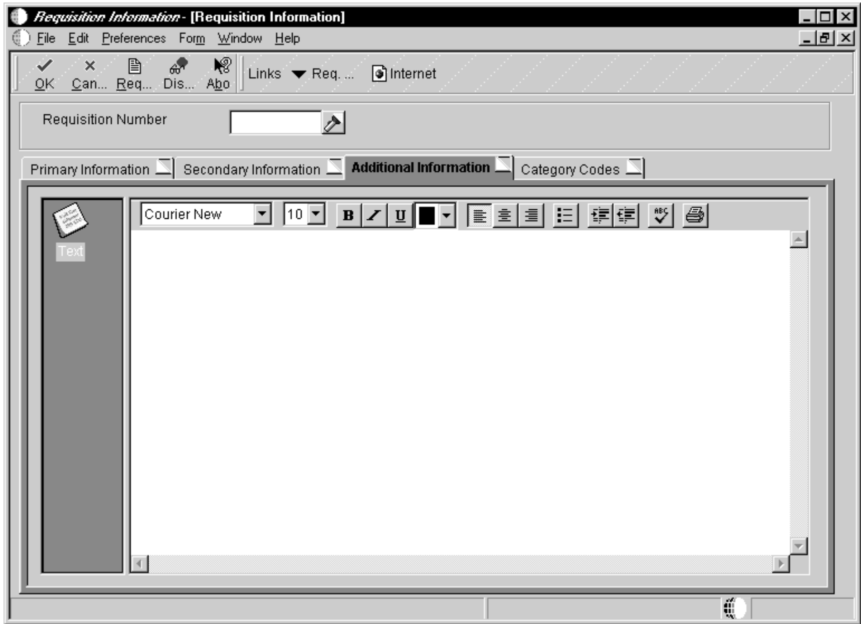
3. Click the Primary Information tab and complete the following fields:
   - Requisition Status
   - Home Business Unit
   - Security Business Unit
   - Requested By
4. Complete any of the following fields, as necessary:
   - Requisition Date
   - Effective From Date
   - Effective Thru Date
   - Fiscal Year
   - Position ID
   - Job Type/Step
   - Approved By
   - Approval Date
   - Headcount

5. Click the Secondary Information tab and complete any of the following fields, as necessary:
   - Pay Grade/Step
   - Pay Class(H/S/P)
   - Overtime Exempt
   - Expected Salary
   - FTE
   - Hours
   - Last Filled By
   - Filled Date

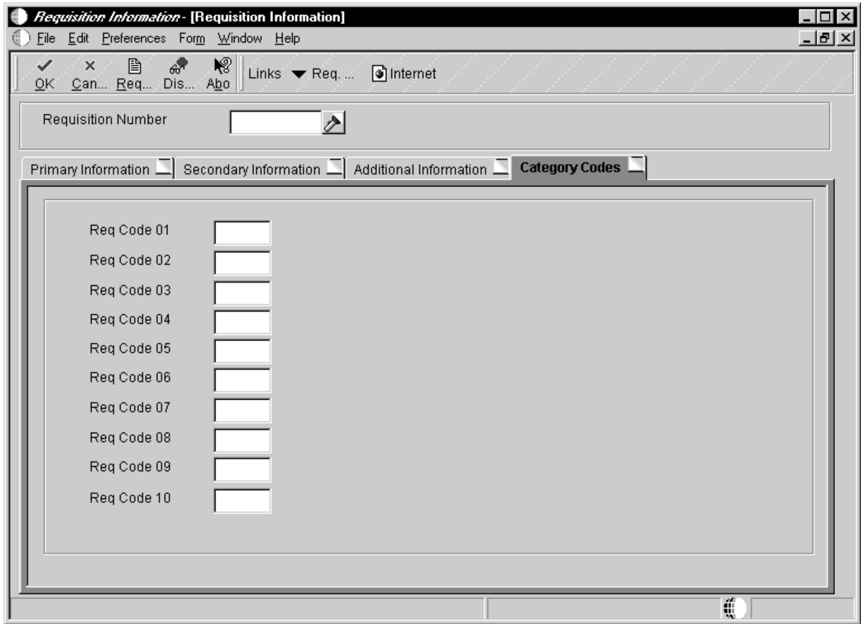
   If you completed the Headcount field on the Primary Information tab and do not complete the FTE and Hours fields on the Secondary Information tab, the system automatically completes the FTE and Hours fields based on the headcount.



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

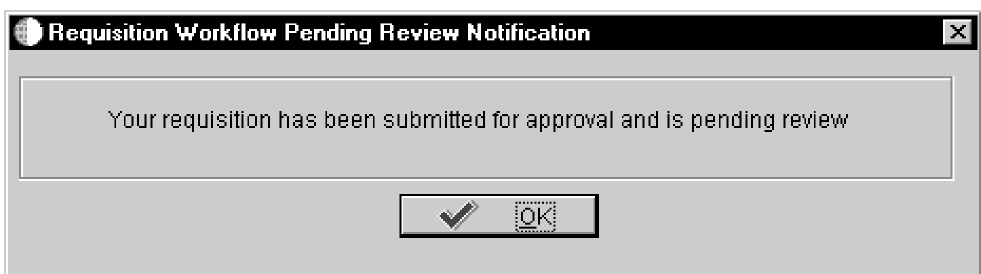


7. Click the Category Codes tab and complete any of the following fields, as necessary:
   - Req Code 01
   - Req Code 02
   - Req Code 03
   - Req Code 04
   - Req Code 05
   - Req Code 06
   - Req Code 07
   - Req Code 08
   - Req Code 09
   - Req Code 10



8. To complete the requisition, click OK.

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



   See *Updating the Status of a Requisition* for information about using the workflow process for approving a requisition.

Field	Explanation
Requisition Number	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
Requisition Status	A code that describes the status of the position associated with the requisition. J.D. Edwards provides several codes that you can use for requisition status purposes. Two of them are hard-coded and should not be changed: • Approved (AA) • Filled and Closed (99) You can define requisition status codes in user defined codes table (08/RS). Statuses that indicate that a requisition is approved should begin with the letter "A." For OneWorld: If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the requisition status when the appropriate person approves the requisition. This update overwrites any existing value in the field.
Home Business Unit	The number of the business unit in which the employee generally resides.
Security 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.
Requested By	The address book number of the person who enters a position requisition. This field is required.
Requisition Date	The effective date of the requisition. The default value for this field is the system date.
Effective From Date	The date on which a requisition, a position, or activity within a position takes effect.
Effective Thru Date	The date on which a requisition, a position, or an activity within a position is no longer in effect. In position activity, the default value for this field is the end of the current fiscal year so that the system can calculate projected figures.

Field	Explanation
Fiscal Year	A four-digit number that identifies the fiscal year. You can enter a number in this field or leave the field blank to indicate the current fiscal year (as defined on the Company Numbers & Names form). Specify the year at the end of the first period rather than the year at the end of the fiscal period. For example, a fiscal year begins October 1, 2005, and ends September 30, 2006. The end of the first period is October 31, 2005. Specify the year 2005 rather than 2006.
Position ID	A code that you use for budgetary (position) control purposes. The position ID consists of: • Position (position code and its description) • Fiscal year • Home business unit For example, you can identify position A0–1 as Accounting Manager for fiscal year 2005–2006, for home business unit 41. 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.
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.
Approved By	The address book number of the person who approves any given work. The system verifies this number against the Address Book. . . . . *Form-specific information* . . . . The address book number of the person who approves a requisition. For OneWorld: If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the approved by field when the appropriate person approves the requisition. This update overwrites any existing value in the field.
Approval Date	The date on which the person with the appropriate authority approves a requisition.
Headcount	The number of employees requested, budgeted, or approved for a position or requisition.

Field	Explanation
Pay Grade/Step	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: • Salary • Hourly Rate • Hours per day • Hours per year • Days per year
Pay Class(H/S/P)	A code that indicates how an employee is paid. Valid codes are: Blank H Hourly S Salaried P Piecework
Overtime Exempt	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.
Expected Salary	The salary that you expect to pay the individual who fills the requisition.
FTE	The number of full-time equivalents (FTEs) that your organization has budgeted for the position. A full-time equivalent is the portion of a full-time worker that an employee represents within a business unit. For example, an employee who works 20 hours per week represents .50 (one-half) FTE. An employee cannot represent more than 1 FTE.
Hours	The number of hours that are budgeted for a position within a business unit for a period of one year. This is the total number of hours allotted to a position for all of the full-time equivalents (FTEs).

Field	Explanation
Last Filled By	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.
Filled Date	The assignment/hire date for the last person to fill the requisition.
Category Code – Requisition 01	A code defined by the user for reporting on requisitions. Each category code is tied to a particular set of User Defined Codes in the data dictionary.

Processing Options for Requisition Information

```
Defaults

1)  Enter a '1' to default Pay Grade,
    Pay Grade Step, Pay Class and
    Overtime Exempt from the Job
    Information Table.

      Default = 0                          ____________
```

Entering Supplemental Data for Requisitions

From the Requisitions menu (G08BR1), choose Requisition Supplemental Data.

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

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

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

Requisitions might include the following types of supplemental data:

- Requirements
- Approval steps
- Requisition notes
- Requisition activity

- Requisition review

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

See Also

- *Working with Supplemental Data* in the *HR and Payroll Foundation Guide* for information about entering, copying, and reviewing supplemental data
- *Reviewing Requisition Reports*

Working with Requisitions

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

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

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

Working with requisitions includes the following tasks:

- ❑ Updating the status of a requisition
- ❑ Attaching a candidate record to a requisition
- ❑ Reopening a requisition

Updating the Status of a Requisition

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

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

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

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

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

Updating the status of a requisition includes either of the following tasks:

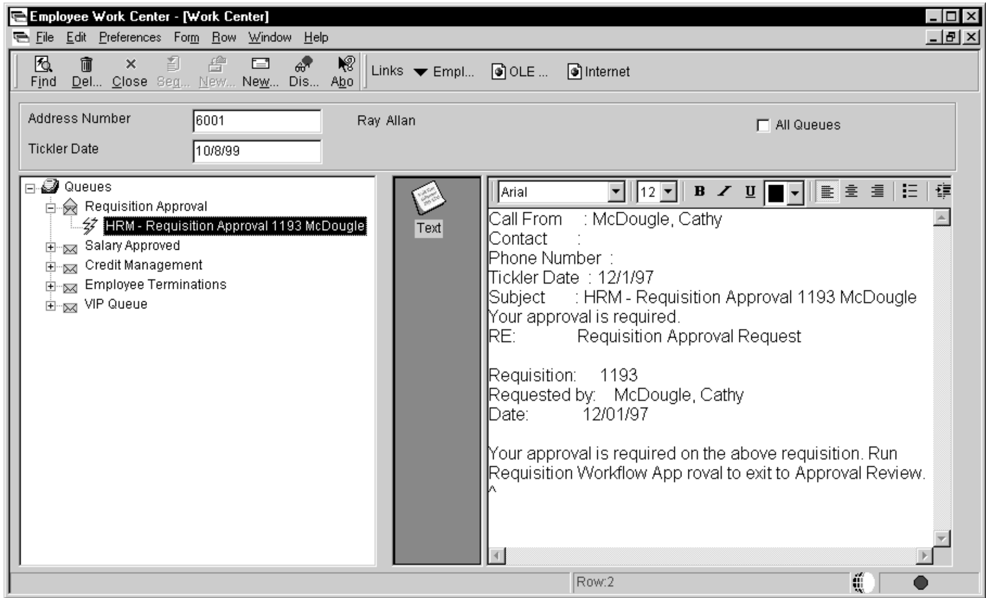
- Updating the status of a requisition using workflow
- Updating the status of a requisition manually

▶ To update the status of a requisition using workflow

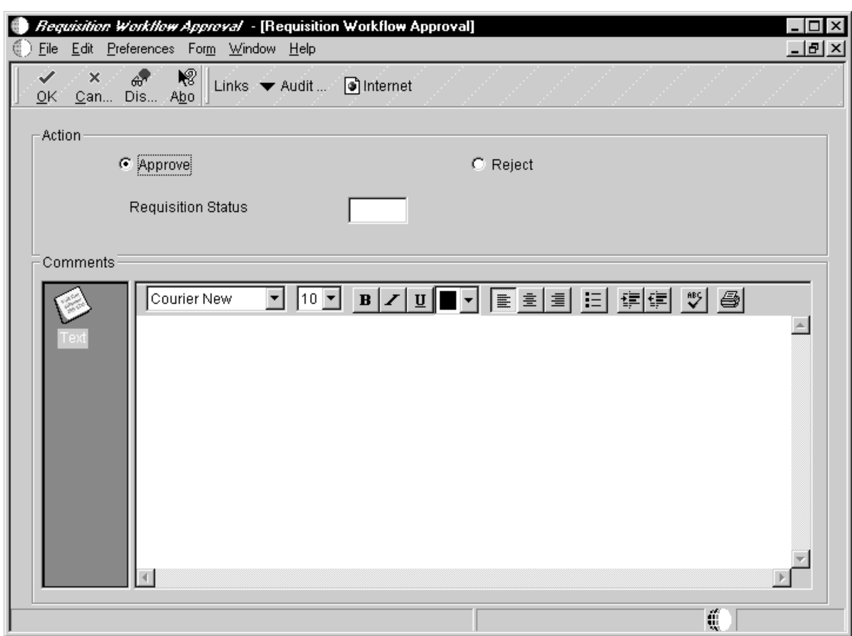
From the Workflow Management menu (G02), choose Employee Work Center.

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

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



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



3. On Requisition Workflow Approval, click the following field:
   - Approve
4. Complete the following field:
   - Requisition Status

5. Enter an optional text message.

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

6. Click OK.

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

▶ To update the status of a requisition manually

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

1. On Work With Requisitions, to locate the requisition that you need to approve, complete one or more of the following fields and click Find:
   - Home Business Unit
   - Position ID
   - Requisition Number
   - Requisition Status
   - Job Type/Step
   - Fiscal Year
2. Choose the requisition and click Select.
3. On Requisition Information, complete the following fields, and then click OK:
   - Requisition Status
   - Approved By
   - Approval Date

Field	Explanation
Approved By	The address book number of the person who approves any given work. The system verifies this number against the Address Book. . . . . *Form-specific information* . . . . The address book number of the person who approves a requisition. For OneWorld: If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the approved by field when the appropriate person approves the requisition. This update overwrites any existing value in the field.
Approval Date	The date on which the person with the appropriate authority approves a requisition.

Attaching a Candidate Record to a Requisition

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

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

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

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

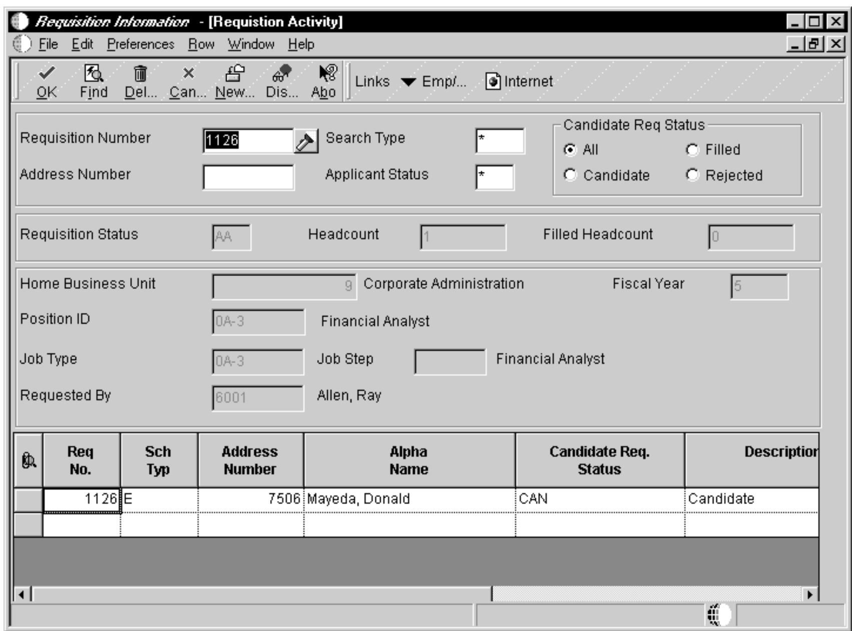
▶ To attach a candidate record to a requisition

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

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

- Home Business Unit
- Position ID
- Requisition Number
- Requisition Status
- Job Type
- Job Step
- Fiscal Year

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



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

Field	Explanation
Candidate Req Status	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. You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are: CAN Any candidate code DET Any code indicating that the position is detached or no longer filled FIL Any code indicating that the position has been filled REJ Rejected TMP Temporarily filled Candidate requisition status codes that have a special handling code of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to “Filled and Closed.”
Requisition Status Date	The date that the current status of a candidate requisition becomes active.
Date Avail.	The date an applicant is available to begin work.

Reopening a Requisition

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

▶ To reopen a requisition

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

1. On Work With Requisitions, to locate the requisition that you need to reopen, complete one or more of the following fields and click Find:
   - Home Business Unit
   - Position ID
   - Requisition Number
   - Requisition Status
   - Job Type

- Job Step
- Fiscal Year

2. Choose the requisition and click Select.
3. On Requisition Information, change the information in the following field:
   - Requisition Status
4. Complete the following field and click OK:
   - Headcount

Field	Explanation
Headcount	The number of employees requested, budgeted, or approved for a position or requisition.

Reviewing Requisition Reports

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

Reviewing requisition reports includes the following tasks:

- ❑ Reviewing the Requisition Supplemental Data report
- ❑ Reviewing the Requisition Data by Data Type report
- ❑ Reviewing the Requisition Review – Position report

Reviewing the Requisition Supplemental Data Report

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

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

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

See Also

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

Reviewing the Requisition Data by Data Type Report

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

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

See Also

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

Processing Options for Requisition Profile Options

```
Options

Enter a '1' to bypass printing text
    information on the report.

      Default of blank will print the              ____________
      text.
```

Reviewing the Requisition Review - Position Report

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

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

See Also

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

Processing Options for Requisition Review by Position/Job/Step

```
Detail Type

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

Applicant Information

Applicant Information

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

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

You might track the following standard types of applicant information:

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

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

Working with applicant information includes the following tasks:

- ❑ Entering applicant information
- ❑ Hiring an applicant
- ❑ Creating applicant letters
- ❑ Reviewing applicant reports

Entering Applicant Information

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

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

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

Entering applicant information includes the following tasks:

- ❑ Adding new applicant records
- ❑ Updating an applicant's address
- ❑ Entering supplemental data for applicants

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

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

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

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

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

See Also

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

Adding New Applicant Records

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

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

Adding new applicant records includes the following tasks:

- Entering basic applicant information
- Entering address book information for an applicant
- Entering country-specific information for an applicant

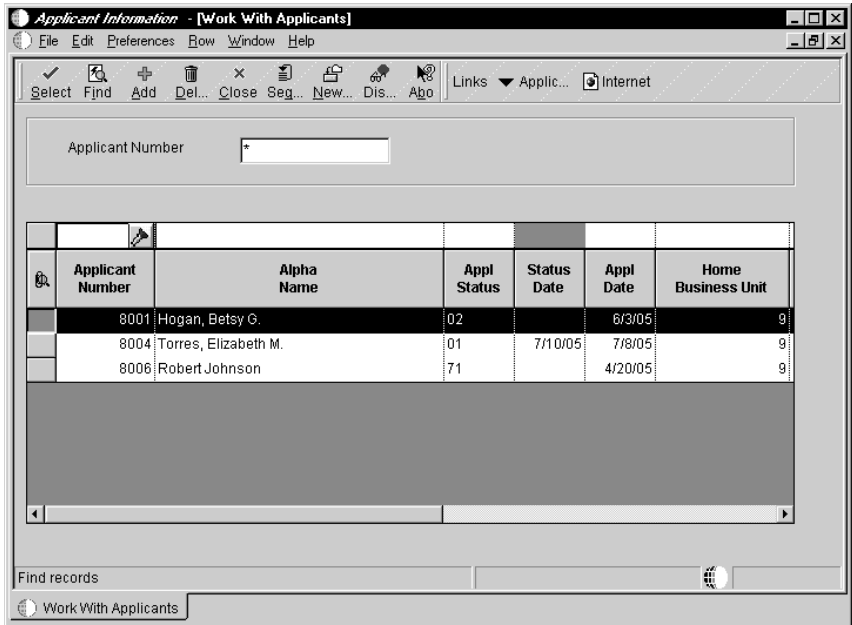
Basic information includes information about the applicant, such as the job for which the applicant is applying.

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

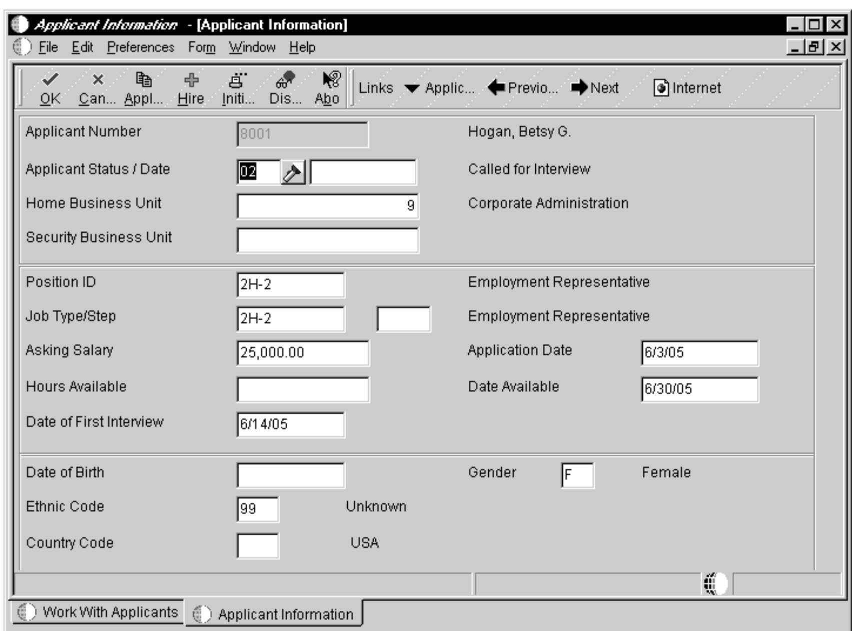
Country-specific information is information that is required only in the country in which the applicant works. For example, in the United States, country-specific information includes information that is required for government reporting, such as veteran and disability status.

▶ To enter basic applicant information

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



1. On Work With Applicants, click Add.



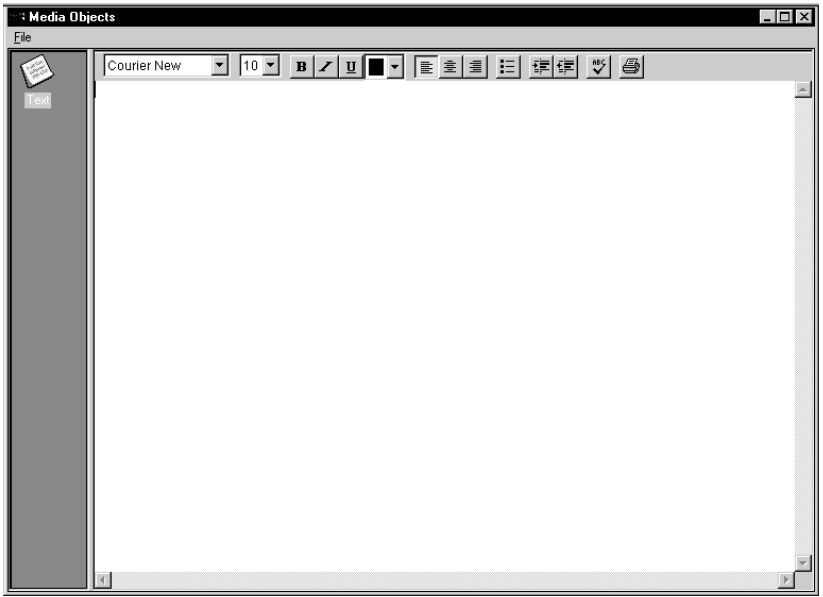
2. On Applicant Information, complete the following fields:
   - Applicant Number

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

3. To associate the applicant's record with a specific job, complete the following fields:
   - Home Business Unit
   - Job Type/Step
4. Complete any of the following optional fields and click OK:
   - Security Business Unit
   - Position ID
   - Date Available
   - Date of First Interview
   - Asking Salary
   - Hours Available
   - Date of Birth

   When you enter applicant information, you can use the attachment feature to attach additional text or objects, such as a scanned copy of the applicant's resume, to the applicant record.

5. From the Form menu, choose Attachments to add text or objects to applicant information.



6. On Media Objects, choose Add then Text, from the File menu.
7. Add text or objects to applicant information, and choose Save & Exit from the File menu.

For information about entering attachments, see Working with Media Objects in the *OneWorld Foundation Guide.*

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

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

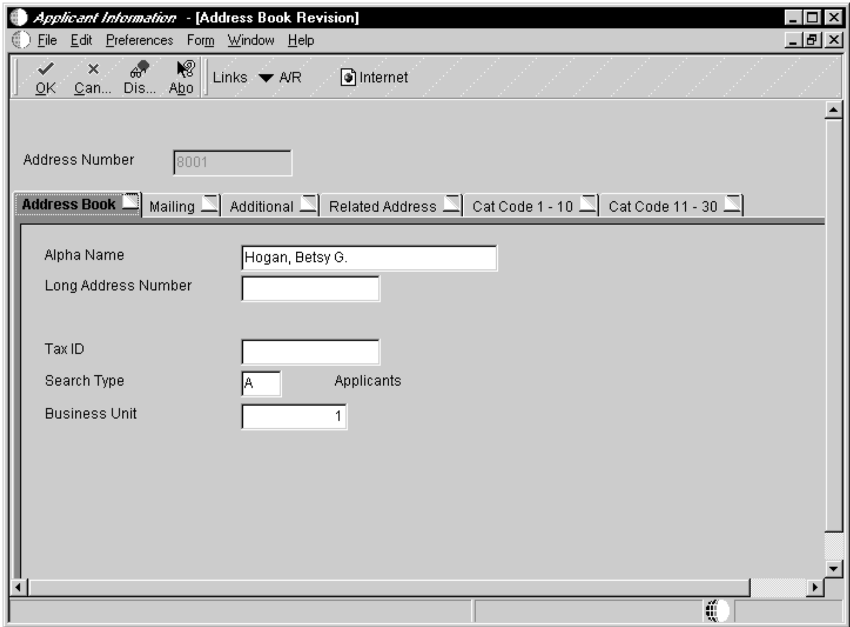
Caution: Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release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

Field	Explanation
Applicant 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. . . . . *Form-specific information* . . . . 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.
Applicant Status / Date	A code that defines a step in the hiring process (such as initial contact, first interview, and so on) that the applicant has completed. You define these codes in user defined code table 08/AS. When you enter or change the status of an applicant on the Applicant Entry form, the system adds a record to the supplemental data type for applicant status. To review the history of an applicant's status, you can review the information that was entered for the applicant in this supplemental data type.
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.
Gender	Valid codes are: M – Male F – Female
Country Code	A user defined code list 00/CN that indicates the country in which the employee resides.
Home Business Unit	The number of the business unit in which the employee generally resides.
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.

Field	Explanation
Security 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.
Position ID	A code that you use for budgetary (position) control purposes. The position ID consists of: • Position (position code and its description) • Fiscal year • Home business unit For example, you can identify position A0–1 as Accounting Manager for fiscal year 2005–2006, for home business unit 41. 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.

▶ To enter address book information for an applicant

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



1. On Address Book Revision, click the Address Book tab.
2. Complete the following field:
   - Alpha Name
   - Search Type
3. Complete the following optional fields:
   - Long Address Number
   - Tax ID
4. Complete the following fields, if necessary:
   - Business Unit
5. Click the Mailing tab.
6. Complete the following fields:
   - Mailing Name
   - Address Line 1
   - City
   - State
   - Postal Code
   - Country
   - County
7. Complete the following fields, if necessary:
   - Address Line 2

- Address Line 3
- Address Line 4

8. Click OK.

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

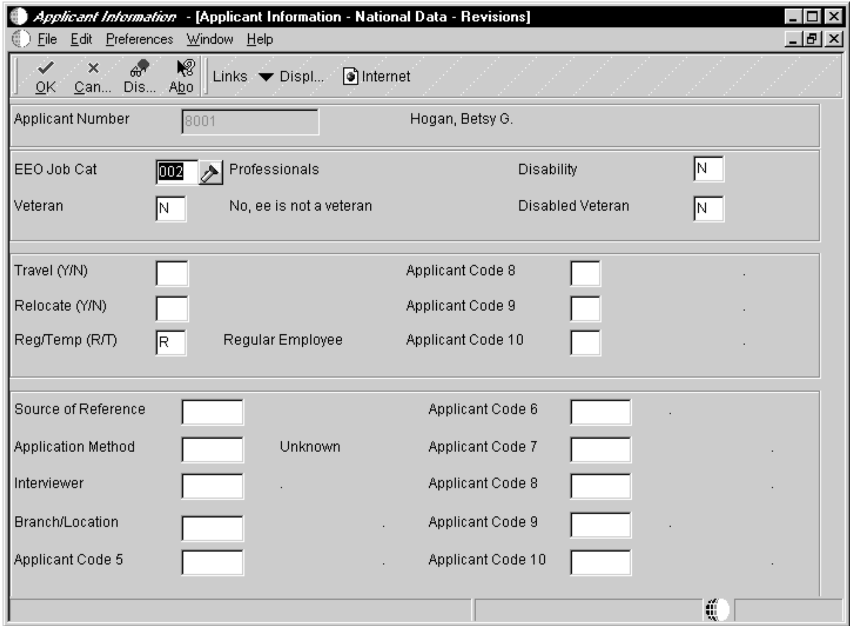
Field	Explanation
Long Address Number	A user defined name or number that is unique to the address book number. You can use this field to enter and locate information. You can use it to cross-reference the supplier to a Dun & Bradstreet number, a lease number, or other reference. . . . . *Form-specific information* . . . . When you set up suppliers using a long address number, you can access the supplier number more quickly. For example, when you enter a voucher, you use the long address number preceded by the special character assigned to long address numbers in Address Book constants in the Supplier Number field. The system converts the long address number to the supplier number.
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. . . . . *Form-specific information* . . . . For US employees, the Tax ID is a social security number. For Canadian employees, the Tax ID must be a valid and unique Social Insurance Number (SIN).

Field	Explanation
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
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.

▶ To enter country-specific information for an applicant

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

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



3. On Applicant Information - National Data - Revisions, complete the following fields to enter government reporting information:
   - EEO Job Cat
   - Veteran
   - Disability
   - Disabled Veteran
4. To enter user-defined information, complete any of the following fields:
   - Applicant Code 5
   - Applicant Code 6
   - Applicant Code 7
   - Applicant Code 8
   - Applicant Code 9
   - Applicant Code 10
5. Complete any of the following optional fields:
   - Travel (Y/N)
   - Relocate (Y/N)
   - Reg/Temp (R/T)
   - Source of Reference
   - Application Method
   - Interviewer

- Branch/Location

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
EEO Job Cat	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.
Veteran	A code that indicates the veteran status of the employee. Valid codes are: N No, this employee is not a veteran. Y Yes, this employee is a veteran. V This employee is a Vietnam veteran.
Disability	A code indicating whether this employee has a mental or physical disability. Valid codes are: Y Yes, this employee has a mental or physical disability. N No, this employee does not have a mental or physical disability. U Unknown
Disabled Veteran	A code indicating whether this employee is a disabled veteran. Valid codes are: Y Yes, this employee is a disabled veteran. N No, this employee is not a disabled veteran. This field is used to generate the Veterans Employee (VETS-100) report.
Applicant Code 5	A user defined code available for you to use as necessary to define applicant information.
Travel (Y/N)	A yes/no (Y/N) code you can use to meet your needs. Currently this code has been defined to indicate whether an applicant is willing to travel. Valid codes are: Y Yes, this applicant will travel N No, this applicant is not willing to travel
Relocate (Y/N)	A yes/no (Y/N) code you can use to meet your needs. Currently it has been defined to indicate whether an applicant is willing to relocate. Valid codes are: Y Yes, the applicant will relocate N No, the applicant is not willing to relocate

Field	Explanation
Reg/Temp (R/T)	A code used to indicate whether the applicant is to be a regular or a temporary employee. Valid codes are: R The applicant is to be a regular employee T The applicant is to be a temporary employee
Source of Reference	A code explaining how an applicant was referred to the position or to the company. You can define these codes using user defined code table 08/N1. This code reflects a more specific source of reference than that in the Application Method (data item HN02) field.
Application Method	A code used to define how an applicant applied for the job. You can define these codes using user defined code table 08/MA. This code reflects a less specific source of information than that in the Source of Information (data item HN01) field.
Interviewer	A code used to identify the person who interviewed the applicant. You can define interviewers using user defined code table 08/N3. You can enter more specific interview information using the data types linked to the detailed applicant resume process.
Branch/Location	A code used to define the branch or geographic location for which the applicant is being considered. You can define this code using user defined code table 01/01. This code is helpful for reporting purposes.

Processing Options for Applicant Entry

Hire Tab

These processing options allow you to transfer specific applicant information to the Employee Master table (F060116) or the Unedited Quick Hire Transaction table (F060116Z) after you add an applicant record.

1. Status Code

Use this processing option to enter the user defined code (08/AS) that your organization uses to indicate that an applicant is hired. When you complete the steps to hire an applicant, the system automatically updates the applicant's status with the code that you enter in this processing option.

2. Requisition Information

Use this processing option to define whether you want the system to automatically transfer information that you entered for the requistion, including the position ID, home business unit, job type, job step, and security business unit, to the applicant's record when you enter an applicant. When you hire an applicant, the system transfers this information to the applicant's employee record. Valid values are:

1 Yes. Transfer requisition information to the applicant and employee records.
Blank No. Do not transfer requisition information.

If you enter 1 for this processing option, you must enter a requisition number for each applicant when you enter the applicant record.

3. Job Information

Use this processing option to define whether you want the system to automatically transfer information that you entered for the job to the employee record when you hire an applicant. The system does not transfer this job information to the applicant record. Valid values are:

1 Yes. Transfer job information to employee records.
Blank No. Do not transfer job information.

If you enter 1 for this processing option, you must enter a job type for each applicant when you enter the applicant record. If your organization uses job steps, you must also enter a job step for each applicant.

4. Transfer Supplemental Data

Use this processing option to define whether you want the system to automatically transfer applicant supplemental data to the employee supplemental database when you hire an applicant. The system transfers the information that you entered in the applicant supplemental data types to the equivalent supplemental data types for employees. Valid values are:

1 Yes. Transfer supplemental data for applicants.
Blank No. Do not transfer supplemental data for applicants.

5. Notification Message

Enter the address book number of the person that you want to notify when you choose Initiate Hire to hire an applicant. Typically, the person that you notify is the person who is responsible for entering employee information for new employees.

Delete Tab

This processing option allows you to automatically delete certain information.

1. Supplemental Data

Use this processing option to define whether you want the system to automatically delete the supplemental data that you entered for an applicant when you delete the applicant's record. Valid values are:

1 Yes. Delete supplemental data for applicants.
Blank No. Do not delete supplemental data for applicants.

Add Tab

This processing option allows you to specify whether the system requires you to complete the Date of Birth, Gender, and Ethnic Code fields.

1. Date of Birth, Gender, and Ethnic Code Required

Use this processing option to specify whether the system requires you to complete the Date of Birth, Gender, and Ethnic Code fields when you enter applicant information. Valid values are:

1 Yes. Date of Birth, Gender, and Ethnic Code fields are required.
Blank No. Date of Birth, Gender, and Ethnic Code fields are not required.

Note: Date of birth is required by Canada for tax purposes.

Updating an Applicant's Address

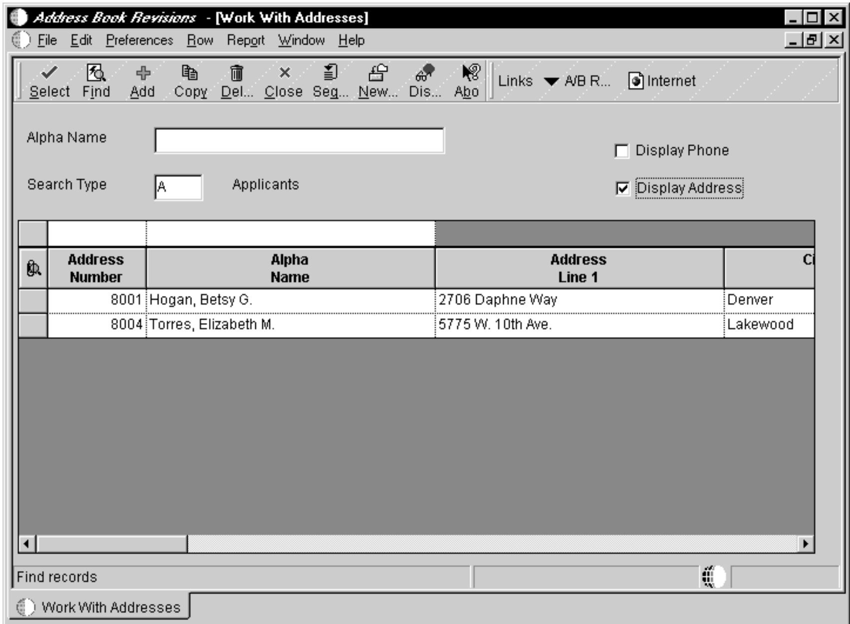
After you have entered applicant information, you can use Address Book Revisions to change an applicant's address.

See Also

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

▶ To update an applicant's address

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



1. On Work With Addresses, complete either of the following fields to locate the address you need to change:
   - Alpha Name
   - Search Type
2. To display the applicant's phone or address, click the Display Phone or Display Address option.
3. Click Find.
4. Choose the employee address you want to change and click Select.
5. On Address Book Revision, complete any of the necessary fields and click OK.

Field	**Explanation**
Alpha 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.

Field	Explanation
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

Entering Supplemental Data for Applicants

From the Applicants menu (G08BA1), choose Applicant Supplemental Data.

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

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

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

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

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

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

See Also

- *Working with Supplemental Data* in the *HR and Payroll Foundation Guide* for information about entering, copying, and reviewing supplemental data
- *Reviewing Applicant Reports*

Hiring an Applicant

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

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

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

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

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

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

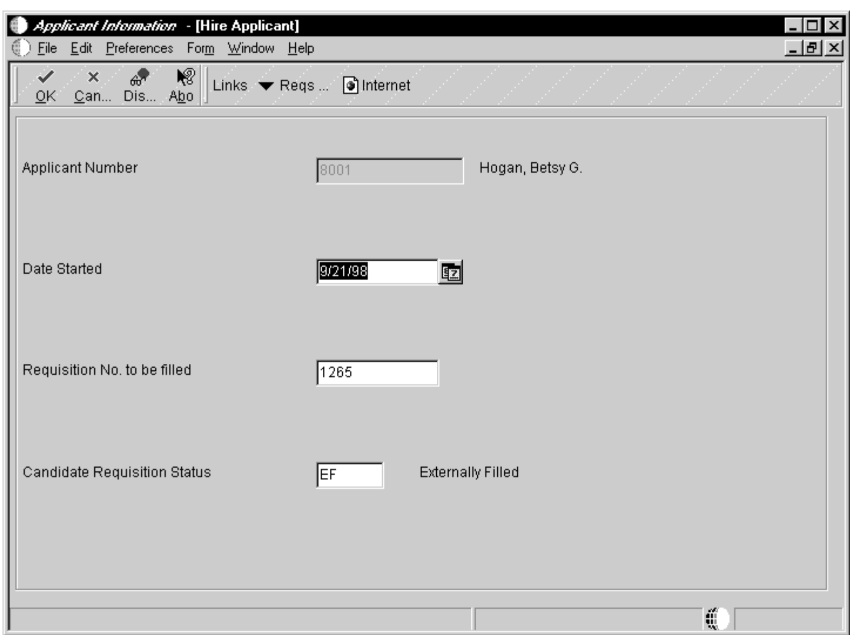
Before You Begin

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

▶ To hire an applicant

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

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



4. On Hire Applicant, complete the following fields and click OK:
   - Date Started
   - Requisition No. to be filled
   - Candidate Requisition Status
5. Click OK to either hire the applicant or send notification to the person who will complete the hiring process.

   If you clicked the Hire button to hire the applicant, the Employee form appears.
6. On Employee, complete the remaining steps to add a new employee record.

   See *Adding Employee Records One at a Time* in the *HR and Payroll Foundation Guide*.

Field	Explanation
Date Started	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. 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.
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
Candidate Requisition Status	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. You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are: CAN Any candidate code DET Any code indicating that the position is detached or no longer filled FIL Any code indicating that the position has been filled REJ Rejected TMP Temporarily filled Candidate requisition status codes that have a special handling code of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to “Filled and Closed.”

Creating Applicant Letters

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

You can use either of two approaches to customize the content of letters that you print for specific individuals:

- Enter direct changes to a selected form letter just before you print it.
- Edit an existing form letter or create a new letter using MailMerge Workbench.

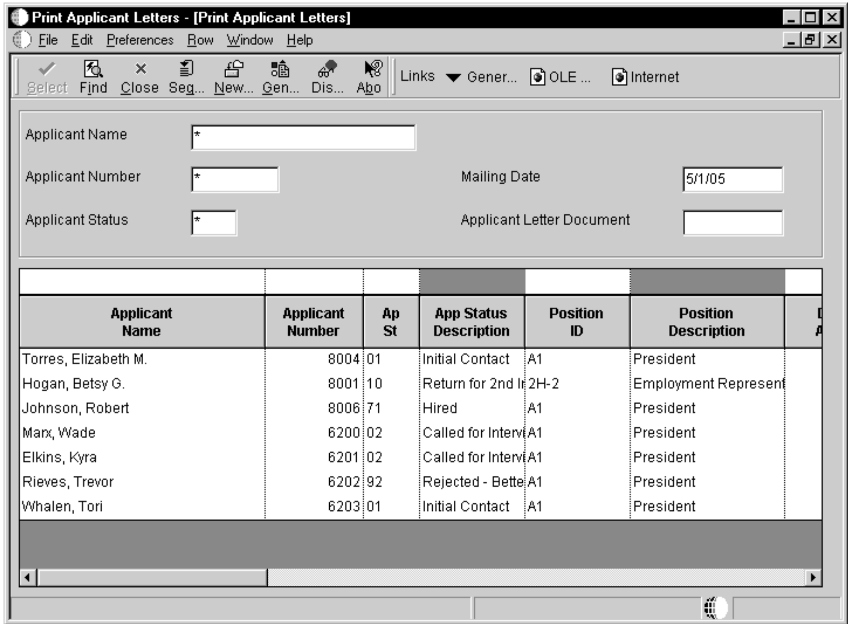
Before You Begin

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

▶ To create an applicant letter

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

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



2. To create a single letter, complete one or more of the following fields, click Find, and then choose the applicant record:
   - Applicant Name
   - Applicant Number
   - Applicant Status
3. If you want to print a date other than the current system date on your letter, complete the following field:
   - Mailing Date

     If the letter has been set up to use this value, this date will print on your letter.
4. Complete the following field to choose the desired letter template.
   - Applicant Letter Document
5. Choose Generate Letter from the Row menu.

   Depending on the setup options you chose when you set up the mailmerge application and your letter, a Print form might appear.
6. On Print, 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.
7. On MailMerge, choose Print from the Form menu.

The system might display a Print dialog form, which requires that you perform step 8.

8. On Print, verify that the form contains the correct information and click OK.

Field	Explanation
Applicant 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.
Applicant 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.
Applicant Status	A code that defines a step in the hiring process (such as initial contact, first interview, and so on) that the applicant has completed. You define these codes in user defined code table 08/AS. When you enter or change the status of an applicant on the Applicant Entry form, the system adds a record to the supplemental data type for applicant status. To review the history of an applicant's status, you can review the information that was entered for the applicant in this supplemental data type.
Mailing Date	This indicates the date that prints on your letter.
Applicant Letter Document	This field identifies which Applicant Letter document will be used from the MailMerge (P980014) application.

Processing Options for Print Applicant Letters (P08450)

Process Tab

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

1. Applicant Letter Document

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

Reviewing Applicant Reports

To review detailed information about applicants, you can print applicant reports. These reports make it easy to do the following things:

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

Reviewing applicant reports includes the following tasks:

- ❑ Reviewing the Applicant List report
- ❑ Reviewing the Applicant Listing by Position report
- ❑ Reviewing the Applicant Listing - Job Type/Step report
- ❑ Reviewing the Applicant Listing - EEO Listing report
- ❑ Reviewing the Applicant Supplemental Data report
- ❑ Reviewing the Applicant Data by Data Type report

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

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

See Also

- *Working with Supplemental Data* in the *HR and Payroll Foundation Guide* for information about reviewing supplemental data online
- *Working with Multiskill Search* in the *HR and Payroll Foundation Guide* for information about locating applicants who meet multiple criteria

Reviewing the Applicant List Report

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

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

See Also

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

Reviewing the Applicant Listing by Position Report

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

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

See Also

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

Reviewing the Applicant Listing - Job Type/Step Report

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

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

See Also

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

Reviewing the Applicant Listing - EEO Listing Report

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

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

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

See Also

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

Processing Options for Applicant Listing – EEO Listing

```
Date of Birth

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

Reviewing the Applicant Supplemental Data Report

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

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

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

See Also

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

Processing Options for Applicant Profile Processing Options

```
Cover Page

      Print Cover Page (Y/N)                      ____________
      Print Instructions (Y/N)                    ____________

Form Options

      Form Type                                   ____________
      Max Form Width                              ____________
      Max Form Length                             ____________
      Location of Page Overflow                   ____________

Printer Option

      Print Queue                                 ____________
      Hide in Print Queue (Y/N/S/T)               ____________
      Lines/Inch                                  ____________
      Char./Inch                                  ____________
      Number of Report Copies                     ____________

Processing

      Enter a '1' if you wish to bypass           ____________
      printing the Tax ID. (Default of
      blank will print the number.)
      Enter a '1' if you wish to bypass           ____________
      printing the Asking Salary.
      (Default of blank will print the
      number.)
      Enter a '1' if you wish to bypass           ____________
      printing any extended narrative
      associated with the data.
```

Reviewing the Applicant Data by Data Type Report

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

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

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

See Also

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

Processing Options for Applicant Data by Data Type Report

Narrative

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

Position Control

Position Control

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

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

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

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

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

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

Working with position control includes the following tasks:

- ❑ Defining position budgets
- ❑ Entering account information for positions
- ❑ Setting up AAIs for position budgets
- ❑ Transferring position budgets to the General Ledger
- ❑ Revising position budgets by business unit
- ❑ Working with position activity information
- ❑ Reviewing position budget information

- Defining next year's position budget
- Working with parent/child relationships by position
- Purging position information
- Reviewing position control reports

Defining Position Budgets

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

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

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

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

Defining a position budget consists of the following tasks:

- ❑ Defining position budgets manually
- ❑ Defining position budgets automatically

When defining a position budget, complete the following steps:

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

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

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

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

Example: Budget Processing

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

Salary	200000.00 (annual)
FTEs	10
Head count	14

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

Before You Begin

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

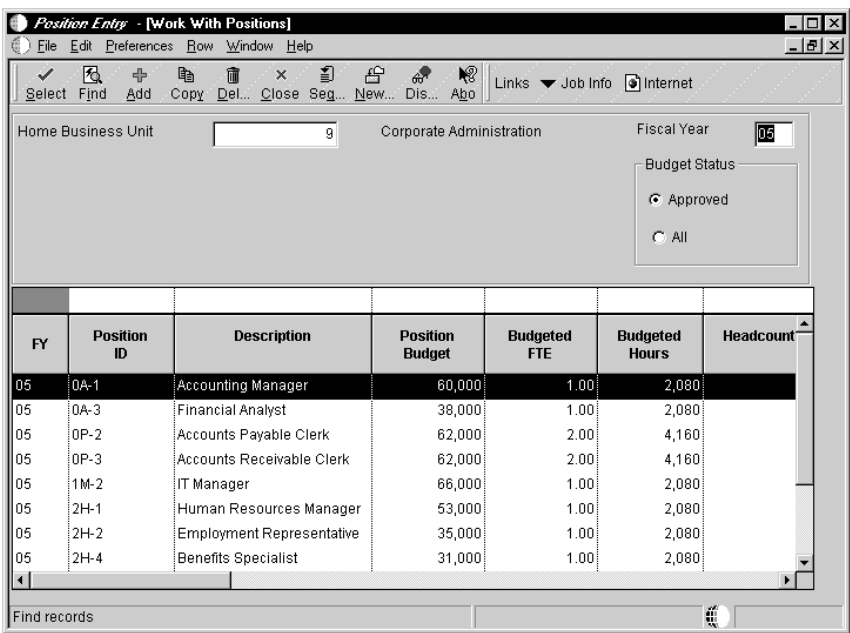
Defining Position Budgets Manually

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

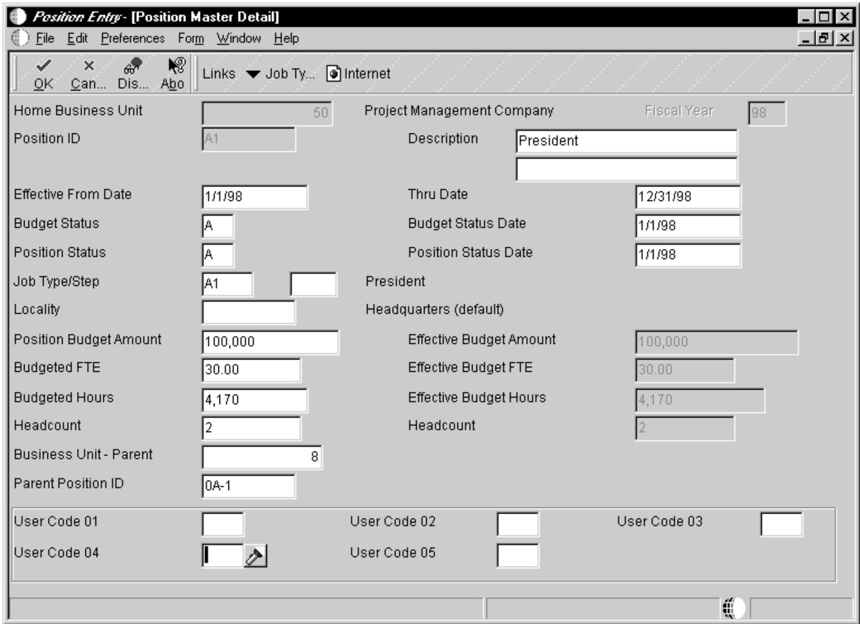
- The initial position budget (the position budget for the first fiscal year for which you are using position control) does not equal the salary, standard hours per year, and FTEs for the employee that you intend to assign to the position. In this case, if you create position budgets automatically, you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

▶ To define a position budget manually

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



1. On Work With Positions, click Add.



2. On Position Master Detail, complete the following fields:
    - Home Business Unit
    - Fiscal Year
    - Position ID
    - Description
    - Position Budget Amount
    - Budgeted FTE
    - Budgeted Hours
    - Headcount
3. To associate a job with the position budget, complete the following fields:
    - Job Type/Step
    - Locality
4. To enter status information, complete the following fields:
    - Effective From Date
    - Thru Date
    - Budget Status
    - Budget Status Date
    - Position Status
    - Position Status Date
5. Complete any of the following additional fields and click OK:

- Business Unit – Parent
- Parent Position ID
- User Code 01
- User Code 02
- User Code 03
- User Code 04
- User Code 05

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
Home Business Unit	The number of the business unit in which the employee generally resides.
Fiscal Year	A four-digit number that identifies the fiscal year. You can enter a number in this field or leave the field blank to indicate the current fiscal year (as defined on the Company Numbers & Names form). Specify the year at the end of the first period rather than the year at the end of the fiscal period. For example, a fiscal year begins October 1, 2005, and ends September 30, 2006. The end of the first period is October 31, 2005. Specify the year 2005 rather than 2006.
Position ID	A code that you use for budgetary (position) control purposes. The position ID consists of: • Position (position code and its description) • Fiscal year • Home business unit For example, you can identify position A0–1 as Accounting Manager for fiscal year 2005–2006, for home business unit 41. 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.

Field	Explanation
Position Budget Amount	The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table (F08101), represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position, for the business unit and year that you specified.
Budgeted FTE	The number of full-time equivalents (FTEs) that your organization has budgeted for the position. A full-time equivalent is the portion of a full-time worker that an employee represents within a business unit. For example, an employee who works 20 hours per week represents .50 (one-half) FTE. An employee cannot represent more than 1 FTE.
Budgeted Hours	The number of hours that are budgeted for a position within a business unit for a period of one year. This is the total number of hours allotted to a position for all of the full-time equivalents (FTEs).
Headcount	The number of employees requested, budgeted, or approved for a position or requisition.
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. . . . . *Form-specific information* . . . . The Job Type/Step information on the Position Master Detail form comes from the Job Master, which contains specific combinations of user defined job types (07/G) and user defined job steps (07/GS). You cannot enter a job type/step combination that has not been set up in the Job Master.
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.

Field	Explanation
Eff From	The date on which a requisition, a position, or activity within a position takes effect. . . . . *Form-specific information* . . . . When the date you enter in this field occurs after the first day of the fiscal year, the system calculates an effective budget for the position. The system also calculates an effective budget when you leave this field blank. Effective budget amounts are the amounts that the system uses to: • Verify position budget information, if you have set up your system options to warn or prevent users from exceeding position budget amounts • Update general ledger information
Eff Thru	The date on which a requisition, a position, or an activity within a position is no longer in effect. In position activity, the default value for this field is the end of the current fiscal year so that the system can calculate projected figures. . . . . *Form-specific information* . . . . When the date you enter in this field occurs before the last day of the fiscal year, the system calculates an effective budget for the position. The system also calculates an effective budget when you leave this field blank. Effective budget amounts are the amounts that the system uses to: • Verify position budget information, if you have set up your system options to warn or prevent users from exceeding position budget amounts • Update general ledger information
Budget Status	A code that indicates the status of the position budget. The system uses the first character in the second description in the user defined code table 08/PC to process approved and closed positions. The position's budget must have an approved status before you can assign it to an employee or to an approved requisition. Positions with a closed budget status are not included when you run Create Next Year's Position Budgets (P081820).
Budget Status Date	The date that the current budget status became active.

Field	Explanation
Position Status	The current activity level of the position. When you attach an employee record to a vacant position, the system updates the position status with the position status code that has DEFA in its special handling code. The system updates the position status code on the beginning date of the employee's assignment. When the position again becomes vacant, you must manually change the value in the Position Status field.
Position Status Date	The date that the current status of the position became active.
Business Unit – Parent	A twelve-byte field used to identify the Business Unit (MCU) that this Position reports to, for example, the Supervisor's Business Unit. *** The Parent Position / Parent Business Unit must already exist as a Position ID/ Business Unit record in the Position Master File. *** For example, Bob Jones is a senior programmer in Business Unit 100 and he reports to Sally Abbot who is a junior manager in Business Unit 200. Bob Jones: Position ID = SRPRG, Business Unit = 100, Parent Position ID = JRMGR, Parent Business Unit = 200 Sally Abbot: Position ID = JRMGR, Business Unit = 200
Parent Position ID	A code that identifies the higher-level position that this position reports to. For example, the supervisor position ID. Note: The parent position or parent business unit must already exist as a position ID or business unit record in the Position Master table.
User Code 01	A user defined code (08/P1) that classifies Position Master records (unique by fiscal year, business unit, and position ID) for reporting purposes. For example, you might classify positions by their field of work. In this case, position codes could be set up as follows: CLT Client Services ENG Engineering FIN Business Finance LAB Contract Labor MGR Business Management PRG Programming

Processing Options for Position Master Detail (P08101)

Defaults Tab

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

1. Job Type/Step Entry

Use this processing option to determine whether the job type/step fields are required on the Position Master Detail Form.

If these fields are required, you cannot close and save the Position Master Detail form without completing the job type/step fields. If these fields are not required, you will receive a warning if you leave the job type/step fields blank; however, you will be able to save and close the form. Valid values are:

Blank Issue a warning if the job step/type is left blank.
1 Require entry of job type/step.

Note: In Position Control Options, if the position ID required is not set to 1, the application will ignore this processing option.

Defining Position Budgets Automatically

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

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

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

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

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

- Position Master Information (F08101)
- Position Budget Detail (F08111)

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

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

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

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

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

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

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

See Also

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

Processing Option for Start Position Control (R081800)

Process Tab

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

1. Clear Tables

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

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

Blank Do not clear tables.
1 Clear tables.

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

Entering Account Information for Positions

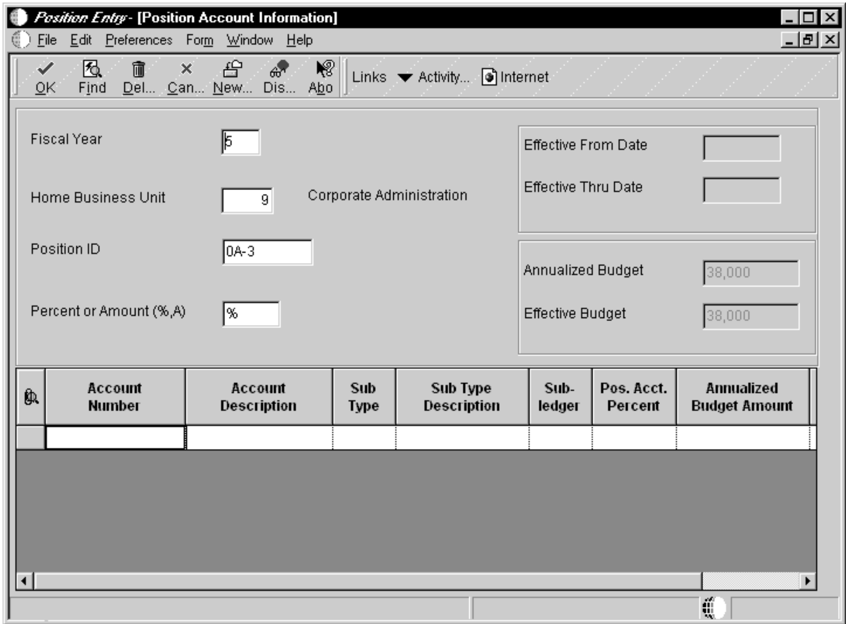
You enter account information for positions so that your accounting department can track the salary amounts that you have budgeted for each position. When you enter account information, you specify the accounts in the general ledger that are affected by the position budget. If you receive funding for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

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

▶ To enter account information for positions

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

1. On Work with Positions, to locate the position for which you need to enter account information, complete one or more of the following fields and click Find:
   - Fiscal Year
   - Home Business Unit
   - Position ID
2. Choose a record in the detail area, and then choose Position Acct Info (Position Account Information) from the Row menu.



3. On Position Account Information, complete the following field:
   - Account Number
4. To specify the method of calculation, complete the following field:
   - Percent or Amount (%,A)
5. If the method of calculation (Percent or Amount field) is percent, complete the following field:
   - Pos. Acct Percent
6. If the method of calculation is amount, complete the following field:
   - Annualized Budget
7. Complete the following optional fields:
   - Sub– ledger
   - Sub Type
8. Click OK.

See Also

- *Transferring Position Budgets to the General Ledger*

Setting Up AAIs for Position Budgets

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

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

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

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

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

See Also

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

Transferring Position Budgets to the General Ledger

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

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

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

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

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

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

To transfer position budgets to the general ledger, complete one of the following tasks:

- ❑ Transfer position budgets to the Account Balances table
- ❑ Post position budgets to the Account Ledger table

Before You Begin

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

See Also

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

Transferring Position Budgets to the Account Balances Table

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

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

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

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

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

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

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

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

Processing Options for Update Position Budgets to Account Balances

```
Update Options

      1. Enter a "1" to update account            ____________
      balances file (F0902)

Ledger Type
```

```
1.  When entering budgets to the actual
    and units ledgers, the ledger type
    "BA" and "BU" is assumed.  If you
    wish to enter to a different ledger
    (such as a temporary budget or a
    revised budget), you must designate
    the alternate budget ledger types.

      Salaries Budget Ledger:                 ____________
      Hours Budget Ledger:                    ____________

Note:  The ledger codes on this screen
    must be valid in User Defined Codes
    09/LT.  If not, the program will not
    function.  Also the following ledger
    types can not be updated by this
    program:  AA, CA, XA, YA, ZA, AC.

Fiscal Year

      1.  Enter the last two digits of        ____________
      the fiscal year.

Budget Cycle

1.  Enter a "1" next to each item you
    wish to update in the Account
    Balances file (F0902).  If all items
    are left blank, the default will
    only update the Final Budget.

      Requested Budget:                       ____________
      Approved Budget:                        ____________
      Final Budget:                           ____________

Report Type

      1.  Enter "0" for an Exception          ____________
      Report.  Enter a "1" to have a
      Summary or a Detail Report.  (See
      option below)
      2.  Enter "0" for a Summary             ____________
      Report.  Enter a "1" for a Detail
      Report.  This option is ignored if
      only an Exception Report is
      requested.  (See option above)
```

Posting Position Budgets to the Account Ledger Table

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

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

See Also

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

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

Select Tab

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

1. Fiscal Year

Use this processing option to select the records from the Position Master table that will be updated to the Journal Entry Transaction – Batch table (F0911Z1). Only the records from the fiscal year you enter will be updated.

You need to enter only the last two digits of the year. A leading zero is stripped from the view (05 becomes 5), so you could enter a single digit for years 2000 to 2009.

Process Tab

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

1. Transaction Description

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

2. Transaction Date

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

3. Budget Ledger Type

Use this processing option to specify the ledger to be updated. Valid values are stored in User Defined Code table 09/LT. If left blank, the BA ledger will be updated. If a value is entered, that ledger is updated.

This program cannot update the following ledger types: AA, AC, CA, XA, YA, ZA. An invalid record type error will occur if one of these ledger types is entered.

4. Proof/Update Mode

Use this processing option to specify whether you run this report in proof or update mode.

In proof mode, a report will be generated showing what will be written to the Journal Entry Transaction – Batch table (F0911Z1). Use proof mode to examine data and fix any errors. Then rerun the process in update mode. Valid values are:

0 or blank   Proof Mode   1   Update Mode

Reports Tab

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

1. Exception Report

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

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

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

No parent record in F08101 found
Invalid Budget Status Code
Invalid Account
Invalid Sub-Ledger
Invalid Sub-Ledger Type
Invalid Fiscal Year
Invalid Salary Ledger Type
Invalid Hours Ledger Type
Invalid Home Business Unit
Budget Not Approved
Non-Posting Account
Inactive Account

2. Summary Report

Use this processing option to create either a summary report or detail report. If the exception report option value is 0 or blank, the summary report option is ignored. A summary report includes subtotals by account number, subledger, and subledger type. A detail report may be very long. Valid values are:

0 or blank Summary report 1 Detailed report

Revising Position Budgets by Business Unit

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

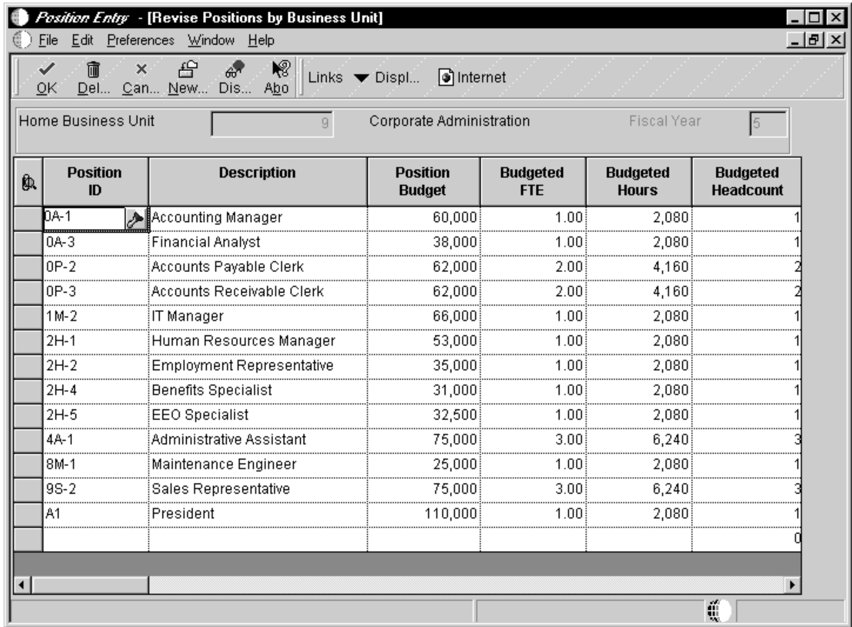
When you review the positions by business unit, you can compare the budgeted amounts for each position with the projected amounts, and use this information to determine whether a position budget will be met by the end of a fiscal year.

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

▶ To revise position budgets by business unit

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

1. On Work With Positions, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
2. From the Form menu, choose Positions by Business Unit.



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

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

Field	Explanation
Reports to BU	A twelve-byte field used to identify the Business Unit (MCU) that this Position reports to, for example, the Supervisor's Business Unit. *** The Parent Position / Parent Business Unit must already exist as a Position ID/ Business Unit record in the Position Master File. *** For example, Bob Jones is a senior programmer in Business Unit 100 and he reports to Sally Abbot who is a junior manager in Business Unit 200. Bob Jones: Position ID = SRPRG, Business Unit = 100, Parent Position ID = JRMGR, Parent Business Unit = 200 Sally Abbot: Position ID = JRMGR, Business Unit = 200
Reports to Position	A code that identifies the higher-level position that this position reports to. For example, the supervisor position ID. Note: The parent position or parent business unit must already exist as a position ID or business unit record in the Position Master table.

Working with Position Activity Information

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

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

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

Working with position activity includes the following tasks:

- ❑ Attaching an employee record to a position budget
- ❑ Reviewing position activity
- ❑ Correcting employee position activity

Attaching an Employee Record to a Position Budget

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

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

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

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

Before You Begin

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

▶ To attach an employee record to a position budget

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

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

See Also

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

Reviewing Position Activity

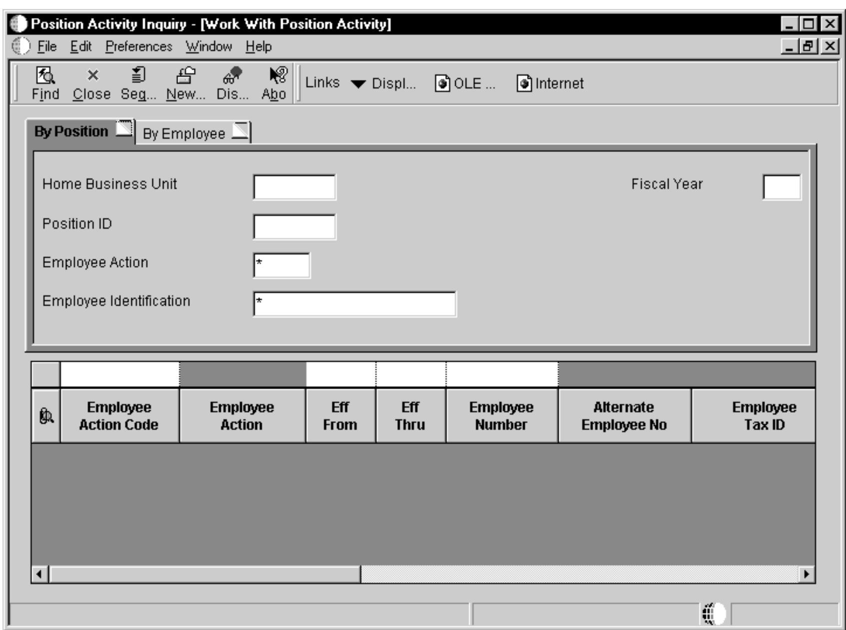
To help you determine whether you stay within the budgeted amounts for salary and head count through the end of the fiscal year, you can review position activity information. You can review position activity either by position or by employee. The type of information that appears on the form varies depending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

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

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

▶ To review position activity

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



1. On Work with Position Activity, to define whether you want to review information by position or by employee, click one of the following tabs:
   - By Position
   - By Employee

2. If you clicked the tab for reviewing activity by position, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
   - Position ID
3. If you clicked the tab for reviewing activity by employee, complete the following field and click Find:
   - Employee Identification
4. To limit either type of search to a particular employee activity, complete the following field and click Find:
   - Employee Action
5. Review the information.

Field	Explanation
Employee Action	The type of action linked to the employee. The following codes are provided by J.D. Edwards and should not be changed: blank Active A Adjust status, such as salary, FTE, hours E Expired L Leave of absence T Transfer (from one business unit to another) X Terminate

Correcting Employee Position Activity

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

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

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

- Moves from one home business unit to another within your organization
- Changes jobs or job steps

- Receives a salary change
- Changes FTE values
- Changes the number of hours worked

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

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

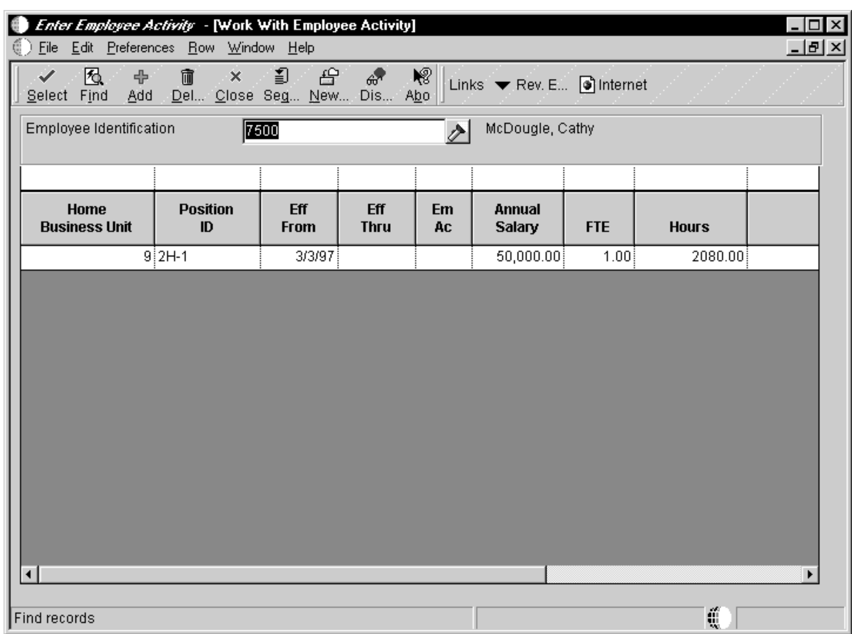
In addition to correcting employee position activity, you can also use Employee Activity to enter historical position activity information that you previously stored in another system.

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

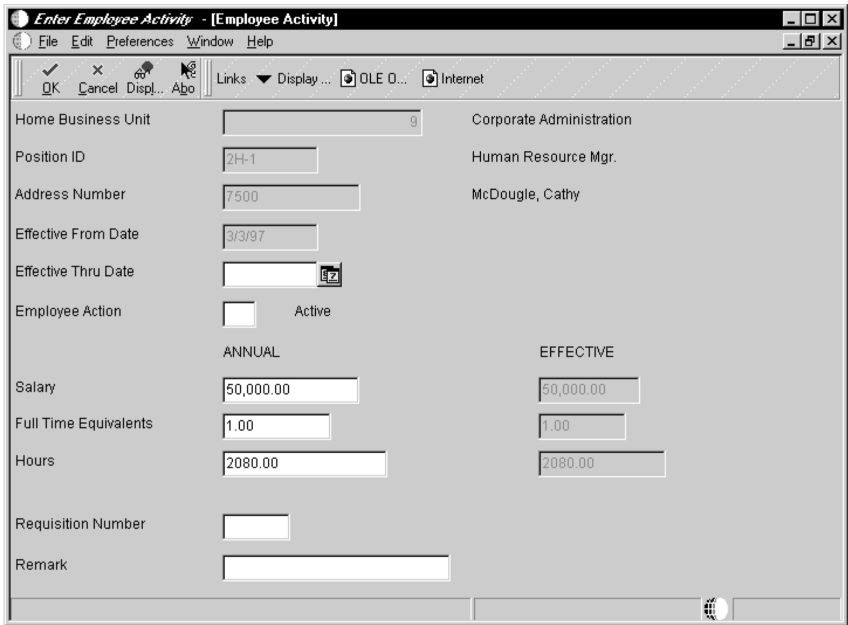
This program updates the Position Budget Detail table (F08111). It does not update the employee history tables or the Employee Master table (F060116).

▶ To correct employee position activity

From the Position Entry menu (G08BP1), choose Enter Employee Activity.



1. On Work With Employee Activity, to locate the employee record, complete the following field and click Find:
   - Employee Identification
2. Choose the current activity record and click Select.



3. On Employee Activity, change the incorrect information in any of the following fields and click OK:
   - Effective Thru Date
   - Employee Action
   - Salary
   - Full Time Equivalents
   - Hours
   - Requisition Number
   - Remark

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

Field	Explanation
Employee Action	The type of action linked to the employee. The following codes are provided by J.D. Edwards and should not be changed: blank Active A Adjust status, such as salary, FTE, hours E Expired L Leave of absence T Transfer (from one business unit to another) X Terminate

See Also

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

Reviewing Position Budget Information

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

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

For example, assume that the following conditions exist:

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

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

Reviewing position budget information consists of the following tasks:

❑ Reviewing position budget information by business unit

❑ Reviewing position budget information by position

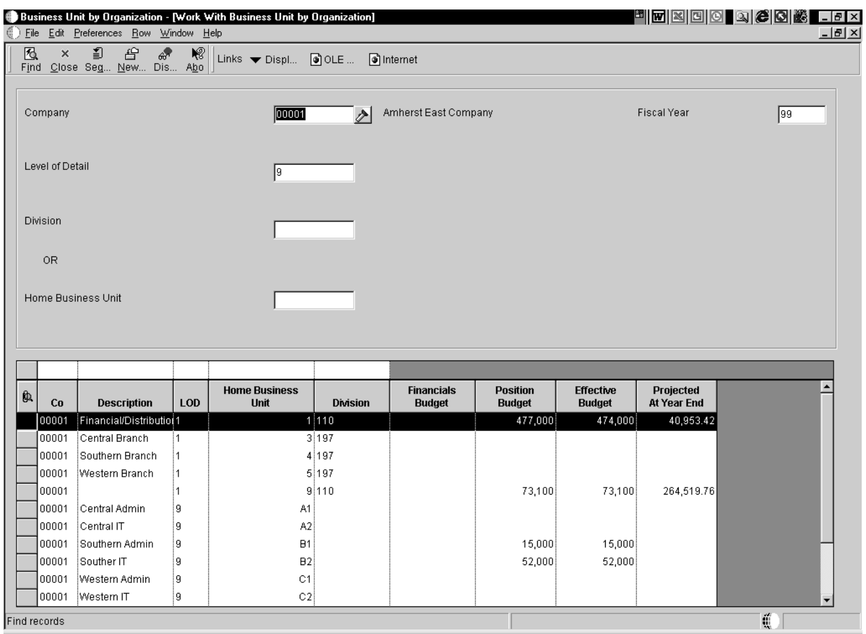
Reviewing Position Budget Information by Business Unit

To determine whether the position budget amounts for a business unit compare favorably with the amounts that your accounting department budgeted for salaries, you can review position budget information by business unit. To determine whether you are likely to remain within position budget amounts through the end of the fiscal year, you can also review projected year-end salary amounts for each business unit.

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

► To review position budget information by business unit

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



1. On Work With Business Unit by Organization, complete any of the following fields and click Find:
   - Company
   - Fiscal Year
   - Level of Detail
   - Division
   - Home Business Unit

2. Review the information in the following fields and click Close:
   - Financials Budget
   - Position Budget
   - Projected At Year End
   - Effective Budget

Field	Explanation
Company	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. Note: You can use Company 00000 for default values, such as dates and automatic accounting instructions. You cannot use Company 00000 for transaction entries.
Level of Detail	A code that identifies the relationship of parent and subordinate business units in a hierarchy. Up to nine levels of detail are available. Level one is the least detailed, and level 9 is the most detailed. An example would be a project number 10000 for Office Parks that has a level of detail of 2. Subordinate to the Office Parks project are the North and the South Office Parks with job numbers of 10010 and 10020, respectively, and each with a level of detail of 3. Subordinate to the North and South Office Parks are Buildings A and B and Buildings C and D, respectively, each with a level of detail of 4. . . . . *Form-specific information* . . . . A number that indicates a business unit's position within the hierarchy of your organization. Levels of detail are defined in the General Accounting system. When you review business units by organization, use the Level of Detail field to limit the number of positions that appear to those within a specific level of detail. If you leave this field blank, the system displays positions in all business units in the hierarchy.
Division	Category code 1 associated with the Business Unit Master table (F0006). This is a user defined code (system 00, type 01) that the system uses in flex account mapping and in printing selected information on reports.

Field	Explanation
Financials Budget	The salary amount that the accounting department has budgeted for a particular position within a business unit. The system calculates this amount by totaling the original budgets for all salary accounts within the business unit. You use automatic accounting instructions (AAIs) to specify the range of accounts to use for salary accounts. This range must be from HRSB to HRSE, with a ledger type of HRLT. The system uses these AAIs to determine which records in the Account Balances table (F0902) to use to calculate the financials budget.
Position Budget	The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table (F08101), represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position, for the business unit and year that you specified.
Projected At Year End	A figure that represents the amount of salary paid over a period of time. At the employee level, the system calculates this amount by multiplying the employee's annual salary by the fraction of the fiscal year that the employee worked. At the business unit level, the system calculates this amount as the sum of all the employee activity in the position for the fiscal year. For example, an employee earning 40,000 annually who works from April 1 to December 31 represents a projected salary cost of 30,000 for that year.
Effective Budget	The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table (F08101), represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position. The system uses the effective from and effective through dates to calculate the effective salary amount that is budgeted. If the effective through date is blank, the system uses the end date for the fiscal year to calculate the effective salary budget. . . . . *Form-specific information* . . . . This field displays the sum of all projected amounts for all of the current positions. This amount is the total salary projection for the business unit.

Reviewing Position Budget Information by Position

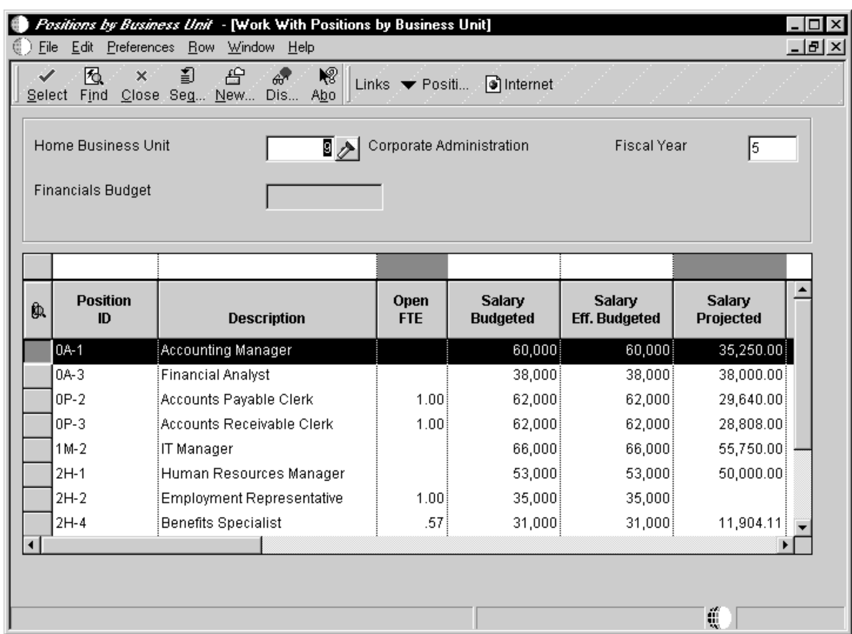
To compare budgeted amounts for salaries, FTEs, hours, and head count with the corresponding actual amounts that are projected through year end, you can review position budget information by position. You use this information to determine whether you expect to meet or exceed your position budgets through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

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

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

▶ To review position budget information by position

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



1. On Work with Positions by Business Unit, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
2. Review the information in the following fields and click Close:

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

Defining Next Year's Position Budget

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

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

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

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

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

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

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

Data Selection

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

Before You Begin

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

Processing Options for Create Next Year's Positions

Dates Tab

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

1. Current Fiscal Year

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

2. Fiscal Year

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

3. Effective Dates for Pay Rates or Pay Grade Step

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

Process Tab

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

1. Select Position Budgets

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

1 All position budgets (default)
2 Position budgets with current activity

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

3 Position budgets with activity during the year
4 Position budgets with current activity

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

2. Create Budgets for Prior Positions

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

Blank Do not create budgets for prior positions.
1 Create budgets for prior positions.

3. Create Positions Accounts

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

Blank Do not create position accounts.
1 Create position accounts.

Options Tab

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

1. Percent Change in New Budget Amount

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

2. Percent Change in Full-Time Equivalents (FTEs), Hours, and Headcount

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

Working with Parent/Child Relationships by Position

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

Working with parent/child relationships by position includes the following tasks:

- ❑ Creating parent/child relationships by position
- ❑ Reviewing parent/child relationships by position

Before You Begin

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

See Also

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

Creating Parent/Child Relationships by Position

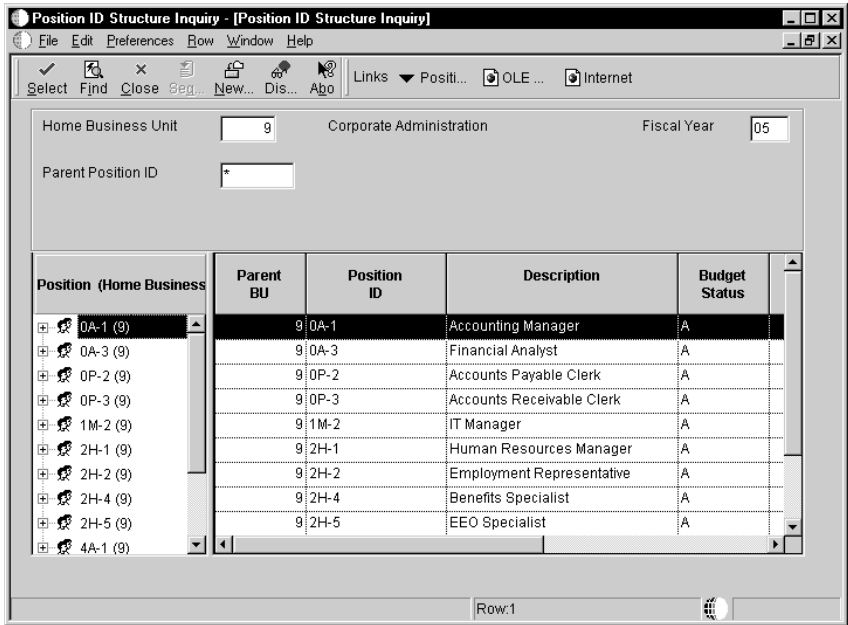
To show the reporting relationships among different positions within your organization, you can create parent/child relationships by position. For example, you can organize a reporting structure in which you define group leaders as parent positions to programmer analysts. The group leaders are, in turn,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

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

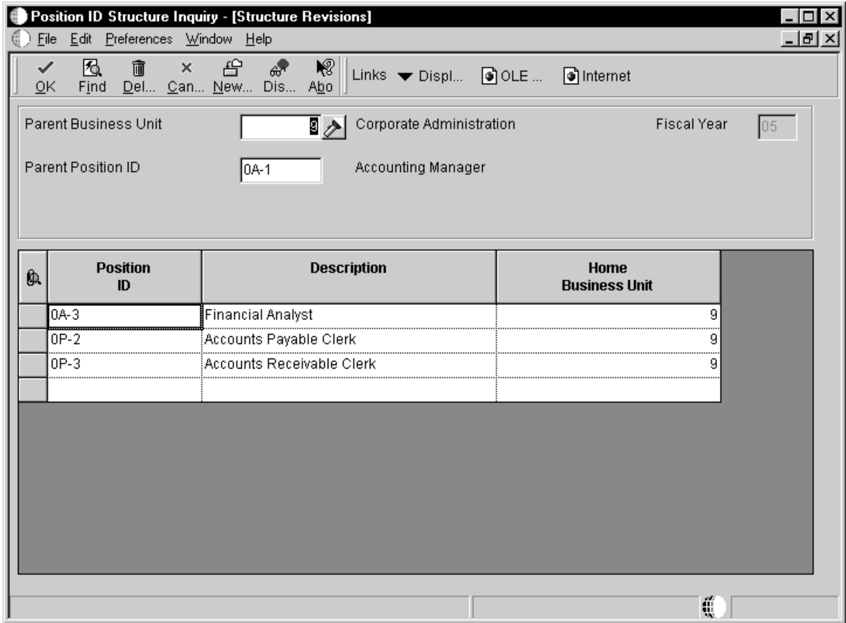
You can create parent/child relationships at any time that your management needs require it. For example, if your organization is resizing, you might need to create a parent/child relationship that shows the number of positions reporting to the first-level managers, and distribute that structure to all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

▶ To create parent/child relationships by position

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



1. On Position ID Structure Inquiry, to locate the positions for which you are creating parent/child relationships, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
2. To limit the positions that appear, complete the following field and click Find:
   - Parent Position ID
3. In the detail area, choose a parent or child position and click Select.



4. On Structure Revisions, complete the following field:
   - Parent Position ID
5. Complete the following fields in the detail area and click OK:
   - Position ID
   - Home Business Unit
6. On Position ID Structure Inquiry, review the structure that you created.

Field	Explanation
Parent Position ID	A code that identifies the higher-level position that this position reports to. For example, the supervisor position ID. Note: The parent position or parent business unit must already exist as a position ID or business unit record in the Position Master table.

Reviewing Parent/Child Relationships by Position

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

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

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

▶ To review parent/child relationships by position

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

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

Purging Position Information

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

Purging position information includes the following tasks:

- ❑ Purging positions
- ❑ Purging position activity

Purging Positions

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

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

Processing Options for Purge Positions Option

```
Purge Positions

      1)  To create a report and delete              ____________
      the Position Master records enter
      '1'.  To create a report, delete
      the Position Master records and
      save it to a purge table enter
      '2'.  Default of blank will only
      create the report.

* Important Note *  When choosing '2',
    the purge table is named F08101P.
    This table is created every time the
    user chooses '2'.  However, it is
    important to remember that the purge
    table is over written every time the
    program is executed.
```

Purging Position Activity

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

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

Processing Options for Purge Activity Options

```
Purge Activity

      1.  Enter a <blank> to only create              ____________
      a report (default); Enter “1” to
      delete records from the Position
      Budget Detail table (F08111);
      Enter “2” to delete records from
      the Position Budget Detail table
      and save the deleted records in a
      purge table. A report is always
      created.

Important Note:  The purge table is
    F08111P. It is purged and
    over-written every time this program
    is run with Purge Activity = “2”.
```

Reviewing Position Control Reports

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

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

Reviewing position reports includes the following tasks:

- ❑ Reviewing the Open Amounts by Position report
- ❑ Reviewing the Cross-Year Budget Comparison report
- ❑ Reviewing the Position Control Comparison reports
- ❑ Reviewing the Position Budgets report
- ❑ Reviewing the Employee Position Activity report
- ❑ Reviewing the Position Budgets by Job Type and Step report

Reviewing the Open Amounts by Position Report

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

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

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

See Also

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

Processing Options for Open Amounts by Position

```
Options

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

Reviewing the Cross-Year Budget Comparison Report

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

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

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

See Also

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

Processing Options for Cross-Year Budget Comparison (R081430)

```
Options

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

Amounts

      1. Effective/Budgeted Amounts                        ____________

      Blank = Budgeted Amounts
      1 =  Effective Amounts
```

Reviewing the Position Control Comparison Reports

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

You can run three comparison reports:

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

Position Control Headcount Report

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

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

See Also

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

Position Control Budgeted FTE Report

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

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

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

See Also

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

Position Control Effective FTE Report

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

See Also

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

Processing Options for Position Control Comparison

FTE/Headcount

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

Reviewing the Position Budgets Report

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

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

See Also

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

Processing Options for Position Budgets

```
Pos Control

      1.  Budgeted/Effective Amounts                    ____________

      Blank = Effective Amounts
      1 = Budgeted Amounts
```

Reviewing the Employee Position Activity Report

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

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

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

Data Selection

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

See Also

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

Reviewing the Position Budgets by Job Type and Step Report

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

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

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

See Also

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

Processing Options for Position Budgets by Job Type and Step

Budget

1. Enter “0” or leave blank to show Effective Amounts, or “1” to show Budgeted Amounts ____________

Compensation Management

Compensation Management

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

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

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

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

Compensation Management includes the following tasks:

- ❑ Setting up compensation management
- ❑ Working with compensation management
- ❑ Updating compensation review

See Also

- Compensation Management Self-Service Considerations in *Manager's Workbench* in the *HR and Payroll Foundation Guide*

Setting Up Compensation Management

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

Setting up compensation management includes:

- ❑ Setting up the additional system options
- ❑ Defining increase type guidelines
- ❑ Defining increase type rules
- ❑ Setting up the approval hierarchy
- ❑ Defining public models
- ❑ Defining the performance appraisal scale
- ❑ Generating the Employee/Supervisor Relationship table
- ❑ Generating compensation review work tables

Before You Begin

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

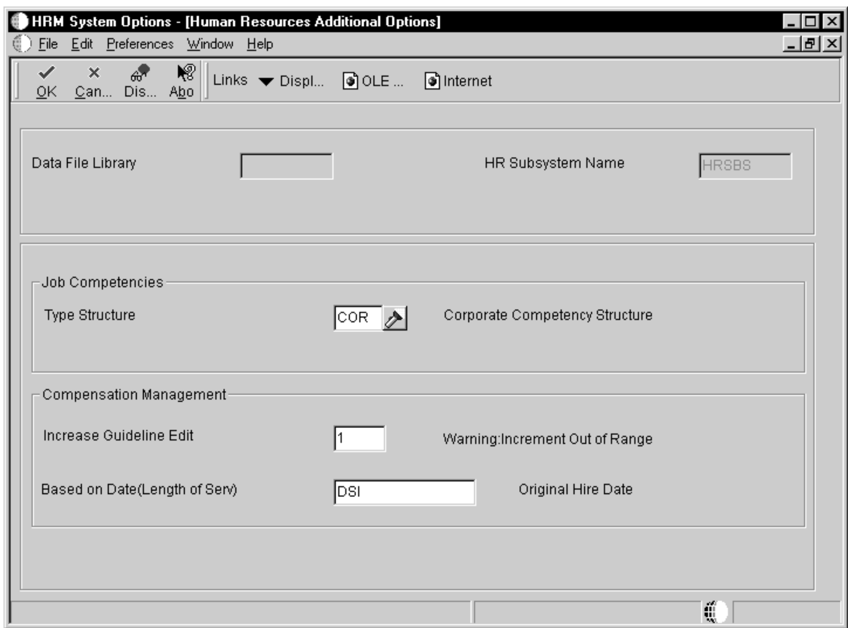
Setting Up the Additional System Options

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

▶ To set up the additional system options

From the Compensation Mgmt System Setup menu (G08CM14), choose HRM System Options.

1. On Work with HRM Foundation System Options, choose HR Addl. Options from the Row menu.
2. On Human Resources Additional Options, complete the following fields in the Compensation Management area, and then click OK:
   - Increase Guideline Edit
   - Based on Date(Length of Serv)



Field	Explanation
Increase Guideline Edit	Increase Guideline Edit. Valid values are: 0 Do not increase. 1 Issue warning that increase is out of range. 2 Hard error, increase is out of range.

Defining Increase Type Guidelines

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

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

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

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

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

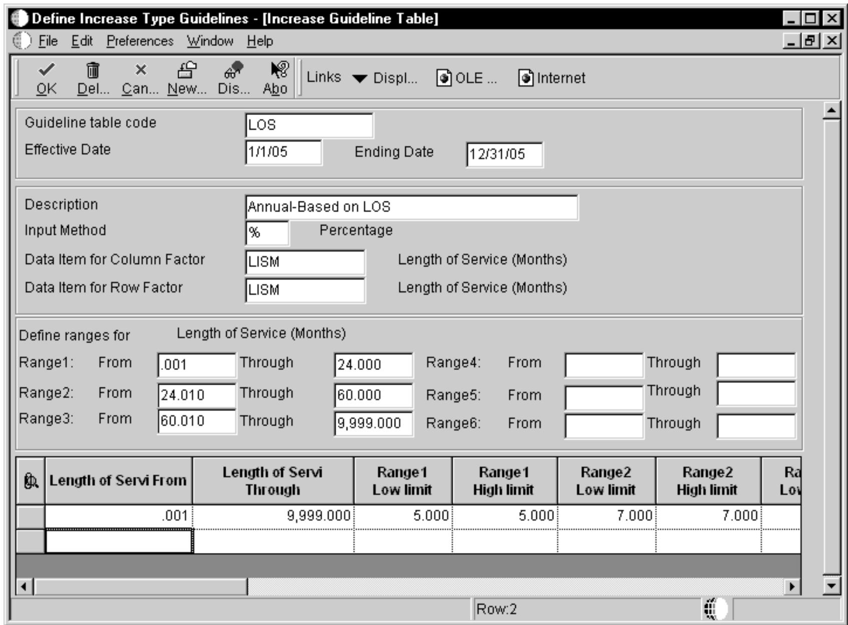
Example: Increase Guidelines Based on Length of Service

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

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

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

months. The last range, 60.01-9999.00, includes all employees that have been employed more than 60 months.

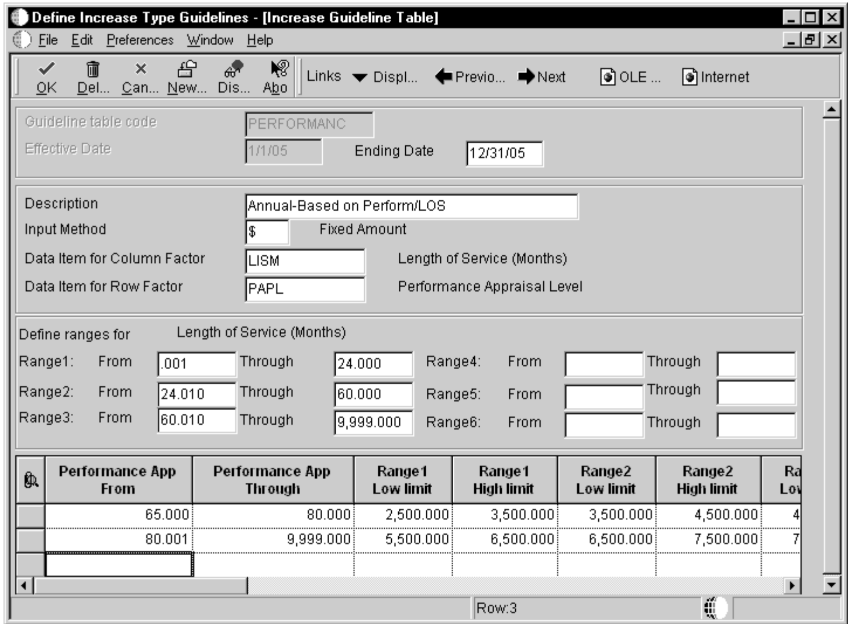


Note: You must complete both the Data Item for Column Factor field and the Data Item for Row Factor field in the Increase Guidelines Table. If you are using only one evaluation factor, such as length of service, you must complete both fields with that evaluation factor.

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

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

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



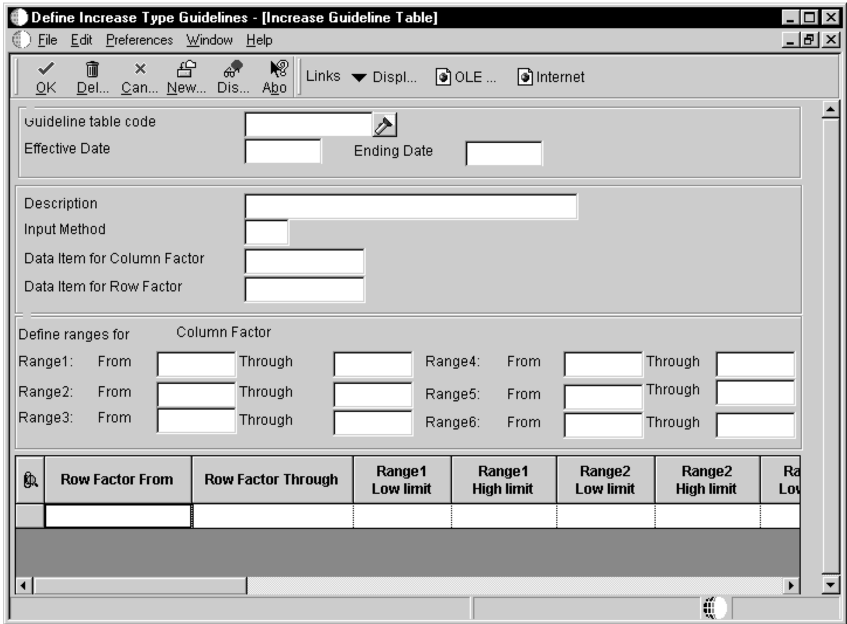
Using this Increase Guideline Table helps to ensure that each employee receives the proper increase. For example, you can determine what the compensation increase should be for an employee who has been employed for 48 months and who has received a 78 on the most recent performance appraisal. Using the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

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

▶ To define increase type guidelines

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

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



2. On Increase Guideline Table, complete the following fields:
   - Guideline table code
   - Date – Effective
   - Description
   - Guide Line Input method
   - Data Item for Column Factor
   - Data Item for Row Factor
3. Complete the following optional field:
   - Date – Ending Effective
4. To define a range for the column factor you specified, complete the following fields:
   - Column Range 1 From
   - Column Range 1 Through
5. To define additional ranges for the column factor, complete the same fields for the other ranges.
6. To define a range for the row factor you specified, complete the following fields:
   - Row Factor From
   - Row Factor Through
   - Range 1 Low Limit
   - Range 1 High Limit

7. To define additional ranges for the row factor, complete the High and Low limit fields for the ranges that you chose in step 4.
8. Click OK.

Field	Explanation
Guideline table code	The name of the record that stores a guideline range.
Effective 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.
Input Method	UDC table with fixed amount or percentage.
Data Item for Column Factor	The column factor representing the compa ratio.
Data Item for Row Factor	The row factor represents the performance rating.
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.
From	The lower minimum amount to be compared for Column Range 1.
Through	The higher maximum amount to be compared for Column Range 1.
From	The lowest factor for the row.
Through	The highest factor for the row.
Range1 Low limit	This field refers to the low limit for Range 1.
Range1 High limit	This field indicates the high limit for Range 1.

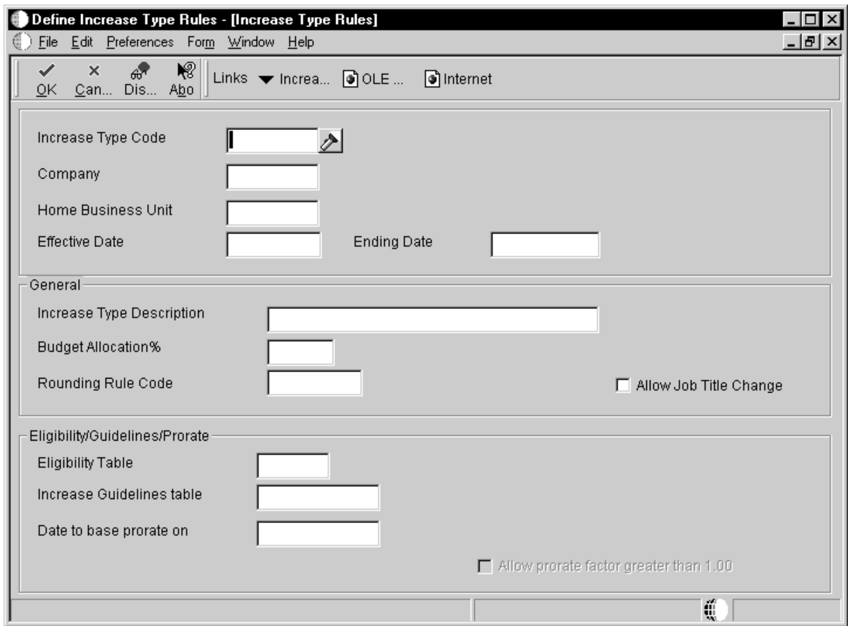
Defining Increase Type Rules

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

▶ To define increase type rules

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

1. On Work With Increase Type, click Add.



2. On Increase Type Rules, complete the following fields:
   - Increase Type Code
   - Company
   - Date – Effective
   - Description
3. Complete the following optional fields and then click OK:
   - Home Business Unit
   - Ending Date
   - Budget Allocation%
   - Rounding Rule Code
   - Allow Job Title Change
   - Eligibility Table
   - Increase Guidelines table
   - Date to base prorate on
   - Allow prorate factor greater than 1.00

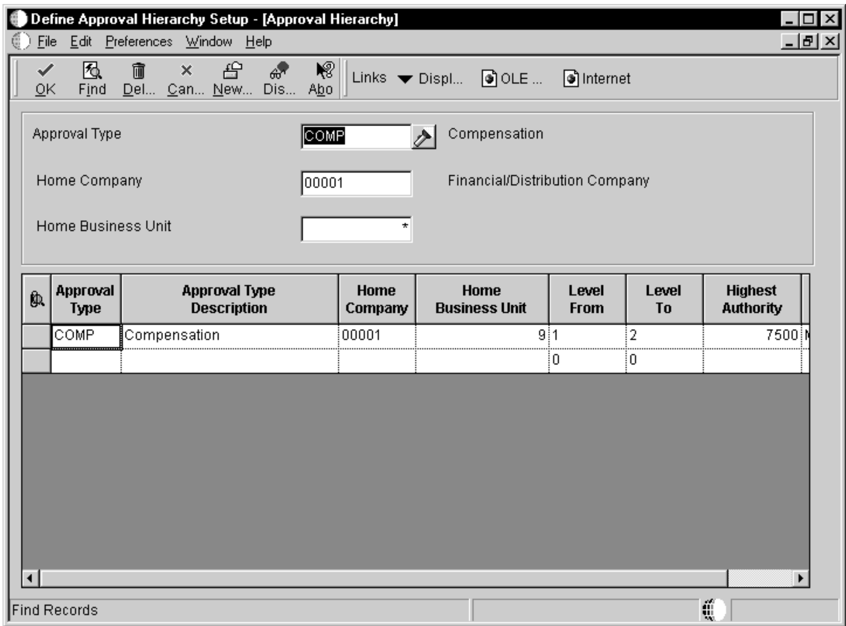
Field	Explanation
Budget Allocation%	The budget for an employee's salary allocated for an increase type.
Rounding Rule Code	A code that specifies the rounding rule for an increase amount or a prorate amount. If a client uses prorating in the compensation review, the prorate amount is rounded. Otherwise, the increase amount is rounded.
Allow Job Title Change	If Job Title Change code can be changed, enter 1 in this field. If no change is allowed, enter 0.
Eligibility Table	A code (table) used to identify the specific table of eligibility rules that determine whether the employee is eligible for enrollment in a plan. . . . . *Form-specific information* . . . . In compensation management, a code used to identify the specific table of eligibility rules that determine whether the employee is eligible for a particular increase type.
Increase Guidelines table	The name of the record that stores a guideline range.
Date to base prorate on	For this field, allow the prorate factor to be greater than 1.
Allow prorate factor greater than 1.00	A code that indicates whether the increase type allows a prorate factor greater than 1. If the increase type does not allow a prorate factor greater than 1, all prorate factors greater than 1 are automatically changed to 1. Valid values are: 0 A prorate factor greater than 1 is not allowed. 1 A prorate factor greater than 1 is allowed.

Setting Up the Approval Hierarchy

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

▶ To set up the approval hierarchy

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



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

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

Field	**Explanation**
Approval Type	A code that specifies the type of change that needs approval. For example, the approval type code required to approve a compensation change could be COM.

Field	Explanation
Highest Authority	The final authority in the approval process. This could be an individual or a department.

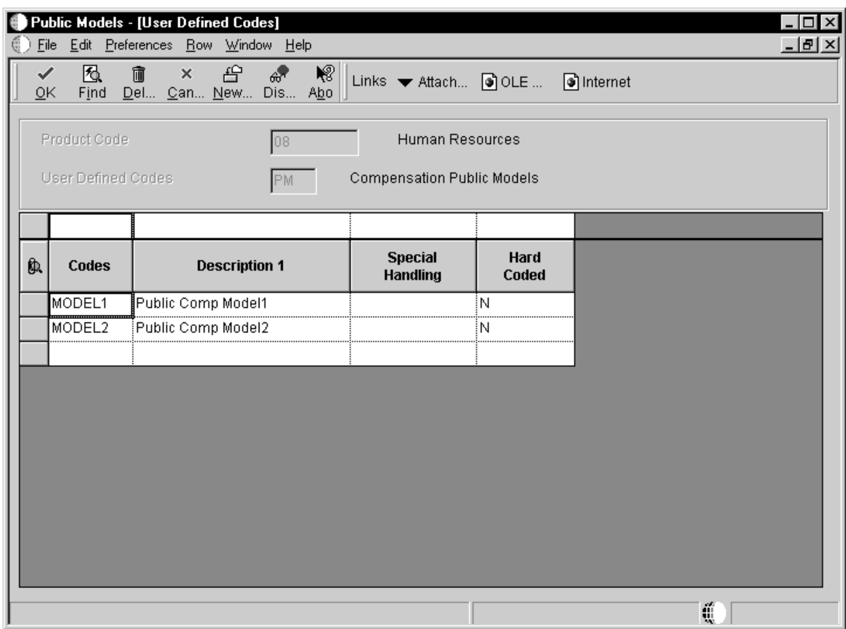
Defining Public Models

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

▶ To define public models

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

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



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

Field	Explanation
Codes	A list of valid codes for a specific user defined code list.
Description 1	A user defined name or remark.
Special Handling	A code that indicates special processing requirements for certain user defined code values. The value that you enter in this field is unique for each user defined code type. The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify whether the language is double-byte or does not have uppercase characters. Programming is required to activate this field.
Hard Coded	A code that indicates whether a user defined code is hard-coded. Valid values are: Y The user defined code is hard-coded N The user defined code is not hard-coded For OneWorld, a check indicates that the user defined code is hard-coded.

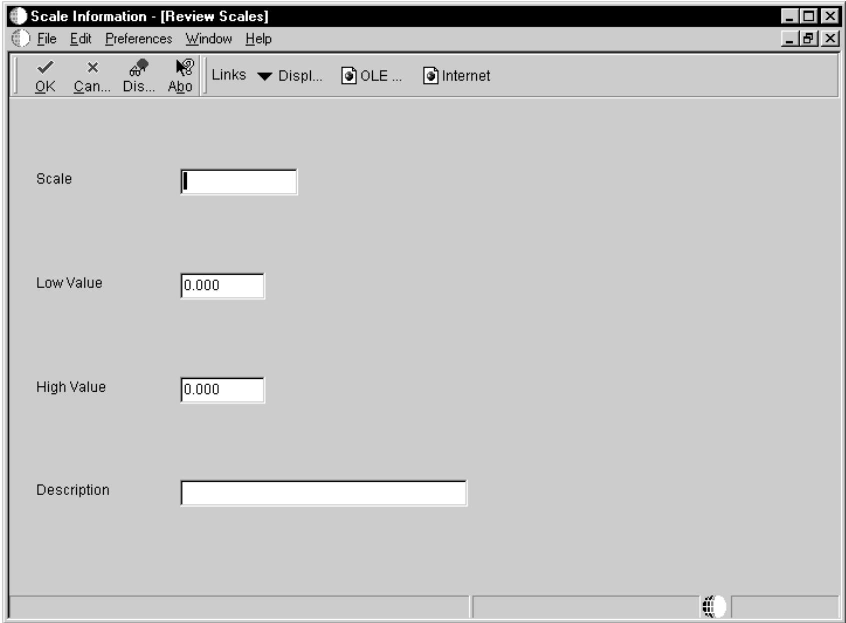
Defining the Performance Appraisal Scale

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

▶ To define the performance appraisal scale

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

1. On Work With Scales, click Add.



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

Field	**Explanation**
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.
Low Value	The lowest rating on the scale, level, or range.
High Value	The highest rating on the scale, level, or range.

Generating the Employee/Supervisor Relationship Table

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

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

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

The processing option must be set before you run the program. The Days Prior To Termination processing option is used to specify how far in the future a supervisor's termination date can be for the supervisor to be written to the table. Any supervisors with termination dates within the specified time period will not be written to the table and will be included in the exception report.

This program uses the Employee Master table (F060116).

Processing Options for Employee/Supervisor Relationship Build (R05846)

Process Tab

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

1. Days Prior To Termination

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

Generating Compensation Review Work Tables

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

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

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

This program uses the Employee Master table (F060116).

See Also

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

Processing Options for Compensation Review Work Tables Build (R08830)

Default Values Tab

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

1. New Increase Effective Date (Required)

The effective date of the new increases.

2. Next Increase Effective Date

The review date of the next increase.

Edits Tab

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

1. Apply Global Increase

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

Blank Do not apply global increases.
1 Apply the increase budget allocations.
2 Apply the increase guideline average.

2. Clear Compensation Review Work Tables Build

This field refers to the Clear Compensation Review Work tables.

Print Option Tab

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

1. Print Option

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

Blank Print summary of employee count.
1 Print summary by employee.
2 Print increase details by employee.

Working with Compensation Management

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

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

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

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

Working with compensation management includes the following tasks:

- ❑ Reviewing salary recommendations
- ❑ Reviewing salary approvals

Before You Begin

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

Reviewing Salary Recommendations

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

The workbench allows you to perform the following tasks:

- Maintain multiple versions of different salary recommendations
- View the salary budget allocation, budget spent, and budget remaining by increase types
- View and change salary recommendations of a specified supervisor

The following options are available for making compensation recommendations or reviews using the Compensation Review Workbench:

- ❑ Entering salary recommendations for an individual employee
- ❑ Entering salary recommendations for groups of employees
- ❑ Choosing a model type
- ❑ Accessing the web
- ❑ Reviewing the rating distribution
- ❑ Submitting compensation recommendations
- ❑ Returning submitted compensation recommendations

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

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

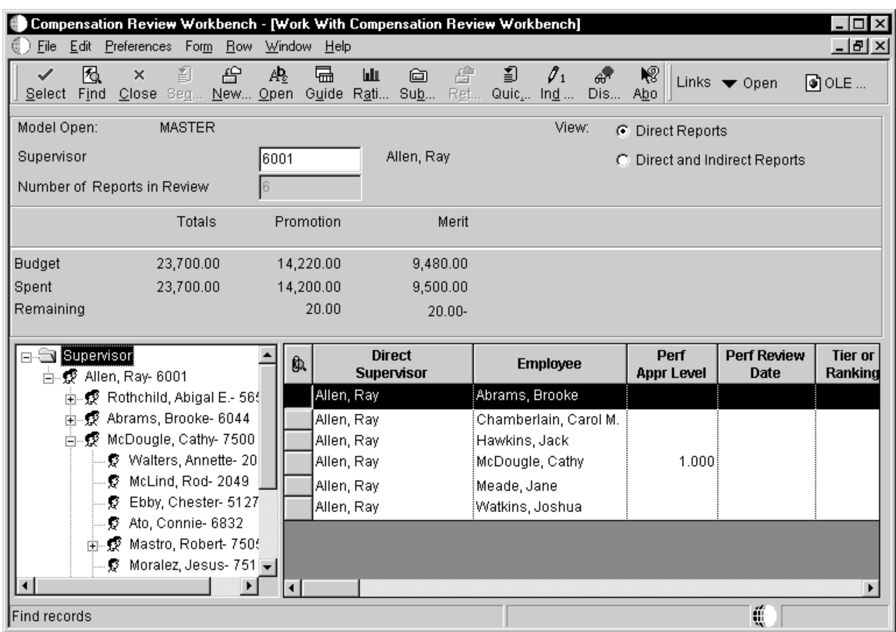
Entering Salary Recommendations for an Individual Employee

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

▶ To enter salary recommendations for an individual employee

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

1. On Work With Compensation Review Workbench, choose an option in the View area.

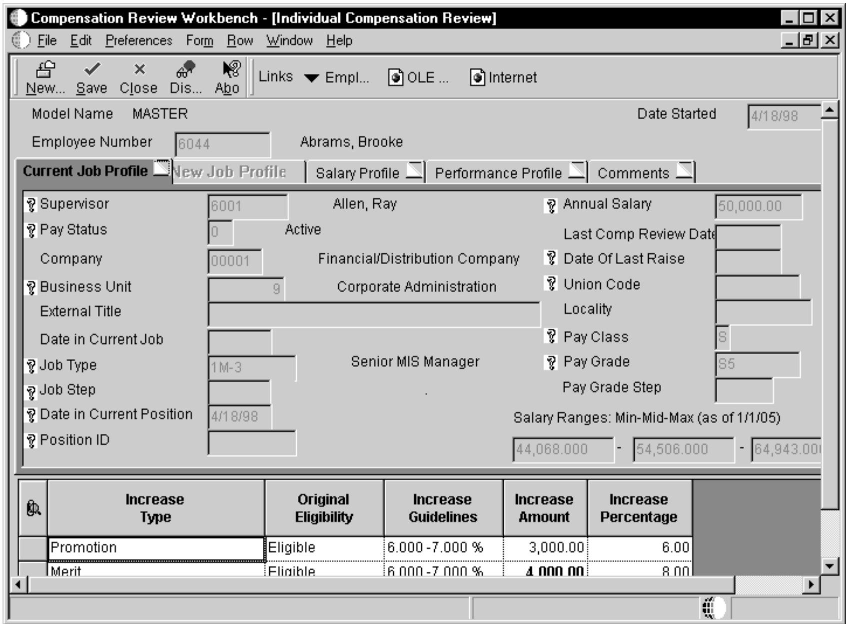


2. Complete the following field and click Find:
   - Supervisor

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

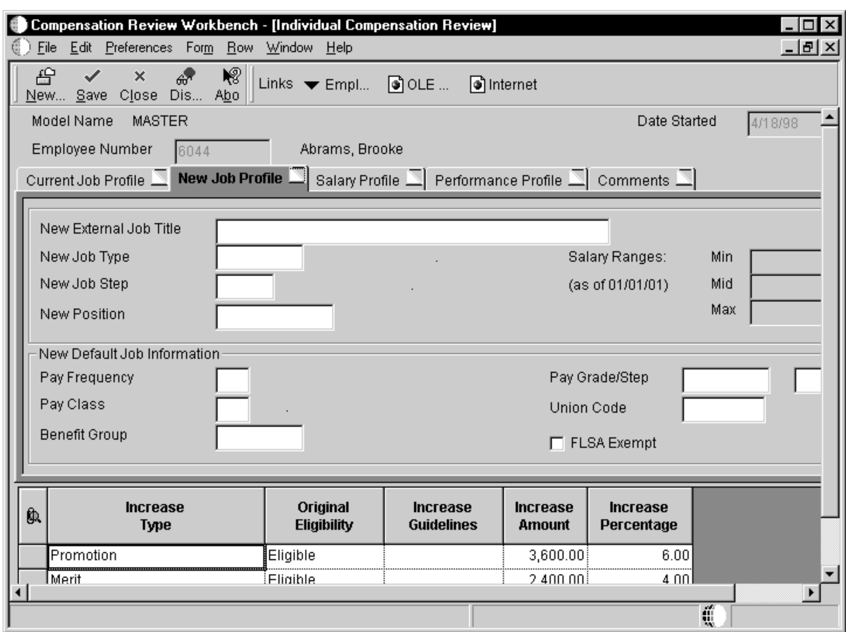
3. Choose the employee whose records you want to review or change from the right side of the detail area.
4. Click Individual Review.

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

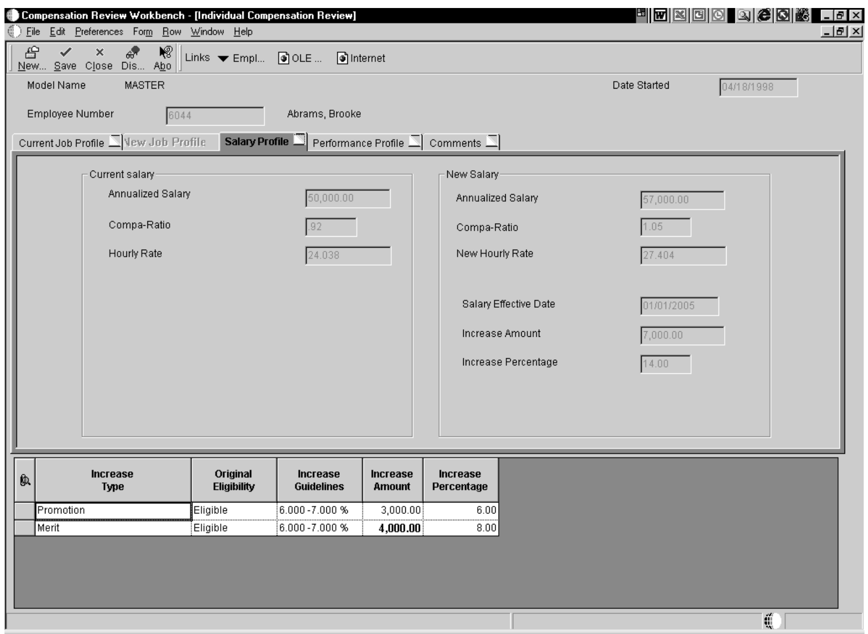


5. Review information about the employee's current job.

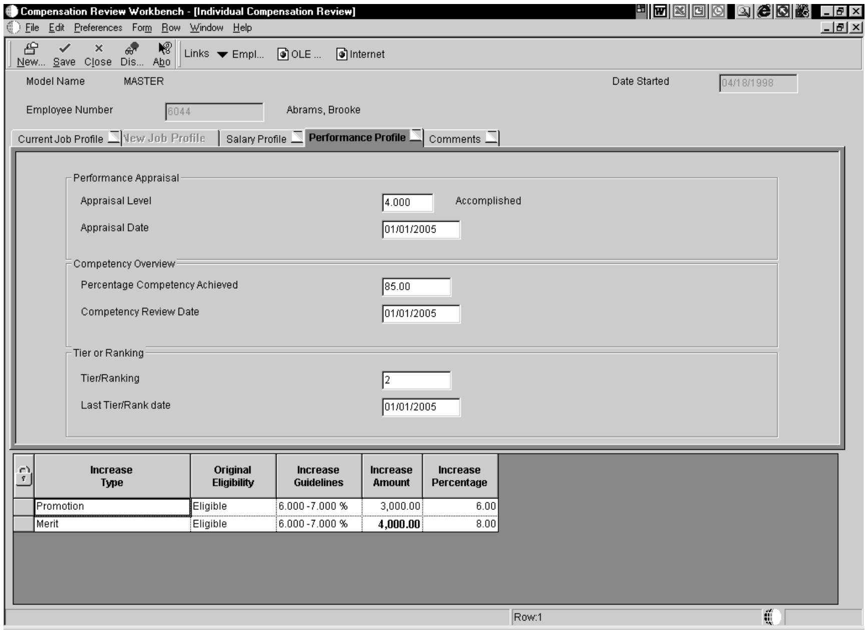
   The New Job Profile tab is enabled only if one of the increase types in the detail area allows a job title change.



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



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



9. Click the Performance Profile tab and complete the following fields. You can enter information only if the processing options are set to allow input.
   - Appraisal Level
   - Benefit Group
   - Percentage Competency Achieved
   - Competency Review Date
   - Tier/Ranking
   - Last Tier/Rank date
10. Click the Comments tab to enter additional information in a textual format.
11. Enter the increase amount or the increase percentage in the detail area.
12. Review the eligibility status of the employee for a new position.
13. Click Save.

    The Work With Compensation Review Workbench reappears.
14. Choose the next employee whose records you wish to review or change, and repeat steps 3-12.
15. When you are finished reviewing and changing records, click Submit to submit the changes you made to the records.

Field	**Explanation**
New External Job Title	This field refers to the new external job title.

Field	Explanation
New Job Type	A code that defines 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.
New Job Step	A code that designates a specific level within a particuar job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
New Position	This is the new position ID to be used for budgetary (position) control purposes. The position ID consists of the position code and its description, the fiscal year and the home business unit.
Union Code	A code that indicates the new union or new plan in which the employee or group of employees work or participate.
FLSA Exempt	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.
Appraisal Level	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.
Appraisal Date	A date that indicates when the process was last reviewed.
Percentage Competency Achieved	This number refers to how an employee is doing in relation to the required competency level for a particular job. 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.
Competency Review Date	The date on which the last job competency review took place.
Tier/Ranking	This field allows a supervisor to rank employees individually or group them into tiers. When employees are ranked, each employee is assigned a unique number. When employees are grouped in a tier, several employees may have a common number. For example, a supervisor can assign a tier of 1–3 to 12 employees. Each employee may be assigned to tier 1, 2 or 3.
Last Tier/Rank date	The date the Tier/Rank was last updated.

Processing Options for Compensation Review Workbench (P08810)

Process Tab

These processing options specify the workbench type and the URL for the Compensation Review Guide.

1. Compensation Workbench Type

Use this processing option to specify the user level or workbench type. Valid values are:

1 Manager (default)
2 HR

2. URL for Compensation Management Guide

Use this processing option to specify the URL for the Compensation Review Guide.

New Job Tab

These processing options specify the defaults that are applied for a new job.

1. When changing employee's job, default the new job information

Use this processing option to specify whether to use the default information for a new job. Valid values are:

0 Do not default
1 Default

2. Allow Override of Default Job Information

Use this processing option to specify whether to allow the supervisor to override the default information for a new job. Valid values are:

0 Do not allow
1 Allow

Performance Profile Tab

These processing options specify the appraisal scale name and the performance profile information that the supervisor is allowed to enter.

1. Performance Appraisal Scale Name (Required)

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.

2. Entry of Performance Appraisal

Use this processing option to specify whether to allow a supervisor to enter performance appraisal information on the Individual Compensation Review form. Valid values are:

0 Do not Allow
1 Allow

3. Entry of Job Competency

Use this processing option to specify whether to allow a supervisor to enter job competency information on the Individual Compensation Review form. Valid values are:

0 Do not Allow
1 Allow

4. Entry of Tier or Ranking

Use this processing option to specify whether to allow a supervisor to enter tier or ranking information on the Individual Compensation Review form. Valid values are:

0 Do not Allow
1 Allow

Entering Salary Recommendations for Groups of Employees

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

▶ To enter salary recommendations for groups of employees

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

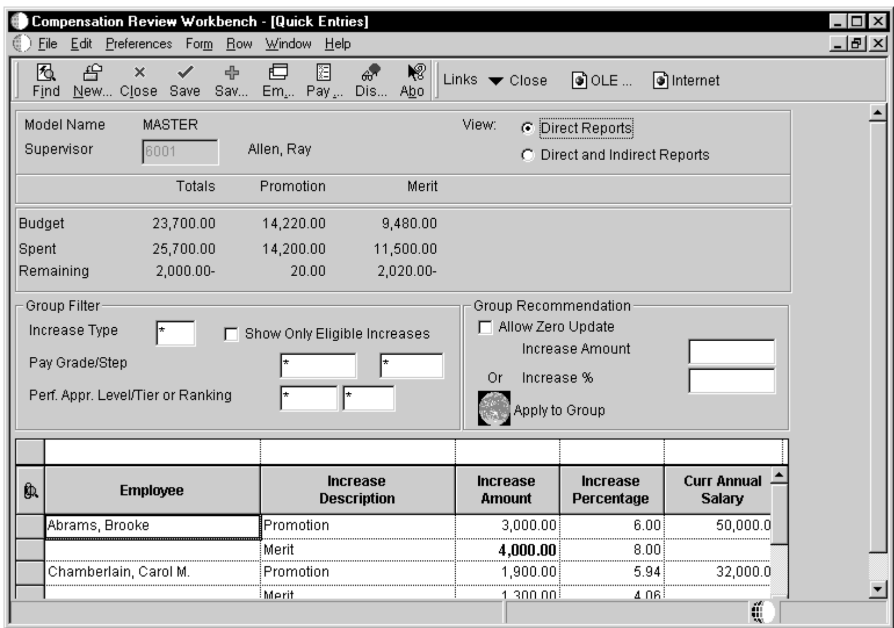
1. On Work With Compensation Review Workbench, choose an option in the View area.

2. Complete the following field and click Find:

   - Supervisor

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

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



5. On Quick Entries, choose an option from the View area and complete the following optional fields for selecting employees with specific criteria:

   - Increase Type
   - Show Only Eligible Increases
   - Pay Grade/Step
   - Curr Pay Step
   - Perf. Appr. Level/Tier or Ranking
   - Tier Ranking

6. To make global salary changes, complete one of the following fields and then click Apply to Group.

   - Allow Zero Update
   - Increase Amount
   - Increase %

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

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

Field	Explanation
Increase Type	A user defined code (06/T) that indicates: • The reason that you are changing an active employee's record. • The reason that you are terminating an employee. • 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. Note: The default reason code for new hires is the default value for the Change Reason data item.
Show Only Eligible Increases	If selected, records will only be shown when their modified eligibility equals 0.
Pay Grade/Step	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: • Salary • Hourly Rate • Hours per day • Hours per year • Days per year
Curr Pay Step	A code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate. 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: • Salary • Hourly Rate • Hours per day • Hours per year • Days per year

Field	Explanation
Perf. Appr. Level/Tier or Ranking	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.
Tier Ranking	This field allows a supervisor to rank employees individually or group them into tiers. When employees are ranked, each employee is assigned a unique number. When employees are grouped in a tier, several employees may have a common number. For example, a supervisor can assign a tier of 1–3 to 12 employees. Each employee may be assigned to tier 1, 2 or 3.
Increase Amount	This field refers to the global increase amount to apply.
Increase %	This field refers to the global increase percentage to apply.

Choosing a Model Type

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

▶ To choose a model type

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

1. On Work With Compensation Review Workbench, click Open.
2. On Compensation Review Model Search/Select, choose a model type from the following list and click Select:
   - Master
   - Public
   - Private
   - All

Accessing the Web

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

▶ To access the web

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

On Work With Compensation Review Workbench, click Guide.

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

Reviewing the Rating Distribution

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

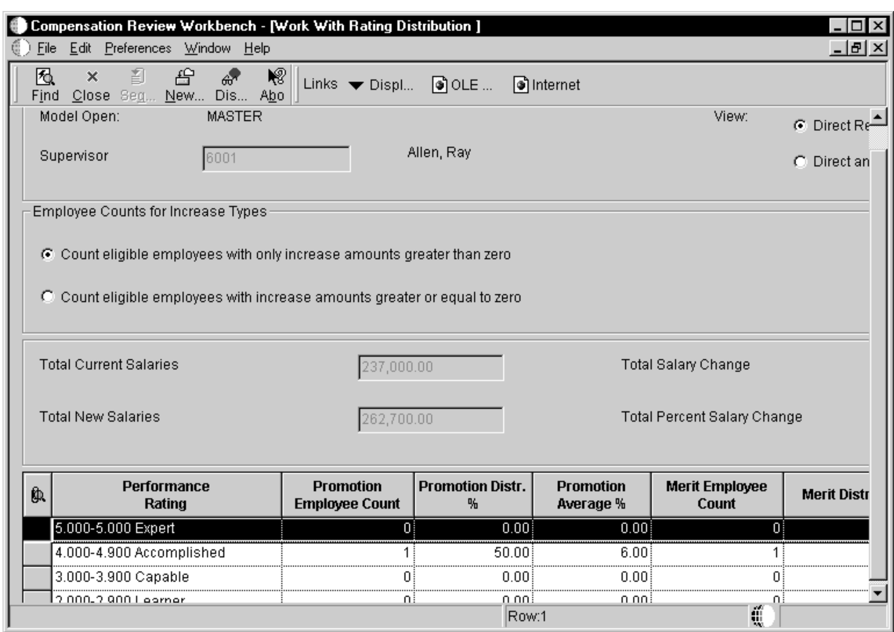
▶ To review the rating distribution

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

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

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

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



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

Submitting Compensation Recommendations

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

► To submit compensation recommendations

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

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

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

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

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

4. Click continue.

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

Returning Submitted Compensation Recommendations

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

► To return a submitted compensation recommendation

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

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

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

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

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

Reviewing Salary Approvals

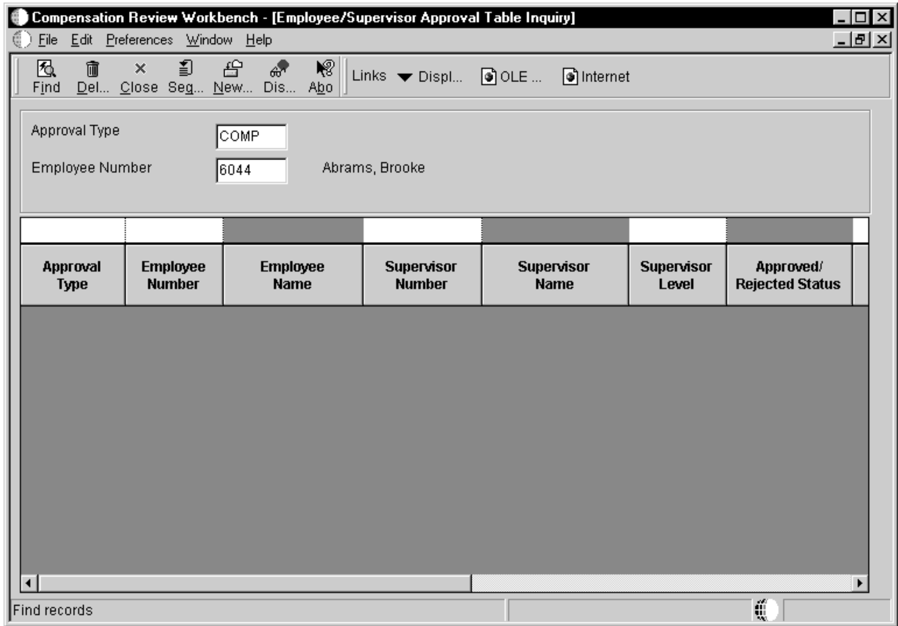
Approval Inquiry allows you to review the approvers of a particular process, such as compensation review of an employee. It provides the date, time, and whether the process was approved or rejected.

▶ To review salary approvals

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

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

- Approval Type
- Employee Number



On the approval table, you can see whether the employee is approved.

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

Field	Explanation
Approval Type	A code that specifies the type of change that needs approval. For example, the approval type code required to approve a compensation change could be COM.
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.

Updating Compensation Review

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

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

Also, after HR closes the compensation review process, the following procedures should be done:

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

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

See Also

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

Processing Options for Compensation Review Updates (R08832)

Process Tab

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

1. Process Mode

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

0 Proof Mode
1 Final Mode

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

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

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

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

3. Update Performance Appraisal Information.

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

0 Do not update to F060120
1 Update to F060120

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

4. Update Tier or Ranking Information

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

0 Do not update to F060120
1 Update to F060120

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

5. Update Job Competency Information

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

0 Do not update to F060120
1 Update to F060120

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

Print Tab

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

1. Print Comment In the Summary By Employee Report

Use this processing option to specify whether to print comments in the Summary By Employee report. Valid values are:

0 Do not print
1 Print

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

2. Eligibility Override Report

Use this processing option to specify whether to print the Eligibility Override report. Valid values are:

0 Do not print
1 Print

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

3. Job Title Change Report

Use this processing option to specify whether to print the Job Title Change Report. Valid values are:

0 Do not print
1 Print

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

4. Salary Outside Pay Grade Range Report

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

0 Do not print
1 Print

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

Safety and Health Administration

Safety and Health Administration

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

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

Safety and health administration includes the following tasks:

- ❑ Working with injury and illness information
- ❑ Reviewing safety and health reports

Working with Injury and Illness Information

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

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

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

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

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

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

Working with injury and illness information includes the following tasks:

- ❑ Opening an injury or illness case
- ❑ Entering supplemental data for injury and illness cases
- ❑ Closing an injury or illness case
- ❑ Reviewing injury and illness cases by establishment

❑ Reviewing supplemental data for injury and illness cases

Opening an Injury or Illness Case

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

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

- Identify hazards
- Increase safety awareness
- Evaluate safety procedures

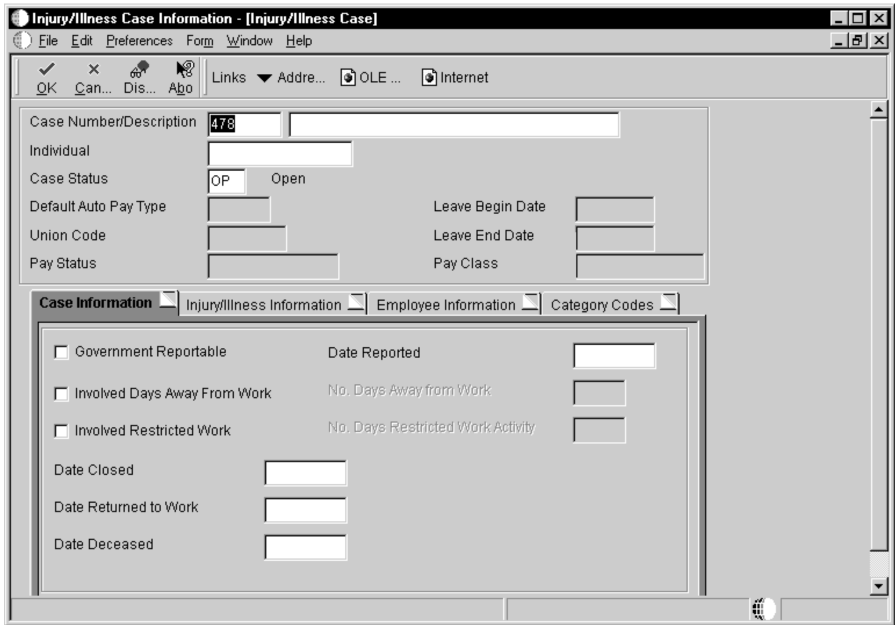
Before You Begin

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

▶ To open an injury or illness case

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

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



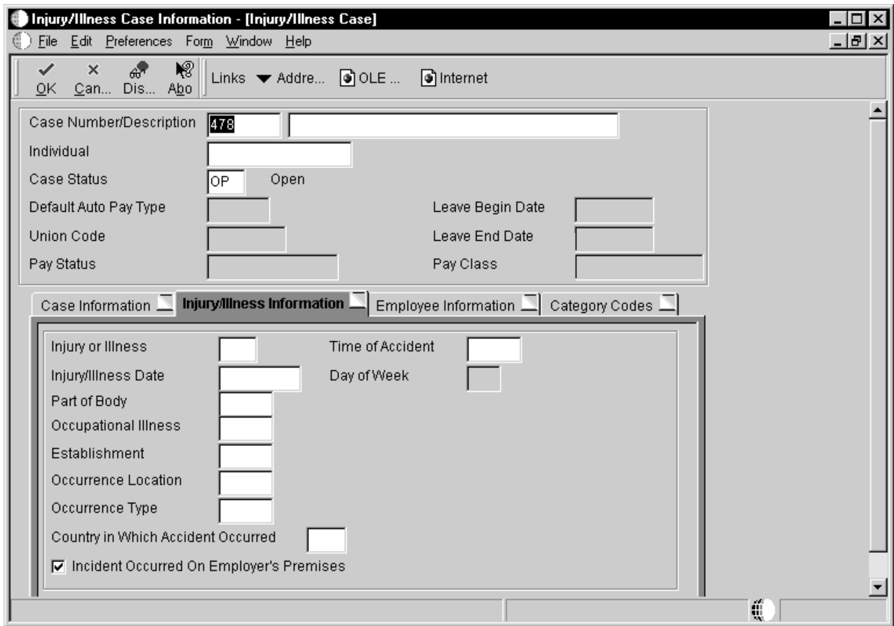
2. On Injury/Illness Case, complete the following field:
   - Number – Case/File

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

3. Complete the following fields:
   - Case Number/Description
   - Employee Identification
   - Status – Case
4. Click the Case Information tab and complete the following fields if necessary:
   - Yes or No – OSHA
   - Date – Injury Reported
   - Days Away from Work Y/N
   - Restricted Work Activity Y/N
   - Date – Case Closed
   - Date – Returned to Work
   - Date – Deceased
5. If you check Involved Days Away from Work, complete the following field:
   - Number – Days Away from Work
6. If you check Involved Restricted Work, complete the following field:

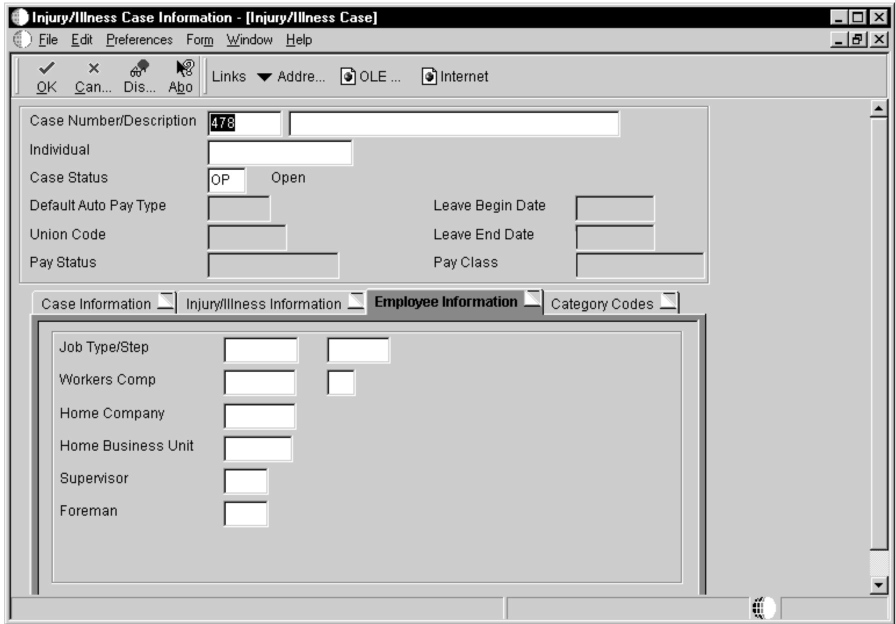
- Number – Days Restricted

7. Click the Injury/Illness Information tab and complete the following fields:
   - Injury/Illness Related (IN/IL)
   - Date – of Injury



8. Complete the following fields if necessary:
   - Time of Accident
   - Part of Body
   - Occupational Illness
   - Number – Establishment of Business Activ
   - Occurrence Location
   - Occurrence Type
   - Country
   - Health & Safety Category Codes 15

9. Click the Employee Information tab and complete the following information:
   - Company – Home
   - Business Unit – Home



10. Complete the following fields if necessary:
    - Job Type (Craft) Code
    - Worker's Comp. Insurance Code
    - Supervisor
    - Address Number – Foreman
11. Click the Category Codes tab and complete the following fields if necessary:
    - Health & Safety Category Codes 06
    - Safety Group
    - Health & Safety Category Codes 08
    - Health & Safety Category Codes 09
    - Health & Safety Category Codes 10
    - Health & Safety Category Codes 11
    - Health & Safety Category Codes 12
    - Health & Safety Category Codes 13
    - Health & Safety Category Codes 14
12. Click OK.

Field	Explanation
Case Number/Description	A unique number assigned to identify the injury or illness case. You can enter a number or let the system assign one.
Description – Injury or Illness	A brief description of the occupational injury or illness, including the part or parts of the employee's body that are affected.
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.
Case Status	A code that indicates the current status of an occupational injury or illness case. You define these codes in user defined code table 08/CS. When you set up this table, you can enter more than one code that indicates that a case is closed. For each closed code, you must enter the letter 'X' in the Description-2 field.
Yes or No – OSHA	A code that indicates whether this case must be recorded for the OSHA 200 Log. Valid codes are: Y Yes, this case must be recorded N No, do not record this case You are required to record information about every occupational death, every non-fatal occupational illness, and those non-fatal occupational injuries that involve loss of consciousness, restriction of work or motion, transfer to another job, or medical treatment.
Date Reported	The date that the occupational injury or illness was reported.
Days Away from Work Y/N	A code that indicates whether the employee missed any days of work as a result of the injury or illness. Valid codes are: Y Yes, the employee lost days of work N No, the employee did not lose days of work This field is required for OSHA 200 reporting.
Restricted Work Activity Y/N	A code that indicates whether the injury or illness involves any days of restricted work activity. Valid codes are: Y Yes, the employee has work restrictions N No, the employee does not have work restrictions Work restrictions include: • Being assigned to another job on a temporary basis • Working at a permanent job less than full time • Working at a permanent job but not being able to perform all of the duties normally required of it This field is required for OSHA 200 reporting.

Field	Explanation
Date Closed	The date all matters concerning the occupational injury or illness case are settled and the case is closed.
Date Returned to Work	The date that the employee returned to work if the injury or illness resulted in days away from work. Use this field in conjunction with the Away from Work field.
Deceased	The date of the employee's death.
No. Days Away from Work	The number of workdays (consecutive or not) on which the employee would have worked but could not because of occupational injury or illness. NOTE: The number of lost workdays should not include the day of injury or onset of illness or any days on which the employee would not have normally worked. This field is required when reporting OSHA 200 incidents.
No. Days Restricted Work Activity	The number of work days (consecutive or not) on which the employee has work restrictions as a result of the injury or illness. Work restrictions include: • Being assigned to another job on a temporary basis • Working at a permanent job less than full time • Working at a permanent job assignment but not being able to perform all of the duties normally required of it
Injury/Illness Related (IN/IL)	A code that indicates whether the case is an injury or an illness. Valid codes are: IN Injury: Injuries are caused by immediate events in the work environment. You must record an injury when it requires medical treatment (other than first aid), or if it involves loss of consciousness, restriction of work or motion, or transfer to another job. IL Illness: Illnesses are any abnormal condition or disorder, other than one resulting from an occupational injury, caused by exposure to environmental factors associated with employment. You must record all work-related illnesses.
Injury Date	The date the injury or illness occurred. For occupational injuries, enter the date of the work accident which resulted in injury. For occupational illnesses, enter the date of initial diagnosis of illness, or, if absence from work occurred before diagnosis, enter the first day of the absence attributed to the illness.

Field	Explanation
Time of Accident	The time of day the occupational injury or illness occurred.
Part of Body	A code that indicates the part of body affected by the injury or illness. You can define this code using user defined code table 08/H4.
Occupational Illness	A code that defines the exact nature of the occupational illness. You can define this code in user defined code table 08/H5. The sequence of the illness codes that J.D. Edwards provides corresponds exactly to the sequence on the OSHA 200 Summary report. If you plan to print the OSHA 200 Summary report that J.D. Edwards provides and send it to the US Department of Labor, you should not change the sequence of the codes. For example, you can change user defined code A, Skin Disease or Disorder, to code R, Rash, if that better meets your needs. However, the corresponding column on the OSHA 200 Summary report always refers to Occupational Skin Diseases or Disorder. If you are not sending the report to OSHA, you can change the codes, descriptions, and sequence.
Establishment	An Establishment is a single physical location where your organization conducts business or performs services or industrial operations. . . . . *Form-specific information* . . . . The establishment where the accident or illness occured.
Occurrence Location	The exact physical location where the event (injury or illness) occurred, such as the computer room, the loading dock, and so forth. You can define this code using user defined code table 08/H2.
Occurrence Type	A further explanation of the occurrence. You can define this code using user defined code table 08/H3.
Country	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.
Health & Safety Category Codes 15	A user defined code (table 08/HE) available for you to define according to your needs.
Home Company	The company number in which the employee generally resides.
Home Business Unit	The number of the business unit in which the employee generally resides.

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.
Worker's Comp	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.
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.
Foreman	The Address Book number of the employee's foreman, if applicable.
Term/Transfer	A code that defines whether the employee was terminated or permanently transferred as the result of an occupational illness. Do not change the codes that J.D. Edwards provides. This information prints on the OSHA 200 Log report if the case is an illness. If the occupational illness did not result in the employee's termination or permanent transfer, you must leave this field blank.
Safety Group	A code that identifies the safety group, if any, to which the employee belongs. You can define this code using user defined code table 08/H6.
H & S Category Code 08	A user defined code (table 08/H8) available for you to define according to your needs.
H & S Category Code 09	A user defined code (table 08/H9) available for you to define according to your needs.
H & S Category Code 10	A user defined code (table 08/H0) available for you to define according to your needs.
H & S Category Code 11	A user defined code (table 08/HA) available for you to define according to your needs.
H & S Category Code 12	A user defined code (table 08/HB) available for you to define according to your needs.
H & S Category Code 13	A user defined code (table 08/HC) available for you to define according to your needs.
Health & Safety Category Codes 14	A user defined code (table 08/HD) available for you to define according to your needs.

Entering Supplemental Data for Injury and Illness Cases

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

- Employees
- Applicants
- Jobs
- Dependents
- Beneficiaries
- Requisitions
- Safety and health cases

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

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

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

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

See Also

- *Working with Supplemental Data* in the *HR and Payroll Foundation Guide* for information about entering, copying, reviewing, and purging supplemental data

Closing an Injury or Illness Case

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

▶ To close an injury or illness case

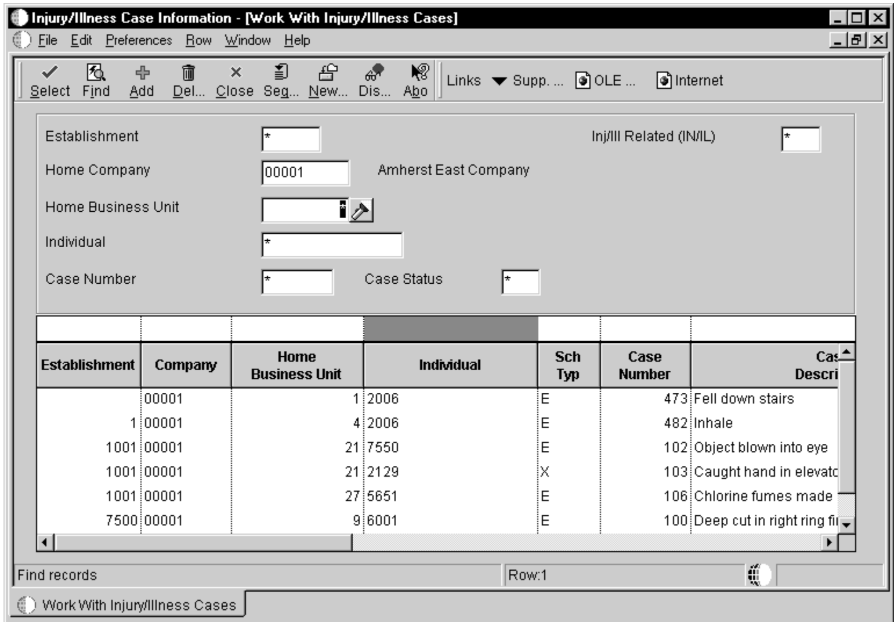
1. On Work with Injury/Illness Cases, complete one or all of the following fields to determine your search pattern, or leave them blank to show all cases:
   - Establishment
   - Inj/Ill Related (IN/IL)
   - Home Company
   - Home Business Unit
   - Employee Identification
   - Case Number
   - Case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

Reviewing Injury and Illness Cases by Establishment

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

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

▶ To review injury and illness cases by establishment



1. On Work with Injury/Illness Cases, complete the following field:
   - Establishment
2. To refine your search, complete one or more of the following optional fields and then click Find:
   - Inj/Ill Related (IN/IL)
   - Home Company
   - Home Business Unit
   - Employee Identification
   - Case Number
   - Case Status
3. Review the information in the detail area and click Close:

Reviewing Supplemental Data for Injury and Illness Cases

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

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

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

See Also

- *Reviewing Supplemental Data For A Specific Employee* in the *HR and Payroll Foundation Guide*
- *Reviewing Supplemental Data By Data Type* in the *HR and Payroll Foundation Guide*

Reviewing Safety and Health Reports

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

Reviewing safety and health reports includes:

- ❑ Reviewing the Case Supplemental Data report
- ❑ Reviewing the Case Report by Data Type report
- ❑ Reviewing the Occupational Illness/Injury report
- ❑ Reviewing the Government Reportable Illness/Injury report

Reviewing the Case Supplemental Data Report

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

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

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

See Also

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

Processing Options for Case Information Report

```
Enter an 'N' to bypass printing text                    ____________
 information on the report.  Default
 of blank will print the text.
```

Reviewing the Case Report by Data Type Report

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

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

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

See Also

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

Processing Options for Case Report by Data Type

```
Enter an 'N' to bypass printing text                    ____________
 information on the report.  Default
 of blank will print the text.
```

Reviewing Occupational Illness/Injury Report

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

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

See Also

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

Processing Options for Occupational Illness/Injury Report

Display Tab

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

1. Display Totals

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

2. Display Percentages for Level Breaks

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

3. Display Percentages for Final Total

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

Reviewing Government Reportable Illness/Injury Report

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

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

See Also

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

Appendices

Appendix A: Partner Processes - Criterion BluePrint

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

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

Integrating OneWorld with Criterion BluePrint consists of the following tasks:

- ❑ Setting up flat file cross-references for Criterion BluePrint
- ❑ Exporting OneWorld data to Criterion BluePrint

For information about using Criterion BluePrint, consult the Criterion BluePrint documentation.

Before You Begin

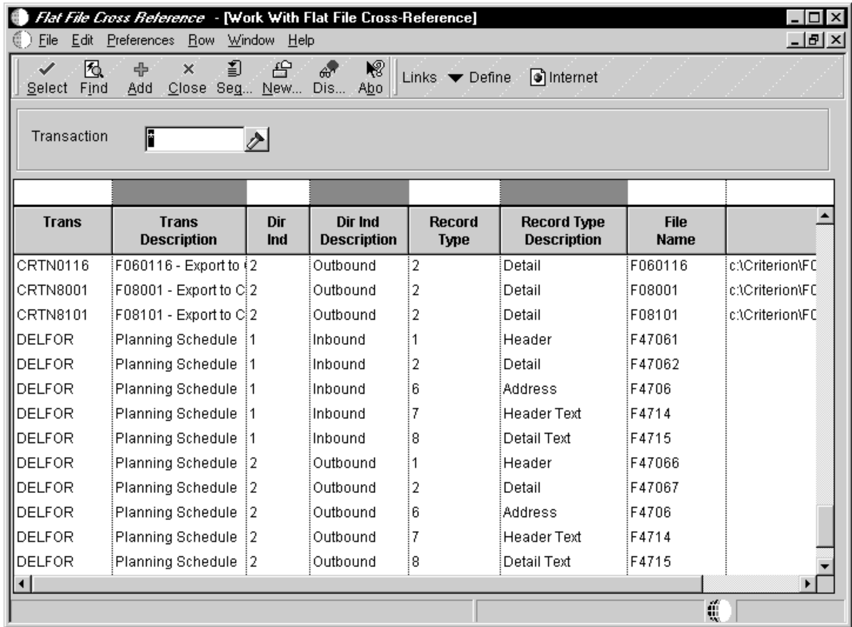
- ❑ Turn on the Criterion BluePrint module in OneWorld System Setup (P99410). See *Setting Up System Controls* in the *HR and Payroll Foundation Guide*.
- ❑ Verify that the codes listed under *Transaction and User Defined Codes for Criterion BluePrint* are set up in user defined code list 00/TT. All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

Setting Up Flat File Cross-References for Criterion BluePrint

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

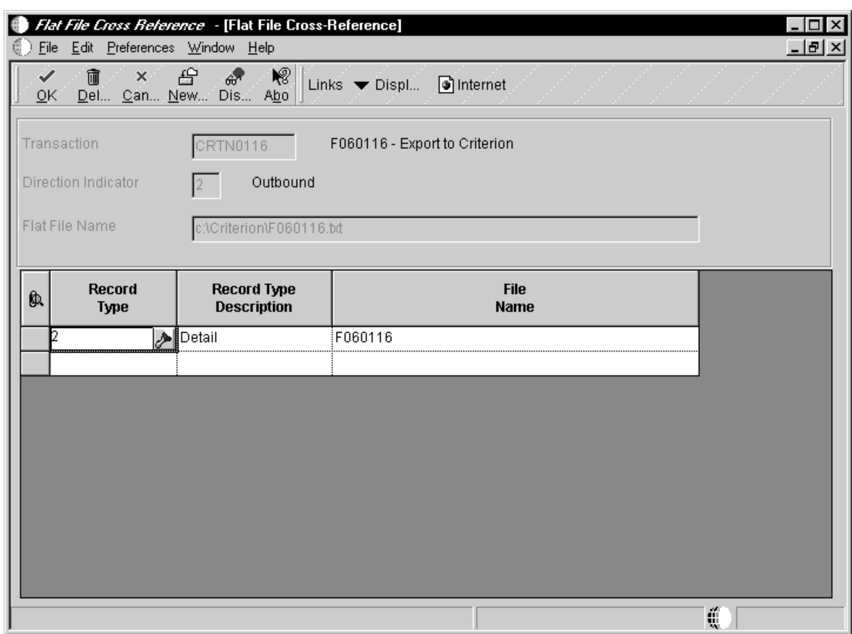
▶ To set up flat file cross-references for Criterion BluePrint

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



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

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



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

- Direction Indicator

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

   - Flat File Name

   Caution: 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:\\Criterion\\F060116.txt).

5. Type 2 in the following field:

   - Record Type

6. Type Detail in the following field and click OK:

   - Record Type Description

7. Complete steps 2 through 6 for each transaction code and user defined code that is listed under *Transaction and User Defined Codes for Criterion BluePrint*.

Field	Explanation
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.
Record Type Description	The identifier used to mark EDI transaction records as header and detail information. This is an EDI function only.

Transaction and User Defined Codes for Criterion BluePrint

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

- CRTN0116 - Export Employees to Criterion
- CRTN8001 - Export Jobs to Criterion
- CRTN8101 - Export Positions to Criterion
- UDCADDS - State
- UDCAT1 - Search Type
- UDCCTR - Country Code
- UDCEEOJ - EEO Job Category

- UDCEEOM - Ethnic Code
- UDCEST - Employment Status
- UDCFLSA - Overtime Exempt
- UDCJBCD - Job Type
- UDCJBST - Job Step
- UDCJGRP - Job Group
- UDCJSTA - Job Status
- UDCLNGP - Language Preference
- UDCMAIL - Check Route Code
- UDCMSTX - Marital Status
- UDCP001 - Category Code 1
- UDCP002 - Category Code 2
- UDCP003 - Category Code 3
- UDCP004 - Category Code 4
- UDCP005 - Category Code 5
- UDCP006 - Category Code 6
- UDCP007 - Category Code 7
- UDCP008 - Category Code 8
- UDCP009 - Category Code 9
- UDCP010 - Category Code 10
- UDCP011 - Category Code 11
- UDCP012 - Category Code 12
- UDCP013 - Category Code 13
- UDCP014 - Category Code 14
- UDCP015 - Category Code 15
- UDCP016 - Category Code 16
- UDCP017 - Category Code 17
- UDCP018 - Category Code 18
- UDCP019 - Category Code 19
- UDCP020 - Category Code 20
- UDCPAST - Pay Status
- UDCPRFQ - Pay Frequency
- UDCRCCD - Record Type
- UDCSALY - Pay Class

- UDCSEX - Gender
- UDCSHFT - Shift Code
- UDCLOC - Locality
- UDCTYC - Emer Contact Type
- UDCUN - Union

Exporting OneWorld Data to Criterion BluePrint

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

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

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

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

► **To export OneWorld data to Criterion BluePrint**

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

Run Export User Defined Codes for version ZJDE0001 through version ZJDE0043.

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

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

Processing Options for Export to Criterion – All Files

```
Position Cntrl

     Enter '1' if you are using                        ____________
     Position control
```

Processing Options for Export User Defined Codes

Process

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

Appendix B: Partner Processes - Personic Workflow

Personic Workflow is an easy-to-use software package that automates the recruiting and hiring process. It can intelligently search scanned resumes, allowing you to narrow your applicant pool according to specific criteria. For example, if you want to look only at applicants with moderate Japanese skills, you can search for those resumes. After you have selected several qualified applicants, Personic Workflow guides you through the process of interviewing and hiring.

You can integrate OneWorld with Personic Workflow by loading requisitions and other data from OneWorld into Personic Workflow. Personic Workflow then helps you find qualified applicants and guides you through the interview process. Then, when you are ready to hire an applicant, you can return the applicant's information to the Employee Master records in OneWorld.

You can set a processing option to have the system automatically purge pending employees when you run Processing Pending Employees (R060116P).

Integrating OneWorld with Personic Workflow consists of the following tasks:

- ❑ Setting up Flat File Cross-References for Personic Workflow
- ❑ Exporting OneWorld data to Personic Workflow
- ❑ Importing new employee information from Personic Workflow

For information about using Personic Workflow, consult the Personic Workflow documentation.

Before You Begin

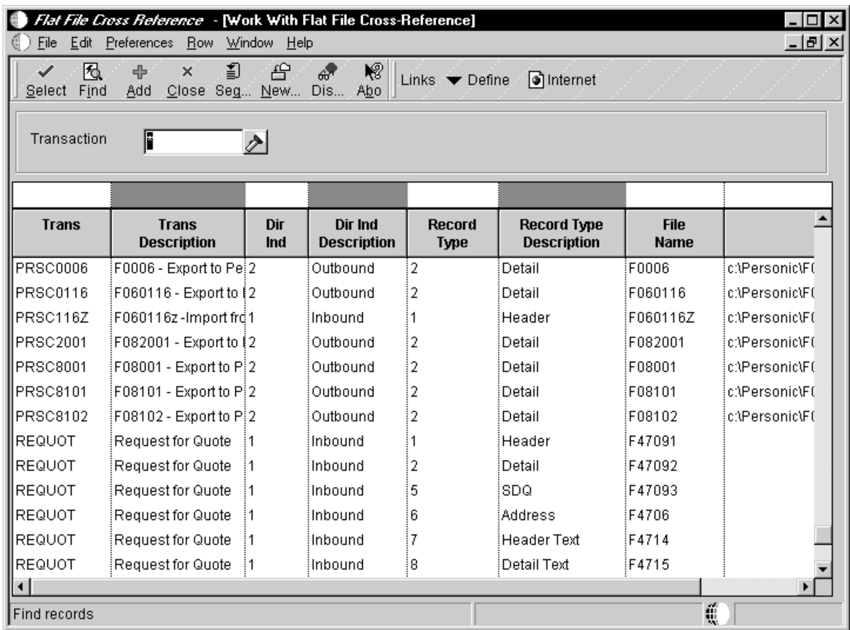
- ❑ Activate the Personic Workflow module in OneWorld System Setup (P99410). See *Setting Up System Controls* in the *HR and Payroll Foundation Guide*.
- ❑ Verify that the codes listed under *Transaction and User Defined Codes for Personic Workflow* are set up in user defined code list 00/TT. All of the codes, except for F060116z - Import from Personic, should have a 1 in the Special Handling column. See *Understanding User Defined Codes* in the *HR and Payroll Foundation Guide*.

Setting Up Flat File Cross-References for Personic Workflow

When you transfer data between OneWorld and Personic Workflow, the system stores the data in flat files. You need to set up flat file cross-references to indicate what file each type of data is stored in.

► To set up flat file cross-references for Personic Workflow

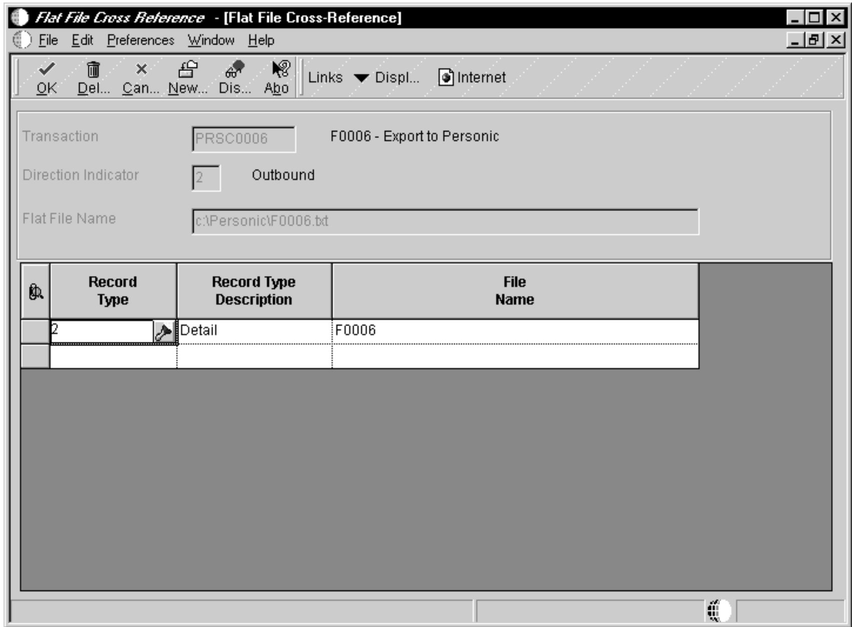
From the Personic menu (G05BPP41), choose Flat File Cross Reference.



Trans	Trans Description	Dir Ind	Dir Ind Description	Record Type	Record Type Description	File Name	
PRSC0006	F0006 - Export to Pe	2	Outbound	2	Detail	F0006	c:\Personic\F(
PRSC0116	F060116 - Export to I	2	Outbound	2	Detail	F060116	c:\Personic\F(
PRSC116Z	F060116z -Import frc	1	Inbound	1	Header	F060116Z	c:\Personic\F(
PRSC2001	F082001 - Export to I	2	Outbound	2	Detail	F082001	c:\Personic\F(
PRSC8001	F08001 - Export to P	2	Outbound	2	Detail	F08001	c:\Personic\F(
PRSC8101	F08101 - Export to P	2	Outbound	2	Detail	F08101	c:\Personic\F(
PRSC8102	F08102 - Export to P	2	Outbound	2	Detail	F08102	c:\Personic\F(
REQUOT	Request for Quote	1	Inbound	1	Header	F47091	
REQUOT	Request for Quote	1	Inbound	2	Detail	F47092	
REQUOT	Request for Quote	1	Inbound	5	SDQ	F47093	
REQUOT	Request for Quote	1	Inbound	6	Address	F4706	
REQUOT	Request for Quote	1	Inbound	7	Header Text	F4714	
REQUOT	Request for Quote	1	Inbound	8	Detail Text	F4715	

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

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



2. On Flat File Cross-Reference, type a transaction or user defined code in the following field:
   - Transaction
3. Type 2 in the following field:
   - Direction Indicator
4. Type a filename for the flat file that the data will be exported to in the following field:
   - Flat File Name

   Caution: 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:\\Personic\\F08001.txt).

5. Type 2 in the following field:
   - Record Type
6. Type Detail in the following field and click OK:
   - Record Type Description
7. Complete steps 2 through 6 for each transaction code that is listed under *Transaction and User Defined Codes for Personic Workflow*.

Field	**Explanation**
Transaction	A code that identifies a transaction by type.
Direction Indicator	A code that indicates the direction of the transaction.

Field	Explanation
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.
Record Type Description	The identifier used to mark EDI transaction records as header and detail information. This is an EDI function only.

Transaction and User Defined Codes for Personic Workflow

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

- PRSC0006 - F006 Export
- PRSC0116 - F060116 Export
- PRSC116Z - F060116z Import from Personic
- PRSC2001 - F082001 Export
- PRSC8001 - F08001 Export
- PRSC8101 - F08101 Export
- PRSC8102 - F08102 Export
- UDCADDS - State
- UDCCTR - Country Code
- UDCEEOJ - EEO Job Category
- UDCEEOM - Ethnic Code
- UDCJBCD - Job Type
- UDCJBST - Job Step
- UDCMAIL - Check Route Code
- UDCREQS - Requisition Status
- UDCSALU - Prefix
- UDCSUFF - Suffix

Exporting OneWorld Data to Personic Workflow

You can export the following items from OneWorld for use in Personic Workflow:

- Managers

- Requisitions
- Cost centers
- Jobs
- Pay grades/steps
- Positions
- User defined codes

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

You might need to export this data only once, when you first start using OneWorld with Personic Workflow. After the initial export, any new or changed requisitions in OneWorld will be sent to Personic Workflow by means of database triggers. However, if you add other new items, such as managers or cost centers, in OneWorld, you must export those items to Personic Workflow again.

▶ To export data to Personic Workflow

From the Personic menu (G05BPP41), choose Export Requisitions and Employees/Personic.

1. Run Outbound Cost Center Extraction to export the cost centers to a working file.
2. Run Export Cost Centers to Personic to move the cost centers to the flat file.
3. Run Export Jobs to Personic.
4. Run Export Pay Grades to Personic.
5. Run Export Positions to Personic.
6. Run Export UDCs to Personic for each of the following codes:
   - ZJDE0021 (MAIL)
   - ZJDE0022 (CTR)
   - ZJDE0023 (EEOJ)
   - ZJDE0026 (EEOM)
   - ZJDE0030 (JBST)
   - ZJDE0031 (JBCD)
   - ZJDE0042 (ADDS)
   - ZJDE0044 (REQS)
   - ZJDE0045 (SALU)
   - ZJDE0046 (SUFF)

This process creates a separate flat file for each data item and user defined code, as defined in the Flat File Cross Reference setup.

After you export the data from OneWorld, you need to import it in Personic Workflow. See the Personic Workflow documentation for more information.

Processing Options for Export Pay Grades to Personic

```
Date

Enter effective date

      1. Date - Effective On                                   ____________
```

Processing Options for Export User Defined Codes

```
Process

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

Importing New Employee Information from Personic Workflow

When you have indicated a hire date for the successful applicant in Personic Workflow, you can import that applicant's information (such as name, address, and so on) into OneWorld, where it is added directly to a pending employee table. From there, the applicant's information is transferred to the Employee Master file.

Before You Begin

❑ Export the appropriate records from Personic Workflow. See the Personic Workflow documentation for more information.

▶ **To import new employee information from Personic Workflow**

From the Personic menu (G05BPP11), choose Inbound Flat File Conversion.

1. Run version XJDE0022, to load the flat file into a pending employee table.
2. Choose Employee Work File Revisions, and then make any necessary additions, changes, and deletions in the employee records.
3. Run Process Pending Employees to transfer the records to the Employee Master table.

Processing Options for Inbound Flat File Conversion

```
Transaction

      1. Enter the transaction to                          ____________
      process.

Separators

      1. Enter the field delimiter.                        ____________
      2. Enter the text qualifier.                         ____________

Process

      1. Enter the inbound processor to                    ____________
      run after successful completion of
      the conversion.
      2. Enter the version for the                         ____________
      inbound processor.  If left blank,
      XJDE0001 will be used.
```

Processing Options for Process Pending Employees

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

Index

Index

A

B

C

D

E

F

G

H

I

L

M

N

O

P

R

S

T

U

W