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# JD Edwards EnterpriseOne Human Resources 8.12 Implementation Guide

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**April 2006**

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# About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

---

**Note.** Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

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## JD Edwards EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your JD Edwards EnterpriseOne applications most effectively.

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## Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

---

## Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

### Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

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**Important!** Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

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### See Also

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](http://www.oracle.com/support/support_peoplesoft.html)

### Ordering Printed Documentation

You can order printed, bound volumes of the complete line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guide CD-ROM. Oracle makes printed documentation available for each major release of JD Edwards EnterpriseOne shortly after the software is shipped. Customers and partners can order this printed documentation by using any of these methods:

- Web
- Telephone
- Email

#### Web

From the Documentation section of Oracle's PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. Use a credit card, money order, cashier's check, or purchase order to place your order.

#### Telephone

Contact MMA Partners, the book print vendor, at 877 588 2525.

## Email

Send email to MMA Partners at [peoplebookspress@mmapartner.com](mailto:peoplebookspress@mmapartner.com).

## See Also

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](http://www.oracle.com/support/support_peoplesoft.html)

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## Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs) (JD Edwards EnterpriseOne only)	Implement, Optimize, and Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

---

## Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

### Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
<b>Bold</b>	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.

## Visual Cues

Implementation guides contain the following visual cues.

### Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne system.

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**Note.** Example of a note.

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If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

---

**Important!** Example of an important note.

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### Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

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**Warning!** Example of a warning.

---

### Cross-References

Implementation guides provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

## Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

## Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

- Asia Pacific
- Europe
- Latin America
- North America

## Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

- USF (U.S. Federal)
- E&G (Education and Government)

## Currency Codes

Monetary amounts are identified by the ISO currency code.

---

## Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about implementation guides and other Oracle reference and training materials. Please send your suggestions to Documentation Manager, Oracle Corporation, 7604 Technology Way, Denver, CO, 80237. Or email us at [documentation\\_us@oracle.com](mailto:documentation_us@oracle.com).

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

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## Common Fields Used in Implementation Guides

### Address Book Number

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.



<b>As If Currency Code</b>	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
<b>Batch Number</b>	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
<b>Batch Date</b>	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
<b>Batch Status</b>	<p>Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:</p> <p><i>Blank:</i> Batch is unposted and pending approval.</p> <p><i>A:</i> The batch is approved for posting, has no errors and is in balance, but has not yet been posted.</p> <p><i>D:</i> The batch posted successfully.</p> <p><i>E:</i> The batch is in error. You must correct the batch before it can post.</p> <p><i>P:</i> The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to <i>E</i>.</p> <p><i>U:</i> The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.</p>
<b>Branch/Plant</b>	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
<b>Business Unit</b>	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
<b>Category Code</b>	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
<b>Company</b>	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
<b>Currency Code</b>	Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
<b>Document Company</b>	<p>Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.</p> <p>If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.</p>

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

**Document Number**

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

**Document Type**

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:

*P*: Accounts payable documents.

*R*: Accounts receivable documents.

*T*: Time and pay documents.

*I*: Inventory documents.

*O*: Purchase order documents.

*S*: Sales order documents.

**Effective Date**

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

**Fiscal Period and Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

**G/L Date** (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

# JD Edwards EnterpriseOne Human Resources Preface

This preface discusses:

- JD Edwards EnterpriseOne products.
- JD Edwards EnterpriseOne application fundamentals.
- Common fields used in this Implementation Guide.

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## JD Edwards EnterpriseOne Products

This Implementation Guide refers to the JD Edwards EnterpriseOne Human Resources product from Oracle.

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## JD Edwards EnterpriseOne Application Fundamentals

Additional, essential information describing the setup and design of the system appears in a companion volume of documentation called *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*.

### See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “JD Edwards EnterpriseOne HCM Fundamentals Preface”

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## Common Fields Used in This Implementation Guide

<b>Address Number</b>	Enter a number that identifies an entry in Address Book, such as employee or applicant.
<b>Applicant Number</b>	<p>Enter a number that identifies an entry in Address Book, such as employee, applicant, participant, customer, supplier, tenant, or location.</p> <p>This number becomes the applicant employee number if the applicant is hired. You can either enter this number or you can leave the field blank and the system automatically assigns the next available number. Each applicant number must be unique. If you enter a number that already exists, the system displays an error message.</p>
<b>Applicant Status/Date</b>	Enter a code that defines a step in the hiring process that the applicant has completed, such as initial contact, first interview, and so on. This is a defined code (08/AS).

When you enter or change the status of an applicant with the Applicant Entry program (P08401), the system adds a record to the supplemental data type for applicant status. To review the history of an applicant status, you can view the information that has been added to this supplemental data type.

**Approved By**

Enter the address book number of the person who approves a requisition.

If you are using JD Edwards EnterpriseOne 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.

**Billing Rate**

Enter a number that specifies the rate that the system uses to bill for labor services. This rate is often referred to as the billing or recharge rate. The system charges the resulting amount, based on this rate, to the primary distribution account for the timecard. The system also enters an offset to an account that is derived from AAIs. This rate does not affect employee payroll.

To enable billing rates in time entry, the employee record type must be set to 2 (payroll and recharge processing) or 3 (recharge processing only) with the Employee Payroll program (P0801PRL).

**Billing Regular**

Enter the employee recharge overtime hourly rate as retrieved, entered or calculated during time entry.

**Billing Double**

Enter the employee recharge doubletime hourly rate as retrieved, entered or calculated during time entry.

**Billing Holiday**

Enter the employee recharge holiday hourly rate as retrieved, entered or calculated during time entry.

**Billing Triple**

Enter the employee recharge triple time hourly rate as retrieved, entered or calculated during time entry.

**Burden-1 Double**

Enter the rate of billing for double time.

**Burden-1 Holiday**

Enter the rate of billing for holiday time.

**Burden-1 Regular**

Enter the rate of billing for regular overtime.

**Burden-1 Triple**

Enter the rate of billing for triple time.

**Competency Code**

Enter a code that specifies a competency within a competency type. For example, a competency for the competency type Skill might be C programming or Driving a forklift.

**Competency Type**

Enter a code that identifies a competency table or category for which you can track employee competencies. Values are:

01: Training

02: Skill

03: Accomplishment

04: Certification

05: Degree

06: Language

It is a defined code (05/CY), but the values are hard coded and cannot be changed. Therefore, each of the competencies that you track must pertain to one of these competency types. Adding additional values to this list requires system customizations.

<b>Country Code</b>	Enter a defined code (00/CN) that indicates the country in which the employee resides.
<b>Double Overtime</b>	Enter the rate of pay for double overtime.
<b>Ethnic Code</b>	Enter a 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 JD Edwards EnterpriseOne 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.
<b>Gender</b>	<p>Values are:</p> <p><i>M</i>: Male</p> <p><i>F</i>: Female</p>
<b>Grade Step</b>	<p>Enter a code that identifies a pay grade and pay step. You can use this code to determine an employee pay rate.</p> <p>If you set up the system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee pay grade step causes the system to automatically update these fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
<b>Headcount</b>	Enter the number of employees requested, budgeted, or approved for a position or requisition.
<b>Holiday Pay</b>	Enter the rate of pay for holiday overtime.
<b>Home Business Unit</b>	Enter the number of the business unit in which the employee generally resides.
<b>Hourly Rate</b>	<p>Enter the employee hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.</p> <p>In the Employee Master table, this number is the employee base hourly rate.</p> <p>In the Union Rates table, it is the straight time rate.</p>

---

**Note.** If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.

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<b>Job Competency Code</b>	Enter a code that uniquely identifies each job competency. Competencies are high level human attributes that help an employee achieve the goals and objectives of the company. These competencies are also the foundation of an employee job and job description.
<b>Job Type</b>	You associate pay and benefit information with a job type when you define jobs on the Job Entry and Evaluation program (P08001). The system provides certain pay and benefit information that you associate with a job type in the Employee Entry forms when you are adding a new employee to the database.
<b>Job Step</b>	Enter a defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
<b>Labor Dist. Method</b> (labor distribution method)	<p>Enter the method that controls whether the labor costs include a flat burden for payroll taxes and benefits. Values are:</p> <p><i>0</i>: The flat burden factor is always 1.0000, so the resulting amount for the flat burden is zero.</p> <p><i>1</i>: The flat burden factor is always greater than 1.0000, so the labor costs include a flat burden.</p>
<b>Labor Dist. Multiplier</b> (labor distribution multiplier)	Enter a multiplier to load direct labor costs with burden. For example, a factor of 1.32 would load every dollar of labor cost with 32 cents worth of burden.
<b>Locality</b>	Enter a 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.
<b>Organizational Business Unit</b>	Enter a business unit that is included in the organizational structure for job competencies. You use organizational business units to assign job competency information to levels within the organizational structure. This business unit is independent of an employee home business unit and security business unit.
<b>Pay Grade</b>	<p>Enter 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 pay grade.</p> <p>To set up pay grades, use Pay Grades by Class (P082001).</p> <p>If you set up the system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee pay grade step causes the system to automatically update these fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
<b>Piecework Rate</b>	Enter the rate paid for the type of component (piece) produced. If you enter a rate in this field, this rate overrides the rate in the Employee Master file.

<b>Position ID</b> (Position Identification)	<p>Enter a code that you use for budgetary (position) control purposes. The position ID consists of:</p> <ul style="list-style-type: none"> <li>• Position (position code and its description).</li> <li>• Fiscal year.</li> <li>• Home business unit.</li> </ul> <p>For example, you can identify position A0-1 as Accounting Manager for fiscal year 2005-2006, for home business unit 41.</p> <p>You might decide to set up positions so that the position IDs are the same as the corresponding job IDs. Within a home business unit, positions appear in the alphanumeric sequence of their position IDs. For example, position A0-1 appears before position A0-2.</p>
<b>Rchg Burden Rate</b> (recharge burden rate)	Enter an hourly rate that the system uses when charging burden associated with the actual billing (recharge) amounts.
<b>Regular Overtime</b>	Enter the rate of pay for regular overtime.
<b>Step Rate</b>	Enter a value that specifies the pay rate that is assigned to a pay grade and step. In certain programs, such as the Pay Grade Step Table program (P082003), you can also use a rate multiplier in combination with this value so that the system automatically calculates the pay rate. For example, you can enter a percentage value that the system uses to increase a pay rate.
<b>Security Business Unit</b>	<p>Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.</p> <p>Business unit security might prevent you from viewing information about business units for which you have no authority.</p>
<b>Triple Overtime</b>	Enter the rate of pay for triple time.
<b>Union Code</b>	Enter a defined code (06/UN) that represents the union or plan in which the employee or group of employees work or participate.
<b>Wrk Comp Code</b> (workers compensation code)	Enter a defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on the periodic workers compensation insurance reports.
<b>Wrk Comp SubClass</b> (workers compensation subclass)	<p>Enter a code that specifies any special circumstances associated with the workers compensation insurance (WCI) code, resulting in multiple rates for the same WCI code due to location or risk, for example. The subclass should remain blank if multiple rates do not exist. Default codes are:</p> <p>Blank: There are no special circumstances associated with this code.</p> <p><i>F</i>: There are special circumstances associated with this code.</p>





# CHAPTER 1

## Getting Started with JD Edwards EnterpriseOne Human Resources

This chapter discusses:

- Human Resources overview
- Human Resources business processes
- Human Resources integrations
- Human Resources implementation

---

### Human Resources Overview

JD Edwards EnterpriseOne 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 the organization policies and procedures. The information that you need is unique and often complex.

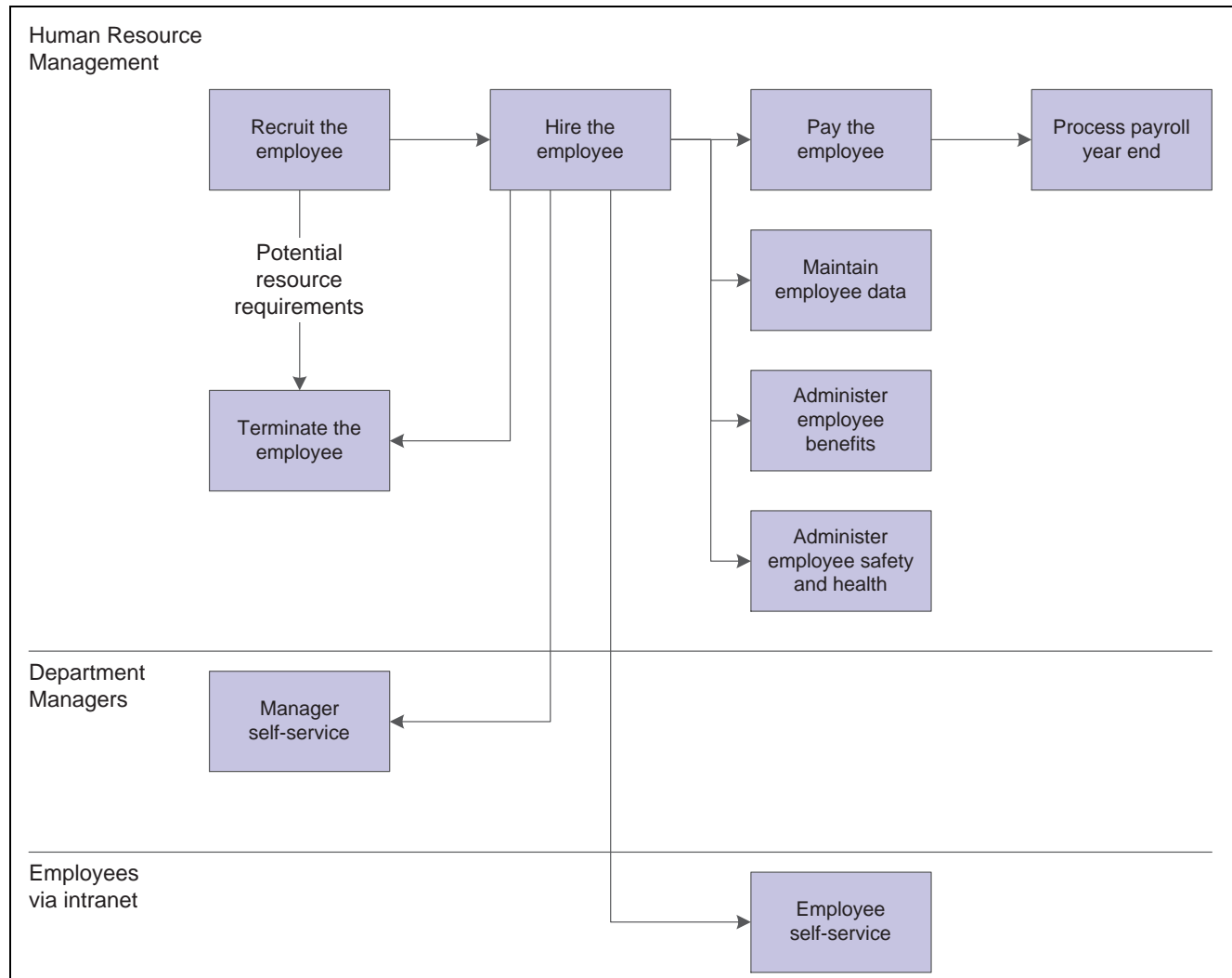
The JD Edwards EnterpriseOne Human Resources system tracks the information that you need to meet both the immediate and long range goals, as well as the demands of change and growth within the company and industry. You can access and compile the information quickly and provide quick answers to questions.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

The Human Resources system provides these features:

- Recruitment processing
- Requisition management
- Applicant tracking
- Position budget management
- Compensation management
- Pay grade step progression
- Competency management
- Performance management
- Health Safety management

## Human Resources Business Processes

This process flow illustrates the Human Resources business processes:



Human resources business processes

We discuss these business processes in the business process chapters in this Implementation Guide.

## Human Resources Integrations

The Human Resources system integrates with these JD Edwards EnterpriseOne systems:

- Address Book
- Human Capital Management Foundation
- Payroll
- General Accounting

- Accounts Payable
- Asset Lifecycle Management

We discuss integration considerations in the implementation chapters in this Implementation Guide. Supplemental information about third party application integrations is located on the JD Edwards EnterpriseOne Customer Connection website.

## **Address Book**

The Address Book system maintains employee personal information such as name, address, and tax ID.

## **Human Capital Management Foundation**

The Human Capital Management Foundation system tracks information that is shared with the Human Resources system:

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

## **Payroll**

The Payroll and Human Resources systems share a central database, enabling the system to reflect employee human resource changes immediately in the Payroll system. This ensures that each paycheck is up to date.

## **General Accounting**

The Human Resources system creates 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 accounts payable vouchers for deductions and benefits that occur during payroll processing.

## **Asset Lifecycle Management**

The Resource Management functionality within Asset Lifecycle Management uses the Human Resources Competency information to select assets and people with the right training, skills, accomplishments, certifications, education and language competencies for the job.

---

# **Human Resources Implementation**

This section provides an overview of the global, core, and application steps that are required to implement the JD Edwards EnterpriseOne Human Resources system.

In the planning phase of the implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the *About This Documentation*, with information about where to find the most current version of each.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne Human Resources, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time required to search and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools 8.96 Software Update Guide*

For information about the Rapid Start solution for implementation of JD Edwards EnterpriseOne Human Resources, review the documentation available.

See *JD Edwards EnterpriseOne Rapid Start 8.12 Documentation*, “JD Edwards EnterpriseOne Rapid Start 8.12 Documentation,” Rapid Start Solution.

## See Also

*About This Documentation*, “About This Documentation Preface” “About This Documentation Preface,” page xxiii

## Global Implementation Steps

This table lists the global implementation steps for the JD Edwards EnterpriseOne Human Resources system:

Step	Reference
1. Set up fiscal date patterns, companies, and business units.	<i>JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Organizations”
2. Set up accounts.	<i>JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide</i> , “Creating the Chart of Accounts”
3. Set up General Accounting constants.	<i>JD Edwards EnterpriseOne General Accounting 8.12 Implementation Guide</i> , “Setting Up the General Accounting System,” Setting Up Constants for General Accounting
4. Set up multicurrency processing, including currency codes and exchange rates.	<i>JD Edwards EnterpriseOne Multicurrency Processing 8.12 Implementation Guide</i> , “Setting Up General Accounting for Multicurrency Processing”
5. Set up ledger type rules.	<i>JD Edwards EnterpriseOne General Accounting 8.12 Implementation Guide</i> , “Setting Up the General Accounting System,” Setting Up Ledger Types for General Accounting
6. Enter Address Book Records.	<i>JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide</i> , “Entering Address Book Records”
7. Set up default location and printers.	JD Edwards EnterpriseOne Foundation, Setting Up Default Locations and Printers
8. Set up Human Capital Management fundamental information.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i>

## Core Implementation Steps

This table lists the core implementation steps for JD Edwards EnterpriseOne Human Capital Management Foundation.

Step	Reference
1. Set up system controls.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up System Options,” Setting Up System Controls
2. Set up general options, position control options, company options, business unit constants, and common settings for Human Capital Management.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up System Options”
3. Define category codes, select fields for future data revisions, and release record reservations.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Employee Information”
4. Select data for history tracking purposes and initialize history and turnover tracking.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Employee Information,” Setting Up Employee History and Turnover Tracking
5. Set up cross reference tables by business unit, job classification constants, and union local and job cross references.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Employee Information,” Setting Up Job Information for Employees
6. Set up shift-rate differentials, occupational pay rates, pay type cross reference tables, and then run the Synchronize Employee Master Rates with Union Rates report (R059122).	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Employee Information,” Setting Up Earnings Information for Employees
7. Set up tax area information, corporate tax IDs, activate Quantum for Payroll, test the Quantum connection, set up the GeoCoder, and then run these UBEs:	<ul style="list-style-type: none"> <li>• Tax Area Table report (R07500).</li> <li>• GeoCoder Employee Batch Processing report (R070103).</li> <li>• Cost Center Tax Area Processing report (R079052).</li> <li>• Populate Vertex Filing Status Process report (R0701730).</li> </ul> <i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Tax Information”
8. Set up workflow for Human Capital Management.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Workflow”
9. Set up a web mail merge queue, convert mail merge templates, add a web mail merge template, or add a web mail merge template record and data structure.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Web Mail Merge”
10. Set up pay types.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Pay Types”
11. Set up calculation tables and attach calculation tables to DBAs.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide</i> , “Setting Up Deductions, Benefits, and Accruals,” Setting Up Calculation Tables

Step	Reference
12. Set up basic DBA information, General Accounting information, the basis of calculation, add text to DBAs, set up group plan DBAs, set up tax status for deductions, and set up tax status for benefits.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide, "Setting Up Deductions, Benefits, and Accruals"</i>
13. Set up rollover calculation tables and rollover information for DBAs.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide, "Setting Up Additional Information for DBAs"</i>
14. Set up limits for tax deferred compensation deductions, tax deferred compensation deductions for the U.S., and taxable fringe benefits for the U.S.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide, "Setting Up Tax-Deferred and Taxable PDBAs"</i>
15. Set up category codes for DBAs.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide, "Setting Up Additional Information for DBAs," Setting Up Category Codes for DBAs</i>
16. Set up a DBA based on another DBA.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide, "Setting Up Additional Information for DBAs," Setting Up a DBA Based on Another DBA</i>
17. Set up advance deductions, a deduction DBA to adjust negative pay, a deduction DBA for overpayment, and a DBA to calculate if no gross pay.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide, "Setting Up Advanced DBAs"</i>
18. Set up garnishment deductions, fee deductions, tax levy deductions, and a wage assignment deduction.	<i>JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide, "Setting Up Deductions for Wage Attachments"</i>

## Human Resources Applications Implementation Steps

This table lists the implementation steps for the JD Edwards EnterpriseOne Human Resources applications:

Step	Reference
1. Define common settings for compensation management. Set up additional system options. Define increase type guidelines, increase type rules, the approval hierarchy, public models, and the performance appraisal scale. Generate tables.	<u>Chapter 2, "Setting Up Compensation Management," page 9</u>
2. Set up security for competency levels and routing instructions for competency approvals. Required only if resource competencies are implemented.	<u>Chapter 3, "Setting Up Competency Management," page 25</u>
3. Define scales for performance management, define the approval hierarchy, set up employee goal suggestions, set up traditional appraisal templates, define performance management company constants, define business unit overrides for performance appraisals, define performance management appraisal type override, and set up security for performance management. This functionality is optional.	<u>Chapter 4, "Setting Up Performance Management," page 29</u>

Step	Reference
4. Set up pay rate tables, pay grades, pay grade steps, pay range formulas, and define job evaluation factors.	<u>Chapter 5, “Setting Up Pay Information,” page 43</u>
5. (USA) Set up establishment conditions, set up OSHA establishment information for OSHA 200 and 300 reports, and set up establishment reporting information for the BLS Survey of Occupational Injuries and Illnesses.	<u>Chapter 6, “(USA) Setting up OSHA Reporting Information,” page 63</u>





## CHAPTER 2

# Setting Up Compensation Management

Before you use the compensation management feature, you must define critical information that the system uses for processing. You set up this information to meet specific needs of the organization.

This chapter lists prerequisites and discusses how to:

- Define common settings for compensation management.
- Set up the additional system options.
- Define increase type guidelines.
- Define increase type rules.
- Define the approval hierarchy.
- Define public models.
- Define the performance appraisal scale.
- Generate the Employee/Supervisor Relationship table.
- Generate Compensation Review Work tables.

---

## Prerequisites

Before you complete the tasks in this section:

- Define the system options for pay rate edit and position control.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

- Define increase type eligibility.

See *JD Edwards EnterpriseOne Benefits 8.12 Implementation Guide*, “Setting Up Benefits Administration,” Setting Up Eligibility Tables.

---

## Defining Common Settings for Compensation Management

This section discusses how to set up common settings for compensation management.

## Understanding Common Settings for Compensation Management

Setting up the common settings for compensation management enables you to specify whether the application performs certain processes and how it performs these processes.

This table describes the common settings for data items in the Common Settings for EE Self Service Appl (Common Settings for Employee Self Service Applications) program (P05004):

Common Setting	Description
Eligibility Override Reflected in Budget (CMPBDGT)	If you want the salary of an employee whose eligibility you overrode to be included in budget calculations, you need to set this setting to <i>Yes</i> .
Open Compensation Review (CMPOPEN)	When the human resources department grants supervisors access to the compensation review process, you need to set this setting to <i>Yes</i> . While you are setting up compensation management and after the managers have finished the review process, set this setting to <i>No</i> .
Allow Override of Increase Eligibility (CMPOVEL)	To enable the manager to override the default eligibility of an employee for an increase type, set this setting to <i>Yes</i> .
Use Prorate Factor in Compensation Review (CMPPRFT)	To use prorate factors in the compensation review, set this setting to <i>Yes</i> .
Use Prorate amount as Spent Amount (CMSPNT)	If you chose to use prorate factors and you want the prorated amount to be reflected in the spent calculations, set this setting to <i>Yes</i> . If you want the full increase amount to be reflected in the spent calculations, set this setting to <i>No</i> .
Synchronize Compensation Work Tables (CMPSYNC)	Use this common setting to indicate whether to synchronize the compensation work tables with employee changes. After the compensation work tables are built, set this setting to <i>Yes</i> to keep the compensation review work tables synchronized with the employee changes that you made to the employee master table. After the human resources department closes the compensation review process to the managers, set this setting to <i>No</i> .
Clear Add New Employee to Workfile (CMPEEWF)	If you do not want to add new or changed employee records to the Compensation Root Work Table (F08830WF), set this common setting to <i>Yes</i> . The system adds the records when this setting is set to <i>No</i> .

### See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”

## Setting Up the Additional System Options

This section provides an overview of additional system options for compensation management and discusses how to set up additional system options.

### Understanding 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 enable increase amounts to be outside of the guideline range and, if you enable 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.

### Form Used to Set Up Additional System Options

Form Name	FormID	Navigation	Usage
Human Resources Additional Options	W08043A	Compensation Mgmt System Setup (G08CM14), HRM System Options  Select HR Addl. Options from the Row menu.	Set up additional system options.

### Setting Up Additional System Options

Access the Human Resources Additional Options form.

**HRM System Options - Human Resources Additional Options**

OK Cancel Tools

Data File Library  HR Subsystem Name

**Job Competencies**

Type Structure  Corporate Competency Structure

**Compensation Management**

Increase Guideline Edit  Warning: Increase Out of Range

Based on Date (Length of Service)  Original Hire Date

Rate Multiplier

Human Resources Additional Options form

<b>Increase Guideline Edit</b>	Enter a code that specifies whether the system enables increase amounts that are outside of the guideline range and the type of message that appears when this occurs. Values are:  0: Do not increase. 1: Issue a warning message that indicates that the increase is out of range. 2: Issue an error message that indicates that the increase is out of range.
<b>Based on Date (Length of Service)</b>	Enter a user-defined code (08/RW) that specifies the date on which to base the calculation of the employee's length of service.

---

## Defining Increase Type Guidelines

This section provides an overview of increase type guidelines and discusses how to define increase type guidelines.

### Understanding Increase Type Guidelines

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

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

You can create increase guideline tables to facilitate these compensation increase scenarios:

- Ranges for one evaluation factor.

For example, if the company bases compensation increases on length of service alone, a table with established ranges for one evaluation factor, such as length of service, can store all of the necessary increase guidelines.

- Ranges for two evaluation factors.

For example, if the company bases compensation increases on length of service and performance appraisal rating, a table with established ranges for both of these evaluation factors can store all of the necessary increase guidelines.

---

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

---

### Example: Increase Guidelines Based on Length of Service

The organization might have a compensation increase policy that is based on employees length of service. For example, assume employees who have been employed between 0 and 24 months receive 5 percent increases, employees who have been employed between 24 months and 60 months receive 7 percent increases, and employees who have been employed for more than 60 months receive increases of 10 percent.

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

Using the evaluation factor of length of service, you can create three different ranges in which to group the employees. The first range includes all of the employees who have been employed between .001 and 24.000 months. The second range includes all of the employees who have been employed between 24.001 and 60.000 months. The last range, 60.001-9999.000, includes all of the employees who have been employed more than 60 months.

This is an example of the setup for increase guidelines based on length of service:

**Define Increase Type Guidelines - Increase Guideline Table**

OK Delete Cancel Tools

Guideline table code: LOS

Effective Date: 01/01/05 Ending Date: 12/31/05

Description: Annual - Based on LOS

Input Method: % Percentage

Data Item for Column Factor: LISM Length of Service (Months)

Data Item for Row Factor: LISM Length of Service (Months)

Define ranges for Length of Service (Months)

Range1: From 0.001 Through 24.000 Range4: From Through

Range2: From 24.001 Through 60.000 Range5: From Through

Range3: From 60.001 Through 9,999.000 Range6: From Through

Records 1 - 2

	Length of Servi From	Length of Servi Through	Range1 Low limit	Range1 High limit	Range2 Low limit	Range2 High limit	Range3 Low limit	Range3 High limit	Range 4 Low Limit
<input type="checkbox"/>	0.001	9,999.000	5.000	5.000	7.000	7.000	9.000	9.000	
<input type="checkbox"/>									

Example of Increase Guideline Table form

**Note.** You must complete both the Data Item for Column Factor field and the Data Item for Row Factor field in the Define Increase Type Guidelines program (P08820). 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

The company might have a compensation increase policy that is based upon employee length of service as well as performance appraisal ratings. For example, assume that employees who have been employed between 0 and 24 months and have a performance appraisal rating of 80 or higher are eligible to receive an increase of between 5500 and 6500. Employees who have been employed between 24 and 60 months and have a performance appraisal rating that is between 65 and 80 are eligible to receive an increase of between 3500 and 4500.

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

This is an example of the setup for increase guidelines based on length of service and performance ratings:

**Define Increase Type Guidelines - Increase Guideline Table**

OK Delete Cancel Tools

Guideline table code: PERF  
 Effective Date: 01/01/05 Ending Date: 12/31/05

Description: Performance  
 Input Method: \$ Fixed Amount  
 Data Item for Column Factor: LISM Length of Service (Months)  
 Data Item for Row Factor: PAPL Performance Appraisal Level

Define ranges for Length of Service (Months)

Range1: From 0.001 Through 24.000 Range4: From Through  
 Range2: From 24.001 Through 60.000 Range5: From Through  
 Range3: From 60.001 Through 9,999.000 Range6: From Through

Records 1 - 2 Customize Grid

	Performance App Fro...	Performance App Thro...	Range1 Low limit	Range1 High limit	Range2 Low limit	Range2 High limit	Range3 Low limit	Range3 High limit	Range 4 Low Limit
<input type="checkbox"/>	65.000	80.000	2,500.000	3,500.000	3,500.000	4,500.000	4,500.000	5,500.000	
<input type="checkbox"/>									

Example of Increase Guideline Table form

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

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

## Form Used to Define Increase Type Guidelines

Form Name	FormID	Navigation	Usage
Increase Guideline Table	W08820B	Compensation Mgmt System Setup (G08CM14), Define Increase Type Guidelines  On the Work With Increase Guideline Tables form, click Add.	Enter increase type guidelines.

## Defining Increase Type Guidelines

Access the Increase Guideline Table form.

**Define Increase Type Guidelines - Increase Guideline Table** i ? |

OK Delete Cancel Tools

Guideline table code

Effective Date  Ending Date

Description

Input Method

Data Item for Column Factor

Data Item for Row Factor

Define ranges for Column Factor

Range1: From  Through  Range4: From  Through

Range2: From  Through  Range5: From  Through

Range3: From  Through  Range6: From  Through

Records 1 - 1 Customize Grid ☐

<input type="checkbox"/>	<input type="checkbox"/>	Row Factor From	Row Factor Through	Range1 Low limit	Range1 High limit	Range2 Low limit	Range2 High limit	Range3 Low limit
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Increase Guideline Table form

<b>Guideline table code</b>	Enter a table code to define the increase guideline ranges for an increase type.
<b>Input Method</b>	Enter a value from UDC (08/RB) that specifies whether the input method is a fixed amount or a percentage.
<b>Data Item for Column Factor</b>	Enter a data item to represent the increase guideline column ranges.
<b>Data Item for Row Factor</b>	Enter a data item to represent the increase guideline row ranges
<b>Ending Date</b>	Enter 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.
<b>From</b>	Enter the lower minimum amount to be compared for Column Range 1.
<b>Through</b>	Enter the higher maximum amount to be compared for Column Range 1.
<b>From</b>	Enter the lowest factor for the row.
<b>Through</b>	Enter the highest factor for the row.
<b>Range 1 Low limit</b>	Enter the low limit for Range 1.
<b>Range 1 High limit</b>	Enter the high limit for Range 1.

## Defining Increase Type Rules

This section provides an overview of increase type rules and discusses how to define increase type rules.

### Understanding Increase Type Rules

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

### Form Used to Define Increase Type Rules

Form Name	FormID	Navigation	Usage
Increase Type Rules	W08818B	Compensation Mgmt System Setup (G08CM14), Define Increase Type Rules  On the Work With Increase Type form, click Add.	Define increase type rules.

### Defining Increase Type Rules

Access the Increase Type Rules form.

1. Complete these fields:

- Increase Type Code
- Company
- Effective Date

The system date is the default effective date.

- Increase Type Description

The system completes this field with the Increase Type Code description.

2. To enable job title changes, select the Allow Job Title Change option.

You enable a job title change only on increase types that also involve a job change, such as a promotion.

3. Complete these optional fields:

- Home Business Unit
- Ending Date
- Budget Allocation Percentage
- Rounding Rule Code
- Eligibility Table
- Increase Guidelines table
- Date to base prorate on



4. Select the Allow prorate factor greater than 1.00 option, and then click OK.

<b>Increase Type Code</b>	<p>Enter a code that indicates the reason for:</p> <ul style="list-style-type: none"> <li>• Changing an active employee record.</li> <li>• Terminating an employee.</li> <li>• Recommending a change in salary or rate.</li> </ul> <p>This is a user-defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.</p>
<b>Allow Job Title Change</b>	Select this option to indicate that the Job Title Change is enabled. If left blank, no change is enabled.
<b>Ending Date</b>	Enter 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.
<b>Budget Allocation Percent</b>	Enter the budget amount that is allocated for a specific type of salary increase. This amount is expressed as a percentage.
<b>Rounding Rule Code</b>	Enter 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.
<b>Eligibility Table</b>	Enter a code that identifies a specific table of eligibility rules. The rules determine whether the employee is eligible for a particular increase type.
<b>Increase Guidelines table</b>	Enter a table code that defines the increase guideline ranges for an increase type.
<b>Date to base prorate on</b>	A user-defined code (08/RM) that specifies the date to use for the basis of prorated calculations.
<b>Allow prorate factor greater than 1.00</b>	Select this option to indicate that the increase type allows a prorate factor greater than 1. If the increase type does not allow a prorate factor greater than 1, then all prorate factors greater than 1 are automatically changed to 1. When this option is selected, a prorate factor greater than 1 is enabled. When this option is not selected, a prorate factor greater than 1 is not enabled.

---

## Defining 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.

This section discusses how to define the approval hierarchy.

## Form Used to Define the Approval Hierarchy

Form Name	FormID	Navigation	Usage
Approval Hierarchy	W05844A	Compensation Mgmt System Setup (G08CM14), Define Approval Hierarchy Setup	Define the approval hierarchy.

## Defining the Approval Hierarchy

Access the Approval Hierarchy form.

**Note.** The 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 supervisor submits a compensation review, all levels of supervisors below the submitting supervisor must have approved it.

**Define Approval Hierarchy Setup - Approval Hierarchy**

OK Find Delete Cancel Tools

Approval Type  Compensation

Home Company  Financial/Distribution Company

Home Business Unit

Records 1 - 2 Customize G

	Approval Type	Approval Type Description	Home Company	Home Business Unit	Level From	Level To	Highest Authority
<input checked="" type="radio"/>	COMP	Compensation	00000		1	5	7500
<input type="radio"/>							

Approval Hierarchy form

### Approval Type

Enter a user-defined code (05/AP) that specifies the type of change that requires an approval. For example, the approval type code required to approve a compensation change is *COMP*.

### Highest Authority

Enter the final authority in the approval process. The final authority can be an individual or a department.

## Defining Public Models

This sections provides an overview of public models.

## Understanding Public Models

If you plan to use public models, you must define them in UDC table 08/PM during setup. These models are visible to all managers in the management chain.

The public model enables higher level supervisors to open the model and view the work. When you save the model as a private model, you are the only person who has access to that model. You use the public model so that higher level managers can make modifications and return the model to the originator. After you have incorporated all of the changes that you want to make, you create a master model. Only a master model can be submitted for approval. You cannot change the master model after you submit it.

### See Also

*JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

---

## Defining the Performance Appraisal Scale

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

This section discusses how to define the performance appraisal scale.

### Forms Used to Define the Performance Appraisal Scale

Form Name	FormID	Navigation	Usage
Review Scales	W05103B	Compensation Mgmt System Setup (G08CM14), Scale Information  On the Work With Scales form, click Add.	Define performance appraisal scales.
Define Competency Levels	W05103C	Compensation Mgmt System Setup (G08CM14), Scale Information  Select Define Levels from the Row menu.	Define the competency levels for the scale.

### Defining the Performance Appraisal Scale

Access the Review Scales form.

**Scale Information - Review Scales**

Work With Scales | **Review Scales**

OK Cancel Previous Next Tools

Scale 5 POINT

Low Value 1.000

High Value 5.000

Description 5 Point Performance Mgmt

Review Scales form

1. Complete these fields, click OK, and then click Cancel:
  - Scale
  - Low Value
  - High Value
  - Description
2. On the Work With Scales form, locate and select the record that you just added in the detail area, and then select Define Levels from the Row menu to define the levels for the scale.
3. On the Define Competency Levels form, complete these fields, and then click OK:
  - Low Value
  - High Value

**Scale**

Enter a code that specifies the method to use for measuring an employee level of proficiency in a particular competency. The scale uses a series of competency levels to represent standards of relative proficiency.

**Low Value**

Enter the lowest rating on the scale, level, or range.

**High Value**

Enter the highest rating on the scale, level, or range.

---

## Generating the Employee/Supervisor Relationship Table

This section provides an overview of the employee/supervisor relationship table and discusses how to set processing options for the employee/supervisor relationship build.

### Understanding the Employee/Supervisor Relationship Table

Before you open the compensation review process to the managers, you need to build the Employee/Supervisor Relationship Level table (F05840) to generate a list that shows the hierarchy of management above each active employee. This build is based on the information in the Employee Master Information table (F060116). The system deletes any existing records before writing the employee records. One record is written for each manager above the employee. The employee's immediate supervisor is written with a level 1, the supervisor's supervisor is written with a level 2, and so on.

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

The processing option must be set before you run the program. When a supervisor has given notice or is going to be terminated, you must decide when to remove the supervisor name from the employee/supervisor relationship level table. Use the Days Prior To Termination processing option to specify how many days before termination you want to exclude the supervisor from the table build. Any records for supervisors who have termination dates within the specified time period are not written to the table and are included in the exception report.

### Setting Processing Options for the Employee/Supervisor Relationship Build (R05846)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by *ZJDE* or *XJDE* prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

#### Process

This processing option specifies whether a terminated supervisor is included in the hierarchy that the workfile creates.

##### 1. Days Prior To Termination

Use this processing option to specify the number of days before a supervisor termination that the system continues to include the supervisor in the Employee/Supervisor Relationship Level table (F05840).

---

## Generating Compensation Review Work Tables

This section provides an overview of compensation review work tables and discusses how to set processing options for the compensation review work tables build.

### Understanding Compensation Review Work Tables

You run the Compensation Review Work Tables Build program (R08830) to generate a list of the employees who will be reviewed. These work tables give the managers easy access to all of the information that you have set up during their compensation review process. When you build the work tables, the system reviews each employee home company and home business unit to establish the available increase types for the employee organization. For each increase type, the increase type rules specify whether to test for the employee eligibility, calculate prorated factors, determine salary guidelines from the employee performance appraisal, calculate budget allocation, and allow job title change. You can specify whether to globally apply the budget allocation percentages for the increase types as the recommended increase amounts. The recommended increase amounts are the basis for salary planning for the supervisors and can be overridden in the compensation review if you have allowed overrides during setup.

Set the CMPSYNC common setting to *Yes* to synchronize compensation work tables. When the compensation work tables are synchronized, any changes made to the Employee Master Information table (F060116) are automatically reflected in the compensation work tables.

#### See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”

### Setting Processing Options for the Compensation Review Work Tables Build (R08830)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by *ZJDE* or *XJDE* prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

#### Default Values

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

- |  |  |
|--|--|
| <b>1. New Increase Effective Date (Required)</b> | Use this processing option to enter the new effective date of the increase, which the system uses for history tracking only. |
| <b>2. Next Increase Effective Date</b>           | Use this processing option to enter the next increase effective date.  |

## Edits

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

- |   |  |
|---|--|
| <b>1. Apply Global Increase</b>                       | Use this processing option to determine whether to apply global increases as starting recommended increases. Values are:<br><br>Blank: Do not apply global increases.<br><i>1</i> : Apply the increase budget allocations.<br><i>2</i> : Apply the increase guideline average. |
| <b>2. Clear Compensation Review Work Tables Build</b> | Use this processing option to specify whether to clear the Compensation Review Work Tables Build table (R08830). Values are:<br><br><i>0</i> : Do not clear<br><i>1</i> : Clear  |

## Print Option

This processing option specifies the print format for the Compensation Review Work Tables Build report.

- |                        |   |
|------------------------|---|
| <b>1. Print Option</b> | Use this processing option to specify the format for the report. Values are:<br><br>Blank: Print a summary of the employee count.<br><i>0</i> : Print a summary of the employee count.<br><i>1</i> : Print a summary by employee.<br><i>2</i> : Print increase details by employee. |
|------------------------|---|





## CHAPTER 3

# Setting Up Competency Management

This chapter provides an overview of security for competency levels and discusses how to:

- Set up security for competency levels.
- Set up routing instructions for competency approvals.

---

## Setting Up Security for Competency Levels

This section provides an overview of security for competency levels and discusses how to set up security for competency levels.

### Understanding Security for Competency Levels

After an employee or an employee supervisor enters competency information, another person in the organization, such as a member of the human resources department, might be responsible for assigning a competency level (the employee level of proficiency) to each competency. You can select a different person to enter competency levels for each competency type or individual competency.

You set up security for competency levels so that you can specify the type of user who has permission to update the competency levels for each competency that the employee enters. For example, you might set up the training competency type so that the training development manager is responsible for approving each employee training competencies and entering the competency levels for each employee. In this case, the employee supervisor could select the Job Comp. In An Or Form exit (P08006) from the Managers Workbench program (P08712) to enter and review employee training competencies, but the supervisors would not be allowed to enter the competency levels for training competencies.

You use the Competency Update Events program (P05106) to set up security for competency levels. This program works in conjunction with a processing option on the Resource Competency Information program (P05100) to control access to the Competency Level field. You enter codes in the Competency Update Events program that represent a type of user, such as supervisors. These codes correspond to the values that you enter in a processing option on Resource Competency Information. You set up different versions of Resource Competency Information for each type of user.

### Prerequisites

Before you complete the tasks in this section:

- Set up the defined code list for competency update codes (05/CU). The codes that you enter in this list correspond to the values that you enter in the Competency Update Event Code processing option for the Resource Competency Information program (P05100).
- Define employee competencies.

See [Chapter 20, “Working with Employee Competencies,” Defining Employee Competencies, page 219.](#)

## Form Used to Set Up Security for Competency Levels

Form Name	FormID	Navigation	Usage
Competency Update Event Revisions	W05106A	Competency Setup (G05BC4), Competency Update Events	Set up security for competency levels.

## Setting Up Security for Competency Levels

Access the Competency Update Event Revisions form.

To set up security for competency levels:

1. Complete the Competency Update Event Code field to specify a category of user who is responsible for approving competencies.  
To give the users who are assigned to this competency update event code access to the competency levels for all employee competencies, leave the remaining fields on the form blank.
2. To limit the users who are assigned to this competency update event code to a specific competency type, complete the Competency Type field.
3. To limit the users who are assigned to this competency update event code to a specific competency within the competency type, complete the Competency Code field.  
If you enter a competency code, you must enter a competency type.
4. To limit the users who are assigned to this competency update event code to a specific competency class, complete the Competency Class field.
5. Repeat steps 1 through 4 for as many competencies, competency classes, and competency types as you need to assign to a competency update event code, and then click OK.

---

## Setting Up Routing Instructions for Competency Approvals

This section provides an overview of routing instruction for competency approvals and discusses how to set up routing instructions for competency approvals.

## Understanding Routing Instructions for Competency Approvals

the organization might enable employees to use self service to enter their own competency information. After the employee enters competency information, the system sends an email message to the person who is responsible for approving the employee competencies. Typically, employee supervisors are responsible for approving the information that employees enter and for assigning a competency level (the employee level of proficiency) to each competency. In some cases, however, you might want someone other than the employee supervisors to assign competency levels. For example, the training development manager might be responsible for approving training competencies. Routing also occurs when another person adds competency information for an employee but is unable to update the competency levels.

You set up routing instructions for competency approvals so that you can identify a person, other than the employee supervisor, who is responsible for approving specific employee competencies or competency types. You can select a different person to approve each competency type or individual competency. For example, you can set up the routing instructions so that the training development manager is responsible for approving employee training competencies, and the employee supervisor is responsible for approving all other types of competencies.

When you set up routing instructions for a competency, the system sends an approval message to the person specified in the routing instructions when any other user enters information in that employee competency. For example, supervisors might be allowed to enter competency information for their employees, but they might not be responsible for approving training competency information. In this case, when a supervisor enters a training competency for an employee, the training development manager receives the approval message, just as he would if the employee entered the training competency.

If one or more competencies have no routing instructions specified, the system automatically routes approval messages for those competencies to the employee supervisor.

These examples illustrate the routing instructions for competency approvals, as specified on the Competency Approval Routing Revision form (W05107A):

- If the Send Msg Flag (Send Message Flag) field is set to *Yes*, and if the Address Number field contains a value, then the competency message is sent to the individual indicated in the Address Number field.
- If the Send Msg Flag field is set to *Yes*, and if the Address Number field does not contain a value, then the competency message is sent to the person who is specified as the employee supervisor in the Employee Master Information table (F060116).
- If the Send Msg Flag field is set to *Yes*, and the employee does not have a supervisor, complete the 2nd Address Number field to specify who will receive the competency message.
- If you do not want to send a message, set the Send Msg Flag field to *No*.

---

**Note.** You can complete only one of the address number fields on the Competency Approval Routing Revisions form. When either field contains a value, the other is disabled.

---

## Form Used to Set Up Routing Instructions for Competency Approvals

Form Name	FormID	Navigation	Usage
Competency Approval Routing Revision	W05107A	Competency Setup (G05BC4), Competency Update Approval Routing	Set up routing instructions for competency approvals.

## Setting Up Routing Instructions for Competency Approvals

Access the Competency Approval Routing Revision form.

To set up routing instructions for competency approvals:

1. Complete the Organizational Business Unit field to limit the approver authority to only those employees who are in a particular organizational business unit.
2. To enter routing instructions for a particular competency type, complete the Competency Type field:
3. To enter routing instructions for a particular competency code within a competency type, complete the Competency Code field:

If you enter a competency code, you must enter a competency type.

4. To indicate whether the system should send an email as a competency notification, complete the Send Msg Flag field.

If you set this flag to *Yes*, you must complete step 5 or 6.

5. To indicate who will receive email notification, complete the Address Number field.

If left blank, the system sends the approval to the employee supervisor. Complete this field to route all approvals to someone other than the supervisor.

6. If the employee does not have an immediate supervisor, complete the 2nd Address Number field with the address book number of the person whom you want to receive the email notification:

You can complete only one of the address number fields. When either field is completed, the other is disabled.

7. Repeat steps 1 through 6 for as many routing instructions as you need to add, and then click OK.

**Send Msg Flag** (send message flag)

Enter a code that specifies whether the system sends an email message as a competency notification. Values are:

*0*: No, do not send a message.

*1*: Yes, send a message.

**2nd Address Number**

Enter the address book number of the person whom you want to receive the email notification if the employee does not have an immediate supervisor.

## CHAPTER 4

# Setting Up Performance Management

This chapter provides an overview of the setup required for performance management, lists prerequisites and common fields, and discusses how to:

- Define scales for performance management.
- Define the approval hierarchy.
- Set up employee goal suggestions.
- Set up traditional appraisal templates.
- Define performance management company constants.
- Define business unit overrides for performance appraisals.
- Define performance management appraisal type overrides.
- Set up security.
- Run table conversions for appraisals without Employee Self Service.

---

## Understanding Performance Management Setup

To implement the performance management features of Human Resources, you must define performance appraisal methods as either competency based or traditional. You define these methods at the system level; and you can override the settings by company, business unit, or appraisal type. Defining the performance appraisal methods at these levels enables you to implement performance management for either the whole organization or for parts of the organization in steps. For example, you can implement a competency based method for a selected business unit and use the traditional method to automate text based appraisals for other business units. You can also define a competency based appraisal method for appraisals created by managers and a traditional appraisal method for employee self appraisals.

The system includes a default company definition that specifies a traditional performance appraisal method. You can redefine this method description, add additional method descriptions, or change this method to a competency based method. You cannot delete the basic company definition.

If you are planning to implement a competency based performance appraisal method or a combination of competency based and traditional methods, you must first define the organizational structures for job competencies and enter background competency information.

You can also define whether all, part, or none of the organization will complete the appraisal process using Employee Self Service (ESS). You can select the Manager Signoff for EE option to specify that a delegate can approve or contest an appraisal on an employee's behalf, rather than having the employee access the appraisal using ESS and approving or contesting the appraisal on his or her own. You can specify that managers can approve or contest appraisals on behalf of employees at these levels:

- Company level

You can specify that all companies (Company 00000) or specific companies allow approval on an employee's behalf by selecting this option in the Performance Management Company Constants program.

- Business unit level

You can specify that specific business units allow approval on an employees behalf by selecting this option in the Performance Management Business Unit Overrides program.

- Appraisal type level

You can specify that specific appraisal types allow approval on an employees behalf by selecting this option in the Performance Management Appraisal Type Overrides program.

As an alternative to setting up manager sign-off information at each level, you can run table conversion programs to automatically set the manager sign-off permissions across all companies, business units, or appraisal types.

---

## Prerequisites

Before you complete the tasks in this chapter:

- Define organizational structures for job competencies.

See [Chapter 19, “Defining Organizational Structures for Job Competencies,” page 203.](#)

- Enter job competency information.

See [Chapter 22, “Working with Job Competency Information,” page 249.](#)

- Attach jobs and job competencies to the hierarchical levels within the organizational structure that you created for job competencies.

See [Chapter 23, “Working with Competencies in Organizational Structures,” page 259.](#)

- Assign employee competency information.

See [Chapter 20, “Working with Employee Competencies,” page 215.](#)

- If you want the system to provide default job competency weights when they are not already assigned, you must set data item DJCW (Default Job Competency Weights?) to *Yes* in the HRM Common Display Settings program (P05004).

When this value is set to *No*, the default value for competency weights that are not already assigned is zero.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

---

## Common Fields Used in this Chapter

### Management Appraisal Method

Enter a code that indicates whether the method used by managers to appraise employees is competency based or uses traditional media based templates. If you leave this field blank, the system uses the default value 0. Values are:

	<p><i>1</i>: Management appraisal is competency based.</p> <p><i>0</i>: Management appraisal uses traditional media based templates.</p>
<b>Manager Signoff for EE</b>	Select this option if you want to allow a manager or human resources representative to approve or contest an appraisal on an employee's behalf. You can set this option at the company, business unit, or performance appraisal type level. Typically, you select this option if you do not use ESS, which enables employees to approve or contest their own appraisals. If you select this option for any part of the organization, you should keep hard copies of all appraisals with handwritten signatures.
<b>Supervisor Rating Scale</b>	Enter a code that represents a system of measuring an employees level of proficiency. The scale uses a series of levels to represent standards of relative proficiency.
<b>Required Level</b>	Enter the rating that indicates that the employee is performing as expected for his or her job. When the supervisor assigns a rating below this level, the performance of the employee needs improvement. If the supervisor assigns a rating above this level, the performance of the employee exceeds expectations.
<b>Self Appraisal Required</b>	<p>Enter a code that indicates whether employees complete self appraisals as part of the performance appraisal process. Values are:</p> <p><i>1</i>: Yes, employees complete self appraisals as part of the performance appraisal process.</p> <p><i>0</i>: No, employees do not complete self appraisals.</p>
<b>Self Appraisal Method</b>	<p>Enter a code that indicates whether the employee self appraisal is competency based or uses traditional media based templates. If you leave this field blank, the system uses the default value <i>0</i>. Values are:</p> <p><i>1</i>: Employee self appraisal is competency based.</p> <p><i>0</i>: Employee self appraisal uses traditional media based templates.</p>
<b>Employee Rating Scale</b>	Enter a code that represents a system of measuring an employee level of proficiency. The scale uses a series of levels to represent standards of relative proficiency.
<b>Required Self Appraisal Level</b>	Enter the level that indicates that the employee is meeting performance expectations. If the employee gives himself a rating below this level, it indicates that he believes there is room for improvement. If the employee gives himself a rating above this level, it indicates that he believes his performance exceeds expectations.

---

## Defining Scales for Performance Management

This section lists prerequisites and discusses how to define scales for performance management.

## Understanding Scales for Performance Management

A competency rating scale is a method of measuring an employee level of proficiency in a particular skill area or job assignment. One or more competency rating scales must be associated with performance management. You might use different competency rating scales to measure different employee competencies. For example, if an employee must pass an internal certification process as a prerequisite for promotional consideration, an appropriate competency rating scale might include only pass or fail, or a scale of two. When an employee competency requires measured progress toward a goal, a competency rating scale of five or ten might be appropriate.

For performance management, you typically must enter new competency rating scales that measure employee performance progress. If only one competency rating scale exists for competency management, and that scale is applicable to all performance management situations, then you can reuse the same scale in performance management. If more than one scale exists for competency management, then you must define one or more competency rating scales for performance management.

When you define rating scales for performance management, you must specify the rating level that represents 100 percent of the organizational performance expectation. For example, if you use a rating scale of 10, you might define 100 percent as a rating level of 5. To apply this approach, a manager might rate an employee at a level of 6 for a specific competency, which indicates that the employee is performing above 100 percent of the organizational expectation.

You use the Scale Information program (P05103) to create new competency rating scales for performance management.

## Prerequisites

Before you complete the tasks in this section:

- Review any rating scales that might exist for competency management.

You use the Scale Information program (P05103) to review existing competency rating scales.

See [Chapter 20, “Working with Employee Competencies,” Defining Scales for Employee Competencies, page 216.](#)

- Review the user-defined code list for type of increase codes (06/RV).

The codes that you enter in this list correspond to the values that you select in the Create Performance Appraisals program (P087711).

- Review the user-defined code list for the relation to employee codes (08/RI).

The codes that you enter in this list correspond to the values that you select in the Daily Diary program (P087715).

- Review the user-defined code list for the originator type codes (05/G2).

The codes that you enter in this list correspond to the values that you enter in the Audience Flag processing option for the Create Performance Appraisals and Employee Performance Appraisals (P087712) programs.

- Review these user-defined code lists for the available values that you can use when you set up performance management information:
  - Goal status (05/G3)
  - Approval type (05/AP)
  - Gap status (08/GT)
  - Appraisers role (08/AL)



- Appraisal status (08/SA)

The values in these lists cannot be changed. Adding additional values to this list requires that you customize the system.

---

## Defining the Approval Hierarchy

This section provides an overview of the approval hierarchy for performance management and discusses how to use the Define Approval Hierarchy program (P05844).

### Understanding the Approval Hierarchy

Human Resources also automates the approval process for performance appraisals. When a manager completes an appraisal, the system routes it to the person or people whom the administrator designates for review. You can specify any number of management levels for review. You can also specify a highest, final level of review. All designated managers must complete their reviews before the system forwards a message to the employee indicating that the appraisal is ready for review.

You use the Define Approval Hierarchy program (P05844) to establish the approval hierarchy before creating new appraisals. You must define at least one performance appraisal UDC so that the company can include the required approval levels.

The automated approval feature, which uses a hierarchy of approving managers, depends on accurate information about the parent child relationships in the organization. The Employee/Supervisor Relationship Build report (R05846) sets up and compiles this information for you. You typically set up this report to run daily. If this report is not set up or is not running daily, then select the Employee/Supervisor Relationship Build report from the Performance Management Advanced and Technical menu (G08PM3) and set up the report to run daily.

### See Also

[Chapter 4, “Setting Up Performance Management,” Defining the Approval Hierarchy, page 33](#)

---

## Setting Up Employee Goal Suggestions

This section provides an overview of employee goal suggestions, lists prerequisites, and discusses how to set up employee goal suggestions.

### Understanding Employee Goal Suggestions

You use the Goal Suggestions program (P05105A) to set up possible goals that managers and employees might use when they are creating a career development plan. You can add one or more UDC codes to create additional suggestion types. After creating a suggestion type, you can add a list of suggestions that an employee might use to accomplish a goal.

On the employee performance appraisal, managers and employees can select an option to create a career development plan to create goal suggestions. You can create suggestion types and ideas for work related goals, as well as for an employee personal goals that might be beyond the scope of the company.

## See Also

*JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

## Prerequisites

Before you complete the task in this section:

- Review the user-defined code list for goal type codes (05/GT).

The codes that you enter in this list correspond to the values that you select in the Goal Action Plans program (P05117) for competency based or traditional appraisals.

- Review the user-defined code list for suggestion type codes (05/G1).

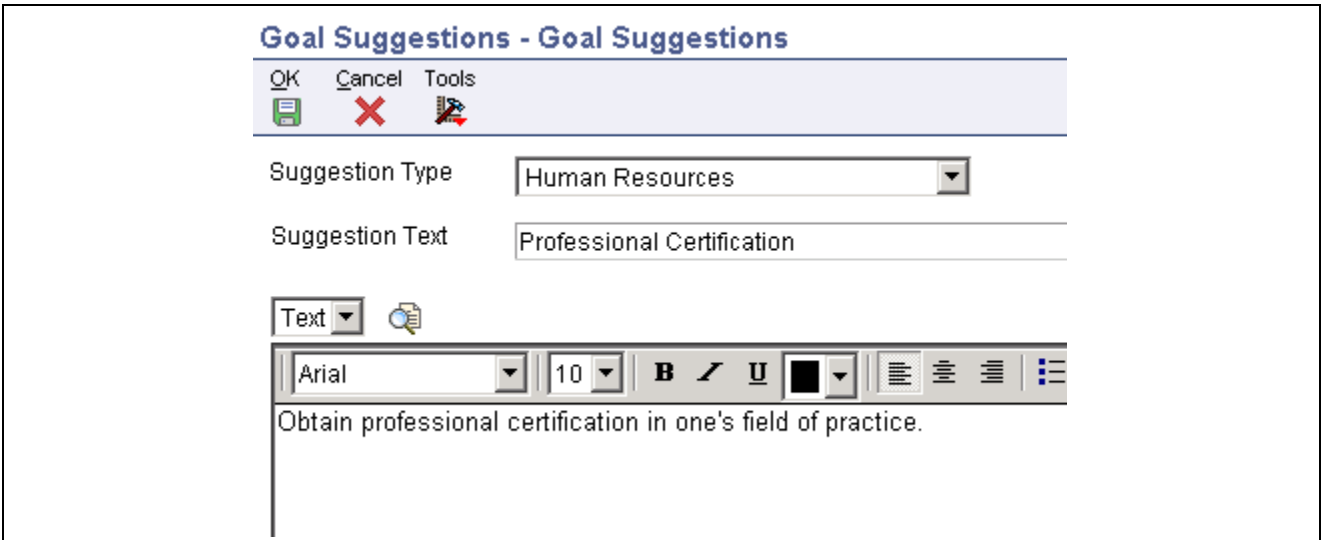
The codes that you enter in this list correspond to the values that you select in the Goal Action Plans program for traditional appraisals.

## Form Used to Set Up Employee Goal Suggestions

Form Name	FormID	Navigation	Usage
Goal Suggestions	W05105AE	Performance Management Setup (G08PM4), Goal Suggestions  On the Work With Goal Suggestions form, click Find to review or modify an existing suggestion, or click Add to create a new one.	Enter employee goal suggestions.

## Setting Up Employee Goal Suggestions

Access the Goal Suggestions form.



Goal Suggestions form

1. Complete the Suggestion Type field

To enter suggestions for an employee competency, you must use the Employee Competency program (P05104).

2. To add a new suggestion, complete the Suggestion Text field, and type the new suggestion into the notes field.

You can also attach a media object or URL that might support the suggestion.

3. To change an existing suggestion, modify the Suggestion Text field, modify the text in the notes area, and then click OK.

<b>Suggestion Type</b>	Enter a user-defined code (05/G1) that identifies the type of goal suggestion with which you are working and how you want to accomplish the goal.
<b>Suggestion Text</b>	Enter a short description of the goal suggestion. If a longer description is needed, you can create a media object attachment.

---

## Setting Up Traditional Appraisal Templates

This section provides an overview of traditional appraisal templates and discusses how to set up traditional appraisal templates.

### Understanding Traditional Appraisal Templates

The traditional employee appraisal is similar to the paper based systems that many companies currently use. You create and store media objects, often text based templates, in the system software. For traditional appraisals, you can also use the daily diary and automated approval features of the human resources software.

You can also use alternate media objects with the traditional appraisal approach. For example, you can attach to the appraisal any type of file that the system supports, or you can enter a URL that connects a user to an appraisal form that is located on the company intranet.

The system supplies the default template record for company 0000. You can customize this template or you can create a new one. You cannot delete this record. If you do not create an additional template, the system uses the default template record.

### See Also

*JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

## Form Used to Set Up Traditional Appraisal Templates

Form Name	FormID	Navigation	Usage
Performance Appraisal Templates	W08776A	<p>Performance Management Setup (G08PM4), Traditional Appraisal Template</p> <p>On the Work With Appraisal Templates form, click Find to review or modify an existing template, or click Add to create a new one.</p> <p>Click the Media Object button to attach an appraisal media object, attach the media object, and then click OK.</p>	Set up traditional appraisal templates. You can modify existing review types to suit the company or you can add new ones.

## Setting Up Traditional Appraisal Templates

Access the Performance Appraisal Templates form.

**Traditional Appraisal Template - Performance Appraisal Templates**

Work With Appraisal Templates | **Performance Appraisal Templates**

OK Cancel Previous Next Tools

Type Review  Annual Review

Performance Appraisers Role  Employee

Home Company  Worldwide Company

Job Group

Organizational Business Unit

Language

Text

Times New Roman 12 **B** *I* U

**Employee Self-Assessment**

Performance Review Period: \_\_\_\_\_

Employee Name \_\_\_\_\_

Date \_\_\_\_\_

Job Title \_\_\_\_\_

Performance Appraisal Templates form

### Type Review

Enter a user-defined code (06/RV) that specifies the type of performance review to be completed.

**Performance Appraisers Role**

Enter a user-defined code (08/AL) that indicates the role for the user of this template. This person might be a supervisor or the employee.

**Job Group**

Enter a grouping of similar jobs that are linked together to form a unit. The jobs might be similar in functions within the organization, job duties, tasks, responsibilities, job evaluation methods, or pay philosophies. Typical job units are clerical or administrative; technical, engineering, scientific, and professional; factory jobs; management; and executive.

Consider dividing groups into separate populations based on the differences between exempt and non exempt employees, according to the rules and regulations of the Fair Labor Standards Act. For example, consider assigning all the managers to the Managers job group.

A job category defines a specific job, and all related job categories are classified by a job group. You can define job group codes using UDC table 08/JG.

**Language**

Enter a user-defined code (01/LP) that specifies the language to use on forms and printed reports. Before you specify a language, a code for that language must exist at either the system level or in the user preferences.

The system uses the language information that is based on the system sign on. You can select a different language if you are creating appraisal templates in another language.

---

## Defining Performance Management Company Constants

You can refine the performance appraisal method by defining overrides for one or more companies within the organization. You can also change the default performance appraisal method that is set up for company 0000. If you do not further refine the performance management method by creating override records for additional companies, business units, or templates, the system uses the settings for the default company 0000.

This section discusses how to define company constants for performance management.

### Form Used to Define Performance Management Company Constants

Form Name	FormID	Navigation	Usage
Performance Appraisal Company Constants Setup	W08771A	Performance Management Setup (G08PM4), Performance Mgmt Company Constants	Define company constants for performance management.

### Defining Performance Management Company Constants

Access the Performance Appraisal Company Constants Setup form.

**Performance Mgmt Company Constants - Performance Appraisal Company Constants Setup**

OK Find Delete Cancel Form Tools

Records 1 - 3 [Customize Grid](#)

<input type="checkbox"/>	<input type="checkbox"/>	Co	Company Description	Management Appraisal Method	Management Appraisal Method Description	Supervisor Rating Scale
<input checked="" type="checkbox"/>		00000	Worldwide Company	0	Traditional Method	DEFAULT
<input type="checkbox"/>		00001	Financial/Distribution Compar	1	Competency Based Method	PERF
<input type="checkbox"/>					Not Required	

Performance Appraisal Company Constants Setup form

## Defining Business Unit Overrides for Performance Appraisals

You can refine the performance appraisal method by defining overrides at the business unit level. This adjustment enables the company to use one performance appraisal method in one business unit and a different method in another business unit.

This section discusses how to define business unit overrides for performance appraisals.

### Form Used to Define Business Unit Overrides for Performance Appraisals

Form Name	FormID	Navigation	Usage
Performance Appraisal Business Unit Overrides	W08772A	Performance Management Setup (G08PM4), Performance Mgmt Bus Unit Overrides	Enter business unit overrides for performance appraisals.

## Defining Business Unit Overrides for Performance Appraisals

Access the Performance Appraisal Business Unit Overrides form.

**Performance Mgmt Bus Unit Overrides - Performance Appraisal Business Unit Overrides**

OK Find Delete Cancel Form Tools

Records 1 - 3 [Customize Grid](#)

<input type="checkbox"/>	<input type="checkbox"/>	Organizational Business Unit	Org. BU Description	Management Appraisal Method	Management Appraisal Method Description
<input type="checkbox"/>		5100	Potomac Hotel	1	Competency Based Method
<input type="checkbox"/>		6100	Protective Services	0	Traditional Method
<input type="checkbox"/>					Not Required

Performance Appraisal Business Unit Overrides form

## Defining Performance Management Appraisal Type Overrides

This section provides an overview of performance management appraisal type overrides and discusses how to define performance management appraisal type overrides.

### Understanding Performance Management Appraisal Type Overrides

In addition to defining the performance appraisal method with business unit overrides, you can further refine the method by defining overrides at the appraisal type level. Using this approach, the company can implement different performance appraisal methods that you can use for various types of reviews. For example, you might want to use different performance appraisal methods for these types of reviews:


- Merit cycle
- 90-day start up
- Annual
- Contractual

### Form Used to Define Performance Management Appraisal Type Overrides







Form Name	FormID	Navigation	Usage
Appraisal Type Overrides Setup	W08773A	Performance Management Setup (G08PM4), Performance Mgmt Appraisal Type Override	Define performance management appraisal type overrides.

### Defining Performance Appraisal Type Overrides






Access the Appraisal Type Overrides Setup form.

**Performance Mgmt Appraisal Type Override - Appraisal Type Overrides Setup** 

OK Find Delete Cancel Form Tools

Records 1 - 3 [Customize Grid](#)

		Type Review	Type Review Description	Co	Company Description	Organizational Business Unit	Org. BU Description
<input type="checkbox"/>		9	90 Day Start Up	00050	Project Management	6100	Protective Services
<input type="checkbox"/>		A	Annual Review	00050	Project Management		
<input type="checkbox"/>			None Assigned				

Appraisal Type Overrides Setup form

---

## Setting Up Security for Performance Management

This section provides an overview of security for performance management and discusses how to set up performance management security.

### Understanding Security for Performance Management

When a manager creates and reviews a performance appraisal, the system automatically revises the employee competency ratings, based on the security settings. For example, you can set up system security so that a manager can revise appropriate employee competency ratings that are related to performance issues, but you can reserve the ability to change education competencies for the human resources department. You must create and define values in the Competency Update Codes UDC (05/CU) so that managers can update appropriate competency levels.

#### See Also

Chapter 3, “Setting Up Competency Management,” Setting Up Security for Competency Levels, page 25

### Setting Up Performance Management Security

After creating values in UDC 05/CU, you use this code in the processing options for the Employee Performance Appraisals program (P087712).

You use the Competency Update Events program (P05106) to define the authority granted under each UDC value when setting security for competency approvals.

---

## Running Table Conversions for Appraisals Without Employee Self Service

This section provides an overview of appraisal table conversions and discusses how to set processing options for appraisal table conversions.

### Understanding Appraisal Table Conversions

If the organization uses the JD Edwards EnterpriseOne performance appraisal feature but does not allow employees to review, approve, or contest the appraisals using ESS, you can set up the system to allow managers or human resources representatives to sign off on the appraisals on behalf of the employees. Before you can complete the appraisal process, you must define which parts of the organization allow managers to sign off for employees. You can use these programs to specify which companies, business units, or appraisal types allow manager sign-off:

- CBPA System Company Constants (P08771).
- CBPA System Business Unit Overrides (P08772).
- CBPA Appraisal Type Overrides (P08773).

Alternatively, you can use these table conversion programs to automatically set the manager sign-off value for all companies, business units, or appraisal types:

- Populate F08771A program (R8908771A)



If you want to set the default value for all companies, you run this program to populate the CBPA System Company Constants Tag table (F08771A). The system creates one record in the F08771A table for each record in the F08771 table, and attaches the default value for the Manager Signoff for EE option to each record. You specify the default value in the processing options. After you run this program to populate the F08771A, if you want to change the value, you must change it using the CBPA System Company Constants program (P08771).

- **Populate F08772A program (R8908772A)**

If you want to set the default value for all business units, you run this program to populate the CBPA System Business Unit Overrides Tag table (F08772A). The system creates one record in the F08772A table for each record in the F08772 table, and attaches the default value for the Manager Signoff for EE option to each record. You specify the default value in the processing options. After you run this program to populate the F08771A, if you want to change the value, you must change it using the CBPA System Business Unit Overrides program (P08772).

- **Populate F08773A program (R8908773A)**

If you want to set the default value for all appraisal types, you run this program to populate the CBPA System Appraisal Type Overrides Tag table (F08773A). The system creates one record in the F08773A table for each record in the F08773 table, and attaches the default value for the Manager Signoff for EE option to each record. You specify the default value in the processing options. After you run this program to populate the F08771A, if you want to change the value, you must change it using the CBPA Appraisal Type Overrides program (P08773).

If you have existing performance appraisals, you can run the Populate F087711A table conversion program (R89087711A) to update the manager sign-off value on appraisals that have not yet been sent for manager approval (status 2). You can use data selection to specify which appraisals should be set using the default sign-off value. You run this program to set the manager sign-off value for existing performance appraisals. The system creates one record in the CBPA Appraisal Header Tag table (F087711A) for each record in the F087711 table, and attaches the default value for the Manager Signoff for EE option to each record. You specify the value in the processing options.

---

**Note.** You must generate the F08771A, F08772A, F08773A and F087711A to the database before you run these programs. These programs can be run in any order.

Additionally, if you do not want to change the sign-off permissions for all existing appraisals, you use data selection to run these table conversion over only those appraisals that you want to change.

---

## Setting Processing Options for Appraisal Table Conversions.

Access each of these programs using Batch Versions (fast path *BV*), and set the processing option value before you run these programs:

- R8908771A
- R8908772A
- R8908773A
- R89087711A

### Default

#### **Manager Can Signoff On Employee Behalf**

Use this processing option to specify whether the organization allows managers to approve or contest performance appraisals on behalf of their employees. Typically, you allow manager sign off if the organization does

not use ESS, which enables employees to review, approve, or contest their own appraisals. Values are:

*0*: No, do not allow manager sign off.

*1*: Yes, allow manager sign off.

## CHAPTER 5

# Setting Up Pay Information

This chapter provides overviews of pay information and employee compensation, lists common fields, and discusses how to:

- Set up pay rate tables.
- Set up pay grades.
- Set up pay grade steps.
- Set up pay range formulas.
- Define job evaluation factors.

---

## Understanding Pay Information

Before you can use the system to define the jobs within the organization, you must define pay and job evaluation information. You define pay information to set up the pay ranges or amounts that are associated with each job. You define job evaluation information to define the methods that you use to evaluate jobs. You use job evaluations to determine equitable pay ranges for jobs. You also can set up a cross-reference table by business unit to define default job information for employees in a specific business unit.

### Prerequisites

Before you complete the tasks in this chapter:

- Set up the user-defined codes for jobs.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up User-Defined Information,” User-Defined Codes for Human Capital Management Systems.

- Review the pay range and step information that you have set up in the system options.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

## Understanding Employee Compensation

Before you enter employee compensation, you must select an appropriate pay rate source based on the business purpose and organizational structure. The type of compensation information that you must enter for each employee and how the system calculates salaries or hourly rates depends on the pay rate source that you have set up in the system options.

The available pay rate sources include:

- Pay rate table.
- Pay grade step table.
- None (no default pay rate source).

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

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

Component	Description
Salary	The amount of money that the employee earns in one year.
Hourly Rate	The amount of money that an employee earns in one hour.
Standard Hours per Year	The number of hours per year that an employee works.

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

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

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

When you need to associate pay rates with a specific group of employees, such as members of a union, you can use the pay rate table as the default pay rate source. The pay rate table, as set up in the Union Rates Master Revisions program (P059121), associates job types and steps with union codes. Therefore, specific hourly rates are attached to union codes when you set up hourly rates with job types and steps. The compensation information that you enter in this program is copied to the forms that you use when you hire employees.

The pay rate table is frequently used by the public sector and other industries that are closely linked to unions.

Pay rate tables are useful for positions that are compensated based on a flat rate, rather than a pay range. Pay rates can be used with hourly jobs, for which an employee is paid a set hourly rate regardless of performance or seniority. For use with unions, pay rate ranges usually need to accommodate only seniority adjustments. However, the use of pay rates can include performance adjustments. To recognize performance, you need to set up a pay type, such as bonus pay, or change the employee job type to a job type that is attached to an increased pay rate.

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

On the Basic Compensation form (W0801CMPB), the system supplies a default value for standard hours per year, which you can override, if necessary. Overriding the standard hours per year does not affect an employee hourly rate.

This table illustrates the guidelines for changing the values on the Basic Compensation form:

Value	Impact
Hourly rate	You cannot change the hourly rate for an employee. The system supplies the default hourly rate from the pay rate table.
Standard hours per year	When you change the standard hours per year for an employee, the hourly rate does not change.  The system recalculates the annual salary for the employee.
Full time equivalents (FTE)	When you change the FTE field for the employee on the Basic Compensation form, you must also remove the value entered for standard hours per year. The system adjusts the employee standard hours per year. The hourly rate remains the same.

### Overriding the Default Pay Rate Source

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

- Leave the Union Code field blank.
- Enter a union code that is not included in the pay rate table.

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

To ensure that all of the employees working in a job receive the same rate of pay, and to provide for progression within a pay grade, you can use the Pay Grade Step Table program (P082003) as the pay rate source.

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

Using the Pay Grade Step Table program is convenient for a company whose structure consists of many positions that allow for progressive advancement. Using the Pay Grade Step Table program to enter compensation also saves data entry time and reduces calculation errors and compensation inconsistencies.

In the Pay Grade Step Table program, a pay grade consists of a group of jobs that are equal in pay range. For example, assume all junior accountant positions and junior graphic artists in a company are in pay grade A, and pay grade A represents a pay range of 30,000 to 40,000 USD. Therefore, all junior accountant and junior graphic positions need to be compensated within this pay range.

However, within each pay grade, you set up pay grade steps that represent a specific salary or hourly rate. For example, suppose that pay grade A includes pay steps A1, A2, and A3. Employees in step A1 receive 33,000 USD, employees in step A2 receive 36,000 USD, and employees in step A3 receive 40,000 USD.

Setting up pay grade steps lets you automate the process of entering compensation information for employees. When you enter employee information, the system automatically calculates the employee salary or hourly rate, based on the pay grade step that you enter for the employee.

When you define pay grade steps, you can also save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then you enter a pay rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step pay rate multiplier.

You might also prefer to use pay grades without using pay grade steps to calculate compa-ratios for pay grades. Compa-ratios are helpful calculations for management to determine equitable pay increases for employees.

When you hire an employee, do not complete the Job Type or Job Step fields in the Employee Organizational Assignments program (P0801ORG). Instead, complete the Pay Grade and Pay Step fields on the Basic Compensation form (W0801CMPB). The system automatically updates the Basic Compensation form with the appropriate salary, hourly rate, and hours per year from the Pay Grade Step table.

This table illustrates the guidelines for changing the values on the Basic Compensation form:

Value	Impact
Pay grade step	When you change the employee pay grade step, the system replaces the employee hourly rate, salary, and standard hours per year with the corresponding information from the pay grade step table.
Hourly rate	You cannot change the hourly rate for an employee. The system supplies the default hourly rate from the table.
Standard hours per year	When you change the standard hours per year for an employee, you must also delete the employee salary. The employee hourly rate does not change. The system recalculates the employee salary, based on the new standard hours per year and the hourly rate for the pay grade step.
Salary	When you change the employee salary, the hourly rate does not change. The system recalculates the employee standard hours per year, based on the new salary and the hourly rate for the pay grade step.
FTE	When you change the FTE for an employee, you must also delete the employee salary and standard hours per year. The system adjusts the employee standard hours per year and salary, based on the pay grade step.

## Overriding the Default Pay Rate Source

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

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

If the organization consists of employees whose salaries and hourly rates are based on a pay range rather than specific amounts for a job or pay grade step, you can select not to use a default pay rate source. If you select this option, you will need to enter each salary or hourly rate individually.

This is a good option for companies that do not use predefined rates for all employees in like jobs. This option might also be preferable for an organization with few positions and few job types.

When you add a new employee, you must enter either a salary or an hourly rate on the Basic Compensation form (W0801CMPB). The system provides a default value for standard hours per year, which you can override, if necessary. When you enter a salary for an employee, the system calculates an hourly rate, based on the salary and standard hours per year. Conversely, when you enter an hourly rate, the system calculates the salary.

This table illustrates the guidelines for changing the values on the Basic Compensation form (W0801CMPB):

Value	Impact
Salary	When you change the employee salary, the system recalculates the hourly rate, based on the new salary and the standard hours per year for the employee.
Standard hours per year	When you change the standard hours per year for an employee, the system recalculates the hourly rate, based on the new standard hours per year and the existing salary.
FTE	When you change the FTE for an employee, the salary and hourly rate calculations are not affected.

This table illustrates the guidelines for changing the values on the Basic Compensation form (W0801CMPB):

Value	Impact
Hourly rate	When you change the hourly rate for an employee, the standard hours per year are not affected. The system recalculates the annual salary for the employee, based on the new hourly rate and the standard hours per year for the employee.
Standard hours per year	When you change the standard hours per year for an employee, the system recalculates the salary, based on the new standard hours per year and the employee hourly rate.
FTE	When you change the FTE for an employee, the salary and hourly rate calculations are not affected.

### See Also

[Chapter 5, “Setting Up Pay Information,” Setting Up Pay Rate Tables, page 48](#)

[Chapter 5, “Setting Up Pay Information,” Setting Up Pay Grades, page 51](#)

[Chapter 5, “Setting Up Pay Information,” Setting Up Pay Grade Steps, page 54](#)

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide, “Setting Up System Options”*

## Common Fields Used in This Chapter

<b>Next Pay Grade</b>	Enter the next higher pay grade in an employee progression path.
<b>Next Pay Grade Step</b>	Enter the next pay grade step in an employee progression path.

<b>Pay Class (H/S/P)</b> (Pay Class [hourly/salaried/piecework])	Enter a code that specifies how an employee is paid. Valid codes are: <i>H</i> : Hourly <i>S</i> : Salaried <i>P</i> : Piecework
<b>Std Hrs/Day</b> (standard hours/day)	Enter the number of hours that the employee normally works in one day. If you leave this field blank, the default is the standard number of hours per day that you defined in the payroll company constants (company options, in JD Edwards EnterpriseOne).  For example, if, in the payroll company constants (company options), you specified 8 as the standard number of hours per day, but a few employees normally work 7 hours per day, enter 7 in this field for those employees.

---

## Setting Up Pay Rate Tables

This section provides an overview of pay rate tables and discusses how to set up pay rate tables.

### Understanding Pay Rate Tables

You set up pay rate tables to associate pay rates with a specific group of employees. You must set up pay rate tables if you have chosen pay rate table as the pay rate default source in the HRM System Options (Human Resource Management System Options) program (P05001S).

The setup of pay rate information includes:

- Pay Rate Tables - You set up pay rate tables to associate pay rates with a specific group, such as a union.
- Union local and job cross references - You set up local and job cross references to cross reference parent unions with local unions.

You set up hourly rates by job type and job step. Any amounts that you enter in the pay rate tables can override rates that you set up in the Employee Master Information table (F060116). As you enter time for various job types and job steps, the system locates the appropriate hourly rate.

The system uses pay rate tables in conjunction with the time entry programs. You must use a processing option in the appropriate time entry program to specify that the system use the pay rate tables.

Setting up pay rate tables enables you to:

- Make rates specific to a job, business unit, or shift.
- Define up to five different rates per job type and step.
- Create workers compensation codes for each job type and step.
- Define a flat burden factor for each job type and step.
- Define a recharge billing rate.

You can use Union Rates Master Revisions program (P059121) to set up and revise pay rates tables. The program enables you to set up or revise pay rate tables one at a time or in groups. This task enables you to set up pay rate tables in groups. To set up a single pay rate table, you need to find a record on the Work with Union Rates form, and then select Single Revision from the Row menu.



Setting up pay rate tables updates the Employee Master Information table and the Union Rates File table (F069126).

## Form Used to Set Up Pay Rate Tables

Form Name	FormID	Navigation	Usage
Revise Multiple Rcds Union Rates (Revise Multiple Records Union Rates)	W059121C	Rate Derivation Setup (G05BRD4), Union Rates Master Revisions  On the Work With Union Rates form, click Add.	Set up pay rate tables.

## Setting Up Pay Rate Tables

Access the Revise Multiple Rcds Union Rates form.

**Union Rates Master Revisions - Revise Multiple Rcds. Union Rates**

Work with Union Rates | **Revise Multiple Rcds. Union Rates**

OK | Delete | Cancel | Form | Previous | Next | Tools

Union Code: 1000 | *Machinists* | Wage Decision No:

Business Unit:

Shift Code:

Effective Dates - From: 01/01/00 | Thru: 12/31/10

**Apply Increases to Which Rates:**

☒ Hourly Rates | ☐ 1st Burden Rates

☐ Billing Rates | ☐ 2nd Burden Rates

**Calculate Which Grid Column(s):**

☒ Hourly | ☐ Regular | ☐ Double | ☐ Triple | ☐ Holiday

Percent to Apply:  | - OR -> Amount to Apply:

**Records 1 - 3** | [Customize Grid](#)

	Job Type	Job Step	Job Type/Step Description	Hourly Rate	Regular Overtime	Double Overtime	Triple Overtime
<input type="checkbox"/>	8R-1	J	Maintenance Mechanic Junior	20.500	30.750		
<input type="checkbox"/>	8R-3	J	Maintenance Instruc. Junior	21.000	31.500		
<input type="checkbox"/>							

Revise Multiple Rcds. Union Rates form

To set up pay rate tables:

1. Complete these fields:

- Union Code
- From:
- Thru:
- Job Type
- Job Step

- Hourly Rate

When you complete only the Hourly Rate field, the system uses the pay type multiplier for the overtime rates.

2. Complete these optional fields:

- Business Unit
- Shift Code

3. Select one of these options to select a group of rates to enter:

- Hourly Rates
- Billing Rates
- 1st Burden Rates
- 2nd Burden Rates

The fields that appear in the detail area vary depending on the option that you select.

4. To enter hourly overtime rates, complete one or more of these fields:

- Regular Overtime
- Double Overtime
- Triple Overtime
- Holiday Pay

When you complete only the overtime rate fields, the system does not use the pay type multiplier from Pay Type Revisions.

5. To enter billing rates, complete one or more of these fields:

- Billing Rate
- Billing Regular
- Billing Double
- Billing Triple
- Billing Holiday

When you enter a value for billing rates, the system does not use the pay type multiplier.

6. To enter the first group of recharge burden rates, complete one or more of these fields:

- Rchg Burden Rate (Recharge Burden Rate)
- Burden-1 Regular
- Burden-1 Double
- Burden-1 Triple
- Burden-1 Holiday

7. To enter the second group of recharge burden rates, complete one or more of these fields:

- Burden-2 Regular
- Burden-2 Double
- Burden-2 Triple
- Burden-2 Holiday

8. Complete these optional fields:
  - Piecework Rate
  - Wrk Comp Code (Workers Compensation Code)
  - Wrk Comp SubClass (Workers Compensation SubClass)
  - Labor Dist. Multiplier (Labor Distribution Multiplier)
  - Labor Dist. Method (Labor Distribution Method)
9. Repeat steps 1 through 8 for each record that you want to add to the same union code.
10. When you finish entering records, click OK.

**From:** Enter the date on which an address, item, transaction, or table record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

**Thru:** Enter 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.

**Shift Code** Enter a defined code (00/SH) that identifies daily work shifts.

In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.

For payroll and time entry: If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee master record. When you enter the shift on the employee master record, you do not need to enter the code on the timecard when you enter time. If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.

---

## Setting Up Pay Grades

This section provides an overview of pay grades and discusses how to set up pay grades.

## Understanding Pay Grades

To create categories for grouping employees according to pay ranges, you can define pay grades for each pay class within the organization. A pay class defines how an employee is paid, such as salaried, hourly, and so on. For example, within the pay class Salaried you can define pay grades 1 through 10. For each of these pay grades, you define a minimum, midpoint, and maximum salary amounts. These amounts define the pay range for the pay grade. For example, the pay range for pay grade 1 might be:

- Minimum equals 20,000.00 USD
- Midpoint equals 25,000.00 USD
- Maximum equals 30,000.00 USD

This means that the annual salary for an employee in pay grade 1 can be any amount between 20,000.00 USD and 30,000.00 USD.

For each pay grade, you can define a separate pay range for each of these factors:

- Locality
- Union
- Effective date

For example, if the organization has three locations in different areas of the country, you might want the pay ranges for employees in the same job to vary according to the location in which the employees work. When you create a pay grade, you can define a separate pay range for each of the three locations. This table illustrates the example:

Location	Pay Range
West Area	Minimum equals 25,000 USD Midpoint equals 30,000 USD Maximum equals 35,000 USD
Midwest Area	Minimum equals 28,000 USD Midpoint equals 33,000 USD Maximum equals 38,000 USD
East Area	Minimum equals 31,000 USD Midpoint equals 36,000 USD Maximum equals 41,000 USD

When you define pay grades by class, you create a record of the pay ranges for the organization pay grades. The system uses these pay ranges to calculate compa-ratios for the employees whom you assign to these pay grades. When you enter employee information, either an error or a warning message appears when you enter a rate that is not within the pay range for an employee pay grade. The type of message that appears depends on how you set up the system options.

If you are using pay grade steps, you can define pay grades at the same time that you define pay grade steps. You do not need to define pay grades by class to use the pay grade step table.

The Pay Grades by Class program (P082001) updates the Pay Grade/Salary Range table (F082001).

## Form Used to Set Up Pay Grades

Form Name	FormID	Navigation	Usage
Pay Grades by Pay Class	W082001A	Job Specifications Setup (G05BJ4), Pay Grades by Class	Set up pay grades by pay class.

## Setting Up Pay Grades

Access the Pay Grades by Pay Class form.

**Pay Grades by Class - Pay Grades by Pay Class** i

OK Find Delete Cancel Form Tools

Pay Class(H/S/P)  *Salaried*

Union Code

Locality

Source

Effective Date

Records 1 - 10 <span style="float: right;">Customize Grid</span>									
<input type="checkbox"/>	<input type="checkbox"/>	Pay Grade	Locality	Source	Effective Date	Union Code	Minimum Salary	2nd Quartile Salary	Midpoint Salary
<input type="checkbox"/>		S1			01/01/99		18,000.000		20,125.000
<input type="checkbox"/>		S2			01/01/99		19,500.000		24,250.000
<input type="checkbox"/>		S3			01/01/99		25,000.000		31,000.000
<input type="checkbox"/>		S4			01/01/99		31,500.000		38,250.000
<input type="checkbox"/>		S5			01/01/99		38,000.000		47,000.000
<input type="checkbox"/>		S6			01/01/99		46,500.000		55,750.000
<input type="checkbox"/>		S7			01/01/99		55,000.000		62,500.000
<input type="checkbox"/>		S1			01/01/00		18,450.000		20,628.000
<input type="checkbox"/>		S2			01/01/00		19,988.000		24,856.000
<input type="checkbox"/>		S3			01/01/00		25,625.000		31,775.000

Pay Grades by Pay Class form

### Minimum Salary

Enter the minimum salary or hourly rate allowed within a pay grade.

This field is used to trigger warnings in the Salary and Wage module when an employee salary or rate is lower than the minimum permitted within the pay grade.

### Midpoint Salary

Enter the midpoint salary or hourly rate within a pay grade or pay range.

For job IDs with a defined pay grade, this amount is defined in the Pay Grade table (F082001). For job IDs that are evaluated by points, this amount is calculated using a Pay Range Formula table (F08290).

The compa-ratio figure is calculated by dividing an employee salary or rate by the appropriate midpoint.

<b>Maximum Salary</b>	Enter the maximum salary or hourly rate within a pay grade.  This field is used to trigger warnings in the Salary and Wage module when an employee salary or rate is higher than the maximum permitted in the pay grade.
<b>Source</b>	Enter a code that identifies the source of the salary information. This is a defined code (08/SS). To display all pay grades regardless of the source, enter * in this field.
<b>2nd Quartile Salary</b>	Displays a defined second figure in a pay grade salary range. This field is for display only. It is not used in any of the computations done on this screen.  This field is reserved for future use.
<b>4th Quartile Salary</b>	Displays a defined fourth figure in a pay grade salary range. This is a display only field. It is not used in any of the computations done on this screen.  This field is reserved for future use.
<b>Remark</b>	A generic field that you use for a remark, description, name, or address.

---

## Setting Up Pay Grade Steps

This section provides an overview of pay grade steps and discusses how to:

- Set up pay grade steps individually.
- Set up pay grade steps using a multiplier.

### Understanding Pay Grade Steps

To ensure that all of the employees working in a job receive the same rate of pay, and to establish progression within a pay grade, you can set up pay grade steps. For example, you might have a pay grade A that contains pay steps A1, A2, and A3. Employees in step A1 receive 15.00 USD per hour, employees in step A2 receive 15.50 USD per hour, and employees in step A3 receive 16.00 USD per hour.

Setting up pay grade steps lets you automate the process of tracking pay information for employees. You can set up the system options so that, when you enter employee information, the system automatically calculates the employee salary or hourly rate, based on the pay grade step that you enter for the employee.

When you define pay grade steps, you can save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then you enter a pay rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step pay rate multiplier.

When you set up pay grade steps individually, you enter a pay rate for each pay grade step. When you set up pay grade steps using a pay rate multiplier, you enter a base pay rate and apply a pay rate multiplier to each pay grade step.

You can define pay grades at the same time that you define pay grade steps. You do not need to define pay grades by class to use the pay grade step table.

The Pay Grade Step Table program (P082003) updates the Pay Grade/Salary Range table (F082001).

## Form Used to Set Up Pay Grade Steps

Form Name	FormID	Navigation	Usage
Pay Grade Step Table	W082003A	Job Specifications Setup (G05BJ4), Pay Grade Step Table	Set up pay grade steps.

## Setting Up Pay Grade Steps Individually

Access the Pay Grade Step Table form.

**Pay Grade Step Table - Pay Grade Step Table** i ? (

OK Find Delete Cancel Calculation Form Row Tools

Pay Class(H/S/P)  *Salaried*

Union Code

Locality

Pay Grade

Effective Date

Std Hrs/Day

Std Days/Year

..... Calculation Information .....

Base Rate  \* Rate Multiplier

OR Percent  OR Amount

Records 1 - 22 <span style="float: right;">Customize Grid</span>									
	Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade	Next Pay Grade Step
<input type="checkbox"/>	S1	A			01/01/05		20,874.000	S1	B
<input type="checkbox"/>	S1	B			01/01/05		23,339.000	S1	C
<input type="checkbox"/>	S1	C			01/01/05		25,803.000	S2	A
<input type="checkbox"/>	S2	A			01/01/05		22,614.000	S2	B
<input type="checkbox"/>	S2	B			01/01/05		28,123.000	S2	C
<input type="checkbox"/>	S2	C			01/01/05		33,051.000	S3	A

Pay Grade Step Table form

To set up pay grade steps individually:

1. Complete the Pay Class field and click Find.
2. Complete any of these fields to define information that applies to all or most of the pay grade steps that you need to add, and click Find:
  - Union Code
  - Locality
  - Std Hrs/Day (Standard Hours/Day)
  - Std Days/Year (Standard Days/Year)
  - Effective Date
3. Move to a blank line in the detail area and complete these fields for each step that you need to set up:

- Pay Grade
  - Grade Step
  - Step Rate
  - Effective Date
4. Complete these optional fields:
    - Next Pay Grade
    - Next Pay Grade Step
  5. Complete these fields in the detail area to define information for this step that varies from the information that you entered for the pay class:
    - Union Code
    - Loc (Locality)
    - Hrs Day (Hours Day)
    - Days Year
  6. Click OK.

**Std Days/Year** (standard days/year)

Enter the number of workdays in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year.

When you set up the human resources constants (System Options, in JD Edwards EnterpriseOne) and you use the pay grade step table as the default source for the pay rate, the system calculates the salary for an employee by multiplying the standard days per year by the employee hourly rate.

**Effective Date**

Enter the date on which the rate associated with a pay grade step becomes effective.

## Setting Up Pay Grade Steps Using a Multiplier

Access the Pay Grade Step Table form.

To set up pay grade steps using a multiplier:

1. Complete the Pay Class (H/S/P) field:
2. Complete any of these fields to define information that applies to all (or most) of the pay grade steps:
  - Union Code
  - Locality
  - Effective Date
  - Std Hrs/Day
  - Std Days/Year
3. Complete the Base Rate field:
4. Complete these fields in the detail area for each step that you need to set up:
  - Pay Grade
  - Grade Step



- Rate Mult
5. Complete these optional fields:
    - Next Pay Grade
    - Next Pay Grade Step
  6. To define information for this step that varies from the information that you entered for the pay class, complete these fields in the detail area:
    - Loc (Locality)
    - Union Code
    - Effective Date
    - Hrs Day
    - Days Year
  7. Click the Calculate button.

<b>Effective Date</b>	Enter the date on which the rate associated with a pay grade step becomes effective.
<b>Std Days/Year</b>	<p>Enter the number of workdays in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year.</p> <p>When you set up the human resources constants (System Options, in JD Edwards EnterpriseOne) and you use the pay grade step table as the default source for the pay rate, the system calculates the salary for an employee by multiplying the standard days per year by the employee hourly rate.</p>
<b>Step Rate</b>	A value that specifies the pay rate that is assigned to a pay grade and step. In certain programs, such as the Pay Grade Step Table program (P082003), you can also use a rate multiplier in combination with this value so that the system automatically calculates the pay rate. For example, you can enter a percentage value that the system uses to increase a pay rate.
<b>Rate Mult</b>	This number is multiplied by the Base Rate to calculate a new step rate. This is not a stored field.

---

## Setting Up Pay Range Formulas

This section provides an overview of pay range formulas and discusses how to set up pay range formulas.

### Understanding Pay Range Formulas

When the pay ranges for the organization pay grades are based on variable factors, you can set up pay range formulas that the system uses to automatically calculate pay ranges for each pay grade. These formulas are based on the job evaluation points. In addition, if a job pays more in one region of the country than in another, you can enter a geographic multiplier in the pay range formula. The system calculates different minimums, midpoints, and maximums for the different areas, based on the minimum, midpoint, and maximum multipliers, as well as the geographic multiplier.

To use pay range formulas, you must evaluate the jobs within the organization. You evaluate jobs to determine equitable pay ranges for them.

### See Also

Chapter 15, “Working with Compensation Management,” Entering Job Evaluation Information, page 163

## Form Used to Set Up Pay Range Formulas

Form Name	FormID	Navigation	Usage
Pay Range Formulas	W05290D	Job Specifications Setup (G05BJ4), Define Pay Range Formulas  On the Work With Pay Range Formulas form, click Add.	Set up pay range formulas.

## Setting Up Pay Range Formulas

Access the Pay Range Formulas form.

**Define Pay Range Formulas - Pay Range Formulas**

OK Cancel Tools

Effective Date 01/01/05

Pay Class(H/S/P) S Salaried

Locality Headquarters (default)

Pay per Point 24.0000

Based On Amount 30,000.00

Multiplier for Minimum 0.800

Multiplier for Maximum 1.250

Geographic Multiplier 1.000

Rounding Factor 100

Pay Range Formulas form

### Pay per Point

Enter the amount that is paid for each evaluation point that a job receives. For example, if a job receives 150 evaluation points and the pay per point is 8, then the total pay from points is 1200 of the currency being used.

The system adds this amount to the based on amount to calculate the job pay range midpoint/control point.

### Based On Amount

Enter the baseline amount from which salary pay ranges are calculated. Enter debits with a plus sign (+) and credits with a minus sign (-). Enter a credit, for example, as 5000.01-. You can enter decimals, dollar signs, and commas. The system ignores nonsignificant characters.

	The Human Resources system uses this field for the Hay Points Evaluation Method. It is the basic salary from which salary ranges are calculated. The amount in this field is added to the pay per point to determine the job pay range midpoint/control point.
<b>Multiplier for Minimum</b>	Enter the number by which a midpoint or control point is multiplied to determine the minimum amount (data item AAQ1) in a pay range formula calculation. This multiplier should be less than 1.00 so that the minimum amount is less than the midpoint.
<b>Multiplier for Maximum</b>	Enter the number by which a midpoint or control point is multiplied to determine the maximum amount (data item AAQ3) in a pay range formula calculation. This multiplier should be greater than 1.00 so that the maximum amount is greater than the midpoint.
<b>Geographic Multiplier</b>	Enter a number that specifies the difference for pay ranges by locality (data item SLOC). The system multiplies this factor by the pay-from-points amount and then adds that product to the base amount (data item BAA). The resulting amount is the midpoint of the pay range.
<hr/>	
	<b>Note.</b> The pay from points is the evaluation points of a job multiplied by the pay per point from a formula.
<hr/>	
<b>Rounding Factor</b>	Enter the increment to which a calculated figure is rounded off. For example, a calculated figure of 24,327 is rounded up to 24,330 if the rounding factor is 10, or down to 24,300 if the rounding factor is 100.

## Defining Job Evaluation Factors

This section provides an overview of job evaluation factors and discusses how to define job evaluation factors.

### Understanding Job Evaluation Factors

To determine equitable pay ranges for the jobs within the organization, you can evaluate jobs. Before you can evaluate jobs, you must define evaluation methods. Typical evaluation methods include:

- Degree (Simple Subjective Point System)
- Evalucomp
- Factor comparison
- Point factor
- Hay

For each evaluation method, you must define the factors that you use to gauge the scope of each job. Typical evaluation factors include:

- Problem solving abilities
- Technical skills
- Working conditions
- Leadership qualities

- Know how
- Accountability

To enable you to rate and compare jobs, you assign points or degrees to each evaluation factor.

## Form Used to Define Job Evaluation Factors

Form Name	FormID	Navigation	Usage
Evaluation Factors Table Review	W05011B	Job Specifications Setup (G05BJ4), Evaluation Factors Table  On the Work With Evaluation Factors Table form, click Add.	Define job evaluation factors.

## Defining Job Evaluation Factors

Access the Evaluation Factors Table Review form.

**Evaluation Factors Table - Evaluation Factors Table Review**

OK Find Delete Cancel Tools

Job Evaluation Method  Degree Method

Job Evaluation Type  Detailed spec of degree

Total Evaluation Points

Records 1 - 4 Customize G

	Factor Number	Description	Evaluation Points	Points 10	Points 9	Points 8	Points 7	Points 6
<input type="checkbox"/>	1	Know How	500	500	450	400	350	300
<input type="checkbox"/>	2	Problem Solving	350	350	250	175	125	100
<input type="checkbox"/>	3	Accountability	450	450	425	375	350	300
<input type="checkbox"/>								

Evaluation Factors Table Review form

### Job Evaluation Method

Enter a user-defined code (08/EM) that specifies the method or grouping that you use to evaluate the jobs within the organization.

Suggested values are:

Blank: Simple subjective point system

*E*: Evalucomp method

*F*: Factor comparison method

*P*: Point factor method

*H*: Hay method

<b>Job Evaluation Type</b>	<p>Enter a numeric code that determines whether job information is recorded using degrees or points. Valid codes are:</p> <p>1: Simple, subjective assignment of job points by each of the 10 defined evaluation factors.</p> <p>2: Detailed specifications of degree of difficulty or value to each of 10 evaluation factors.</p>
<b>Factor Number</b>	<p>Enter a sequential number that identifies each job evaluation factor. Job evaluation factors should meet these criteria:</p> <ul style="list-style-type: none"> <li>• Each factor must distinguish differences between jobs.</li> <li>• Each factor must be common to most of the jobs being rated. A factor should exist in greater to lesser amounts so it is easier to measure factors within a job.</li> <li>• Each factor should be assigned the maximum number of points in each of the 10 levels of degree.</li> <li>• No factor should overlap any other factor.</li> <li>• The factors chosen must be accepted by employees and managers.</li> <li>• The number of factors used should be the minimum needed to insure a balance between completeness and simplicity in rating.</li> <li>• The factor definitions should clearly and objectively define what is being rated so that all raters interpret the factor in the same way.</li> </ul>
<b>Evaluation Points</b>	<p>Enter the number of points calculated for a specific job using any job evaluation method. A job is defined as the combination of job type and job step.</p> <p>You can calculate the points manually and enter them at the Job Master Information level, or you can assign points to each individual factor that has been defined within the evaluation method.</p>
<b>Points 1</b>	<p>Enter the maximum evaluation points allowable within this degree for this factor.</p>



## CHAPTER 6

# (USA) Setting up OSHA Reporting Information

This chapter provides overviews of the setup required for OSHA (Occupational Safety and Health Administration) reporting, and discusses how to:

- Set up establishment conditions.
- Set up OSHA establishment information for OSHA 200 and 300 reports.
- Set up establishment reporting information for the BLS (Bureau of Labor Statistics) Survey of Occupational Injuries and Illnesses.

---

## Understanding OSHA Information for Employees

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

Before you can identify the establishment in which an employee works, you must define the valid search types for establishments in UDC 08H/ES, then add the establishments to the address book with the defined search type. You need to enter effective dates in the supplemental data for OSHA reporting. After you set up the establishment data type, you can attach establishment information to each employee who works in an OSHA reportable establishment.

### See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Supplemental Data

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## Understanding OSHA Establishment Reporting Information

An *establishment* is any single location where the organization conducts business or performs services. When distinctly separate activities are performed at a single physical location, each activity is a separate establishment. An establishment can be a field activity or an office, installation, or facility. You create groups of establishments to satisfy requirements for OSHA reports and the Survey of Occupational Injuries and Illnesses.

When you set up establishment information, you can include conditions that might have affected the establishment during a given year. You can include conditions such as natural disasters, layoffs, strikes, changes in working schedules, or any other event that might affect OSHA reporting information. You can enter multiple conditions for a given year and establishment.

Establishment information is required for the Survey of Occupational Injuries and Illnesses. The conditions that you include might occur even if the establishment had no injuries or illnesses to report.

You can create a grouping of establishments that you might want to use repeatedly for reporting information. Creating an establishment grouping prevents you from having to enter each establishment that you want to include in the report every time that you run a report.

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**Note.** Each entry that you make in the detail area of the Establishment Form (W086011A) must be a unique combination of calendar year, establishment, and establishment conditions.

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## Prerequisite

Verify that the establishment is set up in the Address Book.

See *JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide*, “Entering Address Book Records”.

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## Setting Up Establishment Conditions

This section discusses how to set up establishment conditions for OSHA reporting.

### Form Used to Set Up Establishment Conditions

Form Name	FormID	Navigation	Usage
Establishment	W086011A	HRM Setup (G05B4), Establishment Information	Set up establishment conditions.

## Setting Up Establishment Conditions

Access the Establishment form.

<b>Calendar Year</b>	Enter the 4 digit calendar year.
<b>Establishment</b>	Enter the establishment where the accident or illness occurred.
<b>Establishment Condition</b>	<p>Enter a code that indicates whether any conditions affected the establishment in a given year. The codes and definitions that the system provides with the software should not be changed.</p> <p>The values for Establishment Condition field are stored in UDC (defined code) table 05/CO. You can add conditions to this table, as needed.</p>

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## Setting Up OSHA Establishment Information for OSHA 200 and 300 Reports

This section discusses how to set up establishment information for the OSHA 200 and 300 reports.



## Form Used to Set Up OSHA Establishment Information for OSHA 200 and 300 Reports

Form Name	FormID	Navigation	Usage
OSHA Establishment Reporting	W086400A	<p>Government Reporting (G05BG), OSHA Reporting</p> <p>On the Work With Establishment Groups form, click Add.</p> <p>To run the OSHA report, select an establishment group, and then select Submit from the Row menu.</p>	Set up establishment groups for reporting on the OSHA 200 and 300 reports.

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## Setting Up Establishment Reporting Information for the BLS Survey of Occupational Injuries and Illnesses

This section discusses how to set up establishment reporting information for the BLS Survey of Occupational Injuries and Illnesses.

## Form Used to Set Up Establishment Reporting Information for the BLS Survey of Occupational Injuries and Illnesses

Form Name	FormID	Navigation	Usage
Survey of Occupational Injuries and Illnesses	W086400A	<p>Government Reporting (G05BG), BLS Survey of Occupational Injuries and Illnesses</p> <p>On the Work With Establishment Groups form, click Add.</p> <p>Select the Length of Service at Establishment or Ethnic Background or Race options to include this information in the report.</p> <p>To run the BLS Survey of Occupational Injuries and Illnesses report, select a record in the detail area, and then select Submit from the Form menu.</p>	Set up establishment reporting information for the BLS Survey of Occupational Injuries and Illnesses.



## CHAPTER 7

# Understanding the Recruitment Process

This chapter provides an overview of the recruitment process.

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## Recruitment Process

While many organizations are accustomed to using a paper based process to organize their recruiting efforts, JD Edwards EnterpriseOne Human Resources offers an automated solution.

The requisition, application, and hiring processes are automated and paperless in the system. Using the features of Human Resources and other systems, such as JD Edwards EnterpriseOne Workflow Tools, managers no longer need to notify the human resources department about vacancies. The managers can access the system directly, create electronic requisitions, and forward them by email to the human resources department and the approving managers. With electronic approvals, the human resources department knows immediately when the approval has been granted. When this approval occurs, a recruiter can begin 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, a human resources representative can update the requisition with new information, such as when the applicant completes the second interview. Using the Applicant Supplemental Database, the human resources representative can include additional company specific information in the applicant record, such as scores on skills evaluation tests, competency information, and previous job experience. Using the Supplemental Data Multiskill Search program (P080250), the human resources representative can quickly assess those applicants whose experience and education most closely match the requirements of the job. Reporting on applicant demographics is easy using various standard reports, which are based on the applicant records that the human resources representative has entered throughout the recruiting process.

Converting a candidate to an employee within the system is an easy process. The human resources representative transfers the data that has already been entered for the candidate to the employee database. The human resources representative is then prompted for other important employee information that is required. Throughout this process, managers and approving authorities can access the system to review the status of the search and review the qualification of the applicants.

The recruitment process includes working with requisitions and tracking applicant information.

You enter a requisition to begin the process of filling a vacancy within the organization. A requisition is a record or document that contains information about the open position (an employee assignment for a fiscal year) and job (the duties that an employee performs for the organization). A vacancy is a job opening or unfilled headcount (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. EnterpriseOneWorkflow 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 email based process flow across a network. You can track 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.

Because recruiting is expensive, you need to know where the 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.

## CHAPTER 8

# Working With Requisitions

This chapter provides an overview of the requisition process and discusses how to:

- Enter initial requisition information.
- Enter supplemental data for requisitions.
- Update the status of a requisition.
- Attach a candidate record to a requisition.
- Reopen a requisition.

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## Understanding the Requisition Process

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

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 candidate records to a requisition to track the progress of the candidates 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.

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

To help you manage the 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 JD Edwards EnterpriseOne 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 email 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.

## 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.

## See Also

*JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

Chapter 8, “Working With Requisitions,” Updating the Status of a Requisition, page 75

Appendix B, “JD Edwards EnterpriseOne Human Resources Reports,” page 341

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# Entering Initial Requisition Information

This section provides an overview of initial requisition information and discusses how to:

- Set processing options for the Requisition Information program (P08102).
- Enter requisition information.

## Understanding Initial Requisition Information

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

- Fiscal year
- Home business unit
- Job type
- Job step

You can also attach objects to a requisition:

- Text documents.
- Scanned images.
- Links to other JD Edwards EnterpriseOne applications and other software packages.

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

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

## Forms Used to Enter Requisition Information

Form Name	FormID	Navigation	Usage
Requisition Information	W08102E	<p>Requisitions (G08BR1), Requisition Information</p> <p>On the Work With Requisitions form, click Add.</p> <p>Click Additional Information to attach objects to the requisition.</p> <p>If you have enabled JD Edwards EnterpriseOne Workflow Management for requisition approvals and you entered a waiting for approval requisition status, the Requisition Workflow Pending Review Notification form appears when you save the requisition.</p>	Enter requisition information.
Requisition Workflow Pending Review Notification	W08102AB	Click OK.	Advance the requisition through the workflow process.

## Setting Processing Options for the Requisition Information Program (P08102)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options enable you to specify the default information that the system uses.

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

Use this processing option to specify whether the system enters default job information in the requisition record when you change the job type or job step. The system supplies default values from the Job information table (F08001) for the Pay Grade, Pay Grade Step, Pay Class, and Overtime Exempt fields. Values are:

Blank: Do not use default job information.

0: Do not use default job information.

*1*: Use default job information.

## **2. Address Number of Default Approver**

Use this processing option to specify the address number of the employee who approves requisitions. To override this approver, you can add recipient rules to the workflow process.

## **3. Address Number of Default Recruiter**

Use this processing option to specify the address number of the recruiter. The workflow process sends an email message to the recruiter. To override the recruiter, you can add recipient rules to the workflow process.

## **User Level**

This processing option enables you to specify whether a manager (employee) or a human resources administrator will use the application.

### **1. User Level**

Use this processing option to specify whether a manager, employee, or HR (Human Resources) Administrator will use the application. Values are:

Blank: HR Administrator

*1*: Manager/Employee

*2*: HR Administrator

If you set the user level to *1* (Manager/Employee) and the requisition is not approved (status WW), the Requisition Status field is disabled.

## **Entering Requisition Information**

Access the Requisition Information form.

### **Requisition Number**

Enter the number that identifies the position requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.

## **Primary Information**

Select the Primary Information tab

### **Requisition Status**

Enter a code that describes the status of the position associated with the requisition. The system provides several codes that you can use for requisition status purposes. Two of them are hard coded and should not be changed:

*AA*: Approved

*99*: Filled and Closed

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*.

If you are using JD Edwards EnterpriseOne 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.

### **Requested By**

Enter the Address Book number of the person who enters a position requisition. This field is required.



<b>Requisition Date</b>	Enter the effective date of the requisition. The default value for this field is the system date.
<b>Effective From Date</b>	Enter the date on which a requisition, a position, or activity within a position takes effect.
<b>Effective Thru Date</b>	Enter 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.
<b>Approval Date</b>	Enter the date on which the person with the appropriate authority approves a requisition.

## Secondary Information

Select the Secondary Information tab

<b>Pay Grade/Step</b>	<p>Enter 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 pay grade.</p> <p>To set up pay grades, use Pay Grades by Class (P082001).</p> <p>If you have set up the system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee pay grade step causes the system to automatically update these fields:</p> <ul style="list-style-type: none"> <li>• Salary</li> <li>• Hourly Rate</li> <li>• Hours per day</li> <li>• Hours per year</li> <li>• Days per year</li> </ul>
<b>Overtime Exempt</b>	<p>Enter 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. Codes are:</p> <p><i>Y</i>: Yes, the employee fits the rules and does not have to be paid for working overtime.</p> <p><i>N</i>: No, the employee does not fit the rules and is to be paid for working overtime.</p>
<b>Expected Salary</b>	Enter the salary you expect to pay the individual filling the requisition.
<b>FTE (full-time equivalent)</b>	The number of full-time equivalents (FTEs) that the organization has budgeted for the position. An FTE 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 or one-half FTE. An employee cannot represent more than 1 FTE.

**Hours**

Enter 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 FTEs. If you do not enter a value in this field when you budget the position, the system enters a default value. To determine that default value, the system searches these sources, in the order that they are listed, and uses the value from the first of these sources that contains a value:

1. The number of FTEs multiplied by the standard number of hours per year for the company associated with the business unit that you entered
2. The number of FTEs multiplied by the standard number of hours per year for Company 0
3. A default value that you defined in the data dictionary when you set up the system
4. 2080

**Last Filled By**

Enter a number that identifies an entry in Address Book, such as employee, applicant, participant, customer, supplier, tenant, or location.

**Filled Date**

Enter the assignment or hire date for the last person to fill the requisition.

**Category Codes**

Select the Category Codes tab

**Req Code 01** (Requisition Code 01)

Enter a code defined by the user for reporting on requisitions. Each category code is tied to a particular set of defined codes in the data dictionary.

---

## Entering Supplemental Data for Requisitions

This section provides an overview of supplemental data for requisitions and lists the forms used to enter supplemental data for requisitions.

### Understanding Supplemental Data for Requisitions

Supplemental data is any type of additional information that you want to track about these items or individuals:

- Requisitions
- Jobs
- Employees
- Applicants
- Dependents and beneficiaries
- Health safety management

When you set up Human Resources, 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 these types of supplemental data:

- Requirements

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

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

### See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Supplemental Data

Chapter 8, “Working With Requisitions,” Understanding the Requisition Process, page 69

## Forms Used to Enter Supplemental Data for Requisitions

Form Name	FormID	Navigation	Usage
Work With Supplemental Data	W00092D	Requisition Supplemental Data (G08BSDR1), Requisition Supplemental Data Entry	Add supplemental data to a requisition.
Work With Supplemental Data by Data Type	W050210E	Requisition Supplemental Data (G08BSDR1), Requisition Data by Data Type	Add supplemental data by data type to a requisition.

## Updating the Status of a Requisition

This section provides an overview of requisition status updates and discusses how to:

- Update the status of a requisition using workflow.
- Update the status of a requisition manually.

### Understanding Requisition Status Updates

The 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 enable you to hire a candidate to fill a requisition unless the requisition status is approved.

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

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

If the manager approves the requisition, the system also updates the Approved By field.

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

When you update the status of a requisition using workflow, 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 program (P012501).

## Forms Used to Update the Status of a Requisition

Form Name	FormID	Navigation	Usage
Requisition Workflow Approval	W08102AA	<p>Workflow Management (G02), Employee Queue Manager</p> <p>On the Employee Queue Manager form, find the desired record and click Select.</p> <p>On the Work Center form, select the message containing the requisition, and then click the Requisition Workflow Approval button.</p> <p>Click Requisition Workflow Approval on the right side of the form.</p> <p>On Requisition Workflow Approval, click Approve or Reject.</p> <p>Complete the Requisition Status field, add a text message if desired, and click OK.</p>	<p>Approve or reject a requisition using workflow.</p> <p>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.</p>
Requisition Information	W08102E	<p>Requisitions menu (G08BR1), Requisition Information</p> <p>On the Work With Requisitions form, select the requisition that you need to approve.</p> <p>On the Requisition Information form, complete the Requisition Status, Approved By, and Approval Date fields, and then click OK.</p>	<p>Approve or reject a requisition manually.</p>

## Updating the Status of a Requisition Using Workflow

Access the Requisition Workflow Approval form.

Requisition Workflow Approval form

## Updating the Status of a Requisition Manually

Access the Requisition Information form.

### Approval Date

Enter the date on which the person with the appropriate authority approves a requisition.

---

## Attaching a Candidate Record to a Requisition

This section provides an overview candidate record attachments for requisitions and discusses how to attach a candidate record to a requisition.

### Understanding How to Attach a Candidate Record to a Requisition

When you determine that a candidate might be suitable to fill a vacancy, you can attach the candidate record to the requisition. Attaching candidate records to a requisition simplifies the process of tracking the status of each candidate 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 the review to include only applicants, only employees, or both applicants and employees. For applicants, you can further limit the search to include only those with a specific applicant status, such as applicants who have passed the tests that are required for employment with the organization.

You can also update the candidate 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 status to indicate that the candidate has filled the requisition.

## Form Used to Attach a Candidate Record to a Requisition

Form Name	FormID	Navigation	Usage
Requisition Activity	W08102C	<p>Requisitions (G08BR1), Requisition Information.</p> <p>On the Work With Requisitions form, locate the requisition to which you need to attach a candidate record and click Select.</p> <p>On Requisition Information, select Req. Activity from the Row menu.</p>	Attach a candidate record to a requisition.

## Attaching a Candidate Record to a Requisition

Access the Requisition Activity form.

**Requisition Information - Requisition Activity**

OK Find Delete Cancel Row Tools

Requisition Number: 1126 Search Type: \* ☒ All ☐ Filled  
 Address Number: \* Applicant Status: \* ☐ Candidate ☐ Rejected

Requisition Status: AA Headcount: 1 Filled Headcount: 0

Home Business Unit: 9 Corporate Administration Fiscal Year: 5  
 Position ID: 0A-3 Financial Analyst  
 Job Type/Step: 0A-3 Financial Analyst  
 Requested By: 6001 Allen, Ray

**Records 1 - 2** [Customize Grid](#)

Req No.	Sch Typ	Address Number	Alpha Name	Candidate Req. Status	Description
1126	E	7506	Mayeda, Donald	CAN	Candidate

Requisition Activity form

**Candidate Req. Status**  
(candidate requisition status)

Enter 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. 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** Enter the date that the current status of a candidate requisition became active.

**Date Avail.** (date available) Enter 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.

This section discusses how to reopen a requisition.

### Form Used to Reopen a Requisition

Form Name	FormID	Navigation	Usage
Requisition Information	W08102E	<p>Requisitions (G08BR1), Requisition Information</p> <p>On the Work With Requisitions form, select the requisition that you need to reopen.</p> <p>Change the information in the Requisition Status and Headcount fields to reopen the requisition, then click OK.</p>	Reopen a requisition.

### Reopening a Requisition

Access the Requisition Information form.

**Headcount** Enter the number of employees requested, budgeted, or approved for a position or requisition.



## CHAPTER 9

# Tracking Applicants

This chapter provides an overview of applicant tracking and discusses how to:

- Enter applicant information.
- Enter supplemental data for applicants.
- Hire an applicant.
- Create applicant letters.
- Review applicant reports.

---

## Understanding Applicant Tracking

One opening in the 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 Human Resources Applicant Tracking, you can manage extensive information about each applicant, such as desired salary, available date, education, prior experience, and foreign language proficiency.

You can then search for applicants who meet specific criteria. The systems extensive search capabilities help you reduce a list of applicants to those whom you want to seriously consider. You can then provide the managers with a list of qualified applicants.

You can use the detailed information that you track about applicants to perform these tasks:

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

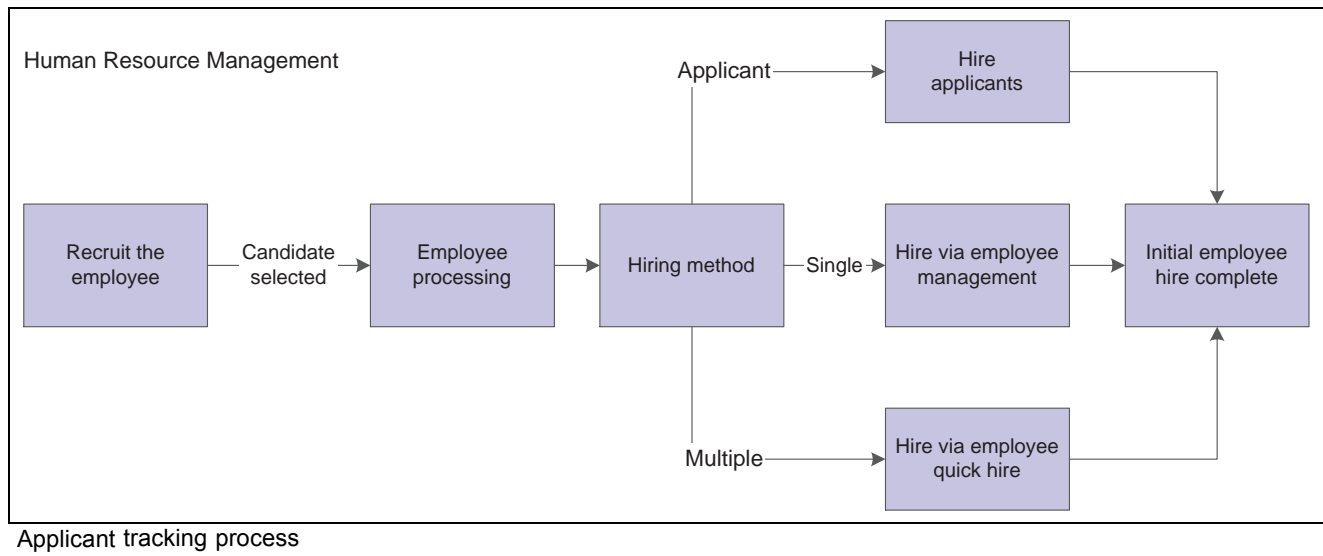
You might track standard types of applicant information:

- 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 the 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.

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

This diagram illustrates the applicant tracking process:



## Entering Applicant Information

This section provides an overview of applicant information entry and discusses how to:

- Set processing options for the Applicant Information program (P08401).
- Enter applicant information.
- Enter country-specific information for an applicant.

## Understanding Applicant Information Entry

Before you can begin evaluating applicant information, you must add a record that contains personal information about the applicant to the database. Adding new applicant records includes entering basic applicant information, plus address book and country specific information.

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

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

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 track for an applicant.

When you hire an applicant, the system updates one of these tables:

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

If you select the Initiate Hire option after you add an applicant record, the system updates the Unedited Quick Hire Transaction File table. 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 Information table and changes the search type from applicant to employee.

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

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

---

**Note.** If you are using Payroll to report applicant information to the Equal Employment Opportunity Commission (EEOC), you must enter all applicants into the database, regardless of the applicant qualifications.

---

After you complete the steps to enter address book information for an applicant, the Work With Applicants form appears. You enter country specific information for each applicant. When you enter country-specific information, the system displays fields only for the information that applies to the country code that you entered for the applicant. Many of the fields that appear on the Applicant Information - National Data - Revisions form can be customized to meet the specific needs of your organization.

## See Also

Chapter 8, “Working With Requisitions,” Attaching a Candidate Record to a Requisition, page 78

Chapter 21, “Working with Employee Competency Information,” Reviewing Gap Analysis Online, page 241

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Adding Employee Records One at a Time,” Entering Basic Employee Information

*JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

*JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide*, “Entering Address Book Records”

## Forms Used to Enter Applicant Information

Form Name	FormID	Navigation	Usage
Applicant Information	W08401C	Applicants (G08BA1), Applicant Information  On the Work With Applicants form, click Add.	Enter basic applicant information.
Work With Employee Competency Gap Analysis	W08008A	On the Applicant Information form, select Gap Analysis from the Form menu.  On Work With Employee Competency Gap Analysis, complete the desired fields and then click Find.	Compare the applicant competencies with the competencies that are required for a particular job.
Media Objects	None	On the Applicant Information form, select Attachment from the Form menu.  On the Media Objects form, click the Text button, enter the text, and then click Save.	Add text or media objects to applicant information. You can use this feature to attach a scanned copy of the applicant's resumé.
Address Book Revision	W01012A	On the Applicant Information form, click OK. The Address Book Revision form appears.  On the Address Book Revision form, click OK.	Enter Address Book information for the applicant.
Applicant Information - National Data - Revisions	W08401E	On the Applicant Information form, select Applicant National from the Form menu.	Enter country-specific information for an applicant.

## Setting Processing Options for the Applicant Information Program (P08401)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Hire

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

- 1. Status Code** Use this processing option to specify the user-defined code (08/AS) that the organization uses to indicate that an applicant is hired. When you complete the steps to hire an applicant, the system automatically updates the applicant status with the code that you enter.
- 2. Requisition Information** Use this processing option to specify whether you want the system to automatically transfer information that you entered for the requisition, including the position ID, home business unit, job type, job step, and security business unit, to the applicant record when you enter an applicant.

When you hire an applicant, the system transfers this information to the applicant employee record. 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 specify 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 automatically transfer this job information to the applicant record. 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 the organization uses job steps, you must also enter a job step for each applicant.
- 4. Transfer Supplemental Data** Use this processing option to specify 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. Values are:

*1*: Yes. Transfer supplemental data for applicants.

Blank: No. Do not transfer supplemental data for applicants.
- 5. Notification Message** Use this processing option to specify the address book number of the person that you want to notify when you select 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

This processing option enables you to automatically delete certain information.

**1. Delete Supplemental Data and Address Book Record**

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 record. Values are:

*1*: Yes. Delete supplemental data for applicants.

Blank: No. Do not delete supplemental data for applicants.

**Add**

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

**6. 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. 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.** Canada requires date of birth information for tax purposes.

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**Versions**

These processing options specify the version for the Resource Competency Information (P05100), Competencies Gap Analysis (P08008), and Address Book Revisions (P01012) programs.

**1. Resource Competency Information Version**

Use this processing option to define the version of the Resource Competency program (P05100) that you want to use when you add or change information. If you leave this field blank, the system enters the default version *ZJDE0001*.

**2. Gap Analysis Version**

Use this processing option to define the version of the Gap Analysis program (P08008) that you want to use when you add or change information. If you leave this field blank, the system enters the default version *ZJDE0003*.

**3. Address Book Version**

Use this processing option to define the version of the Address Book program (P01012) that you want to use when you add or change information. If you leave this field blank, the system enters the default version *ZJDE0003*.

**Entering Applicant Information**

Access the Applicant Information form.

Applicant Information - Applicant Information			
Work With Applicants		Applicant Information	
OK	Cancel	Applicant National	Hire
<div> <div>Initiate Hire</div> <div>Form</div> <div>Previous</div> <div>Next</div> <div>Tools</div> </div>			
Applicant Number	8001	Hogan, Betsy G.	
Applicant Status / Date	10 06/30/05	Return for 2nd Interview	
Home Business Unit	9	Corporate Administration	
Security Business Unit			
Position ID	2H-2	Employment Representative	
Job Type/Step	2H-2	Employment Representative	
Asking Salary	25,000.00	Application Date	06/03/05
Hours Available		Date Available	06/30/05
Date of First Interview	06/14/05		
Date of Birth		Gender	F Female
Ethnic Code	99	Unknown	
Country Code	US	United States	

Applicant Information form

**Date Available**

Enter the date an applicant is available to begin work.

**Date of First Interview**

Enter the date the applicant first interviewed for the job.

**Asking Salary**

Enter the amount an applicant has requested for salary.

**Hours Available**

Enter the number of hours an applicant is available to work, if hired.

**Date of Birth**

Enter the employee date of birth.

**Type Structure**

Enter a user-defined code (00/TS) that identifies the type of organization structure, such as financial or responsibility. Each type of organization structure can have a separate hierarchy.

## Entering Country-Specific Information for an Applicant

Access the Applicant Information - National Data - Revisions form.

Applicant Information - Applicant Information - National Data - Revisions					
<div> <div>OK</div> <div>Cancel</div> <div>Form</div> <div>Tools</div> </div>					
Address Number		8001	Hogan, Betsy G.		
EEO Job Cat	002	Professionals	Disability	N	
Veteran	N	No, EE is not a veteran	Disabled Veteran	N	
Travel (Y/N)		Blank	Applicant Code 8		.
Relocate (Y/N)		Blank	Applicant Code 9		.
Reg/Temp (R/T)	R	Regular Employee	Applicant Code 10		.
Source of Reference		Unknown	Applicant Code 6		.
Application Method		Unknown	Applicant Code 7		.
Interviewer		.	Applicant Code 8		.
Branch/Location		.	Applicant Code 9		.
Applicant Code 5		.	Applicant Code 10		.

Applicant Information - National Data - Revisions form

**EEO Job Cat** (Equal Employment Opportunity job category)

Enter 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 the JD Edwards EnterpriseOne system. You can add codes if needed.

**Veteran**

Enter a code that indicates the veteran status of the employee for EEO reporting purposes. Values are:

*N*: No, this employee is not a veteran.

*V*: This employee is a Vietnam veteran.

*S*: This employee is a Newly Separated veteran.

*W*: This employee is a Vietnam and Other veteran.

*X*: This employee is a Vietnam and Newly Separated veteran.

*Y*: This employee is an Other and Newly Separated veteran.

*Z*: This employee is a Vietnam, Other, and Newly Separated veteran.

*O*: This employee is a veteran, classified as Other, as defined by the U.S. Department of Labor.

**Disability**

Enter a code indicating whether this employee has a mental or physical disability. Codes are:

*Y*: Yes, this employee has a mental or physical disability.

*N*: No, this employee does not have a mental or physical. disability.



	<i>U</i> : Unknown.
<b>Disabled Veteran</b>	<p>Enter a code indicating whether this employee is a disabled veteran. Codes are:</p> <p><i>Y</i>: Yes, this employee is a disabled veteran.</p> <p><i>N</i>: No, this employee is not a disabled veteran.</p> <p>This field is used to generate the Veterans Employee (VETS-100) report.</p>
<b>Applicant Code 5</b>	Enter a code used to define applicant information.
<b>Travel (Y/N)</b> (travel [yes/no])	<p>Enter a code that indicates whether an applicant is willing to travel. Values are:</p> <p><i>Y</i>: Yes, this applicant will travel.</p> <p><i>N</i>: No, this applicant is not willing to travel.</p>
<b>Relocate (Y/N)</b> (relocate [yes/no])	<p>Enter a code that indicates whether an applicant is willing to relocate. Codes are:</p> <p><i>Y</i>: Yes, the applicant will relocate.</p> <p><i>N</i>: No, the applicant is not willing to relocate.</p>
<b>Reg/Temp (R/T)</b> (regular/temporary)	<p>Enter a code that indicates whether the applicant is to be a regular or a temporary employee. Values are:</p> <p><i>R</i>: The applicant is to be a regular employee.</p> <p><i>T</i>: The applicant is to be a temporary employee.</p>
<b>Source of Reference</b>	<p>Enter a code that explains how an applicant was referred to the position or to the company. See user-defined code table 08/N1.</p> <p>This code is a more specific source of reference than that in the Application Method (data item HN02) field.</p>
<b>Application Method</b>	<p>Enter a code that defines how an applicant applied for the job. You can define these codes using user-defined code table 08/MA.</p> <p>This code reflects a less specific source of information than that in the Source of Information (data item HN01) field.</p>
<b>Interviewer</b>	Enter a code that identifies the person who interviewed the applicant. Use user-defined code table 08/N3. You can enter more specific interview information using the data types linked to the detailed applicant resume process.
<b>Branch/Location</b>	Enter a code that defines the branch or geographic location for which the applicant is being considered. Define this code using user-defined code table 01/01. This code is helpful for reporting purposes.

---

## Entering Supplemental Data for Applicants

This section provides an overview of supplemental data for applicants and lists the forms used to enter supplemental data for applicants.

## Understanding Supplemental Data for Applicants

Supplemental data is any type of additional, defined information that you want to track about:

- Requisitions
- Applicants
- Employees
- Jobs
- Dependents
- Beneficiaries
- Health safety management

When you set up Human Resources, 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 these 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 type of supplemental information that you track.

After you enter supplemental data, you can use it to locate applicants who meet specific criteria that are required to fill vacancies within the organization. For example, you might need someone with an MBA degree who can speak Spanish. You can access the Supplemental Data Multiskill Search program (P080250) to search for all applicants who meet these requirements.

### See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Supplemental Data

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Multiskill Search

Chapter 9, “Tracking Applicants,” Reviewing Applicant Reports, page 97

## Forms Used to Enter Supplemental Data for Applicants

Form Name	FormID	Navigation	Usage
Work With Supplemental Data	W00092D	Applicant Supplemental Data (G08BSDA1), Applicant Supplemental Data Entry	Enter supplemental data for applicants.
Work With Supplemental Data by Data Type	W050210E	Applicant Supplemental Data (G08BSDA1), Applicant Data by Data Type	Enter applicant data by data type.
Supplemental Data Multiskill Search	W080250G	Applicant Supplemental Data (G08BSDA1), Supplemental Data Multiskill Search	Search supplemental database for applicants with specific skills.

---

## Hiring an Applicant

This section provides an overview of the applicant hire process and discusses how to hire an applicant.

### Understanding the Applicant Hire Process

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 or send a message to the person in the organization who is responsible for creating new employee records in the database.

When the person who hires applicants typically is the same person who creates new employee records, you can save time and eliminate redundant data entry by setting up the 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 Address Book record to indicate that he or she is an employee.

Use the Employee Quick Hire program (P060116Q) to expedite the hiring of many new employees.

### See Also

Chapter 9, “Tracking Applicants,” Reviewing Applicant Reports, page 97

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Adding Employee Records Using Employee Quick Hire,” Adding Employee Records for Applicants, Rehires, and New Hires

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Adding Employee Records One at a Time”

## Prerequisite

Before you complete the tasks in this section:

- Set up the system to transfer selected types of supplemental data when you hire an applicant.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Setting Up Cross-Reference Tables for Supplemental Data.

- Review the processing options for this program and for the Employee Information program (P0801).

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 in the Supplemental Data Setup program (P00091).

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Supplemental Data.

## Forms Used to Hire an Applicant

Form Name	FormID	Navigation	Usage
Hire Applicant	W084HA	<p>Applicants (G08BA1), Applicant Information</p> <p>On the Work With Applicants form, select the desired applicant record, and then do one of the following:</p> <p>Click the Hire button to hire the applicant and enter complete employee information for the applicant.</p> <p>Click the Initiate Hire button to hire the applicant and send an email message to the person who needs to enter complete employee information for the applicant.</p>	Hire an applicant.
History Effective Date Confirmation	W084HC	<p>On the Hire Applicant form, click OK to either hire the applicant or send notification to the person who will complete the hiring process.</p> <p>On the History Effective Date Confirmation form, click OK.</p>	Validate the values you selected for Effective Date and Change Reason Code for history tracking.
Employee	W0801EMPA	On the Hire Applicant form, click OK. If you clicked the Hire button to hire the applicant, the Employee form appears.	Add a new employee record.

## Hiring an Applicant

Access the Hire Applicant form.

Applicant Information - Hire Applicant		
OK Cancel Form Tools 		
Applicant Number	8001	Hogan, Betsy G.
Date Started	11/02/04	
Requisition No. To Be Filled	1265	
Candidate Requisition Status	EF	
Employee Tax ID	116-36-3646	
Effective On	11/02/04	
Change Reason	001	

Hire Applicant form

1. On the Work With Applicants form, locate the applicant.
2. Select the applicant record, and then click Select.
3. On the Applicant Information form, do one of these:
  - Click the Hire button to hire the applicant and enter complete employee information for the applicant.
  - Click the Initiate Hire button to hire the applicant and send an email message to the person who needs to enter complete employee information for the applicant.
4. On the Hire Applicant form, complete these fields and click OK:
  - Date Started
  - Requisition No. To Be Filled
  - Candidate Requisition Status
  - Effective On
  - Change Reason
5. Click OK to either hire the applicant or send notification to the person who will complete the hiring process.
6. On the History Effective Date Confirmation form, click OK.
7. On the Hire Applicant form, click OK.
 

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

### Date Started

Enter 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 value is the original hire date. If no original hire date exists, the system uses

	<p>the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker.</p> <p>For the calculation tables in Payroll and the eligibility tables and date codes in Human Resources, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.</p>
<b>Requisition No. To Be Filled</b>	<p>Enter the number that identifies the position requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.</p>
<b>Candidate Requisition Status</b>	<p>Enter the current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from user-defined code table 08/CN.</p> <p>You can group candidate requisition status codes based on the hard-coded special handling code values in the table. Values are:</p> <p><i>CAN</i>: Any candidate code.</p> <p><i>DET</i>: Any code indicating that the position is detached or no longer filled.</p> <p><i>FIL</i>: Any code indicating that the position has been filled.</p> <p><i>REJ</i>: Rejected.</p> <p><i>TMP</i>: Temporarily filled.</p> <p>Candidate requisition status codes that have a special handling code of either <i>FIL</i> or <i>TMP</i> update the Filled Headcount field. However, only those status codes that have special handling codes of <i>FIL</i> can cause the system to change the requisition status to <i>Filled</i> and <i>Closed</i>.</p>
<b>Effective On</b>	<p>A future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.</p>
<b>Change Reason</b>	<p>Enter a code that indicates the reason for:</p> <ul style="list-style-type: none"> <li>• Changing an active employee record.</li> <li>• Terminating an employee.</li> <li>• Recommending a change in salary or rate.</li> </ul> <p>This is a user-defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.</p>

---

## Creating Applicant Letters

This section provides an overview of applicant letters, lists the prerequisite, and discusses how to:

- Set processing options for Print Applicant Letters (P08450).
- Create applicant letters.

## Understanding Applicant Letters

To send written information to applicants, you can use the mailmerge features of the JD Edwards EnterpriseOne software to produce letters for small, infrequent mailings effectively. Using the Print Applicant Letters program (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 these two methods to customize the contents 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 the MailMerge Workbench Setup program (P980014).

## Prerequisite

Create or customize letters that you can use with the merge process.

See *JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

## Forms Used to Create Applicant Letters

Form Name	FormID	Navigation	Usage
Print Applicant Letters	W08450A	Applicants (G08BA1), Print Applicant Letters  On the Print Applicant Letters, select the desired records, select the desired letter template, and select Generate Letter from the Row menu.	Access applicant letters that you wish to print.
MailMerge Letter Display	W05WEBMMA	On the MailMerge Letter Display form, select Print from the Form menu.	Print applicant letters.

## Setting Processing Options for the Print Applicant Letters Program (P08450)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Process

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

**Applicant Letter Document Name** Use this processing option to specify which letter template will be used when generating applicant letters.

## Creating Applicant Letters

Access the Print Applicant Letters form.

**Print Applicant Letters - Print Applicant Letters**

Find Close GenerateLetter Row Tools

Applicant Name \*

Applicant Number \*  Mailing Date

Applicant Status \*  Applicant Letter Document

Records 1 - 10 [Customize](#)

<input type="checkbox"/>	Applicant Name	Applicant Number	Ap St	App Status Description	Position ID	Position Description
<input type="checkbox"/>	Jackson, John	2129	95	Terminated Em		
<input type="checkbox"/>	Marx, Wade	6200	02	Called for Interv		
<input type="checkbox"/>	Elkins, Kyra	6201	02	Called for Interv		
<input type="checkbox"/>	Rieves, Trevor	6202	92	Rejected - Bette		
<input type="checkbox"/>	Whalen, Tori	6203	01	Initial Contact		
<input type="checkbox"/>	Hogan, Betsy G.	8001	10	Return for 2nd li	2H-2	Employment Represent:
<input type="checkbox"/>	Torres, Elizabeth M.	8004	01	Initial Contact		
<input type="checkbox"/>	Johnson, Robert	8006	71	Hired		
<input type="checkbox"/>	Tremont, Terrance	10101	10	Return for 2nd li		
<input type="checkbox"/>	Allcott, Melissa	10102	79	Applicant Accep		

Print Applicant Letters form

To create an applicant letter:

1. On the Print Applicant Letters form, to create multiple letters, click Find to display all applicants, and then select multiple applicant records from the detail area.
2. To create a single letter, complete one or more of these fields, click Find, and then select the applicant record:
  - Applicant Name
  - Applicant Number
  - Applicant Status
3. If you want to print a date other than the current system date on the letter, complete the Mailing Date field:  
If the letter has been set up to use this value, this date prints on the letter.
4. Complete the Applicant Letter Document field to select the desired letter template:
5. Select Generate Letter from the Row menu.



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

6. On the MailMerge Letter Display form, select Print from the Form menu.

<b>Applicant Name</b>	Enter 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.
<b>Applicant Status</b>	<p>Enter a code that defines a step in the hiring process that the applicant has completed, such as initial contact, first interview, and so on. This is a defined code (08/AS).</p> <p>When you enter or change the status of an applicant with the Applicant Entry program (P08401), the system adds a record to the supplemental data type for applicant status. To review the history of an applicant status, you can view the information that has been added to this supplemental data type.</p>
<b>Mailing Date</b>	Enter the date that prints on the letter.
<b>Applicant Letter Document</b>	Enter a code that identifies which Applicant Letter document will be used from the MailMerge (P980014) application.

---

## Reviewing Applicant Reports

This section provides an overview of applicant report information.

### Understanding Applicant Reports

To review detailed information about applicants, you can print applicant reports. You can use these reports to:

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

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

#### See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Supplemental Data

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Multiskill Search

[Appendix B, “JD Edwards EnterpriseOne Human Resources Reports,” page 341](#)



## CHAPTER 10

# Entering Data for Human Resources Government Reports

Organizations complete government reporting requirements that enable the Equal Employment Opportunity Commission (EEOC) to track and evaluate data regarding the equal treatment of employees in the workplace. Human Resources enables you to build reports for a variety of government reporting requirements.

### See Also

[Appendix B, “JD Edwards EnterpriseOne Human Resources Reports,” page 341](#)

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## (USA) Entering EEO-1 Information

This chapter provides an overview and discusses how to enter EEO-1 (Equal Employment Opportunity-1) information.

### Understanding When to Enter EEO-1 Information

You enter EEO-1 reporting information when:

- This is the first time that you are using Human Resources to run an EEO-1 report.
- You need to revise company information for the EEO-1 report.

After you enter the required EEO-1 information, run the EEO-1 report.

The system stores the required values in the EEO-1 Annual Data table (F05850) so that you can report them on the following year EEO-1 report. When you run the report, the system lists the prior year reporting information and also calculates the current year gender and ethnicity totals.

### Form Used to Enter EEO-1 Information

Form Name	FormID	Navigation	Usage
EEO-1 Annual Data Revisions	W05850B	Government Reporting (G05BG), EEO-1 Annual Data  On the Work With EEO-1 Annual Data form, click Add.	Enter current year EEO-1 data in preparation for filing a first time report.

## (USA) Entering EEO-1 Information

Access the EEO-1 Annual Data Revisions form.

EEO-1 Annual Data - EEO-1 Annual Data Revisions			
OK	Cancel	Tools	
EEO Company	<input type="text"/>	Establishment A/B...	<input type="text" value="1"/>
Company	<input type="text" value="00001"/>	Century/Year	<input type="text" value="2005"/>
EEO Unit	<input type="text"/>	Industry Classification	<input type="text"/>
EEO White Males	<input type="text" value="5"/>	EEO White Females	<input type="text" value="3"/>
EEO Black Males	<input type="text" value="1"/>	EEO Black Females	<input type="text" value="1"/>
EEO Hispanic Males	<input type="text" value="1"/>	EEO Hispanic Females	<input type="text" value="2"/>
EEO Asian Males	<input type="text" value="0"/>	EEO Asian Females	<input type="text" value="3"/>
EEO Indian Males	<input type="text" value="0"/>	EEO Indian Females	<input type="text" value="1"/>

EEO-1 Annual Data Revisions Form

**EEO Company** (Equal Employment Opportunity Company)

Enter a code assigned by the U.S. Equal Employment Opportunity Commission (EEOC)

that identifies a specific organization, fund, entity, and so on. The code is used for government reports, such as EEO-1. Do not include dashes with keyed value. Appropriate dashes will be added when reports are printed.

**Century/Year**

Enter the year for which you are reporting.

**EEO Unit** (Equal Employment Opportunity Unit)

Enter a code assigned by the U.S. Equal Employment Opportunity Commission (EEOC) that identifies a specific business unit, location, establishment, and so on.

The code is used for government reports, such as EEO-1. Do not include dashes with keyed value. Appropriate dashes will be added when reports are printed.

**Industry Classification**

Enter a code used to classify goods and services. This code can be in the format specified by any one of these classification systems:

- Standard Industrial Classification (SIC) or North American Industry Classification System (NAICS).

Numerical systems that the United States uses to classify goods and services. A code in the SIC format is four digits. A code in the NAICS format is six digits.

- Harmonized System (HS).

The international method of classifying goods. More than fifty countries use this system. A code in the HS format can be up to 10 digits.

- Standard Industrial Trade Classification (SITC).

A numerical code system developed by the United Nations to classify goods used in international trade. International organizations use this system. A code in the SITC format can be up to six digits.

**EEO White Males** (Equal Employment Opportunity White Males)

Enter an amount that represents the number of white males employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO Black Males** (Equal Employment Opportunity Black Males)

Enter an amount that represents the number of black males employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO Hispanic Males** (Equal Employment Opportunity Hispanic Males)

Enter an amount that represents the number of Hispanic males employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO Asian Males** (Equal Employment Opportunity Asian Males)

Enter an amount that represents the number of Asian males employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO Indian Males** (Equal Employment Opportunity Indian Males)

Enter an amount that represents the number of Indian males employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO White Females** (Equal Employment Opportunity White Females)

Enter an amount that represents the number of white females employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO Black Females** (Equal Employment Opportunity Black Females)

Enter an amount that represents the number of black females employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO Hispanic Females** (Equal Employment Opportunity Hispanic Females)

Enter an amount that represents the number of Hispanic females employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO Asian Females** (Equal Employment Opportunity Asian Females)

Enter an amount that represents the number of Asian females employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.

**EEO Indian Females** (Equal Employment Opportunity Indian Females)

Enter an amount that represents the number of Indian females employed by a business unit, establishment, and so forth during a date range. Use the number for government reports, such as EEO-1.



## CHAPTER 11

# Understanding Position Budget Management

This chapter provides an overview of position budget management.

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## Position Budget Management

A position is an employee 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 Human Resources and Payroll. However, to use positions, you must have a position budget.

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

If a company desires, they can also associate a job with a 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 the 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 the organization.

Human Resources provides comprehensive tools for position budget management so that you can improve the management of employee salary costs. The system enables you to:

- Review the approved headcount 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, headcount, or full time equivalents.
- Track positions and headcount by company and department.

- Post position budgets and accounts to the general ledger.



# CHAPTER 12

## Defining Position Budgets

This chapter provides an overview of position budget definitions and discusses how to:

- Define position budgets manually.
- Define position budgets automatically.
- Set processing options for the Start Position Control program (R081800).

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### Understanding Position Budget Definitions

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

- Salary expenditures
- Hours worked
- Full time equivalents (FTEs)
- Headcount (number of employees)

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

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

When defining a position budget, complete these steps:

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

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

After you activate the appropriate system options and create the 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 year end values. The activity record includes these types of information:

- Employee.
- Assigned position.
- Date on which the employee was assigned to the position.
- Employee salary.
- Standard hours per year.
- FTE.
- Projected year end amounts for salary, FTE, hours, and headcount, based on assignment date.

### Example: Budget Processing

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

Field	Value
Salary	20,0000.00 (annual)
FTEs	10
Headcount	14

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

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## Prerequisites

Before you complete the tasks in this section:

- Set up position control information in the system options.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

- Set up the business units and fiscal periods.

See *JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Setting Up Organizations,” Setting Up Business Units and *JD Edwards EnterpriseOne General Accounting 8.12 Implementation Guide*, “Setting Up 52 Period Accounting,” Setting Up 52 Period Fiscal Date Patterns.

- If you want to associate job type codes with each position, define those job type codes.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Defining Jobs”.

## Defining Position Budgets Manually

This section provides an overview of manual position budget definitions and discusses how to:

- Set processing options for Position Entry (P08101).
- Define position budgets manually.

### Understanding Manual Position Budget Definitions

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

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

### Form Used to Define Position Budgets Manually

Form Name	FormID	Navigation	Usage
Position Master Detail	W08101C	Daily Processing (G08BP1), Position Entry  On the Work With Positions form, click Add.	Define position budgets manually.

### Setting Processing Options for the Position Entry Program (P08101)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

#### Defaults

This processing option enables you to determine whether the Job Type and Job Step fields are required on the Position Master Detail form.

#### 1. Job Type/Step Entry

Use this processing option to indicate whether the Job Type and Job Step fields are required on the Position Master Detail form. If these fields are required, you cannot close and save the Position Master Detail form without completing the Job Type and Job Step fields. If these fields are not required

and the Position ID Required field in the HRM Foundation Position Control Options is set to 1 (Required), the system displays a warning message when you leave these field blank; however you can save the work and close the form. Values are:

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

/: Require entry of Job Type and Job Step.

If you enter / in this processing option, you must also use the Position ID Required field on the HRM Foundation Position Control Options form to indicate that position ID is required. The system ignores the processing option in P08101 if you have set the HRM Foundation Position Control Options so that the position ID is not required. There will be no errors or warnings on P08101 when saving the record in this case.

## Defining Position Budgets Manually

Access the Position Master Detail form.

Position Entry - Position Master Detail			
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Tools"/>			
Home Business Unit	<input type="text" value="9"/>	Corporate Administration	Fiscal Year <input type="text" value="05"/>
Position ID	<input type="text" value="0A-1"/>	Description	<input type="text" value="Accounting Manager"/>
Security Business Unit	<input type="text" value="9"/>	Corporate Administration	<input type="text"/>
Effective From Date	<input type="text"/>	Thru Date	<input type="text" value="12/31/05"/>
Budget Status	<input type="text" value="A"/>	Budget Status Date	<input type="text" value="01/01/05"/>
Position Status	<input type="text" value="F"/>	Position Status Date	<input type="text" value="01/01/05"/>
Job Type/Step	<input type="text" value="0A-1"/>	<input type="text"/> Accounting Manager	
Locality	<input type="text"/>	Headquarters (default)	
Position Budget Amount	<input type="text" value="60,000"/>	Effective Budget Amount	<input type="text" value="60,000"/>
Budgeted FTE	<input type="text" value="1.00"/>	Effective Budget FTE	<input type="text" value="1.00"/>
Budgeted Hours	<input type="text" value="2,080"/>	Effective Budget Hours	<input type="text" value="2,080"/>
Headcount	<input type="text" value="1"/>	Headcount	<input type="text" value="1"/>
Business Unit - Parent	<input type="text" value="9"/>	Corporate Administration	
Parent Position ID	<input type="text" value="A1"/>	President	
User Code 01	<input type="text"/>	User Code 02	<input type="text"/>
User Code 04	<input type="text"/>	User Code 05	<input type="text"/>
		User Code 03	<input type="text"/>

Position Master Detail form

### Position Budget Amount

Enter 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 equivalent (FTEs) within this position, for the business unit and year that you specified.
<b>Budgeted FTE</b> (budgeted full time equivalents)	<p>Enter the number of full time equivalents (FTEs) that the 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 or one-half FTE. An employee cannot represent more than 1 FTE.</p> <p>If you leave this field blank, the system supplies a default value. Typically, this value is 1. However, you can set up the system to use another value as the default.</p>
<b>Budgeted Hours</b>	<p>Enter 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 the full time equivalents (FTEs). If you do not enter a value in this field when you budget the position, the system enters a default value. To determine that default value, the system searches these sources, in the order that they are listed, and uses the value from the first of these sources that contains a value:</p> <ol style="list-style-type: none"> <li>1. The number of FTEs multiplied by the standard number of hours per year for the company associated with the business unit that you entered</li> <li>2. The number of FTEs multiplied by the standard number of hours per year for Company 0</li> <li>3. A default value that you defined in the data dictionary when you set up the system</li> <li>4. 2080</li> </ol>
<b>Headcount</b>	Enter the number of employees requested, budgeted, or approved for a position or requisition.
<b>Effective From Date</b>	<p>Enter the date on which a requisition, a position, or activity within a position takes effect.</p> <p>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.</p> <p>Effective budget amounts are the amounts that the system uses to:</p> <ul style="list-style-type: none"> <li>Verify position budget information, if you have set up the system options to warn or prevent users from exceeding position budget amounts</li> <li>Update general ledger information</li> </ul>
<b>Thru Date</b>	<p>Enter 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.</p> <p>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:</p> <ul style="list-style-type: none"> <li>Verify position budget information, if you have set up the system options to warn or prevent users from exceeding position budget amounts</li> </ul>

	Update general ledger information
<b>Budget Status</b>	Enter a code that indicates the status of the position budget. The system uses the first character in the second description in the defined code table 08/PC to process approved and closed positions. The position 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).
<b>Budget Status Date</b>	Enter the date the current budget status became active.
<b>Position Status</b>	Enter 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 the special handling code for defined Code 08/PL. The system updates the position status code on the beginning date of employee assignment. When the position again becomes vacant, you must manually change the value in the Position Status field.
<b>Position Status Date</b>	The date the current status of the position became active.
<b>Business Unit - Parent</b>	Enter a code that identifies the Business Unit (MCU) that this Position reports to, such as the Supervisor's Business Unit.  The Parent Position and 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 equals SRPRG Business Unit equals 100 Parent Position ID equals JRMGR Parent Business Unit equals 200  Sally Abbot: Position ID equals JRMGR Business Unit equals 200
<b>Parent Position ID</b>	Enter a code that identifies the higher level position this position reports to, such as the supervisor position ID.  <hr/> <b>Note.</b> The parent position/parent business unit must already exist as a position ID or business unit record in the Position Master File. <hr/>
<b>User Code 01</b>	Enter a 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

---

## Defining Position Budgets Automatically

This section provides an overview of automatic position budget definitions and discusses how to:

- Run the Start Position Control Program (R081800).
- Set processing options for Start Position Control (R081800).

## Understanding How to Define Position Budgets Automatically

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

### Defining Position Budgets Automatically

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

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

When you define position budgets automatically, the program uses the employee 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 these tables:

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

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

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

To modify position budget information after you have defined position budgets automatically, use Position Entry program (P08101).

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

- The employee is terminated prior to the beginning of the current fiscal year.
- No job type exists in the employee 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 the Start Position Control program on August 16th, and the employee hire date is September 1st, the employee is not included.

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

---

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

---

## Running the Start Position Control Program (R081800)

Select Position Control Setup (G08BP4), Start Position Control.

## Setting Processing Options for the Start Position Control Program (R081800)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Process

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

#### 1. Clear Tables:

Use this 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. Values are:

Blank: Do not clear tables.

1: Clear tables.

---

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

---



## CHAPTER 13

# Working With Position Budget Information

This chapter discusses how to:

- Enter account information for positions.
- Set up automatic accounting instructions (AAIs) for position budgets.
- Transfer position budgets to the General Ledger and Account Balances table.
- Revise position budgets by business unit.
- Work with position activity information.
- Review position budget information.
- Define position budget for next year.
- Work with parent/child relationships by position.
- Use position control reports.
- Purging position information.

---

## Entering Account Information for Positions

This section provides an overview of account information entry for positions and discusses how to enter account information for positions.

### Understanding Account Information Entry for Positions

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

#### Prerequisites

Before you complete the tasks in this section:

- Set up position control information in the system options.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

- Set up the business units and fiscal periods.

See *JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Setting Up Organizations,” Setting Up Business Units and *JD Edwards EnterpriseOne General Accounting 8.12 Implementation Guide*, “Setting Up 52 Period Accounting”.

- If you want to associate job type codes with each position, define those job type codes.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Defining Jobs”.

## See Also

Chapter 13, “Working With Position Budget Information,” Transferring Position Budgets to the General Ledger and Account Balances Table, page 117

## Form Used to Enter Account Information for Positions

Form Name	FormID	Navigation	Usage
Position Account Information	W081012A	<p>Daily Processing (G08BP1), Position Entry</p> <p>On the Work With Positions form, to locate the position for which you need to enter account information, complete the Fiscal Year and Home Business Unit fields and click Find.</p> <p>Select a record in the detail area, and then select Position Acct Info (Position Account Information) from the Row menu.</p>	<p>Enter account information for positions.</p> <p>You can further refine the search for positions by entering a position ID in the Position ID field of the Query By Example row.</p>

## Entering Account Information for Positions

Access the Position Account Information form.

**Position Entry - Position Account Information**

OK Find Delete Cancel Form Tools

Fiscal Year	5	Effective From Date	
Home Business Unit	9 Corporate Administration	Effective Thru Date	
Position ID	0A-3 Financial Analyst	Annualized Budget	38,000
Percent or Amount (%A)	%	Effective Budget	38,000

**Records 1 - 2** Customize

	Account Number	Account Description	Sub Type	Sub Type Description	Sub-ledger	Pos. Acct. Percent	Annualized Budget Amount
<input type="checkbox"/>	9.8110	Salaries and Wages				100.00	
<input type="checkbox"/>							

Position Account Information form

- To specify the method of calculation, complete the Percent or Amount (%A) field.
- Complete the Account Number field in the detail area.
- If the method of calculation (Percent or Amount field) is percent, complete the Pos. Acct. Percent (Position Account Percent) field.
- If the method of calculation is amount, complete the Annualized Budget Amount field.
- Complete these optional fields:
  - Subledger
  - Sub Type
- Click OK.
- Click OK again to update the account information and return to the Work With Positions form.

**Percent or Amount (%A)** Specify whether the value is a percentage or an amount.

**Account Number** Enter a value that identifies an account in the general ledger. Use one of these formats to enter account numbers:

- Standard account number (business unit.object.subsidiary or flex format).
- Third GL number (maximum of 25 digits).
- Account ID number (eight digits).
- Speed code.

This is a two-character code that you concatenate to the AAI item SP. You can then enter the code instead of an account number.

The first character of the account number indicates its format. You define the account format in the General Accounting constants.

**Pos. Acct. Percent** (position account percent) Enter a percentage of a position account.

<b>Annualized Budget Amount</b>	Enter 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.
<b>Subledger</b>	Enter a code that identifies a detailed, auxiliary account within a general ledger account. A subledger can be an equipment item number or an address book number. If you enter a subledger, you must also specify the subledger type.
<b>Sub Type</b>	Enter a user-defined code (00/ST) that is used with the Subledger field to identify the subledger type and how the system performs subledger editing. On the Defined Codes form, the second line of the description controls how the system performs editing. This is either hard-coded or defined. Values include:  A: Alphanumeric field, do not edit. N: Numeric field, right justify and zero fill. C: Alphanumeric field, right justify and blank fill.

---

## Setting Up AAIs for Position Budgets

This section provides an overview of AAI setup for position budgets.

### Understanding AAI Setup for Position Budgets

You set up AAIs to specify the accounts in the general ledger that contain position budget information. Someone in the accounting department must set up AAIs in General Accounting; these AAIs cannot be set up from Human Resources.

These AAIs determine which accounts in the general ledger are used to calculate the financials budget that appears on the Work With Business Unit by Organization form (W081200A). You can review the financials budget for a position to determine whether it corresponds to the amount that you entered for the position in Human Resources.

This table shows 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.

AAI	Description
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 the organization that has position budgets. The system stores AAIs in the Automatic Accounting Instructions Master table (F0012).

## See Also

*JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Setting Up Automatic Accounting Instructions”

---

## Transferring Position Budgets to the General Ledger and Account Balances Table

This section provides an overview of the transfer process from position budgets to the General Ledger and Account Balances Table, lists the prerequisite, and discusses how to:

- Transfer position budgets to the Account Balances table.
- Set processing options for Update Position Budgets to Account Balances program (R08902).
- Run the Update Position Budgets to Account Ledger program (R08911).
- Set processing options for the Update Position Budgets to Account Ledger program (R08911).

## Understanding Position Budget Transfers to the General Ledger and Account Balances Table

After you define the position budgets and position accounts, you can post detailed information for position budgets to the Account Ledger table (F0911) so that the accounting department can access it.

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

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

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

You can use the Position Account Information program (P081012) to identify the general ledger accounts to which you want to transfer the information.

---

**Important!** You transfer position budget information to the general ledger only if the 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 the accounting department determines the salary budgets for the organization.

---

## Transferring Position Budgets to the Account Balances Table

To create or refresh the position budget accounts, you transfer summary position budget information to the Account Balances table (F0902) in General Accounting. You typically perform this task to establish an initial budget for a new year.

As you work through the budgeting process, you can transfer these 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 program (R08902) to transfer each of these types of position budgets. This program updates the Account Balances table. You or someone in the accounting department can review this information as you work through the budgeting process.

When you run the Update Position Budgets to Account Balances program 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.

---

**Important!** Because this program overwrites all of the existing information in the Account Balances table, you transfer position budgets to the Account Balances table only when you are setting up budgets for a new year. If you need to revise position budgets in the middle of the year, do not rerun this program. Instead, post position budgets to the Account Ledger table (F0911).

---

See *JD Edwards EnterpriseOne General Accounting 8.12 Implementation Guide*, “Creating Budgets,” Entering Annual Budgets and *JD Edwards EnterpriseOne General Accounting 8.12 Implementation Guide*, “Creating Budgets,” Entering Detailed Budget Amounts.

## Posting Position Budgets to the Account Ledger Table

To track detailed information for the position budgets, you can update the position budget information to the Journal Entry Transactions - Batch File table (F0911Z1), which is a temporary account ledger table. The accounting department posts the Journal Entry Transactions - Batch File table to the live Account Ledger table (F0911). 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 *JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Posting Financial Transactions,” Posting Financial Batches.

## Prerequisite

Define the position budgets.

See [Chapter 12, “Defining Position Budgets,” page 105](#).

## Transferring Position Budgets to the Account Balances Table

Select Position Control Adv/Tech Operations (G08BP3), Update Position Budgets to Acct Bal (Account Balances).

## Setting Processing Options for the Update Position Budgets to Account Balances Program (R08902)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Update Options

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

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

Use this processing option to specify whether to update the account balances file (F0902) when you run the process.

### Ledger Type

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

#### Salaries Budget Ledger:

Use this processing option to specify the ledger type (UDC 09/LT) to update when entering budgets. 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.

You can set up multiple, concurrent accounting ledgers within the general ledger to establish an audit trail for all transactions.

---

**Note.** The ledger codes on this screen must be valid in defined Codes 09/LT. If not, the program will not function. These ledger types cannot be updated by this program: AA, CA, XA, YA, ZA, AC.

---

#### Hours Budget Ledger:

Use this processing option to specify the ledger type (UDC 09/LT) to update when entering budgets. 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.

You can set up multiple, concurrent accounting ledgers within the general ledger to establish an audit trail for all transactions.

---

**Note.** The ledger codes on this screen must be valid in defined Codes 09/LT. If not, the program will not function. These ledger types cannot be updated by this program: AA, CA, XA, YA, ZA, AC.

---

## Fiscal Year

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- 1. Enter the last two digits of the fiscal year.** Use this processing option to specify the last two digits of the fiscal year. Generally, you can either enter a number in this field or leave it blank to indicate the current fiscal year (as defined on the Company Setup 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, 1998 and ends September 30, 1999. The end of the first period is October 31, 1998. Specify the year 98 rather than 99.

## Budget Cycle

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 value will only update the Final Budget.

- Requested Budget Version:** Use this processing option to specify update preferences. Enter a *1* next to Requested Budget, Approved Budget, and Final Budget for this version.
- Approved Budget Version:** Use this processing option to specify update preferences. Enter a *1* next to Approved Budget and Final Budget for this version.
- Final Budget Version:** Use this processing option to specify update preferences. Enter a *1* next to Final Budget for this version.

## Report Type

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- 1. Enter 0 for an Exception Report.** Use this processing option to specify the type of report to run. Values are:  
*0*: Exception report  
*1*: Summary or detail report  
 See next processing option.
- 1. Enter 0 for a Summary Report. Enter a 1 for a Detail Report. This option is ignored if only an Exception report is requested.** Use this processing option to specify the type of report to run. Values are:  
*0*: Summary report  
*1*: Detail report  
 See previous processing option.

## Running the Update Position Budget to Account Ledger Program (R08911)

Select Position Control Adv/Tech Operations (G08BP3), Update Position Budgets to Acct. Ledger.



## Setting Processing Options for the Update Position Budgets to Account Ledger Program (R08911)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Select

This processing option enables 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

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

- 1. Transaction Description** Use this processing option to enter a brief description of the transaction.  
  
This description will be included on every record that is updated to the Journal Entry Transaction - Batch table (F0901101). This description can be up to 30 characters in length.
- 2. Transaction Date** Use this processing option to specify the date to be posted for this transaction. If left blank, the system date will be used.
- 3. Budget Ledger Type** Use this processing option to specify the ledger to be updated. 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 these 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 mode 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, and then rerun the process in update mode. Values are:  
  
Blank: Proof Mode  
0: Proof Mode

*1*: Update Mode

## Reports

These processing options enable 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 File 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. Values are:

Blank: Exception report only

*0*: Exception report only

*1*: Exception report and Summary or Detailed report

These messages 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. Values are:

Blank: Summary report

*0*: Summary report

*1*: Detailed report

---

## Revising Position Budgets by Business Unit

This sections provides an overview of position budget revisions by business unit and discusses how to revise position budgets by business unit.

### Understanding Position Budget Revisions by Business Unit

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

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

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

### Form Used to Revise Position Budgets by Business Unit

Form Name	FormID	Navigation	Usage
Revise Positions by Business Units	W08101B	Daily Processing (G08BP1), Position Entry  Complete the Home Business Unit and Fiscal Year fields and from the Form menu, select Pos by Business Un (Positions by Business Units).	Revise position budgets by business unit.

### Revising Position Budgets by Business Unit

Access the Revise Positions by Business Units form.

**Position Entry - Revise Positions by Business Units**

OK Find Delete Cancel Row Tools

Home Business Unit  Corporate Administration Fiscal Year

Records 1 - 10

<input type="checkbox"/>	<input type="checkbox"/>	FY	Home Business Unit	Security Business Unit	Position ID	Description
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	0A-1	Accounting Manager
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	0A-3	Financial Analyst
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	0P-2	Accounts Payable Clerk
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	0P-3	Accounts Receivable Clerk
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	1M-2	IT Manager
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	2H-1	Human Resources Manager
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	2H-2	Employment Representative
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	2H-4	Benefits Specialist
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	2H-5	EEO Specialist
<input type="checkbox"/>	<input type="checkbox"/>	05	9	9	4A-1	Administrative Assistant

Revise Positions by Business Units form

### Reports to BU

Enter a code that identifies the Business Unit (MCU) that this Position reports to, such as the Supervisor's Business Unit.

The Parent Position and 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.

For Bob Jones:

Position ID equals SRPRG.

Business Unit equals 100.

Parent Position ID equals JRMGR.

Parent Business Unit equals 200.

For Sally Abbot:

Position ID equals JRMGR.

Business Unit equals 200.

### Reports to Position

Enter a code that identifies the higher level position that this position reports to, such as the supervisor position ID.

**Note.** The parent position/parent business unit must already exist as a position ID or business unit record in the Position Master File.

---

## Working With Position Activity Information

This section provides an overview of working with position activity information and discusses how to:

- Attach an employee record to a position budget.
- Review position activity.
- Correct position activity.

### Understanding How to Use Position Activity Information

After you define and approve the position budgets, you can attach employee records to them. You attach employee records to ensure that the actual salaries, hours, and FTEs for the employees are within those that you established for the position budgets. Employee records are attached to positions by entering a Position ID to the employee organizational record in the P0801 Employee Master. Position activity illustrates employee movement into and out of positions. To determine appropriate position budgets, you can set up the system to store historical records of position activity.

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

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

### Attaching an Employee Record to a Position Budget

After you define and approve the 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 record.

To stay within the 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 headcount for the position. When you set up the system options, you define the type of message that appears when a position effective budget is exceeded.

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

- Adds the salary, hours, FTEs, and headcount amounts for the employee to the projected position budget amounts through the end of the fiscal year.
- Adds job information that is associated with the position to the employee record.
- Updates the Position Budget Detail table (F08111) with the effective date of the employee assignment to the position, the employee salary, FTE, and hours.

The system then uses this information to determine the effect of these values on the budget through the end of the fiscal year.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Adding Employee Records One at a Time,” Setting Processing Options for Employee Organizational Assignments (P0801ORG).

## Reviewing Position Activity

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

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

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

## Updating Employee Position Activity

When an employee changes positions or leaves the organization, you must update the employee record in the Position Master Detail program (P08101) to reflect the change. When you change employee records in P08101, the system updates the position activity in the F08111 table. In HRM Foundation Position Control Options, you can set up the system to create historical records of the information that you have changed. The system updates position activity records when an employee record is changed for any of these reasons:

- When an employee enters a position.
- Leaves a position.
- Changes positions within the organization.

When you are also tracking position information for employees, the system creates position activity records for an employee when any of these situations occurs:

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

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

## Correcting Employee Position Activity

You can correct position activity records if you make a mistake when entering position information for an employee. For an activity record that has an Employee Action status of Active, you can correct most of the position activity information. For historical activity records, you can correct only the requisition number and remarks.

Use the Employee Position Activity Report (R081480) to review all of the position activity for each employee within the organization.

---

**Important!** Because the system does not create an audit trail of the changes that you make when you correct position activity records, we recommend that you assign high security to this program.

---

The Employee Master Detail program (P081111) updates the Position Budget Detail table (F08111). It does not update the employee history tables or the Employee Master Information table (F060116).

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

## Prerequisites

Before you complete the tasks in this section:

- Verify that you have set up position control options.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

- For each position to which you need to attach employee records, verify that the budget status is approved.

See Chapter 12, “Defining Position Budgets,” page 105.

## Forms Used to Work With Position Activity Information

Form Name	FormID	Navigation	Usage
Organizational Assignment	W0801ORGA	<p>Employee Management (G05BE1), Organizational Assignment</p> <p>On the Work With Organizational Assignments form, to locate the employee record, complete the Employee Identification field and click Find.</p> <p>Select the employee record and click Select.</p> <p>On the Organizational Assignment form, complete the Position ID field and click OK.</p> <p>On the Change Reason form, complete the Effective On and Change Reason fields and then click OK.</p>	Attach an employee record to a position budget.
Work With Position Activity	W08111A	Daily Processing (G08BP1), Position Activity Inquiry	Review position activity.
Employee Activity	W081111C	<p>Daily Processing (G08BP1), Enter Employee Activity</p> <p>On the Work With Employee Activity form, complete the Employee Identification field and click Find.</p> <p>Select the current activity record and click Select.</p> <p>On the Employee Activity form, change the incorrect information.</p> <p>As an alternate entry method, you can use the Revise Employee Activity form to correct multiple position activity records at the same time. To access this form, select Rev. Emp Activity (Revise Employee Activity) from the Row menu on the Work With Employee Activity form.</p>	Correct employee position activity.

## Attaching an Employee Record to a Position Budget

Access the Organizational Assignment form.



<b>Effective On</b>	Enter a future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.
<b>Change Reason</b>	Enter a user-defined code (06/T) that indicates the reason for an employee record change. For example, you can enter the reason you are recommending a salary or rate change. <hr/> <b>Note.</b> If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item. <hr/>

## Reviewing Position Activity

Access the Work With Position Activity form.

<b>Employee Action</b>	Enter the type of action linked to the employee. These codes are provided by the system and should not be changed: Blank: Active <i>A</i> : Adjust status, such as salary, FTE, hours. <i>E</i> : Expired. <i>L</i> : Leave of absence. <i>T</i> : Transfer (from one business unit to another). <i>X</i> : Terminate.
------------------------	--

## Correcting Employee Position Activity

Access the Employee Activity form.

Enter Employee Activity - Employee Activity		
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Tools"/>		
Home Business Unit	<input type="text" value="9"/>	Corporate Administration
Position ID	<input type="text" value="2H-4"/>	Benefits Specialist
Address Number	<input type="text" value="2049"/>	McLind, Rod
Effective From Date	<input type="text" value="07/27/05"/>	
Effective Thru Date	<input type="text"/>	
Employee Action	<input type="text" value="A"/> Adjust Status	
	ANNUAL	PROJECTED
Salary	<input type="text" value="27,500.00"/>	<input type="text" value="11,904.11"/>
Full Time Equivalents	<input type="text" value="1.00"/>	<input type="text" value="0.43"/>
Hours	<input type="text" value="2080.00"/>	<input type="text" value="900.38"/>
Requisition Number	<input type="text"/>	
Remark	<input type="text"/>	

Employee Activity form

**Employee Action**

Enter the type of action linked to the employee. These codes are provided by JD Edwards EnterpriseOne 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.

## Reviewing Position Budget Information

This section provides an overview of position budget information reviews and discusses how to:

- Review position budget information by business unit.
- Set processing options for Positions by Business Unit (P081210)
- Review position budget information by position.

## Understanding Position Budget Information Reviews

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

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

For example, assume that these conditions exist:

- Position A2 (accountant) pays an annual salary of 42,000.
- Cathy worked in position A2 from January 1 through April 30 (85 days multiplied by 8 hours = 680 hours), so her projected annual salary for that position is 13,729.20 (42,000 divided by 2080 = 20.19; 20.19 multiplied by 680 hours = 13,729.20).
- The position was vacant from May 1 to May 31.
- George worked in position A2 from June 1 through December 31 (153 days multiplied by 8 hours = 1224 hours), so his projected annual salary was 24,712.56 (42,000 divided by 2080 = 20.19; 20.19 multiplied by 1224 hours = 24,712.56).

The system calculates the projected year end amount for position A2 as 38,441.76 (13,729.20 plus 24,712.56).

### Reviewing Position Budget Information by Business Unit

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

A positive open amount for salary, hours, headcount, 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.

### Reviewing Position Budget Information by Position

To compare budgeted amounts for salaries, FTEs, hours, and headcount to 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 the position budgets through the end of the year.

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

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

## Forms Used to Review Position Budget Information

Form Name	FormID	Navigation	Usage
Work With Business Unit by Organization	W081200A	Daily Processing (G08BP1), Business Unit by Organization	Review position budget information by business unit.
Work With Positions by Business Unit	W081210A	Daily Processing (G08BP1), Positions by Business Unit	Review position budget information by position.

## Reviewing Position Budget Information by Business Unit

Access the Work With Business Unit by Organization form.

<b>Level of Detail</b>	Enter a number that indicates a business unit position within the hierarchy of the organization. Levels of detail are defined in General Accounting. 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.
<b>Division</b>	Enter a user-defined code (system 00, type 01) that the system uses for flexible account mapping and for printing selected information on reports.
<b>Home Business Unit</b>	<p>Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.</p> <p>Business unit security might prevent you from viewing information about business units for which you have no authority.</p>
<b>Financials Budget</b>	<p>Enter 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.</p> <p>Use 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.</p>
<b>Position Budget</b>	Enter 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 FTEs within this position for the business unit and year that you specified.
<b>Effective Budget</b>	Enter the sum of all projected amounts for all of the current positions. This amount is the total salary projection for the business unit.
<b>Projected At Year End</b>	Enter 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 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 USD annually who works from April 1 to December 31 represents a projected salary cost of 30,000 USD for that year.

## Setting Processing Options for the Positions by Business Unit Program (P081210)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Process

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

#### Calculate Open Salary

The Open Salary can be calculated using either Salary Budgeted or Salary Eff. Budget minus Salary Projected. Values are:

Blank: Open Salary equals Salary Budgeted minus Salary Projected (default).

/: Open Salary equals Salary Eff. Budget minus Salary Projected.

## Reviewing Position Budget Information by Position

Access the Work With Positions by Business Unit form.

#### Home Business Unit

Enter an alphanumeric code 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 document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

#### Open FTE (open full-time equivalent)

Enter the FTE amount. This figure is the portion of a full-time worker that an employee represents within the business unit. For example, an employee who

works 20 hours per week would represent .50 (1/2 FTE). This number cannot be greater than 1 for any employee.

**Salary Budgeted**

Enter 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 FTEs within this position, for the business unit and year that you specified.

-

**Salary Eff. Budgeted**  
(salary effective budgeted)

Enter 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 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.

**Salary Projected**

Enter 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 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 USD annually who works from April 1 to December 31 represents a projected salary cost of 30,000 USD for that year.

**FTE Budgeted** (full-time  
equivalent budgeted)

Enter the number of FTEs that the organization has budgeted for the position. An FTE 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 (1/2 FTE). An employee cannot represent more than 1 FTE.

**FTE Projected** (full-time  
equivalent projected)

Enter a figure that represents the FTEs projected for the fiscal year. At the employee level, the system calculates projected FTEs by multiplying each employee FTE by the fraction of the year that the employee worked in the position.

For example, one full-time employee (FTE = 1.0) working from April 1 to December 31 has a projected FTE of .75.

**FTE Eff. Budgeted**  
(full-time effective budgeted)

Enter the number of FTEs that the organization has budgeted for the position. An FTE 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 (1/2 FTE). An employee cannot represent more than 1 FTE.

The system uses the effective from and effective through dates to calculate the effective budget hours. If the effective through date is blank, the system uses the end date for the fiscal year to calculate the effective budget.

**FTE Projected** (full-time  
equivalent projected)

Enter a figure that represents the FTEs projected for the fiscal year. At the employee level, the system calculates projected FTEs by multiplying each employee FTE by the fraction of the year that the employee worked in the position.

For example, a full-time employee (FTE = 1.0) working from April 1 to December 31 has a projected FTE of .75.

### Hours Budgeted

Enter 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 FTEs. If you do not enter a value in this field when you budget the position, the system enters a default value. To determine that default value, the system searches these sources, in the order that they are listed, and uses the value from the first of these sources that contains a value:

- The number of FTEs multiplied by the standard number of hours per year for the company associated with the business unit that you entered.
- The number of FTEs multiplied by the standard number of hours per year for Company 0.
- A default value that you defined in the data dictionary when you set up the system.
- 2080.

### Hours Eff. Budgeted (hours effective budgeted)

Enter the number of hours budgeted for a particular position within a business unit.

The system uses the effective from and effective through dates to calculate the effective budget hours. If the effective through date is blank, the system uses the end date for the fiscal year to calculate the effective hours that are budgeted.

### Hours Projected

Enter a figure that represents the number of hours worked during a period of time.

At the employee level, the system calculates this amount by multiplying the annual number of hours worked by the fraction of a year that the employee worked.

For example, an employee who works 2080 hours annually from April 1 to December 31 represents a projected hours figure of 1560 hours for that year.

### Headcount

Enter the number of employees requested, budgeted, or approved for a position or requisition.

### Effective Headcount

Enter the number of employees requested, budgeted, or approved for a position or requisition.

### Headcount Projected

Enter the number of employees requested, budgeted, or approved for a position or requisition.

### Open Salary

Enter 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 FTEs within this position for the business unit and year that you specified.

### Open Hours

Enter 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 FTEs. If you do not enter a value in this field when you budget the position, the system enters a default value. To determine that default value, the system searches these sources, in the order that they are listed, and uses the value from the first of these sources that contains a value:

- The number of FTEs multiplied by the standard number of hours per year for the company associated with the business unit that you entered.
- The number of FTEs multiplied by the standard number of hours per year for Company 0.
- A default value that you defined in the data dictionary when you set up the system.
- 2080.

**Open Headcount**

Enter the number of employees requested, budgeted, or approved for a position or requisition.

**Budget Status**

Enter a code that indicates the status of the position budget. The system uses the first character in the second description in the defined code table 08/PC to process approved and closed positions. The position 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).

**Position Status**

Enter 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 employee assignment. When the position again becomes vacant, you must manually change the value in the Position Status field.

---

## Defining Position Budget for Next Year

This section provides an overview of the Create Next Year's Positions program and discusses how to:

- Run the Create Next Year's Positions program (R081820).
- Set processing options for Create Next Year's Positions (R081820).

## Understanding the Create Next Year's Positions Program

Although a position budget is valid for only one fiscal year, you do not need to manually enter position budget information each year. You can select from several options to automatically generate the next fiscal year 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 Budget Detail table (F08111). If the 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 FTEs, hours, and headcounts by flat percentages.

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

- Creates the position, fiscal year, home business unit, position ID, and description.
- Prints an exception report that lists existing positions that have effective through dates that are before 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 these 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.

### See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Creating Parent-Child Relationships”

## Prerequisites

Before you complete the tasks in this section:

- Set up the fiscal date patterns for the next fiscal year.

See *JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Setting Up Organizations,” Setting Up Fiscal Date Patterns.

- Set up a salary default source in the system options.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

## Running the Create Next Year's Positions Program (R081820)

Select Position Control Adv/Tech Operations (G08BP3), Create Next Year's Positions.

## Setting Processing Options for the Create Next Year's Positions Program (R081820)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Dates

These processing options enable 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 the next year position budget.
- Enter a date in this field only if you use the pay rate or pay grade step methods of salary calculation.

## Process

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

- 1. Select Position Budgets - Press F1 for values** 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. 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 select option 1, the system will calculate budgets for all positions in the Position Master table. If you select 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 select 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 select 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 before the beginning of the new fiscal year. An exception report will list all positions that are created in this manner. Values are:
- Blank: Do not create budgets for prior positions.
  - 1: Create budgets for previous positions.
- 3. Create Position Accounts** Use this processing option to specify whether to create position accounts, in addition to position budgets, for the new fiscal year. Position accounts let you allocate the position budgets by percentage to various accounts in General Accounting. Values are:
- Blank: Do not create position accounts.
  - 1: Create position accounts.

## Options

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

- |  |   |
|--|---|
| <b>1. Percent Change in New Budget Amount</b>                              | 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 percent increase or enter -5 for a 5 percent decrease.                               |
| <b>2. Percent Change in Full Time Equivalents (FTEs), Hours, Headcount</b> | Use this processing option to enter the percent of increase or decrease from the old to the new values for FTEs, hours, and headcount.<br><br>Enter percentages as whole numbers. Use a negative number to indicate a decrease. For example, enter 5 for a 5 percent increase or enter -5 for a 5 percent decrease. |

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## Working With Parent/Child Relationships By Position

This section provides an overview of parent/child relationships by position and discusses how to:

- Create parent/child relationships by position.
- Review parent/child relationships by position.

### Understanding Parent/Child Relationships By Position

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

#### Creating Parent/Child Relationships by Position

To show the reporting relationships among different positions within the 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 the management requires. For example, if the organization is in the process of resizing, you might need to create a parent/child relationship that shows the number of positions that report to the first level managers and distribute that structure to all of the managers.

#### Reviewing Parent/Child Relationships by Position

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

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

## Prerequisite

Set up parent/child structure types in user-defined code list 01/TS.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up User-Defined Information,” User-Defined Codes for Human Capital Management Foundation.

## Forms Used to Work With Parent/Child Relationships by Position

Form Name	FormID	Navigation	Usage
Structure Revisions	W08230B	Daily Processing (G08BP1), Position ID Structure Inquiry  On the Position ID Structure Inquiry form, locate and select a parent or child position.	Create parent/child relationships by position.
Position ID Structure Inquiry	W08230A	Daily Processing (G08BP1), Position ID Structure Inquiry	Review parent/child relationships by position.

## Creating Parent/Child Relationships by Position

Access the Structure Revisions form.

**Position ID Structure Inquiry - Structure Revisions**

OK Find Delete Cancel Tools

Parent Business Unit  Corporate Administration Fiscal Year

Parent Position ID  Accounting Manager

**Records 1 - 4** [Customize Grid](#) ☐

	Position ID	Description	Home Business Unit
<input checked="" type="radio"/>	0A-3	Financial Analyst	9
<input type="radio"/>	0P-2	Accounts Payable Clerk	9
<input type="radio"/>	0P-3	Accounts Receivable Clerk	9
<input type="radio"/>			

Structure Revisions form

### Parent Position ID

Enter a code that identifies the higher level position this position reports to, such as the supervisor position ID.

**Note.** The parent position/parent business unit must already exist as a position ID or business unit record in the Position Master File.

## Reviewing Parent/Child Relationships by Position

Access the Position ID Structure Inquiry form.

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

---

## Using Position Control Reports

This section discusses how to use position control reports.

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

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

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up User-Defined Information,” User-Defined Codes for Human Capital Management Foundation.

---

## Purging Position Information

This section provides an overview of purging position information and discusses how to:

- Run the Purge Positions program (R0808151).
- Set processing options for Purge Positions (R0808151).
- Run the Purge Position Activity program (R0808161).
- Set processing options for Purge Position Activity (R0808161).

## Understanding Position Information Purges

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

## Running the Purge Positions Program (R0808151)

Select Position Control Adv/Tech Operations (G08BP3), Purge Positions.

To purge outdated positions from the Position Master table (F08101), run the Purge Positions program (R0808151). For example, you can purge records from past years that are no longer relevant. You can also purge all of the position records from a certain fiscal year or select which records to purge using data selection.

## Setting Processing Options for the Purge Positions Program (R0808151)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Running the Purge Position Activity Program (R0808161)

Select Position Control Adv/Tech Operations (G08BP3), Purge Position Activity.

To purge employee position activity records that are no longer needed, run the Purge Position Activity program (R0808161). For example, you might remove records of former employees.

## Setting Processing Options for the Purge Position Activity Program (R0808161)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Purge Activity

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

#### 1. Enter a Blank to only create a report (default)

Use this processing option to specify purging preferences when you run the report. Values are:

Blank: Create the report only (Default).

1: Delete records from the Position Budget Detail table (F08111) when you run the report.

2: Delete records from the Position Budget Detail table and save the deleted records in a purge table when you run the report.

---

**Important!** The purge table is F08111P. It is purged and written over every time this program is run with Purge Activity = 2.

---





## CHAPTER 14

# Understanding Compensation Management

This chapter provides an overview of compensation management and discusses how to set processing options for Compensation Review Workbench (P08826).

---

## Compensation Management

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

Compensation management is a flexible salary planning tool that improves the salary review process for both the human resources department and management. A human resources representative 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, the human resources representative must first build work tables. After building these work tables, the human resources representative can grant managers access to them.

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

Managers can use compensation management to create compensation review models with different “what if” scenarios and save their work to a master model, a private model, or a 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 enable private models from multiple managers to be consolidated without committing the salary review to the master model. Upper level managers can look at public models to see the combined salary review recommendations from multiple supervisors without having to open the individual models of each of the lower level managers.

The compensation management feature gives human resources representatives more control over the salary planning process while freeing them from administrative tasks that are historically associated with salary planning. The benefits to the human resources department include:

- Human resources representatives can define the parameters under which supervisors can operate, thereby removing the human resources department 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 save time and prevent security risks that are associated with mailing employee information.

Benefits to supervisors include:

- A Web based user interface enables supervisors to plan salaries or approve recommendations from any location.
- Real time information gives supervisors the most current data on which to base decisions.

- Online guidelines with visual indicators help supervisors make informed decisions and give them instant feedback about their recommendations.
- Summary information immediately tells supervisors whether the salary information that they and their subordinate supervisors are entering is within the salary budget.
- Upper management can review the progress of the staff from a budget and salary review perspective.

The compensation management feature can improve the salary review process for both the human resources department and management.

### See Also

*JD Edwards EnterpriseOne Human Capital Management Self Service 8.12 Implementation Guide*, “Manager self service,” Understanding Manager self service

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## Setting Processing Options for the Compensation Review Workbench Program (P08826)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Process

This processing option specifies the URL (Uniform Resource Locator) for the Compensation Review Guide.

<b>URL for Compensation Review Guide</b>	Use this processing option to specify the URL for the Compensation Review Guide.
--	--

### New Job

These processing options specify the default values that the system applies to a new job.

<b>1. When changing employee's job, default the new job information.</b>	<p>Use this processing option to specify whether to use the default information for a new job. Values are:</p> <p>0: Do not default</p> <p>1: Default</p>
<b>2. Allow Override of Default Job information.</b>	<p>Use this processing option to specify whether to enable the supervisor to override the default information for a new job. Values are:</p> <p>0: Do not allow</p> <p>1: Allow</p>

## Performance Profile

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

- |   |  |
|---|--|
| <b>1. Performance Appraisal Scale Name (Required)</b> | Use this processing option to specify the scale to use for measuring an employee level of proficiency in a particular competency. You define the scale in the Scale Information program (P05103) as part of setting up compensation management. The scale uses a series of competency levels to represent standards of relative proficiency. |
| <b>2. Entry of Performance Appraisal</b>              | Use this processing option to specify whether to enable a supervisor to enter performance appraisal information on the Individual Compensation Review form (W08812A). Values are:<br><br><i>0</i> : Do not Allow<br><i>1</i> : Allow   |
| <b>3. Entry of Job Competency</b>                     | Use this processing option to specify whether to enable a supervisor to enter job competency information on the Individual Compensation Review form (W08812A). Values are:<br><br><i>0</i> : Do not Allow<br><i>1</i> : Allow  |
| <b>4. Entry of Tier or Ranking</b>                    | Use this processing option to specify whether to enable a supervisor to enter tier or ranking information on the Individual Compensation Review form (W08812A). Values are:<br><br><i>0</i> : Do not Allow<br><i>1</i> : Allow   |



## CHAPTER 15

# Working with Compensation Management

This chapter provides an overview of compensation management and discusses how to:

- Review salary recommendations.
- Review salary approvals.
- Update the compensation review.
- Enter job evaluation information.
- Review job comparisons by factor.
- Review and rank jobs by factor.
- Review pay ranges for jobs.
- Revise pay rate tables.
- Update pay rates for pay grade steps.
- Update the compa ratio for an employee.

---

## Understanding Compensation Management

The compensation management feature is a salary planning tool that empowers managers or human resources administrators to make salary decisions based on real time information. The system also provides a flexible Web tool that enables managers to make adjustment recommendations to employee salaries.

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

As a human resources administrator, you can use this application to review or change salary records of any employee. Managers using this tool can review and change only the salary records of employees who report to them. Both human resource administrators and managers can review each employee individually or use the quick entry feature to review the entire group at once. When you use the quick entry feature, you can apply global increases that are based on the criteria that you select (for example, a 5 percent merit raise to all employees who are rated as outstanding).

For both input methods, you can review online the spent and remaining budget. The system displays this information for each increase type and for the total of all of the increase types. When the managers are finished making and approving compensation recommendations, the human resources administrator turns off supervisor access to the compensation management programs, and then runs a batch process to update the information to the active tables and to archive the salary planning information to historical records.

The Compensation Review Workbench program (P08826) is the initial entry point that human resources representatives use for all of the Compensation Management features in JD Edwards EnterpriseOne software. The Compensation Review Workbench program (P08826) located on the Manager Self Service menu (G05BMSS1) is the entry point for managers to use the Compensation Management features. These applications provide centralized access to the tools that you need to make salary recommendations, using budgets, rules, and approval requirements that are defined by the human resources department.

Both managers and human resources representatives can use their respective Compensation Review Workbench to perform these tasks:

- Determine which subordinates are eligible for each type of adjustment.
- Review employee history for position, job, and compensation data items.
- Review results from employee performance reviews.
- Review the recommended increase amount that the system generates, based on the criteria that the human resources department sets up.
- Calculate "what if" scenarios for each employee or for all of the employees as a group, and review the effect of these scenarios on budgets.
- Review salary planning information for indirect reports, such as employees who report to direct subordinates.
- Review approval statuses of salary increases for indirect reports.

This table shows the features you can access from the Compensation Review Workbench:

Feature	Usage
Open	You use the Open feature to select the compensation review model that you want to use in the salary planning process. You can select a public or private model, or the master model.
Guide	You use the Guide feature to directly access a Web address that you define in the processing options.
Rating Distribution	You use the Rating Distribution feature to quickly review the average increase for the increase types and determine how each of the increase types is distributed to the employees, based on their performance.
Submit	When you have finished with the compensation review, you use the Submit feature to submit the compensation recommendations to the supervisor. The system notifies you if the submission has been successful.
Return	You use the Return feature to return a submitted compensation recommendation to a supervisor. After the review is returned, the supervisor can make changes to the compensation recommendations or return the work of lower level supervisors.

Feature	Usage
Quick Entries	You use the Quick Entries feature to apply global increases, based on certain criteria, to the employees within a group.
Work Center	You use the Work Center to view or send messages pertaining to submitted salary recommendations.
Individual Review	You use the Individual Review feature to complete salary planning work for an individual.
Approval Inquiry	You use Approval Inquiry to display whether an employee record has been approved or rejected and the date for the last update to the record.
Attachment	You use the Attachment feature to add or view information that has been attached to the employee record.

---

## Prerequisites

Before you complete the tasks in this section:

- Verify that the human resources administrator has performed these tasks:
- Set up the information that the system needs for processing.

See [Chapter 2, “Setting Up Compensation Management,” page 9](#).

- Activate the common setting CMPOPEN to give managers access to make compensation reviews. Managers and supervisors can access compensation information for only their own employees.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options” and [Chapter 2, “Setting Up Compensation Management,” Defining Common Settings for Compensation Management, page 9](#).

---

## Common Fields Used in This Chapter

<b>Job Evaluation Method</b>	Enter a defined code (08/EM) that specifies the method or grouping that you use to evaluate the jobs within the organization.  Suggested values are:  Blank: Simple subjective point system  <i>E</i> : Evalucomp method  <i>F</i> : Factor comparison method  <i>P</i> : Point factor method  <i>H</i> : Hay method
<b>- OR -&gt; Amount to Apply</b>	Enter the flat amount to add to selected rates.

**Percent to Apply**

Enter the percent increase to apply to selected rates.

---

## Reviewing Salary Recommendations

This section provides an overview of salary recommendations and discusses how to:

- Enter salary recommendations for an individual employee.
- Enter salary recommendations for groups of employees.

## Understanding Salary Recommendation Reviews

The Compensation Review Workbench program (P08826 for human resource representatives or P08824 for managers) is the initial entry point for the salary review process. Both managers and human resources administrators use this program. The workbench provides you with a compensation planning tool to make salary recommendations using budgets, rules, and guidelines that the human resources department sets up.

The workbench enables you to perform these tasks:

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

Managers access the Compensation Review Workbench program (P08824) through the Manager Self Service menu (G05BMSS1). When managers access the workbench, the supervisor field is disabled and the system automatically supplies the supervisor number.

Human resources administrators access the workbench through the Compensation Mgmt Periodic Processing menu (G08CM12). When you use the workbench as a human resources administrator, the supervisor field is enabled so that you can enter a supervisor number. You can enter a supervisor number and review the records of the employees who are in that supervisor reporting structure. You can then review or change salary recommendations and review summary information about the employees who report to that supervisor.

### Entering Salary Recommendations for an Individual Employee

You can enter salary recommendations for one individual employee at a time (individual review). The Individual review feature enables you to make modifications to individual eligibility or job titles, based on rules the human resources administrator set up.

### Entering Salary Recommendations for Groups of Employees

You can do salary planning work for an entire group of employees at once (quick entries). The quick entries feature enables you to apply global increases to the employees within a group based on certain criteria, such as a performance appraisal, tier or ranking, increase type, or pay grade and pay grade step.



## Forms Used to Enter Salary Recommendations

Form Name	FormID	Navigation	Usage
Individual Compensation Review	W08812A	<ul style="list-style-type: none"> <li>For HR administrators, Compensation Mgmt Periodic Processing (G08CM12), Compensation Review Workbench</li> <li>For managers, Manager Self Service (G05BMSS1), Compensation Review Workbench</li> </ul> <p>On the Work With HR Compensation Review Workbench form or the Work With Manager Compensation Review Workbench form, select either the Direct Reports or Direct and Indirect Reports option.</p> <p>Complete the Supervisor field and click Find.</p> <p>The tree structure on the left side of the detail area shows the management hierarchy.</p> <p>Select the employee whose records you want to review or change from the right side of the detail area, and then select Ind Review from the Row menu.</p> <p>Review and edit information on each tab, as necessary. Click Save and repeat these steps as necessary for each employee.</p>	<p>Enter salary recommendations for an individual employee.</p> <p>Review current job information for the employee.</p> <p>Enter new job information for the employee.</p> <p>Review current and new salary information for the employee</p> <p>Enter, edit, or review the employee performance appraisal information.</p> <p>Enter, edit, or review competency overview information for an employee</p> <p>Enter, edit, or review an employee tier or ranking information.</p> <p>When you are finished reviewing and changing records, click Submit on the Work With Compensation Review Workbench form to submit the compensation recommendations that you made.</p>

Page Name	Object Name	Navigation	Usage
Quick Entries	W08814A	<p>For HR administrators, Compensation Mgmt Periodic Processing (G08CM12), Compensation Review Workbench</p> <p>For managers, Manager Self Service (G05BMSS1), Compensation Review Workbench</p> <p>On the Work With HR Compensation Review Workbench form or the Work With Manager Compensation Review Workbench form, select either the Direct Reports or Direct and Indirect Reports option.</p> <p>Complete the Supervisor field and click Find.</p> <p>The tree structure on the left side of the detail area shows the management hierarchy.</p> <p>Click the Quick Entries button.</p> <p>On the Quick Entries form select a group of employees who meet specific criteria.</p> <p>Enter or edit compensation recommendations in the detail area for each employee.</p> <p>For global compensation recommendations complete the Allow Zero Update, Increase Amount, or Increase Percent field, fully load the detail area by scrolling to the bottom, and then click Apply to Group.</p> <p>Click Save or Save As to save the changes.</p> <p>If you click Save As, select the Master, Private, or Public Model option, fill in a name and description if required, and click OK.</p>	<p>Enter salary recommendations for groups of employees.</p> <p>When you are finished reviewing and changing the compensation recommendations, click Submit on the Work with Compensation Review Workbench form.</p>

## Entering Salary Recommendations for an Individual Employee

Access the Individual Compensation Review form.

**Compensation Review Workbench - Individual Compensation Review**

Save Close Form Row Tools

Model Name MASTER Date Started 02/15/05

Employee Number 2006 Walters, Annette

Current Job Profile New Job Profile Salary Profile **Performance Profile** Comments

**Performance Appraisal**

Appraisal Level 4.000 Accomplished

Appraisal Date 06/01/05

**Competency Overview**

Percentage Competency Achieved 85.00

Competency Review Date 01/01/06

**Tier or Ranking**

Tier/Ranking 1

Last Tier/Rank date 01/01/06

Records 1 - 2 Customize Grid ☐

	Increase Type	Original Eligibility	Increase Guidelines	Increase Amount	Increase Percentage
<input checked="" type="radio"/>	Promotion	Ineligible	6.00 - 7.00 %		0.00
<input type="radio"/>	Merit	Ineligible	7.00 - 8.00 %		0.00

Individual Compensation Review form: Performance Profile tab

## Current Job Profile

Select the Current Job Profile Tab.

### Supervisor

Review the address book number of the supervisor.

### Pay Status

Review the code that indicates whether an employee pay status is active or inactive. Codes for active pay status employees are numeric, and codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run.

### External Title

Review the title associated with an employee job.

### Date in Current Job

Review the date when an employee started working in this job.

### Date in Current Position

Review the date the employee started the current position.

### Annual Salary

Review the amount that an employee is paid in one year, assuming that the employee is paid every pay period of the year.

### Last Comp Review Date (last compensation review date)

Review the date the last compensation review was given.

### Date Of Last Raise

Review the date of the employee last raise. For the stand alone HR system, this is the date when you update salary and wages. If you also have the Payroll

system, this date is automatically updated when a payroll is run. You define pay effective dates using the Pay Rate Information screen.

### Pay Grade Step

Review the code that identifies a pay grade and pay step. You can use this code to determine an employee pay rate.

If you have set up the system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee pay grade step causes the system to automatically update these fields:

- Salary
- Hourly Rate
- Hours per day
- Hours per year
- Days per year

### New Job Profile

Select the New Job Profile Tab.

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

<b>New External Job Title</b>	Enter the name for the new job that the company uses externally, such as on business cards.
<b>New Job Type</b>	Enter a code that defines jobs within the organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
<b>New Job Step</b>	Enter a code that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.
<b>New Position</b>	Enter the new position ID to use for budgetary (position) control purposes. The position ID consists of the position code and its description, the fiscal year and the home business unit.
<b>FLSA Exempt</b> (Fair Labor Standards Act exempt)	<p>Enter 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. Values are:</p> <p><i>Y</i>: Yes, the employee fits the rules and does not have to be paid for working overtime.</p> <p><i>N</i>: No, the employee does not fit the rules and is to be paid for working overtime.</p>

### Salary Profile

Select the Salary Profile Tab.

<b>Increase Amount</b>	Enter the amount of increase for this type.
<b>Increase Percent</b>	Enter the percentage amount of the increase.

## Performance Profile

Select the Performance Profile Tab.

You can complete these fields only if the processing options are set to enable input.

<b>Appraisal Level</b>	Enter 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.
<b>Appraisal Date</b>	Enter a date that indicates when the process was last reviewed.
<b>Percentage Competency Achieved</b>	<p>Enter a number that indicates how an employee is progressing in relation to the required competency level for a particular job.</p> <p>The system calculates this value by first calculating the value for the Employee Competency Percent of Required field (EEPCTRQD) for all employee competencies that are related to a job competency for a particular job. The system then multiplies these percentages by their respective weighting factor and adds them together to determine the total job competency percent achieved.</p>
<b>Competency Review Date</b>	Enter the date on which the last job competency review took place.
<b>Tier/Ranking</b>	Enter a value that enables a supervisor to either rank employees individually or group them into tiers. When employees are ranked, each employee is assigned a unique number. When employees are grouped into tiers, several employees can have a common number. For example, a supervisor can assign a tier of 1 through 3 to 12 employees. Each employee can be assigned to tier 1, 2, or 3.
<b>Last Tier/Rank date</b>	Enter the date the Tier/Rank was last updated.

## Comments

Select the Comments Tab.

## Entering Salary Recommendations for Groups of Employees

Access the Quick Entries form.

**Compensation Review Workbench - Quick Entries**

Find Close Save Save As Employee Profile Pay Grade/Step Form Row Tools


Model Name MASTER View: ☒ Direct Reports  
 Supervisor 7500 McDougle, Cathy ☐ Direct and Indirect Reports



	Totals	Promotion	Merit
Budget	13384	8030.4	5353.6
Spent	13400	8100	5300
Remaining	-16	-69.6	53.6

**Group Filter**

Increase Type \*  ☐ Show Only Eligible Increases  
 Pay Grade/Step \*  \*   
 Perf. Appr. Level/Tier or Ranking \*  \*

**Group Recommendation**

☐ Allow Zero Update  
 Increase Amount   
 Or Increase %   
 Apply to Group

Records 1 - 10   [Customize G](#)

	Employee	Increase Description	Increase Amount	Increase Percentage	Curr Annual Salary
<input checked="" type="radio"/>	Ato, Connie	Promotion	2,300.00	6.01	38,250.00
<input type="radio"/>		Merit	1,500.00	3.70	
<input type="radio"/>	Ebby, Chester	Promotion		0.00	42,000.00

Quick Entries form

**Increase Type**

Enter a code that indicates the reason for:

- Changing an active employee record
- Terminating an employee
- Recommending a change in salary or rate

This is a defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.

**Show Only Eligible Increases**

Select an option that specifies whether records will appear when their modified eligibility equals 0.

**Pay Grade/Step**

Enter 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 pay grade.

To set up pay grades, use Pay Grades by Class (P082001).

If you have set up the system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee pay grade step causes the system to automatically update these fields:

- Salary
- Hourly Rate
- Hours per day
- Hours per year
- Days per year

**Perf. Appr. Level/Tier or Ranking** (performance appraisal level/tier or ranking)

Enter 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.

**Allow Zero Update**

Enter a value that specifies yes or no on prompt screens. Values are:

*1*: Yes

*0*: No

**Increase Amount**

Enter the global increase amount to apply.

**Increase Percent**

Enter the global increase percentage to apply.

**Master Version**

Enter the master version of the model.

**Model Name**

Enter the model name. Values are:

*MASTER*: A model name to be used for the Final Submitted Compensation.

*PUBLIC*: A model that is controlled by a UDC Table. Must use entry from the UDC Table.

*PRIVATE*: A model could have any name the owner selects.

**Model Description**

Enter a description of the data item.

---

## Reviewing Salary Approvals

This section provides an overview and discusses how to review salary approvals.

### Understanding Salary Approval Reviews

After you submit salary recommendations, you can review the approval status of the recommendations. You can determine whether the recommendations were approved or rejected, the date and time when the recommendations were approved or rejected, and the name of the person who approved or rejected them.

## Forms Used to Review Salary Approvals

Form Name	FormID	Navigation	Usage
Employee/Supervisor Approval Table Inquiry	W05842A	Compensation Mgmt Periodic Processing (G08CM12), Approval Inquiry  You can also access the Employee/Supervisor Approval Table Inquiry form from the Row menu on the Work With HR Compensation Review Workbench form (W08810A).	Review salary approvals.

## Reviewing Salary Approvals

Access the Employee/Supervisor Approval Table Inquiry form.

**Approval Inquiry - Employee/Supervisor Approval Table Inquiry** i ?

Find  Delete  Close  Tools

Approval Type  \*

Employee Number  \*

**Records 1 - 5** Customize Grid ☐

<input type="checkbox"/>	Approval Type	Employee Number	Employee Name	Supervisor Number	Supervisor Name	Supervisor Level	Approved/ Rejected Status
<input type="checkbox"/>	STSC	2275	Nguyen, Daniel	2275	Nguyen, Daniel	0	
<input type="checkbox"/>	STSC	5522	Thompson, Craig	5522	Thompson, Craig	0	
<input type="checkbox"/>	COMP	5522	Thompson, Craig	5522	Thompson, Craig	0	
<input type="checkbox"/>	STSC	8015	Kilmer, Jessica	7500	McDougle, Cathy	1	Approved
<input type="checkbox"/>	STSC	8015	Kilmer, Jessica	6001	Allen, Ray	2	

Employee/Supervisor Approval Table Inquiry form

### Approval Type

Enter a defined code (05/AP) that specifies the type of change that requires an approval. For example, the approval type code required to approve a compensation change is COMP.

### Employee Number

Enter a number that identifies an entry in Address Book, such as employee, applicant, participant, customer, supplier, tenant, or location.



---

## Updating the Compensation Review

This section provides an overview compensation review updates and discusses how to set processing options for Compensation Review Updates (R08832).

### Understanding Compensation Review Updates

Select Compensation Mgmt Advanced & Tech Oper (Operations) (G08CM13), Compensation Review Updates.

After the compensation review period has closed and the final review has been submitted, the new compensation information needs to be updated to the Employee Master Information table (F060116). The Compensation Review Updates program (R08332) 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.

Because the Compensation Review Updates program makes immediate changes to compensation information, you should run the update during the pay period for which the increase applies, but before prepayroll is processed for that pay period.

After the human resources administrator closes the compensation review process, he or she should also perform these tasks:

- Set the CMPSYNC common setting to No to clear the synchronization of the compensation work tables.
- Set the CMPOPEN common setting to No to close the compensation review process.

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

### See Also

[Chapter 2, “Setting Up Compensation Management,” Defining Common Settings for Compensation Management, page 9](#)

### Setting Processing Options for the Compensation Review Updates Program (R08832)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Process

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. 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). 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). 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). 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**

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. Values are:

*0*: Do not print

*1*: Print

**2. Eligibility Override Report**

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

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

*0*: Do not print

*1*: Print

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

---

## Entering Job Evaluation Information

This section provides an overview of job evaluation information entries and discusses how to:

- Set processing options for Job Evaluation Degree (P050011).
- Enter job evaluation information.

## Understanding Job Evaluation Information

Job evaluation is a method of comparing jobs and establishing equitable salaries for all positions relative to their importance and value to the company. You might evaluate jobs when you add new positions to the company.

Evaluating jobs is also helpful for comparing how salaries in the company compare with other salaries for the same positions within the industry.

To evaluate jobs, you need to select a method of evaluation and then define evaluation factors for rating the job. You can select an industry method like the Hay method, or you can define the own method of evaluation.

## Prerequisite

Use the Evaluation Factors Table program (P05011) to define a table for each evaluation method that you want to use.

See [Chapter 5, “Setting Up Pay Information,” Defining Job Evaluation Factors, page 59](#).

## Form Used to Enter Job Evaluation Information

Form Name	FormID	Navigation	Usage
Job Evaluation	W050011A	Job Specifications (G05BJ1), Job Evaluation Degree  Depending on how the processing options for the Job Entry and Evaluation program (P08001) are set, the Job Evaluation form might automatically appear after you enter job information.	Enter job evaluation information.

## Setting Processing Options for the Job Evaluation Degree Program (P050011)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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### Edits

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

#### 1. Enter a '1' to clear the Evaluation Points and Degrees when the Evaluation Method is changed.

Use this processing option to specify whether the system clears job evaluation information. Values are:

Blank: The system does not clear any of the evaluation data.

1: The system clears the Evaluation Points and Degrees when the Evaluation Method is changed.

2: The system clears the Evaluation Points, Degrees, Memo and Weight when the Evaluation Method is changed.

## Entering Job Evaluation Information

Access the Job Evaluation form.

**Job Evaluation Degree - Job Evaluation**

OK Find Cancel Form Tools

Job Type/Step: QA-1 Accounting Manager

Job Evaluation Method: F Factor Comparison Method

Job Evaluation Date:

Records 1 - 5 [Customize Grid](#)

	Description	Job Points	Maximum Points	Evaluation Memo Code	Weight %
<input type="radio"/>	Profit and Loss Responsibility		300		
<input type="radio"/>	Number of Subordinates		250		
<input type="radio"/>	Technical Skills		200		
<input type="radio"/>	Education		100		
<input checked="" type="radio"/> Σ		0	850		

Job Evaluation form

**Job Evaluation Date**

Enter the last date you evaluated the job.

**Degree**

Enter the level of difficulty corresponding to the job. The system automatically determines the points associated with this degree.

**Job Points**

Enter the points for the first evaluation factor within a job. Once you enter the applicable number of points, the points calculation program automatically totals all points entered, and updates the Job Master file (F08001).

Total points display for the point method (type 1) or the degree method (type 2) of job evaluation.

**Maximum Points**

Enter the number of points calculated for a specific job using any job evaluation method. A job is defined as the combination of job type and job step.

You can calculate the points manually and enter them at the Job Master Information level, or you can assign points to each individual factor that has been defined within the evaluation method.

**Evaluation Memo Code**

Enter a memo that indicates why a certain point value was assigned to job evaluation factor 01.

For example, this field might contain the row and column numbers from a Hay evaluation chart where the particular point value resides.

**Weight Percent**

Enter a percentage that indicates the relative importance of the points assigned to job evaluation factor 01 versus the other factors. This enables you to recognize that certain job evaluation factors are more significant than others.

## Reviewing Job Comparisons by Factor

This section provides an overview of job comparisons by factor and discusses how to review job comparisons by factor.

### Understanding Job Comparisons by Factor

You evaluate jobs to determine an equitable salary range for each job within the organization. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Typical evaluation methods include:

- Degree method
- Hay method
- Factor comparison method

After you define and evaluate jobs, you can review evaluation information for all the jobs that use a specific evaluation method. You can use this information to verify that you evaluated each job equitably.

### Form Used to Review Job Comparisons by Factor

Form Name	FormID	Navigation	Usage
Work With Job Comparison by Factor	W05012C	Job Specifications (G05BJ1), Job Comparisons by Factor	Review job comparisons by factor.

## Reviewing Job Comparisons by Factor

Access the Work With Job Comparison by Factor form.

<b>Job Evaluation Method</b>	<p>Enter a defined code (08/EM) that specifies the method or grouping that you use to evaluate the jobs within the organization. Suggested values are:</p> <p>Blank: Simple subjective point system</p> <p><i>E</i>: Evalucomp method</p> <p><i>F</i>: Factor comparison method</p> <p><i>P</i>: Point factor method</p> <p><i>H</i>: Hay method</p>
<b>Job Evaluation Type</b>	<p>Enter a numeric code that determines whether job information is recorded using degrees or points. Values are:</p> <p><i>1</i>: Simple, subjective assignment of job points by each of the ten defined evaluation factors.</p> <p><i>2</i>: Detailed specifications of degree of difficulty or value to each of ten evaluation factors.</p>
<b>Factor Number</b>	<p>Enter a sequential number that identifies each job evaluation factor. Job evaluation factors should meet these criteria:</p>

- Each factor must distinguish differences between jobs.
- Each factor must be common to most of the jobs being rated. A factor should exist in greater to lesser amounts so it is easier to measure factors within a job.
- Each factor should be assigned the maximum number of points in each of the 10 levels of degree.
- No factor should overlap any other factor.
- The factors chosen must be accepted by employees and managers.
- The number of factors used should be the minimum needed to insure a balance between completeness and simplicity in rating.
- The factor definitions should clearly and objectively define what is being rated so that all raters interpret the factor in the same way.

---

## Reviewing and Ranking Jobs by Factor

This section provides an overview of the review and ranking of jobs by factor process and discusses how to review and rank jobs by factor.

### Understanding the Review and Ranking of Jobs by Factor

In addition to reviewing jobs by method, you can also review and rank jobs using additional criteria to ensure the accuracy of data entry and equitable salary ranges in the organization. Although you can print a report to produce similar results, reviewing and ranking jobs by factor provides a greater range of options for sorting and reviewing. A sample group of criteria might include:

- Job Group
- Job Type/Step
- Job Evaluation Method

Use the search button to display the five options that you can use to rank the jobs that you select. The ranking method that you select provides criteria that weight different aspects of a job to apply in the selection process.

- Pay Grade/Step
- Job Effective Date

You rank jobs when you apply one of the job evaluation methods. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Evaluation options include:

- Degree method
- Evalucomp method
- Factor comparison method
- Hay method
- Point factor method

You can also use any of the fields in the Query By Example row to sort, rank, and compare job data. You can use the job effective date on each of the forms to limit the search to a desired time period.

## See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Defining Jobs,” Understanding Job Reports

## Forms Used to Review and Rank Jobs by Factor

Form Name	FormID	Navigation	Usage
Work With Jobs By Factor	W05013A	Job Specifications (G05BJ1), Review and Rank Jobs by Factor	Review and rank jobs by factor.

## Reviewing and Ranking Jobs by Factor

Access the Work With Jobs By Factor form.

**Job Evaluation Method** Enter a defined code (08/EM) that specifies the method or grouping that you use to evaluate the jobs within the organization.

Suggested values are:

Blank: Simple subjective point system

*E*: Evalucomp method

*F*: Factor comparison method

*P*: Point factor method

*H*: Hay method

---

## Reviewing Pay Ranges for Jobs

This section provides an overview of pay ranges for jobs and discusses how to review pay ranges for jobs.

## Understanding Pay Ranges for Jobs

After you define and evaluate the jobs for the organization, the system automatically creates a pay range (minimum, midpoint, and maximum rate) for each job, based on the job evaluation points and the pay range formulas. To verify that the pay ranges for the jobs are equitable and appropriate for the job duties and the geographic location where each job is performed, you can review pay ranges for jobs.

## Prerequisites

Before you complete the tasks in this section:

- Evaluate the job and verify that it is not associated with a pay grade step.

See [Chapter 15, “Working with Compensation Management,” Entering Job Evaluation Information, page 163](#).

- Verify that the job has a pay class. (The pay class defines the way in which an employee who works in the job is paid. Valid pay classes include salary, hourly, and piecework.)



See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up Employee Information,” Setting Up Job Information for Employees.

- Set up the formulas that the system uses to calculate pay ranges.

See [Chapter 5, “Setting Up Pay Information,” Setting Up Pay Range Formulas, page 57](#).

## Forms Used to Review Pay Ranges for Jobs

Form Name	FormID	Navigation	Usage
Pay Range Formulas	W05290D	Job Specifications (G05BJ1), Pay Ranges by Job  On the Work With Pay Ranges by Job form, select a record and click Select.	Review pay ranges for jobs.

---

## Revising Pay Rate Tables

This section provides an overview of pay rate table revisions and discusses how to:

- Revise pay rate tables manually.
- Revise pay rate tables by calculation.

## Understanding Pay Rate Table Revisions

You can use the Union Rates Master Revisions program (P059121) to revise pay rate tables. You can revise pay rate tables one at a time or in groups. To revise a single pay rate table, you need to locate a record on the Work with Union Rates form, and then select Single Revision from the Row menu.

You can revise pay rate tables in groups either manually or by calculation.

Revising pay rate tables updates the Employee Master Information table (F060116) and the Union Rates File table (F069126).

## Forms Used to Revise Pay Rate Tables

Form Name	FormID	Navigation	Usage
Revise Multiple Rcds. Union Rates	W059121C	Rate Derivation Setup (G05BRD4), Union Rates Master Revisions  On the Work with Union Rates form, click Find.  Select a record in the detail area, and then select Revise Multiple from the Row menu.	Revise pay rate tables manually.
Revise Multiple Rcds. Union Rates	W059121C	Rate Derivation Setup (G05BRD4), Union Rates Master Revisions  On the Work with Union Rates form, click Find.  Select a record in the detail area, and then select Revise Multiple from the Row menu.	Revise pay rate table by calculation.

## Revising Pay Rate Tables Manually

Access the Revise Multiple Rcds, Union Rates form.

**Union Rates Master Revisions - Revise Multiple Rcds. Union Rates** i ?

**Work with Union Rates** **Revise Multiple Rcds. Union Rates**

OK Delete Cancel Form Previous Next Tools

Union Code  *Machinists* Wage Decision No

Business Unit

Shift Code

Effective Dates - From:  Thru:

**Apply Increases to Which Rates:**

☒ Hourly Rates ☐ 1st Burden Rates

☐ Billing Rates ☐ 2nd Burden Rates

**Calculate Which Grid Column(s):**

☒ Hourly ☐ Regular ☐ Double ☐ Triple ☐ Holiday

Percent to Apply  - OR -> Amount to Apply

**Records 1 - 3** Customize Grid

	Job Type	Job Step	Job Type/Step Description	Hourly Rate	Regular Overtime	Double Overtime	Triple Overtime
<input type="checkbox"/>	8R-1	J	Maintenance Mechanic Junior	20.500	30.750		
<input type="checkbox"/>	8R-3	J	Maintenance Instruc. Junior	21.000	31.500		
<input type="checkbox"/>							

Revise Multiple Rcds. Union Rates form

To revise pay rate tables manually:

1. Review these fields and change them, as necessary:
  - Thru:
  - Job Type
  - Job Step
2. Change the value in the Wage Decision No field, if needed:
3. Select a group of rates to revise by selecting one of these options:
  - Hourly Rates
  - Billing Rates
  - 1st Burden Rates
  - 2nd Burden Rates

The fields that appear in the detail area vary depending on the option that you select.
4. To revise hourly rates, change one or more of these fields:
  - Hourly Rate
  - Regular Overtime
  - Double Overtime
  - Triple Overtime
  - Holiday Pay
5. To revise billing rates, change one or more of these fields:
  - Billing Rate
  - Billing Regular
  - Billing Double
  - Billing Triple
  - Billing Holiday
6. To enter the first group of recharge burden rates, change the value in one or more of these fields:
  - Rchg Burden Rate
  - Burden-1 Regular
  - Burden-1 Double
  - Burden-1 Triple
  - Burden-1 Holiday
7. To enter the second group of recharge burden rates, change the value in one or more of these fields:
  - Burden-2 Regular
  - Burden-2 Double
  - Burden-2 Triple
  - Burden-2 Holiday
8. Complete these optional fields:

- Piecework Rate
- Wrk Comp Code
- Wrk Comp SubClass
- Labor Dist. Multiplier
- Labor Dist. Method

9. To save the revisions, click OK.

10. To revise records for the next union code, select Next and repeat steps 2 through 9 for each record that you want to revise.

**Thru:** Enter 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.

**Wage Decision No** (wage decision number) Enter a code that references the government Wage Decision that the contract pay rates fall under.

**Hourly Rates** Select this option to process the pay rate by an hourly rate.

**Billing Rates** Select this option to process the pay rate by a billing rate.

**1st Burden Rates** Select this option to process the pay rate by the 1<sup>st</sup> burden rate.

**2nd Burden Rates** Select this option to process the pay rate by the 2<sup>nd</sup> burden rate.

**Burden-2 Regular** Enter the burden rate for regular overtime.

**Burden-2 Double** Enter the burden rate for double time.

**Burden-2 Triple** Enter the burden rate for triple time.

**Burden-2 Holiday** Enter the burden rate for holiday time.

## Revising Pay Rate Tables by Calculation

Access the Revise Multiple Rcds. Union Rates form.

**Union Rates Master Revisions - Revise Multiple Rcds. Union Rates**

Work with Union Rates | **Revise Multiple Rcds. Union Rates**

OK Delete Cancel Form Previous Next Tools

Union Code: 1000 *Machinists* Wage Decision No:

Business Unit:

Shift Code:

Effective Dates - From: 01/01/00 Thru: 12/31/10

**Apply Increases to Which Rates:**

☒ Hourly Rates ☐ 1st Burden Rates

☐ Billing Rates ☐ 2nd Burden Rates

**Calculate Which Grid Column(s):**

☒ Hourly ☐ Regular ☐ Double ☐ Triple ☐ Holiday

Percent to Apply:  - OR -> Amount to Apply:

**Records 1 - 3** Customize Grid

	Job Type	Job Step	Job Type/Step Description	Hourly Rate	Regular Overtime	Double Overtime	Triple Overtime
<input type="checkbox"/>	8R-1	J	Maintenance Mechanic Junior	20.500	30.750		
<input type="checkbox"/>	8R-3	J	Maintenance Instruc. Junior	21.000	31.500		
<input type="checkbox"/>							

Revise Multiple Rcds. Union Rates form

To revise pay rate tables by calculation:

- Review these fields and change information, as necessary:
  - Thru:
  - Job Type
  - Job Step
- Revise the Wage Decision No field, if needed:
- Select a group of rates to which to apply the calculation by selecting one of these options:
  - Hourly Rates
  - Billing Rates
  - 1st Burden Rates
  - 2nd Burden Rates
- Select one or more records in the detail area for which you want to revise pay rate information.
- Complete one of these fields and then select Calculate from the Form menu:
  - Percent to Apply
  - - OR ->Amount to Apply
- Complete these optional fields:
  - Piecework Rate
  - Wrk Comp Code

- Wrk Comp SubClass
  - Labor Dist. Multiplier
  - Labor Dist. Method
7. To save the revisions, click OK.
  8. To revise records for the next union code, repeat steps 2 through 7 for each record that you want to revise.

---

## Updating Pay Rates for Pay Grade Steps

This section provides an overview of pay rates for pay grade steps updates and discusses how to update pay rates for pay grade steps.

### Understanding Pay Rates for Pay Grade Steps Updates

Periodically you might need to adjust the pay rates for the pay grade steps. For example, you might need to enter a cost-of-living increase for certain pay grade steps. Updating the pay grade step table automatically applies a cost-of-living increase to one or multiple pay grade steps. Therefore, employees in these pay grade steps receive the specified increase.

You can enter a new amount or a percentage change once, and the system automatically applies the change to the specified pay grade steps.

### Forms Used to Update Pay Rates for Pay Grade Steps

Form Name	FormID	Navigation	Usage
Pay Grade Step Table	W082003A	Job Specifications Setup (G05BJ4), Pay Grade Step Table	Update pay rates for pay grade steps.

### Updating Pay Rates for Pay Grade Steps

Access the Pay Grade Step Table form.

**Pay Grade Step Table - Pay Grade Step Table** i ? (

OK Find Delete Cancel Calculation Form Row Tools

Pay Class(H/S/P)  *Salaried*  
 Union Code   
 Locality   
 Pay Grade   
 Effective Date

Std Hrs/Day   
 Std Days/Year

..... Calculation Information .....  
 Base Rate  \* Rate Multiplier  
 OR Percent  OR Amount

Records 1 - 22 <span style="float: right;">Customize Grid</span>										
<input type="checkbox"/>	<input type="checkbox"/>	Pay Grade	Grade Step	Loc	Union Code	Effective Date	Rate Mult	Step Rate	Next Pay Grade	Next Pay Grade Step
<input type="checkbox"/>		S1	A			01/01/05		20,874.000	S1	B
<input type="checkbox"/>		S1	B			01/01/05		23,339.000	S1	C
<input type="checkbox"/>		S1	C			01/01/05		25,803.000	S2	A
<input type="checkbox"/>		S2	A			01/01/05		22,614.000	S2	B
<input type="checkbox"/>		S2	B			01/01/05		28,123.000	S2	C
<input type="checkbox"/>		S2	C			01/01/05		33,051.000	S3	A

Pay Grade Step Table form

To update pay rates for pay grade steps:

1. Complete any of these fields to locate the pay grade steps that you need to update and click Find:
  - Pay Class (H/S/P)
  - Union Code
  - Locality
  - Pay Grade
  - Effective Date
2. Complete either of these fields:
  - Percent to Apply
  - OR Amount
3. To cause the system to calculate the new pay rate for each pay grade step, select Calculation from the Form menu.
4. Click OK.

### OR Amount

Enter a value that represents a flat monetary amount. You need to enter an amount in this field, the Percent field, or the Base Rate field to change pay grade step rates. Only one of these fields can be used at the same time.

---

## Updating the Compa-Ratio for an Employee

This section provides an overview of employee compa-ratio updates and discusses how to:

- Run the Compa-Ratio Batch Calculation Program (R082501).
- Set processing options for Compa-Ratio Batch Calculation (R082501).

### Understanding Employee Compa-Ratio Updates

A company can use a compa-ratio to assess how it pays employees in relation to the midpoint of the employee pay range. Compa-ratios can be used to compare employee salaries to the company intended pay policy. Generally, a compa-ratio of 1.0 means that the employee current salary falls within close parameters of the company pay policy.

The compa-ratio is an employee salary divided by the midpoint amount of the employee pay grade. For example, if an employee in pay grade X has a salary of 35,000 USD, and the midpoint of pay grade X is 38,000 USD, the employee compa-ratio is .921. This means that the employee is making 92.1 percent of the midpoint of his or her pay grade. Compa-ratios might be +/- 1.0 for a number of reasons. For example, a new hire typically has a compa-ratio under 1.0. A compa-ratio over 1.0 could mean that the employee has high seniority or performs well.

When calculating the new compa-ratio, the system uses the midpoint of the pay grades that you defined in the Pay Grade/Salary Range table (F082001). The system also uses the midpoint amount that is effective for the effective date.

When any of the information that the system uses to calculate compa-ratio changes, you must run a batch program to update employee compa-ratios. For example, when you change the mid point amount for a pay grade, you must update the compa-ratio for all of the employees who are assigned to those salary ranges. You can update compa-ratio for one employee or all employees.

You must update employee compa-ratios when you have run the global mass update program for pay grades, rates, or jobs and their salary ranges. You can run this program in either proof or update mode. You can also have the system print a report that lists the updated information.

If the new compa-ratio differs from the existing compa-ratio, and the system is set up to track employee history, the program creates a history record.

### Running the Compa Ratio Batch Calculation Program (R082501)

Select Employee Adv & Technical Operations (G05BE3), Compa-Ratio Batch Calculation.

### Setting Processing Options for the Compa-Ratio Batch Calculation Program (R082501)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.



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## Report

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- |                                       |   |
|---------------------------------------|---|
| <b>1. Should the file be updated?</b> | Use this processing option to specify whether the table is updated. Values are:<br><i>1</i> : Update the table.<br><i>0</i> : Do not update the table.                                      |
| <b>2. Would you like a report?</b>    | Use this processing option to specify whether the batch process produces a report. Values are:<br><i>1</i> : Print a report when the batch is complete.<br><i>2</i> : Do not print a report |

## Employee

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- |   |  |
|---|--|
| <b>1. Enter a valid change reason code for all new records.</b> | Use this processing option to indicate the reason for one of these: <ul style="list-style-type: none"> <li>• Changing an active employee record.</li> <li>• Terminating an employee.</li> <li>• Recommending a change in salary or rate.</li> </ul> <p>This is a defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.</p> <p>The system updates the change reason that you enter here to the history record created when the compa-ratio is changed for each employee.</p> |
| <b>2. Enter the effective date.</b>                             | Use this processing option to specify the date on which a record becomes active.<br><br>The system uses this effective date in the history record created for each employee whose compa-ratio has changed. If left blank, the system date is used.   |

## Pay Range

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- |   |   |
|---|---|
| <b>1. Enter the effective date for the Pay Range.</b> | Use this processing option to specify the date that determines which pay grade record the system uses to recalculate all of the compa-ratios. If left blank, the system date is used. |
|---|---|



## CHAPTER 16

# Changing Employee Salaries

This chapter provides an overview of employee salary changes and discusses how to:

- Set processing options for the Basic Compensation program (P0801CMP).
- Change an employee salary using workflow.
- Change an employee salary using pay rate information.

---

## Understanding Employee Salary Changes

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

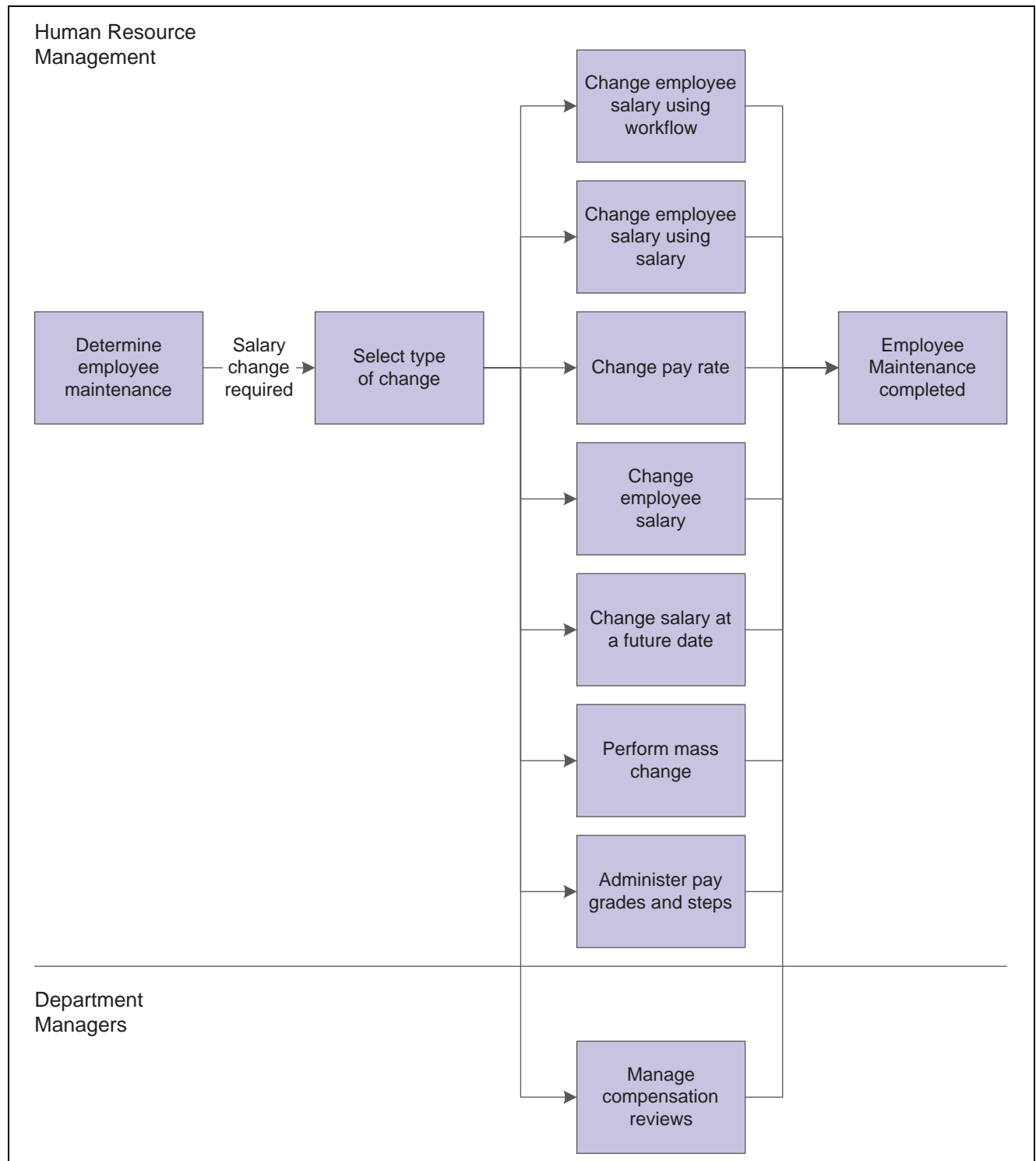
Workflow is an electronic message delivery system that you can use to process salary changes automatically. The Workflow process includes obtaining approval for salary increases that exceed a specified limit and updating the Employee Master Information table (F060116). Workflow is designed to save time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

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

This table illustrates alternate methods for changing employee salaries:

Method	Description
Individual employee changes	You can manually change the value in the Salary field using the Basic Compensation program (P0801CMP).
Future date changes	If a salary change will not take effect until a future date, you can enter information using the Future Data EE Master Revisions program (P06042).
High volume changes	You can reduce data entry time by changing salaries for groups of employees using the Employee Master Mass Changes program (P06045).

This process flow illustrates the process for employee salary changes:



Employee salary changes process flow

## See Also

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information”

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Processing Mass and Future Changes

*JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Processing Mass Changes

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## Setting Processing Options for the Basic Compensation Program (P0801CMP)

This section discusses processing option settings for Basic Compensation (P0801CMP).

### Processing Options for Basic Compensation (P0801CMP)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Process

These processing options enable you to specify threshold values for the salary change workflow process.

- |  |   |
|--|---|
| <b>1. Workflow - Salary Threshold</b>                | Use this processing option to specify an amount that, if the salary is increased by the amount entered or increased by more than the amount entered, then the system initiates the Employee Salary Change Approval Process (EEMAST1) workflow. The system sends an approval message to the workflow recipient, and the salary is updated after the change is approved. A value of 0 indicates the workflow is disabled. The default value is 0. |
| <b>2. Workflow - Salary Percent Change Threshold</b> | Use this processing option to specify the percentage of salary increase at which the system starts the Change Approval Workflow Process (EEMAST1). When the salary is increased to or beyond the percent entered, the system starts the workflow process. The system sends an approval message to the workflow recipient and the salary is updated only after the change is approved.   |

---

## Changing An Employee Salary Using Workflow

This section provides an overview of changing an employee salary using workflow and discusses how to:

- Initial a salary change
- Approve a salary change

## Understanding Employee Salary Changes Using Workflow

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

The process of using PeopleSoft Enterprise Workflow Management to change a salary usually involves more than one supervisor or manager. For example, the employee supervisor might originally enter the salary change information. After the supervisor enters this request, the supervisor's manager must approve the change before it becomes effective. You can set a salary threshold in the processing options for the Basic Compensation program (P0801CMP) so that Enterprise Workflow Management obtains approval for a certain percentage or flat monetary salary increase.

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

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

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

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

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

---

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

---

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

## Prerequisite

Before you complete the tasks in this section:

- Create a congratulatory letter, if needed.

See *JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

- Select a version and set up the processing options for the Basic Compensation program (P0801CMP).
- Verify that the Workflow process EEMAST1 is activated in the Object Management Workbench program (P98220).

See *JD Edwards EnterpriseOne Tools 8.96 Workflow Tools Guide*

## Forms Used to Change Salaries

Form Name	FormID	Navigation	Usage
Basic Compensation	W0801CMPB	<p>Employee Management (G05BE1), Basic Compensation</p> <p>On the Work With Basic Compensation form, locate the employee record you wish to change and click Select.</p> <p>On the Basic Compensation form, complete the Salary field and click OK.</p>	<p>Initiate a salary change.</p> <p>A delay might occur after you click OK. The delay indicates that the workflow process has been activated. A message appears to confirm that the changes have been submitted for approval and are pending review.</p>
Work Center	W012503F	<p>Workflow Management (G02), Employee Queue Manager</p> <p>On the Work With Employee Queue Manager form, select the desired employee and click Select.</p>	Approve a salary change.

## Initiating a Salary Change

Access the Basic Compensation form.

Basic Compensation - Basic Compensation			
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Form"/> <input type="button" value="Tools"/>			
Employee No.	7500	McDougle, Cathy	
Home Business Unit	9	Corporate Administration	
Job Type/Step	2H-1	Human Resources Manager	
Pay Frequency	B Bi-Weekly	Position ID	2H-1 Human Resources Manager
Union		Locality	Headquarters (default)
Pay Class	S Salaried		
Pay Grade/Step	S6	Pay Rate Source	3 None
Salary	50,000.00 @ A	Pay Period Salary	1,923.08
Hourly Rate	24.038	Compa-Ratio	0.87
Std Hrs/Day		Pay on Std Hours	
Std Hrs/Year	2080.00	Overtime Exempt	Y
Std Days/Year		FTE	1.00
Default Auto Pay Type			
<b>Compensation Review</b>			
Review Type	A Annual Review		
Last Comp Review Date	01/01/04	Next Comp Review Date	01/01/05
Tier/Ranking	2	Last Tier/Ranking Review Date	01/01/04

Basic Compensation form

**Salary**

Enter the amount that an employee is paid in one year, assuming that the employee is paid every pay period of the year.

When you enter a value in this field for a salaried employee, the system calculates the hourly rate based on one of these:

- Standard hours per year entered at the employee level.
- Standard hours per year specified in company options.

**Approving a Salary Change**

Access the Work Center form.

To approve a salary change:

1. Click the Salary Approval button in the left queue.  
All salary requests pending approval appear in the right queue.
2. To approve or reject a salary change, click the Workflow Approval button in the middle of the form, and then click the Workflow Approval button in the right section of the form.
3. On the Workflow Approval form, select of these options to accept or reject the salary change request, add text if applicable, and click OK.
  - Accept



- Reject

4. On the Work Center form, click Close.

<b>Skip To Name</b>	Enter 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.
<b>Search Type</b>	Enter a defined code (01/ST) that specifies the kind of address book record to search for. Examples include: <i>E</i> : Employees <i>X</i> : Ex-employees <i>V</i> : Suppliers <i>C</i> : Customers <i>P</i> : Prospects <i>M</i> : Mail distribution lists <i>TAX</i> : Tax authorities
<b>Cat Code 1</b> (category code 1)	Enter one of thirty reporting codes that you can assign to an address in Address Book. Use these codes to group address book records for reports, mailings, and so on. Category codes are defined (system 01, types 01 through 30). Examples of category codes include: Category code <i>01</i> : Location or Branch Category code <i>02</i> : Salesperson Category code <i>03</i> : Product Category code <i>04</i> : Credit officer

---

## Changing An Employee Salary Using Pay Rate Information

This section provides an overview and discusses how to change an employee salary using pay rate information.

### Understanding Employee Salary Changes Using Pay Rate Information

You can change an employee salary using pay rate information. This method is preferable when you are changing an employee hourly, billing, or piecework rate because you directly enter the change to the rate. You can specify the change as a monetary amount or as a percentage of the employee current pay rate, and you can enter a change that takes effect on a future date. For example, suppose that you enter a future effective date after you enter a pay rate change. When the future date occurs, the system can automatically update the employee pay rate information. To automate this process, you must either run JD Edwards EnterpriseOne payrolls or run the Employee Master Update (R06394) daily in the job scheduler. If the effective date is between pay cycles, the new rate appears in the payment for the first pay period after the effective date.

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

## Form Used to Change Employee Salaries Using Pay Rate Information

Form Name	FormID	Navigation	Usage
Pay Rate Revisions	W060131A	Employee Management (G05BE1), Pay Rate Information  On the Work With Pay Rate Information form, locate the desired employee record and click Select.	Change employee salaries using pay rate information.

## Changing Employee Salaries Using Pay Rate Information

Access the Pay Rate Revisions form.

**Pay Rate Information - Pay Rate Revisions**

OK Cancel Form Tools

Employee No. 7500 McDougle, Cathy

	Current Rate	Planned Increase	Method	New Rate	Effective Date
Annual Salary	50,000.00	2,500.00	<input checked="" type="radio"/> Flat <input type="radio"/> Percent	52,500.00	11/01/05
Hourly Rate	24.038	1.202		25.240	
Billing Rate					
Burden Rate					
Piecework Rate					

Change Reason 010

Current Pay Effective Date

Pay Rate Revisions form

To change an employee salary using pay rate information:

- Review the current rates in any of these fields of the Current Rate column:
  - Annual Salary
  - Hourly Rate
  - Billing Rate
  - Burden Rate
  - Piecework Rate

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

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

4. In the Effective Date column, complete as many of these fields as necessary for each rate that you are changing:
  - Next Raise Date
  - New Bill Rate Date
  - New Burden Rate Date
  - New Piece Rate Date
5. Complete the Change Reason field.
6. Review the new rates in the New Rates column and click OK.

<b>Annual Salary</b>	Enter the amount that an employee is paid in one year, assuming that the employee is paid every pay period of the year.
<b>Billing Rate</b>	<p>Enter a number that specifies the rate that the system uses to bill for labor services. This rate is often referred to as the billing or recharge rate. The system charges the resulting amount, based on this rate, to the primary distribution account for the timecard. The system also enters an offset to an account that is derived from AAIs. This rate does not affect employee payroll.</p> <p>To enable billing rates in time entry, the employee record type must be set to 2 (payroll and recharge processing) or 3 (recharge processing only) with the Employee Payroll program (P0801PRL).</p>
<b>Burden Rate</b>	Enter an hourly rate to be used when charging burden associated with the actual billing (recharge) amounts.
<b>Flat</b>	Enter the method by which the pay increase amount is to be calculated. The increase can either be a percentage of the current amount or a monetary amount.
<b>Next Raise Date</b>	Enter the date that the hourly or annual pay rate for the employee increases. The new rate goes into effect after a payroll cycle completes with a pay period end date on or after the date of the next raise.
<b>New Bill Rate Date</b>	Enter the date on which the new billing rate for an employee goes into effect. The new rates actually go into effect AFTER THE PAYROLL PROCESSING RUN that has a payroll date on or after this date.
<b>New Burden Rate Date</b>	<p>Enter the date on which the new burden billing rate for an employee takes effect.</p> <p>The new rates actually go into effect AFTER THE PAYROLL PROCESSING RUN that has a payroll date on or after this date.</p>
<b>New Piece Rate Date</b>	Enter the date on which the new piecework rate for an employee goes into effect. The new rates actually go into effect AFTER THE PAYROLL PROCESSING RUN that has a payroll date on or after this date.
<b>Chg Rsn (change reason)</b>	Enter a code that indicates the reason for one of these:

- Changing an active employee record.
- Terminating an employee.
- Recommending a change in salary or rate.

This is a defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.

**Current Pay Effective Date** Enter the date of the employee last raise. For Human Resources, this is the date when you update salary and wages. If you also have Payroll, this date is automatically updated when a payroll is run. You define pay effective dates using the Pay Rate Information screen.

## CHAPTER 17

# Working With Pay Grade Step Progression

This chapter provides an overview of pay grade step progression and discusses how to:

- Work with pay rates for pay grade steps.
- Create progression work groups.
- Work with progression work groups.
- Update pay grade step changes to the Employee Master Information table.
- Delete a progression work group.

---

## Understanding Pay Grade Step Progression

You use pay grade step progression to automate pay rate changes for groups of employees. Pay grade step progression helps you ensure that all employees that perform the same job at the same level receive the same rate of pay, even if the pay rate for that position changes.

The scenario illustrates how using pay grade step progression can automate pay rate changes for a group of employees. Company A negotiates a new contract with a union. The new contract includes a 2.00 USD per hour pay rate increase for all union related positions. More than 1000 union employees perform more than 100 different union related jobs within the company. Using pay grade step progression, you can automatically update the pay rates for all union related positions and the employees who perform those jobs.

You can also use pay grade step progression to establish job paths that employees can follow. Progression paths include predefined pay grade step levels, each with its own rate of pay. You can automatically move groups of employees to the next level in their progression path and update their pay rates accordingly.

The scenario illustrates how creating progression paths can automate pay rate changes for a group of employees. Company B hires a group of employees, all for different positions, at the same time. The company policy states that employees are hired on a 30 day trial basis. After 30 days, the employees are either terminated or they are promoted to the next level and receive an associated pay rate increase. Using pay grade step progression, you can automatically move all selected employees to the next level in their progression paths and update their pay rates accordingly.

Automating the process of administering pay rate changes for a group of employees can significantly decrease data entry time as well as the occurrence of data entry errors. Pay grade step administration can also help eliminate the possibility of incorrectly excluding an employee from receiving a pay rate change.

---

## Prerequisite

Set up pay grade step tables and assign pay grade step information to the employees.

See [Chapter 5, “Setting Up Pay Information,” page 43](#).

---

## Working with Pay Rates for Pay Grade Steps

This section provides an overview of pay rates for pay grade steps and discusses how to copy pay grade step records.

### Understanding Pay Rates for Pay Grade Steps

Periodically, you might need to adjust the pay rates for the pay grade steps. For example, you might need to enter a cost-of-living increase for all pay grade steps, or you might need to make a market adjustment to a particular pay grade step. You can manually or automatically update the pay grade step table to reflect the new rates.

You can use any of these three methods to make automated changes to pay rates that are associated with pay grade steps:

- Enter a flat amount by which the rate will change.
- Enter a percentage rate change.
- Enter a base rate and a rate multiplier.

You might also need to make additional entries to the pay grade step tables. For example, you might need to enter new rates for all pay grade steps for the upcoming year. To avoid having to manually enter all of the information in the table for the upcoming year, you can copy existing records in the table and change only the fields in the new records that contain different information, such as the rate and date fields.

### Copying Pay Grade Step Records

You might need to add records to the pay grade step tables that are similar to records that already exist in the tables. To avoid excessive data entry, you can copy existing records and change only the information that is different for the new records. For example, if the pay grade step rates for the upcoming year are different from the rates for the current year, you might want to create new records, rather than update the existing records with the new rates. Copying existing records can significantly reduce the instances of data entry errors. After you have created the new records, you can modify them, as necessary.

### See Also

[Chapter 15, “Working with Compensation Management,” Updating Pay Rates for Pay Grade Steps, page 174](#)

## Form Used to Copy Pay Grade Step Records

Form Name	FormID	Navigation	Usage
Pay Grade Step Table	W082003A	Job Specifications Setup (G05BJ4), Pay Grade Step Table	Set up pay grade steps.

## Copying Pay Grade Step Records

Access the Pay Grade Step Table form.

To copy pay grade step records:

- To locate the pay grade steps that you want to copy, complete any of these fields and click Find:
  - Pay Class(H/S/P)
  - Union Code
  - Locality
  - Pay Grade
  - Effective Date
- Select the records that you want to copy and then select Copy from the Row menu.
- Scroll down to the newly created records, which will appear at the bottom of the Pay Grade Step Table, and make changes to any of these fields:
  - Pay Grade
  - Grade Step
  - Loc Desc
  - Union Code
  - Effective Date
  - Rate Mult
  - Step Rate
  - Next Pay Grade
  - Next Pay Grade Step
  - Remark
  - Hrs Day

---

**Note.** You must change information in the new records to avoid having duplicate records in the Pay Grade Step table.

---

- Click OK.

### Effective Date

Enter the date on which the rate associated with a pay grade step becomes effective.

### Loc Desc (locality description)

Enter a description of the different salary localities within an organization.

<b>Rate Mult</b> (rate multiplier)	Enter a number that is multiplied by the Base Rate to calculate a new step rate. This is not a stored field.
<b>Step Rate</b>	Enter a value that specifies the pay rate that is assigned to a pay grade and step. In certain programs, such as the Pay Grade Step Table program (P082003), you can also use a rate multiplier in combination with this value so that the system automatically calculates the pay rate. For example, you can enter a percentage value that the system uses to increase a pay rate.
<b>Remark</b>	A generic field that you use for a remark, description, name, or address.
<b>Hrs Day</b> (hours/day)	<p>Enter the number of hours that the employee normally works in one day. If you leave this field blank, the default is the standard number of hours per day that you defined in the payroll company constants (company options, in JD Edwards EnterpriseOne).</p> <p>For example, if, in the payroll company constants (company options), you specified 8 as the standard number of hours per day, but a few employees normally work 7 hours per day, enter 7 in this field for those employees.</p>

---

## Creating Progression Work Groups

This section provides an overview of progression work group information and discusses how to:

- Set processing options for Grade/Step Progression Workbench.
- Create progression work groups.

## Understanding Progression Work Group Information

After you have updated the pay grade step table with rate changes, you can create groups of employees to which you want to apply those rate changes. Creating progression work groups enables you to update all employees within a work group at the same time.

You can also use work groups to select employees that you want to move from one pay grade step to the next. You do not need to update the pay grade step table with rate changes in order to move employees to the next pay grade step, as long as the next step is already included in the table.

## Effective Dates for Progression Work Groups

When you create progression work groups, you assign an effectivity date or an effectivity data item to the entire work group. The effectivity data item can be any data item included in UDC 08/DT. The effectivity date is used to determine when the rate change becomes effective for the employees who are included in the work group. You should use an effectivity date or data item that you want to use for all employees who are included in the work group. However, you can change the date for individual employees after you create the work group. You can change the effectivity date for an individual in a progression group only if you are using an effectivity data item to determine the date on which the changes become effective. Otherwise, you must change the effectivity date for all employees within the progression group.

If the effectivity date is on or before the system date, the update process directly updates the Employee Master Information table (F060116). If the effectivity date is after the system date, the pay rate change is stored in the Future Data EE Master Revisions table (F06042). The system then updates the Employee Master Information table during the final update step of the payroll cycle within which the effectivity date occurs.



---

**Note.** It is recommended that you use an effectivity date that will update the Employee Master Information table directly. Processing future data revisions during the final update step of the payroll cycle uses additional system resources and can cause a dramatic increase in processing time. If you use the Future Data EE Master Revisions program (P06042) to update pay grade information during final update, you must set the Process Future Data Revisions processing option for the Pay Cycle Workbench program (P07210) to enable future data processing.

---

This table shows the dates you can use to set up effectivity dates for pay rate changes:

Date	Result
System Date	If you leave the Effectivity Date field and the Effectivity Data Item field blank, the system uses that date to determine when the pay rate changes become effective.
Override Date	If you enter a date in the Effectivity Date field, the system uses that date to determine when the pay rate changes become effective.
Defined Date	If you enter a data item in the Effectivity Data Item field, such as Date of Next Review or Date of Next Raise, the date associated with each employee for that particular data item is the date that the system uses to determine when the pay rate changes become effective. You can enter any date that appears in UDC 08/DT.

---

**Important!** The effectivity date is not always the date on which the pay rate change becomes effective. If you enter an effectivity date that falls after the system date, when you run the update process, the Future Data EE Master Revisions table is updated. Future data revisions are not updated to the Employee Master Information table until the final update step of the payroll cycle during which the effectivity date occurs. This can cause the pay rate change to become effective on a date later than the effectivity date. For example, if you use an effectivity date of 06/16/05, and that date occurs after the system date, the Future Data EE Master Revisions table is updated. If the pay cycle that includes the effectivity date includes work dates of 06/15/05 through 06/30/05, the new pay rate is not updated to the Employee Master Information table until the final update step of this payroll cycle, and, therefore, is not used to calculate pay for this payroll cycle. The pay rate change becomes effective during the next payroll cycle, making the actual effective date of the change 07/01/05.

---

## New and Existing Pay Grade Steps

You can base pay rate changes on two different pay grade step options. If you want to change the rate for an existing pay grade step and update the records for the employees who are currently attached to that pay grade step with the new rate, use the existing pay grade step option as the basis for creating the work group. To move employees from one pay grade step to the next, use the new pay grade step option as the basis for creating the work group.

---

**Note.** To move some employees from one pay grade step to the next and update other employees with new rates for their current pay grade steps, you must create more than one work group. You cannot perform both types of updates for one work group.

---

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Processing Mass and Future Changes.

## Prerequisite

Update the pay grade steps with the rate changes in the pay grade step table.

See [Chapter 15, “Working with Compensation Management,” Updating Pay Rates for Pay Grade Steps, page 174.](#)

## Form Used to Create Progression Work Groups

Form Name	FormID	Navigation	Usage
Add Progression Work Group	W082005B	Pay Grade Step Administration (G05BJ2), Pay Grade/Step Progression Workbench.  On the Grade/Step Progression Workbench form, click Add.	Create progression work groups.

## Setting Processing Options for the Grade/Step Progression Workbench Program (P082005)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Versions

These processing options specify the versions that are available for you to use.

- |   |  |
|---|--|
| <b>1. Add new work group version.</b>                   | Use this processing option to specify the version for the Work Group Build. This version will be used on the Add Progression Work Group form. The version may be changed on the Add form. The default version is <i>ZJDE0001</i> . |
| <b>2. Proof - Apply pay grade/step changes version.</b> | Use this processing option to specify the version of the Grade/Step Progression Changes program to use in proof mode. The default is <i>ZJDE0001</i> .   |
| <b>3. Final - Apply pay grade/step changes version.</b> | Use this processing option to specify the version of the Grade/Step Progression Changes program to use in Final Mode. The default is <i>ZJDE0002</i> .   |

## Creating Progression Work Groups

Access the Progression Work Group form.

**Pay Grade/Step Progression Workbench - Add Progression Work Group**

OK Cancel Tools

Review Group ID: 100 Description: Cost-of-Living Adjustments

**Date change becomes effective:**

☐ Effectivity Date  
☒ Effectivity Data Item: NRDT

**Enter version to build work group:**

Build Version: ZJDE0001

**Pay Grade/Step:**

Update Employee Based on:

☒ Existing Grade/Step  
☐ New Grade/Step

**Reporting**

☐ Generate Detail Report
 An Exception Report is always produced.

Add Progression Work Group form

To create progression work groups:

- Complete these fields:
    - Review Group ID
    - Description
  - To use the system date as the effectivity date for the rate change, select the Effectivity Date option and leave the Effectivity Date field blank.
  - To use an override date as the effectivity date for the rate change, select the Effectivity Date option and complete the Effectivity Date field.
  - To use a defined date as the effectivity date for the rate change, select the Effectivity Data Item option and complete the Effectivity Data Item field:
  - To select the basis for the pay rate change, select one of these options:
    - Existing Grade/Step
    - New Grade/Step
  - To produce a detailed report of the employees who are included in the work group, select the Generate Detail Report option.
- An exception report is always printed, regardless of whether you generate the detail report.
- Complete the Build Version field and click OK.

**Note.** You cannot create progression work groups that contain employees from more than one country. If you have employees in different countries that work in the same pay grade step, you must create country specific work groups to update pay grade information. Using data selection, you can specify which country you want to include when you create the work groups. Including employees from more than one country in the same progression work group might cause undesirable results.

<b>Review Group ID</b> (review group identification)	<p>Specify a group of employees selected in order to review whether they should be in the pay grade step progression update. This update will do one of these:</p> <ul style="list-style-type: none"> <li>• Change the existing pay rate based on the employee pay grade step.</li> <li>• Move the employee to the next pay grade step as defined in the Pay Grade Step table (F082001) and change the pay rate, hours per day, days per year, and resultant hours per year in the employee record.</li> </ul>
<b>Effectivity Date</b>	Enter the date on which the wage or salary change is effective.
<b>Effectivity Data Item</b>	<p>Enter a code that specifies the date that will be used to determine when the pay grade step progression changes are applied to the employee master. For instance, if NRVW is entered, the date in the employee next review date field will be used to determine when changes will become effective.</p> <hr/> <p><b>Note.</b> If you are using Future Data Revisions to update pay grade step progression information, the effectivity date is not always the date that the pay grade changes will become effective for the employee. When you are using Future Data Revisions, the payroll cycle that includes the effectivity date of the changes is used to update the changes to the employee master table.</p> <hr/> <p>Because future data is updated during the final update process of the payroll cycle, any changes processed during the payroll are effective on the first day of the next payroll cycle.</p> <p>Available values are defined in defined table 08/DT.</p>
<b>Existing Grade/Step</b>	<p>An option that specifies whether the pay grade step progression work group is built based on existing or new pay grades.</p> <p>If a pay range has changed for a group of employees within the same pay grade step (market adjustment), the existing pay grade step can be used to apply the adjustment.</p> <p>If a group of employees was promoted to the next pay grade step, the new pay grade step can be used to apply the promotion.</p>
<b>New Grade/Step</b>	<p>An option that specifies whether the pay grade step progression work group is built based on existing or new pay grades.</p> <p>If a pay range has changed for a group of employees within the same pay grade step (market adjustment), the existing pay grade step can be used to apply the adjustment.</p> <p>If a group of employees was promoted to the next pay grade step, the new pay grade step can be used to apply the promotion.</p>
<b>Generate Detail Report</b>	<p>Select this option to create both a detailed report of employees included in the build and an exception report that displays the job status and any errors encountered.</p> <p>To create only the exception report, clear this option.</p>
<b>Build Version</b>	Specify a set of defined specifications for the Work Group Build. When you define a version for the Work Group Build, you can select the employees that you want to include in the build.

---

## Working with Progression Work Groups

This section provides an overview of progression work group information and discusses how to:

- Review progression work group summary information.
- Review progression work group detail information.
- Change the effectivity date for a progression work group.
- Change the effectivity date for an employee.
- Delete an employee from a progression work group.

### Understanding Progression Work Group Information

After you create progression work groups, you can review detailed information for each employee, as well as summary information for the entire work group. You can make changes to employee information and update the work group with the changes without having to rebuild the entire progression work group. You can also delete employees from a work group. However, if you accidentally delete an employee, you must rebuild the progression work group to include that employee in the work group again.

---

**Note.** The Build Grade/Step Progression Work Group program (R082006) must finish processing before you can review information in the work group. Until the process is complete, you will not see the work group in the Pay Grade/Step Progression Workbench program (P082005).

---

### Reviewing Progression Work Group Information

You review work group information to verify that the pay rate changes that you created are accurate. You can review information for each employee within the progression work group, as well as summary information for the entire work group.

### Changing Progression Work Group Information

After you review the information in the progression work group, you might need to make changes to information for the employees who are included in the work group. You might also need to change the effectivity date for an individual employee or for the entire work group.

For example, if you used effectivity data item NRDT, the date of next raise, you might find that an employee effectivity date is blank. To correct this, you must enter a date for the employee in the Date of Next Raise field. If you leave blank the effectivity date for an employee in the work group, the system date when you run the update process will be used as the effectivity date for that employee.

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**Note.** You can change the effectivity date for an individual in a progression group only if you are using an effectivity data item to determine the date on which the changes become effective. Otherwise, you must change the effectivity date for all employees within the progression group.

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You might also find that information for a particular employee is incorrect. For example, an employee might be assigned to the wrong job type, business unit, or home company. Before you continue processing, you can correct this information and automatically update the work group to reflect the changes that you make to the employee information.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information”.

## Deleting Employees from a Progression Work Group

After you review the information in the progression work group, you might notice that an employee has been incorrectly included in the work group. You can delete an employee from the work group and automatically update the work group to reflect this change.

---

**Note.** After you select the employee and click the Delete button, the employee is deleted from the work group. You do not need to run the Update Work File process to update the work group. If you accidentally delete an employee, you must rebuild the progression work group to include that employee in the work group again.

---

## Forms Used to Review and Change Progression Work Group Information

Form Name	FormID	Navigation	Usage
Progression Work Group Summary	W082005C	Pay Grade Step Administration (G05BJ2), Pay Grade/Step Progression Workbench  On the Grade/Step Progression Workbench form, select the progression work group that you want to review and click Select..	Review progression work group summary information.
Progression Work Group Detail	W082005D	Pay Grade Step Administration (G05BJ2), Pay Grade/Step Progression Workbench  On the Grade/Step Progression Workbench form, select the progression work group that you want to review and select Detail from the Row menu.	Review progression work group detail information.
Progression Work Group Summary	W082005C	Pay Grade Step Administration (G05BJ2), Pay Grade/Step Progression Workbench  On the Grade/Step Progression Workbench form, select the work group that you want to update and click Select.  On the Progression Work Group Summary form, select the Effectivity Date or Effectivity Data Item option and complete the corresponding field, if necessary. Then click OK.	Change the effectivity date for a progression work group.

Page Name	Object Name	Navigation	Usage
Progression Work Group Detail	W082005D	<p>On the Grade/Step Progression Workbench form, to update all effectivity date changes to the work group, select the work group and select Detail from the Row menu.</p> <p>On the Progression Work Group Detail form, select all records in the detail area and select Update Work Files from the Row menu.</p>	Update all effectivity date changes to the work group.
Work With Employee Information	W0801A	<p>Pay Grade Step Administration (G05BJ2), Pay Grade/Step Progression Workbench</p> <p>On the Grade/Step Progression Workbench form, select the progression work group that you want to review and select Detail from the Row menu.</p> <p>On the Progression Work Group Detail form, select the employee record that you want to change and select Employee Master from the Row menu.</p> <p>On the Work With Employee Information form, select the appropriate option from the Row menu, and then make any necessary changes to the employee effectivity data item.</p>	Change the effectivity date for an employee.
Progression Work Group Detail	W082005D	On the Progression Work Group Detail form, to update all effectivity date changes for the employee, select a record and select Update Work Files from the Row menu.	Update all effectivity date changes for the employee.

## Reviewing Progression Work Group Summary Information

Access the Progression Work Group Summary form.

### Group Status

Enter a code that specifies the status of a work group. This status is defined in defined table 08/WS.

### Creation Date

Enter the date the review group pool was created.

<b>Current Salary</b>	Enter the amount that an employee is paid in one year, assuming that the employee is paid every pay period of the year.
<b>New Salary</b>	<p>Enter the employee new annual salary for all payroll entries manually entered or automatically generated for the payroll period after the Date of Next Raise from the employee master record.</p> <p>See the definition for data item NRDT (Date - Next Raise).</p>
<b>Number of Employees</b>	Enter the total number of employees within a work group.
<b>Percent Increase</b>	Enter the amount of increase specified either as a monetary amount or as a percent, that is added to the current annual salary to obtain the new annual salary.

## Reviewing Progression Work Group Detail Information

Access the Progression Work Group Detail form.



## CHAPTER 18

# Understanding Competency Management

This chapter provides an overview of competency management.

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## Competency Management

Competency management is a method of categorizing and tracking the qualifications that employees possess that make them competent to perform their job duties. These qualifications, such as C programming skills, CPA license, and fluency in French, are called *competencies*. You can use competency management to identify both employee competencies (the competencies that employees or applicants possess or attain) and job competencies (the competencies that are required to perform a specific job within the organization). You might want to track competencies for employees, but not for jobs. However, if you want to track competencies for jobs, you must also track competencies for employees.

Competency management features enable organizations to identify and track both individual competencies and competencies that are required to perform a specific job within the organization.

Benefits of competency management include:

- Competency based job descriptions provide clear, detailed expectations for employees and can illustrate the way in which each employee fits into the whole organization.
- Categorizing and quantifying competencies enable you to create a searchable database that you can use to locate employees who possess specific competencies that are required for a job.
- Job requirements are consistent within organizational levels.
- Competency based performance appraisals enable you to assess the level of an employee performance compared to the job requirements, perform a gap analysis, and develop training plans and career paths.
- Employees can update competency information using self service programs.
- You can use job competency information to create job postings in eRecruit.

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**Important!** When you enter and review information for competency management, use the menu options, not the fast path, to access the forms. Accessing forms from the fast path might produce unexpected results.

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### Advantages of Competency Management

Employees use their competencies to help the organization achieve its goals and objectives. By linking the competencies of an organization with employee jobs, you can determine how employees can best help the organization meet its goals and objectives, thereby giving employees competency based job descriptions that provide clear, detailed expectations and illustrate the ways in which each employee fits into the whole organization.

Some types of competencies, such as education and training, are relatively simple to track and quantify, while more intangible skills, such as negotiation skills or knowledge of pricing strategies, are more difficult to quantify. Categorizing and quantifying competencies enables you to create a searchable database that you can use to locate employees who possess specific competencies, thereby enabling you to efficiently reallocate employees in response to market or organizational changes. Such reallocation can help the organization reduce operating costs and make employees more productive.

Effectively managing competencies can also help the organization train and retain competent employees. The organization benefits by having more productive employees and less employee turnover, which results in a lower operating cost. Employees benefit by having a set of goals and expectations to do their job and improve in their careers. The challenge for human resource representatives is to align and link the goals and objectives of the corporation with the valuable human assets within the organization.

## Core Competencies

Core competencies are competencies that help employees meet the high-level goals and objectives of the organization. All of the employees in the organization should be proficient in these core competencies. You can track core competencies only if you are tracking competencies for both jobs and employees.

## Inherited Competencies

To simplify the tracking of job competencies, you can attach individual competencies to each level in the organizational structure, and then attach jobs to those levels. *Inheritance* is the process of attaching job competencies to high levels in the organizational structure so that they also apply to the subordinate levels. Inheritance means that, when you attach a competency to a business unit that is at a high level in the organizational structure, that competency applies to the jobs in that business unit, as well as to all of the jobs that are in subordinate, lower-level business units. You can further take advantage of inheritance by assigning competencies at the company or job-group level. For example, you might define Commitment to Quality as a core competency and attach it to the company level of the organizational structure so that all of the jobs in the company will inherit that competency. For jobs that are at lower levels of the organizational structure, you can attach additional, more specific competencies and override the inherited competencies, if necessary.

Employees are expected to be proficient in the competencies required for their jobs, as well as in any inherited competencies. Advantages of inherited competencies include:

- You can reduce data entry tasks by defining and attaching a competency in one place only.
- When you change a competency, you make changes in one place and all jobs that inherit that competency automatically inherit the changes.
- You can attach one competency to many jobs.

## Gap Analysis

Competency management gives employees and managers a clear, quantifiable measurement of the current and future needs of the organization and the abilities of the employees. When you track both employee competencies and job competencies, you can easily identify discrepancies between the competencies that an employee possesses and the competencies that are required for the employee current job, or for a job to which the employee aspires. The process of identifying and analyzing such discrepancies is called *gap analysis*. Employees and managers can use self service applications to review gap analysis information. They can also use gap analysis to review career paths for employees who want to examine the possible career opportunities within the organization. Managers and human resources representatives can use gap analysis for succession planning.

## CHAPTER 19

# Defining Organizational Structures for Job Competencies

This chapter provides an overview of organizational structures for job competencies and discusses how to:

- Copy existing organizational structures.
- Change the default organizational structure.
- Update date-effective information for organizational structures.
- Activate draft organizational structures.
- Run the Delete Job Competency Report program (R080017).

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## Understanding Organizational Structures for Job Competencies

Before you can assign jobs and job competencies to the hierarchical levels in the organizational structure, you must define the organizational structure that you will use to track competency information. Although you can use the financials organizational structure to track competency information, we recommend that you create a separate structure. You can also create new business units for job competencies so that you are not using the business units that the organization uses for financial reporting purposes. By maintaining the competency organizational structure and business units separately from the financials structure, the human resources department can revise the competency structure without affecting the structure that the accounting department uses to make financial decisions. Likewise, when the accounting department needs to revise the financials organization structure, the competency structure is not affected.

When you define a separate organizational structure for job competencies, you can either create a new structure or copy and modify an existing structure, such as the financials structure. In most cases, copying an existing structure is probably more efficient; however, if the existing structures are very different from the one that you intend to create, you might decide to create a new organizational structure.

You can create organizational structures to take advantage of the concept of inheritance. Inheritance is the process of attaching job competencies to high levels in the organizational structure so that they also apply to the subordinate levels. Inheritance means that, when you attach a competency to a business unit that is at a high level in the organizational structure, that competency applies to the jobs in that business unit, as well as to all of the jobs that are in subordinate, lower-level business units. You can take further advantage of inheritance by assigning competencies at the company or job-group level.

To help you explore a variety of scenarios, you might create several draft versions of the organizational structure. When you decide which draft you want to use, you can activate that draft and define it as the default organizational structure. When an organizational structure becomes obsolete, you can update date-effective information to indicate that it is no longer the current structure.

## Creating New Organizational Structures for Job Competencies

Select Competency Setup (G08BC4), Organization Structure Revision.

To associate jobs and job competencies with the hierarchical levels in the organization, you can create an organizational structure that is specific to job competencies. In many cases, you can base the competency organizational structure on the structure that the accounting department uses for financial reporting (the financial organizational structure). If the financial organizational structure is much different from the organizational structure that you need to create for competencies, creating a new structure is probably more efficient than copying and modifying an existing structure.

To give the human resources department more flexibility in attaching competencies, you might also create new business units for the competency organizational structure. When you create a new business unit for job competencies, enter 1 in the Subledger Inactive field so that no activity about the business unit is reflected in the business units and organizational structure that the organization uses to track financial information.

To create a new organizational structure, use the Organization Structure Definition program (P0050B). To create new business units, use the Business Units by Company program (P0006). You complete the same steps to create the new organizational structure and business units for job competencies as you would to create them for financials. When you create the structure for job competencies, you do not need to run the Organization Structure Build program (R10450).

The new structure that you create is an inactive, or draft, structure that contains no effective dates. You can modify the draft as many times as necessary. When you are ready to begin using this organizational structure, run the Activate Job Competencies report (R080014) to activate the draft structure and set it up as the default structure for job competencies. This program also enters an ending date for the organizational structure that was previously the default structure, if one exists.

### See Also

*JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Setting Up Organizations,” Defining Organizational Structures

*JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Setting Up Organizations,” Setting Up Business Units

[Chapter 19, “Defining Organizational Structures for Job Competencies,” Updating Date Effective Information for Organizational Structures, page 208](#)

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## Copying Existing Organizational Structures

This section provides an overview of the Copy Job Competency program and discusses how to:

- Set processing options for the Copy Job Competency Program (P080020).
- Copy existing organizational structures.

## Understanding the Copy Job Competency Program (P080020)

To associate jobs and job competencies with the hierarchical levels in the organization, you can create an organizational structure that is specific to job competencies. In many cases, you can save time by copying the existing organizational structure for financials and then modifying it so that it is appropriate for tracking job competencies. The business units for the new organizational structure are the same as those that are in the organizational structure that you copied; however, in the new structure, you can change the arrangement of the business units, if necessary.

When you copy an existing structure, the system creates a draft structure that contains no effective dates. You can modify the draft as many times as necessary. When you are ready to begin using this organizational structure, run the Activate Job Competencies report (R080014) to activate the draft structure and set it up as the default structure for job competencies. This program also enters an ending date for the organizational structure that was previously the default structure, if one exists.

You can also copy job competency information from an existing organizational structure to a new organizational structure that does not yet have job competency information associated with it.

The copy program includes both a form where you specify the information that you want to copy and a batch process. When you click OK on the form, the system automatically runs the batch process and prints a report that lists the information that you want to copy. You can run the batch process in proof mode, which enables you to verify the information before the system updates the database. You must run the copy program from a client workstation (NT), not from an internet or intranet site. Internet and intranet servers do not have the specific application program interfaces (APIs) that the system needs to perform the copy.

## Prerequisites

Before you complete the tasks in this section:

- Set up the program to run on the local workstation.

See *JD Edwards EnterpriseOne Tools 8.96 Configurable Network Computing Implementation Guide*

- Enter a code for the new organizational structure in UDC 00/TS.

## Form Used to Copy Existing Organizational Structures

Form Name	FormID	Navigation	Usage
Copy Job Competencies	W080020A	<ul style="list-style-type: none"> <li>• Competency Mgmt Advanced &amp; Tech Oper (G05BC3), Copy Job Competency</li> <li>• Competency Management Periodic Processing (G05BC2), either Jobs in an Organization or Job Competencies in an Organization, Create Draft from the Report menu</li> </ul>	Copy an existing organizational structure.

## Setting Processing Options for the Copy Job Competency Program (P080020)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Versions

Use these processing options to specify versions of the job competencies to copy:

- |  |  |
|--|--|
| <b>1) Copy Job Competencies Report Version</b>         | Use this processing option to specify the version of the Copy Job Competency Report (R080015) to use when exiting to the program. Blank uses version <i>XJDE0001</i> . |
| <b>2) Jobs Competencies in an Organization Version</b> | Use this processing option to specify the version of the Job Competencies In An Organization program (P08006) to use. The default is <i>ZJDE0001</i> .                 |

## Copying Existing Organizational Structures

Access the Copy Job Competencies form.

To copy an existing organizational structure:

1. Complete the From Type Structure and To Type Structure fields.
2. Select the Proof Mode or Show Report Details option.
3. If the From Type Structure has job competency information associated with it, select one of these options:
  - Copy Job Competencies
  - Copy Job Competency Descriptions
  - All Translations
4. If you decide to copy competency descriptions, select one or more of the options in the Copy Specific Descriptions group.
5. Click Submit.

The system prints a report that lists the information that it will copy. If you did not turn the Proof Mode option on, the system also runs a batch process that updates the database with the copied information.

- |                              |  |
|------------------------------|--|
| <b>From Type Structure</b>   | Enter a defined code (00/TS) that identifies the type of organization structure, such as financial or responsibility. Each type of organization structure can have a separate hierarchy. |
| <b>To Type Structure</b>     | Enter a defined code (00/TS) that identifies the type of organization structure, such as financial or responsibility. Each type of organization structure can have a separate hierarchy. |
| <b>Proof Mode</b>            | Select this option to view a report of the job competencies, job competency descriptions, or both to be copied. The copy is not made if this box is checked.                             |
| <b>Show Report Details</b>   | Select this box to have the details of the copy appear on the report.  |
| <b>Copy Job Competencies</b> | Select this box to copy job competencies associated with a structure type.   |

**Copy Job Competency Descriptions**

Select this box to copy job competency descriptions.

**All Translations**

Select this check box to copy all the translations of the job competency descriptions. If this check box is not selected, only the domestic (blank) language is copied.

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## Changing the Default Organizational Structure

This section provides an overview of the default organizational structure and discusses how to change the default organizational structure.

### Understanding the Default Organizational Structure

As you work with job competency information, you might create several organizational structures for job competencies. Some of these structures might be draft structures that you have either decided not to use or are planning to use at some time in the future. For example, if the organization plans to acquire an additional company, you might create a draft structure that you use to incorporate jobs from the new company into the existing organizational structure. You might also have some historical organizational structures. Historical structures are those that the organization used at one time but is no longer using. A historical structure remains active, but you cannot use it as the default structure.

The default organizational structure is the structure that the organization currently uses to track job competency information. When managers and employees use self service to review job competency information, they can access only the information for the default structure. For security purposes, only human resources administrators can access draft and inactive structures.

Occasionally, you might need to change the default organizational structure for job competencies. For example, you might have mistakenly activated a draft structure that should not have been activated for another month.

### Form Used to Change the Default Organizational Structure

Form Name	FormID	Navigation	Usage
Human Resources Additional Options	W08043A	HRM Setup (G05B4), System Options  On the Work with HRM Foundation System Options form, select HR Addl. Options from the Row menu.  Complete the Type Structure field, and then click OK.	Change the default organizational structure.

### Changing the Default Organizational Structure

Access the Human Resources Additional Options form.

**HRM System Options - Human Resources Additional Options**

OK Cancel Tools

Data File Library  HR Subsystem Name

**Job Competencies**

Type Structure  *Corporate Competency Structure*

**Compensation Management**

Increase Guideline Edit  *Warning: Increase Out of Range*

Based on Date (Length of Service)  *Original Hire Date*

Rate Multiplier

Human Resources Additional Options form

**Type Structure**

Enter a defined code (00/TS) that identifies the type of organization structure, such as financial or responsibility. Each type of organization structure can have a separate hierarchy.

## Updating Date Effective Information for Organizational Structures

This section provides an overview of date effective information for organizational structures and discusses how to update date effective information for organizational structures.

### Understanding Date Effective Information for Organizational Structures

When you create a new organizational structure for job competencies using the Organizational Structures Revisions program (P0050), the system does not recognize the structure as a valid structure for job competencies. To make the structure valid for job competencies, you must update its date effective information. You do not need to enter this information if you used the Copy Job Competencies program (P080020) to create the organizational structure for job competencies, nor do you need to enter this information if you run the Activate Job Competencies program (R080014).

This program updates the Date Effective Organizational Structure table (F0800608).

After you update date effective information for organizational structures, you must run the Activate Job Competencies program (R080014) to complete the process of activating the draft structure.



## See Also

[Chapter 19, “Defining Organizational Structures for Job Competencies,” Activating Draft Organizational Structures, page 210](#)

## Form Used to Update Date Effective Information for Organizational Structures

Form Name	FormID	Navigation	Usage
Date Effective Organizational Structure Revisions	W0800608C	Competency Setup (G05BC4), Date Effective Organizational Structure  On the Work with Date Effective Organizational Structures form, locate the organizational structure you want to update and click Select.	Update date effective information for organizational structures.

## Updating Date Effective Information for Organizational Structures

Access the Date Effective Organizational Structure Revisions form.

**Date Effective Organizational Structure - Date Effective Organizational Structure Revisions**

OK Cancel Tools

Type Structure  Corporate Competency Structure

Draft Flag  Yes

Start Effective Date

Ending Effective Date

Date Effective Organizational Structure Revisions form

### Draft Flag

Enter a code that indicates whether an organizational structure is in draft mode and has not yet been activated. Values are:

1: Yes

0: No

<b>Start Effective Date</b>	Enter the date on which the organizational structure becomes active.
<b>Ending Effective Date</b>	Enter the date on which the organizational structure becomes inactive.

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## Activating Draft Organizational Structures

This section provides an overview of draft organizational structures and discusses how to:

- Run the Activate Job Competencies program (R080014).
- Set processing options for the Activate Job Competencies program (R080014).

### Understanding the Activate Job Competencies Program (R080014)

When you create a new organizational structure or copy and modify an existing one, the system maintains that organization structure in draft mode. You can modify the draft organizational structure and add jobs and job competencies to it without affecting the active structure. When you are ready to begin using the draft structure, you can run a program that updates the status of the structure to Active. Activating the draft structure also makes that structure the default structure for the organization (the structure that the organization currently uses to track job competency information).

After you activate a draft structure, you cannot change it back to a draft again. To help you verify that the information in the draft structure is correct before you activate it, you can set processing options to run the program in proof mode and print a verification report. When you run the program in proof mode, the system does not update the tables to indicate that the structure is the default, active structure. When you run the program in update mode, the system performs these functions:

- Changes the status and date of the draft organizational structure to indicate that it is Active.  
Because you might have more than one draft structure, you must enter in the processing options the name of the structure that you want to activate.
- Enters an ending effective date for the structure that is currently the default structure for job competencies, if one exists.

The system maintains a historical record of this structure's status so that you know the dates it was used as the default structure.

- Updates the system options to indicate that the new structure is the default structure.
- Updates these tables:
  - HR Additional Constants (F08043).
  - Date Effective Organizational Structure (F0800608).
  - Organizational Business Unit/Job Cross Reference (F0800601).
  - Job Group Competencies (F0800603).
  - Organizational Business Unit Competencies (F0800604).
  - Job Type/Step Competencies (F0800605).
  - Competency Options - Overrides (F0800606).
  - Organizational Competencies (F0800607).

- Competencies in Structure and Job (F0800610).
- Job Competency Default - Overrides (F0800611).
- Defined Job Competency Description Reference (F0800612).

## Running the Activate Job Competencies Program (R080014)

Select Competency Mgmt Advanced & Tech Oper (G05BC3), Activate Job Competencies.

## Setting Processing Options for the Activate Job Competencies Program (R080014)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Display

This processing option specifies the level of detail that appears on the report.

#### 1) Show Detail

Use this processing option to enter a code that specifies whether the system prints a detailed report. Values are:

*0*: No, the system does not print a detailed report.

*1*: Yes, the system prints a detailed report.

If you leave this processing option blank, the system prints a detailed report.

### Defaults

These processing options specify the dates on which old organizational structure ends and the new one becomes active, as well as the new organizational structure that you want to apply.

#### 1) Active Organizational Structure End Date

Use this processing option to specify an ending date for the organizational structure that is currently active.

Blank: The end date for the active organizational structure is the current date.

#### 2) New Organization Structure

Use this processing option to specify a new organizational structure. The new structure name is needed for updating the Beginning/End Dates for the new structure.

#### 3) New Organizational Structure Begin Date

Use this processing option to specify a beginning date for the new organizational structure.

#### 4) New Organizational Structure Ending Date

Use this processing option to specify an ending date for the new organizational structure.

## Process

This processing option specifies whether you want to process the activation in final mode.

- 1) Final Mode** Use this processing option to specify the mode in which the system runs the process. Values are:
- 0*: Run the process in proof mode. Do not update the tables.
  - 1*: Run the process in final mode and update all appropriate tables.
  - Blank: Run the process in final mode and update all appropriate tables.

---

## Running the Delete Job Competency Report Program (R080017)

This section provides an overview of the Delete Job Competency Report program and discusses how to:

- Run the Delete Job Competency Report program (R080017).
- Set processing options for the Delete Job Competency Report program (R080017).

## Understanding the Delete Job Competency Report Program (R080017)

This report deletes any attachments or overrides to a specified structure type. For example, Company A carefully evaluates its business needs and decides to include six job competencies in the company. The company creates these six job competencies in the Job Competency program (P08009) and sets up default descriptions and options for these job competencies. Next, Company A creates three draft organizational structures and tests some "what if" scenarios, in which it attaches or overrides the job competencies in different business units, jobs, and so on. When the company determines which scenario best meets its business needs, it runs the Delete Job Competency report (R080017) to delete the two draft organizational structures that it does not plan to use. The report deletes the connection of the competencies and their overrides in just the organization that is deleted. Default information about the six job competencies that the company created remains in the Job Competency program.

## Running the Delete Job Competency Report Program (R080017)

Select Competency Mgmt Advanced & Tech Oper (G05BC3), Delete Job Competency Report.

## Setting Processing Options for the Delete Job Competency Report (R080017)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Defaults

This processing option specifies the organization structure to delete.

**1. Organization Structure to Delete**      Use this processing option to specify the organizational structure to be deleted.

## Process

This processing option specifies the amount of detail to print on the report.

**1. Print Report Detail**      Use this processing option to print a report of the items being deleted. Values are:

Blank: Print report.

*1*: Print report

*0*: Do not print report.



## CHAPTER 20

# Working with Employee Competencies

This chapter provides an overview of employee competencies and discusses how to:

- Define scales for employee competencies.
- Define employee competencies.
- Define Training Courses.
- Assign competencies to employees.

---

## Understanding Employee Competencies

You use competency management to track the competencies that employees possess and to compare them with those that are required for the employee jobs. You can track these types of employee competencies:

- Training
- Skills
- Accomplishments
- Certificates
- Degrees
- Languages

You can track a variety of competencies for each competency type. For example, for the Skills competency type, you can track programming skills, communication skills, and so on.

Before you enter competency information for employees, you must define the scales that you use to rate the levels of proficiency that employees demonstrate in each competency. You must also define the specific employee competencies that you are tracking for each competency type. You also can define training courses and specify the competencies that they fulfill.

You set up security for competency levels so that you can specify the type of user within the organization who is responsible for entering competency levels for employee competencies. This feature is particularly useful if the organization enables employees and managers to enter and update competency information using self service. In some cases, when the organization is using employee self service, you might also want to set up routing instructions for competency approvals. Routing instructions enable you to identify a person, other than an employee's supervisor, who is responsible for approving specific employee competencies or competency types.

When you assign competencies to an employee, you list each competency that the employee possesses, along with the level of proficiency that the employee demonstrates.

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## Common Fields Used in This Chapter

<b>Scale</b>	Enter a code that specifies the method to use for measuring an employee level of proficiency in a particular competency. The scale uses a series of competency levels to represent standards of relative proficiency.
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## Defining Scales for Employee Competencies

This section provides an overview of scales for employee competencies and discusses how to:

- Define basic information for scales.
- Generate values for scales automatically.
- Enter values for scales manually.

### Understanding Scales for Employee Competencies

A *competency scale* is a method of measuring an employee level of proficiency in a particular competency. You must associate a scale with each competency before you can begin entering competency information for employees. You can use the same scale for every competency, or you can define a separate scale for each competency. For example, for C programming ability, in the Skill competency type, you might define the numeric scale as described in this table:

Scale Value	Description
1	Beginner
2	Competent
3	Accomplished
4	Expert

For each level on a scale, you define a low value and a high value. Scale values always increase from low to high; therefore, low values always mean less proficient and high values mean more proficient. You can either enter the scale values manually or have the system generate them automatically.

If you are also tracking job competencies, the scales that you define for employee competencies are the same scales that you use for job competencies.



## Forms Used to Work With Scales for Employee Competencies

Form Name	FormID	Navigation	Usage
Review Scales	W05103B	Competency Setup (G05BC4), Scale Information  On the Work With Scales form, click Add.	Define basic information for scales.  After you create a scale, you must define the values for each level. You can enter the values manually or run a program that assigns them automatically.
Generate Competency Levels/Ranges	W05103D	Competency Setup (G05BC4), Scale Information  On the Work With Scales form, locate and select the scale that you just created, and then select Generate Levels from the Row menu.	After you complete the steps to define basic information for scales, you can have the system automatically generate the values for the scales.
Define Competency Levels	W05103C	Competency Setup (G05BC4), Scale Information  On the Work With Scales form, locate and select the scale that you just created, and then select Define Levels from the Row menu.  On the Define Competency Levels form, enter the Low and High Values for as many competency levels as you need to define and then click OK.	After you complete the steps to enter basic information for scales, you can enter values for scales manually.

### Defining Basic Information for Scales

Access the Review Scales form.

**Low Value** Enter the lowest rating on the scale, level, or range.

**High Value** Enter the highest rating on the scale, level, or range.

### Generating Values for Scales Automatically

Access the Generate Competency Levels/Ranges form.

**Scale Information - Generate Competency Levels/Ranges**

OK Cancel Tools

Scale  5 Point Performance Mgmt

Low Value  Increment By

High Value

Description

☒ Distinct Values

☐ Range

Generate Competency Levels/Ranges form

**Increment By** Enter a numeric value that differentiates a competency level from the next level in a series.

**Distinct Values** Select this option to specify distinct values for each scale level.

**Range** Select this option to specify a range of values for the scale.

## Entering Values for Scales Manually

Access the Define Competency Levels form.

**Scale Information - Define Competency Levels**

OK Delete Cancel Tools

Scale  Five Point Performance Scale

Records 1 - 6 [Customize Grid](#)

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Low Value	High Value	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1.000	1.999	Needs Improvement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	2.000	2.999	Learner
<input type="checkbox"/>	<input checked="" type="checkbox"/>	3.000	3.999	Capable
<input type="checkbox"/>	<input checked="" type="checkbox"/>	4.000	4.999	Accomplished
<input type="checkbox"/>	<input checked="" type="checkbox"/>	5.000	5.000	Expert
<input type="checkbox"/>	<input checked="" type="checkbox"/>			

Define Competency Levels form

## Defining Employee Competencies

This section provides an overview of employee competencies and discusses how to define employee competencies.

### Understanding Employee Competencies

You define employee competencies to quantify the skills, training, and expertise that employees possess. You categorize competencies by competency type and then track multiple competencies for that competency type. For example, for the competency type Training you might track these competencies:

- Employee orientation
- Foundation class
- Benefits Administration class

After you define employee competencies, you can assign these competencies to employees and indicate the levels of proficiency that employees demonstrate in each competency.

### Prerequisite

Review UDC 05/CY for a list of available competency types. Each of the values in this UDC list represents a competency table. The values in this list are hard coded and cannot be changed. Adding additional values to this list requires that you customize the system.

## Form Used to Define Employee Competencies

Form Name	FormID	Navigation	Usage
Review Competencies	W05104B	Competency Management (G05BC1), Competency Information  On the Work With Competency Information form, click Add.	Define employee competencies.

## Defining Employee Competencies

Access the Review Competencies form.

**Competency Information - Review Competencies**

Work With Competency Information | Review Competencies

OK Cancel Form Previous Next Tools

Competency Type 002 Skill

Competency Code INIT

Competency Class SOFT SKILL

Description Initiative

Scale 5PT Five Point Performance Scale

Auto Calculate Competency 1 Yes

Review Competencies form

### Competency Class

Enter a division or rating based on some common attribute among competencies.

### Auto Calculate Competency

Select this option to indicate this competency can be automatically calculated during an employee performance appraisal.

During an employee performance appraisal, supervisors might have the option to complete only the job competency ratings and have the program derive the new competency ratings for the employee. This option decreases the time required to complete performance appraisals and keeps the employee competency ratings up-to-date.

For some competencies, automatically calculated values would be erroneous. For example, if a job requires a training class, you typically would not want the system to automatically calculate a rating of 3 (Complete) if the employee has not completed the class.

You set up the default value for this option when you define job competency options. You can override the default value at any level where you attach job competency options.

---

## Defining Training Courses

This section provides an overview of training course definitions and discusses how to:

- Define training courses.
- Review available courses by competency.

## Understanding Training Courses Definitions

In some cases, a training course might help employees attain a variety of competencies in addition to a specific training competency. For example, a training course in JD Edwards EnterpriseOne Foundation might help employees acquire the competencies described in this table:

Competency	Description
Training	Foundation training
Skills	Basic system skills
Certification	Product certification

When you define a training course, you can specify the competencies that it affects. Assigning competencies to training courses helps ensure that you consistently update the competency information for the employees who complete those training courses.

After you define a training course, you can use the Define Class/Competency X-Reference form to do any of these:

- Review the competencies that are attached to the training course.
- Attach additional competencies to the training course.
- Delete (detach) competencies from the training course.

To access the Define Class/Competency X-Reference form, select Define X-Reference from the Row menu on Work with Course Information.

## Reviewing Available Courses by Competency

When you enter course information into the system, you can associate each course with a number of different competency areas. You associate a course with the competencies that the course might help to improve. When you assign competencies to an employee, you can then review the courses that are available for each specified competency area.

Reviewing the available courses by competency area enables you to easily create comprehensive training development plans for employees.

For example, the organization might offer the course Introduction to Microsoft Excel. This course might assist employees with a number of different competency areas, such as data analysis skills or knowledge of Microsoft Office products. Therefore, you would assign the data analysis and Microsoft Office competencies to the training course.

Subsequently, when you assign the Microsoft Office competency to an employee, and you review the available courses in that competency area, the system displays the Introduction to Microsoft Excel course, along with any other courses that have been associated with that competency area.

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**Note.** You can also review available course information at the time that you assign competencies to an employee.

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See [Chapter 20, “Working with Employee Competencies,” Assigning Competencies to Employees, page 225](#).

## Prerequisites

Before you complete the tasks in this section:

- Define each training course and associate it with all relevant competency areas.

See [Chapter 20, “Working with Employee Competencies,” Defining Training Courses, page 221](#).

- Assign competencies to employees.

See [Chapter 20, “Working with Employee Competencies,” Assigning Competencies to Employees, page 225](#).

## Forms Used to Define Training Courses

Form Name	FormID	Navigation	Usage
Course Information Revisions	W051011B	Competency Management (G05BC1), Course Information  On the Work With Course Information form, click Add.	Define training courses.
Define Class/Competency X-Reference	W051011D	Competency Management (G05BC1), Course Information.  On the Work With Course Information form, select Define X-Reference from the Row menu.	Review the competencies that are attached to the training course, attach additional competencies to the training course, or delete (detach) competencies from the training course
Search & Select Competency/Course	W051011E	Competency Management (G05BC1), Resource Competency Information  On the Work with Competencies form, select the competency record for which you want to review the associated courses, and then select Course Information from the Row menu.	Review available courses by competency.

## Defining Training Courses

Access the Course Information Revisions form.

**Course Information - Course Information Revisions**

OK Cancel Tools

Course Code: PRES1 Effective From Date: 01/01/05

Provider: INT Internal Class Offering: Effective Thru Date: 12/31/05

Course Name: Presentation Skills 101

Units: 3.0

Cost: 450.00

Training Type:

Course Competency X-Reference Training Skill

Competency Codes

Course Information Revisions form

To define training courses:

- Complete these fields:
  - Course Code
  - Provider
  - Effective From Date
  - Effective Thru Date
  - Course Name
  - Units
  - Cost
  - Training Type
- On the lower left portion of the form, select the competency type that the training course affects.  
On the lower right portion of the form, the system displays the competency codes for the competency type that you selected.
- Select the competency code that the training course affects and then click the left arrow button in the lower middle portion of the form.  
A + sign appears next to the competency type. When you click it, the system displays the competency code under the competency type.
- Repeat steps 2 and 3 for as many competencies as the training course affects.  
You can select multiple competency codes for each competency type.
- Click OK.



<b>Course Code</b>	Enter a code that represents a training course.
<b>Provider</b>	Enter a person or institution that provides training.
<b>Effective From Date</b>	Enter the date on which the offered course becomes effective.
<b>Effective Thru Date</b>	Enter the date when the course is no longer offered.
<b>Course Name</b>	Enter the text that describes a training course.
<b>Units</b>	Enter a unit of measure for calculating student credits for training courses.
<b>Cost</b>	Enter the cost of the training course.
<b>Training Type</b>	Enter a defined code (05/TY) that you use to categorize the type of training. Examples of training types include classroom training and computer based training.

---

## Assigning Competencies to Employees

This section provides an overview of employee competency assignment and discusses how to:

- Set processing options for Resource Competency Information (P05100).
- Assign training competencies.
- Assign skill competencies.
- Assign accomplishment competencies.
- Assign certification competencies.
- Assign education competencies.
- Assign language competencies.
- Set processing options for the Competency History program (P05120).
- Review competency history for employees.

## Understanding Employee Competency Assignment

After you define employee competencies, you can assign those competencies to employees and indicate the level of proficiency that employees demonstrate in each competency. By tracking competencies for employees, you can determine the competencies that they need in order to satisfy the requirements of their current jobs and any jobs that they hope to obtain in the future. You can also create clear career goals and performance objectives for employees.

When you assign competencies to an employee, you can then review the courses that are available to assist the employee in gaining a higher proficiency level in each competency area. Reviewing courses that are associated with assigned competencies can help you develop a training development plan for the employee.

## Self Service Considerations for Assigning Competencies to Employees

Because maintaining competency information for all of the employees in an organization can be a time consuming task for human resources representatives, the organization might have set up the employee competency programs as self service programs that managers can access from the Managers Workbench program (P08712). Managers can enter and review competency information for only those employees who report to them.

The organization can also activate the employee self service programs for competency management. Employees can use these programs to enter their own competency information and then request that their managers approve the information. The employee self service programs for competency management are slightly different from the competency programs that you access from the Competency Management menu and the Managers Workbench program; however, the two sets of programs contain essentially the same information.

See *JD Edwards EnterpriseOne Human Capital Management Self Service 8.12 Implementation Guide*, “Employee self service,” Entering Competency Information Using self service.

See [Chapter 20, “Working with Employee Competencies,” Understanding Training Courses Definitions, page 221.](#)

## Reviewing Competency History for Employees

Each time someone enters or changes competency information for an employee, the system creates a historical record of the new information. You can review this history to determine whether an employee is becoming more proficient in a particular competency.

## Prerequisite

Enter an organizational business unit for each employee for whom you plan to assign competencies. You enter organizational business units on the Organizational Assignment form (W0801ORGA).

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Adding Employee Records One at a Time,” Entering Organizational Assignment Information.

## Forms Used to Assign Competencies to Employees

Form Name	FormID	Navigation	Usage
Review Training & Development	W05111B	Competency Management (G05BC1), Resource Competency Information  On the Work With Competencies form, enter 001 in the Competency Type field and then click Add.	Assign training competencies to employees.
Skills/Resource Revisions	W05112B	Competency Management (G05BC1), Resource Competency Information  On the Work With Competencies form, enter 002 in the Competency Type field, and then click Add.	Assign skill competencies.

Page Name	Object Name	Navigation	Usage
Review Accomplishments	W05113B	Competency Management menu (G05BC1), Resource Competency Information  On the Work With Competencies form, enter 003 in the Competency Type field, and then click Add.	Assign accomplishment competencies.
Certification Revisions	W05114B	Competency Management (G05BC1), Resource Competency Information  On the Work With Competencies form, enter 004 in the Competency Type field, and then click Add.	Assign certification competencies.
Review Education	W05115B	Competency Management (G05BC1), Resource Competency Information  On the Work With Competencies form, enter 005 in the Competency Type field, and then click Add.	Assign education competencies.
Review Languages	W05116B	Competency Management (G05BC1), Resource Competency Information  On the Work With Competencies form, enter 006 in the Competency Type field, and then click Add.	Assign language competencies
Work With Competency History	W05120A	Competency Management (G05BC1), Competency History	Review competency history for employees.

## Setting Processing Options for the Resource Competency Information Program (P05100)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Edits

This processing option specifies the Competency Update Event Code.

## 1. Competency Update Event Code

Use this processing option to enter a code that specifies a type of user that has access to employee competency information. The code that you enter must exist in the defined code list for competency update codes (05/CU). This code also corresponds to a code that you entered in the Competency Update Event Code field in the Competency Update Events program (P05106).

You use this processing option in conjunction with the Competency Update Events program to control access to the Competency Level field for specific types of users. You set up different versions of Resource Competency Information for each type of user. For example, you might define a Competency Update Event Code called Train that you use to represent the organization training manager. You can use the Competency Update Events program to grant Train the ability to update competency levels for all training competencies.

You then set up a version of the Resource Competency Information program for Train.

## Assigning Training Competencies

Access the Review Training & Development form.

**Resource Competency Information - Review Training & Development**

OK Find Delete Cancel Form Row Tools

**Training/Development** Attachment

Resource Type 01 Individual  
 Address Number 7500 McDougale, Cathy  
 Competency Type 001 Training  
 Competency Code BENST Benefits Study  
 Competency Level 2.000 In progress

Records 1 - 2 [Customize](#)

	Provider	Course Code	Course Description	Start Date	End Date	Grade	Location Room
<input checked="" type="radio"/>	MSEC	BEN1	Group Benefits Administration	03/15/00	03/18/00	A	145
<input type="radio"/>							

Review Training and Development form: Training/Development tab

To assign training competencies:

1. Enter 001 in the Competency Type field and then click Add.
2. On Review Training & Development, complete these fields:
  - Address Number
  - Competency Code
  - Competency Level

3. To attach a document that provides more detailed information about the employee level of competency, select Header Attachment from the Form menu.
4. On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
5. On the Review Training & Development form, complete these fields in the detail area:
  - Provider
  - Course Code
  - Start Date
  - End Date
  - Grade
  - Location Room
  - Delivery Type
  - Units
  - Cost
  - Training Reason
6. To attach a document that provides more detailed information about a record in the detail area, select the record, and then select Detail Attachment from the Row menu.
7. On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
8. Repeat steps 5 through 7 for as many training courses as you need to enter for this employee and competency code.
9. To review the available courses for the competency area, select Course Information from the Form menu.
10. On the Search & Select Competency/Course form, click Find and review the course information in the detail area.
11. To return to the Review Training & Development form, click Close.
12. On the Review Training & Development form, click OK.

<b>Competency Level</b>	Enter a code that refers to the level of proficiency that a person or asset has demonstrated for a specific competency type and competency code.
<b>Provider</b>	Enter the person or institution that provides training.
<b>Course Code</b>	Enter a code that represents a training course.
<b>Start Date</b>	Enter the date on which the training course started.
<b>End Date</b>	Enter the date on which the training course ended.
<b>Grade</b>	Enter the grade that the employee received for the course.
<b>Location Room</b>	Enter the classroom or location where the training course is held.
<b>Delivery Type</b>	Enter a code that specifies the way in which a course is delivered or presented. Examples of delivery type include classroom training and computer based training.

<b>Units</b>	Enter a unit of measure for calculating student credits for training courses.
<b>Cost</b>	Enter the cost of the training course.
<b>Training Reason</b>	Enter a defined code (05/TN) that indicates the reason for the training.

## Assigning Skill Competencies

Access the Skill/Resource Revisions form.

**Resource Competency Information - Skills/Resource Revisions**

OK Find Delete Cancel Form Row Tools

**Skill/Resource** Attachment

Resource Type  Individual

Address Number  McDougale, Cathy

Competency Type  Skill

Competency Code  Conflict Resolution

Competency Level  Accomplished

**Records 1 - 2**

	Description	Date Acquired	Verified By	Status
<input checked="" type="radio"/>	Accomplished	01/01/05		
<input type="radio"/>				

Skills/Resources Revisions: Skill/Resource tab

To assign skill competencies:

- Complete these fields:
  - Address Number
  - Competency Code
- Review these fields:
  - Competency Level
  - Resource Type
- To attach a document that provides more detailed information about the employee level of competency, select Header Attachment from the Form menu.
- On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
- On the Skills/Resource Revisions form, complete these fields in the detail area:
  - Description

- Date Acquired
  - Verified By
  - Status
6. To attach a document that provides more detailed information about a record in the detail area, select the record, and then select Detail Attachment from the Row menu.
  7. On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
  8. Repeat steps 5 through 7 for as many skills as you need to enter for this employee and competency code.
  9. To review the available courses for the competency area, select Course Information from the Form menu.
  10. On the Search & Select Competency/Course form, click Find and review the course information in the detail area.
  11. To return to the Skills/Resource Revisions form, click Close.
  12. On the Skills/Resource Revisions form, click OK.

<b>Resource Type</b>	Enter a code that identifies the type of resource for which you are entering competency information. This is a defined code (05/RT). Values are: <i>01</i> : Individual <i>02</i> : Asset, such as equipment
<b>Date Acquired</b>	Enter the date on which the employee acquired the skill.
<b>Verified By</b>	Enter the name or address book number of the person who verified that the employee is certified in the competency.
<b>Status</b>	Enter a defined code (05/CR) that indicates the progress that the employee has made toward a level of proficiency in a particular competency. For example, for certification competencies, you might define a status, Pending, to indicate that the employee has completed a certification test but has not yet received his or her test scores.

## Assigning Accomplishment Competencies

Access the Review Accomplishments form.

**Resource Competency Information - Review Accomplishments**

OK Find Delete Cancel Form Row Tools

**Accomplishments** Attachments

Resource Type 01 Individual

Address Number 2479 Ellis, Jody A.

Competency Type 003 Accomplishment

Competency Code IDEA Idea to Action Award

Competency Level 1.000 Yes

**Records 1 - 2**

	Accomplishment Type	Accomplishment Type Description	Date Achieved	Awarding Organization
<input checked="" type="radio"/>	3	Other	06/20/05	A Model Financial Reptg Co.
<input type="radio"/>				

Review Accomplishments form: Accomplishments tab

To assign accomplishment competencies:

- Complete these fields:
  - Address Number
  - Competency Code
- Review the Competency Level field.
- To attach a document that provides more detailed information about the employee level of competency, select Header Attachment from the Form menu.
- On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
- On the Review Accomplishments form, complete these fields in the detail area:
  - Accomplishment Type
  - Date Achieved
  - Awarding Organization
  - Date Awarded
  - Status
- To attach a document that provides more detailed information about a record in the detail area, select the record, and then select Detail Attachment from the Row menu.
- On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.



8. Repeat steps 5 through 7 for as many accomplishments as you need to enter for this employee and competency code.
9. To review the available courses for the competency area, select Course Information from the Form menu.
10. On the Search & Select Competency/Course form, click Find and review the course information in the detail area.
11. To return to the Review Accomplishments form, click Close.
12. On the Review Accomplishments form, click OK.

<b>Accomplishment Type</b>	Enter a code that indicates an accomplishment. For example, you could define an accomplishment for Network Administration as Certification. It is a defined code (05/AT).
<b>Date Achieved</b>	Enter the date on which the employee achieved the accomplishment.
<b>Awarding Organization</b>	Enter the name of the organization that awards the certification or other documentation for the competency.
<b>Date Awarded</b>	Enter the date on which an accomplishment was formally recognized by the awarding organization.
<b>Status</b>	Enter a defined code (05/CR) that indicates the progress that the employee has made toward a level of proficiency in a particular competency. For example, for certification competencies, you might define a status, Pending, to indicate that the employee has completed a certification test but has not yet received his or her test scores.

## Assigning Certification Competencies

Access the Certification Revisions form.

**Resource Competency Information - Certification Revisions** i ?

OK Find Delete Cancel Form Row Tools

**Certifications** Attachments

Resource Type	01	Individual
Address Number	7500	McDougle, Cathy
Competency Type	004	Certificate
Competency Code	SPHR	Sr. Prof. in Human Resources
Competency Level	3.000	Obtained
Expiration Date	08/01/01	

**Records 1 - 2** Customize Grid

	Licensing Body	Licensing Body Description	Licensing Number	Issue Date	Expiration Date	Verified By
<input checked="" type="radio"/>	HRCI	Human Res Cert Institute	6541356	08/01/99	08/01/01	6001
<input type="radio"/>						

Certification Revisions: Certifications tab

To assign certification competencies:

1. Complete these fields:
  - Address Number
  - Competency Code
2. Review these fields:
  - Resource Type
  - Competency Level
3. To attach a document that provides more detailed information about the employee level of competency, select Header Attachment from the Form menu.
4. On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
5. On the Certification Revisions form, complete these fields in the detail area:
  - Licensing Body
  - Licensing Number
  - Issue Date
  - Expiration Date
  - Verified By
  - Score Rating
  - Verification Method
  - Renewal Code
  - Cost
  - Status
6. To attach a document that provides more detailed information about a record in the detail area, select the record, and then select Detail Attachment from the Row menu.
7. On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
8. Repeat steps 5 through 7 for as many certifications as you need to enter for this employee and competency code.
9. To review the available courses for the competency area, select Course Information from the Form menu.
10. On the Search & Select Competency/Course form, click Find and review the course information in the detail area.
11. To return to the Certification Revisions form, click Close.
12. On the Certification Revisions form, click OK.

<b>Licensing Body</b>	Enter a defined code (05/LB) that represents the name of the organization that grants the professional license or certification.
<b>Licensing Number</b>	Enter the identification number of the employee professional license.
<b>Issue Date</b>	Enter the date on which the professional license was issued to the employee.

<b>Expiration Date</b>	Enter the date on which the employee professional license expires.
<b>Verified By</b>	Enter the name or address book number of the person who verified that the employee is certified in the competency.
<b>Score Rating</b>	Enter the score that the employee receives when attaining a professional license or certification.
<b>Verification Method</b>	Enter a defined code (05/VM) that defines the methods that you use to verify employee competency levels.
<b>Renewal Code</b>	Enter a defined code (05/RC) that indicates the requirements that the employee must complete to renew the license.
<b>Cost</b>	Enter the cost of the training course.
<b>Status</b>	Enter a defined code (05/CR) that indicates the progress that the employee has made toward a level of proficiency in a particular competency. For example, for certification competencies, you might define a status, Pending, to indicate that the employee has completed a certification test but has not yet received his or her test scores.

## Assigning Education Competencies

Access Review Education form.

**Resource Competency Information - Review Education**

OK Find Delete Cancel Form Row Tools

Education Attachment

Resource Type 01 Individual  
Address Number 7500 McDougle, Cathy  
Competency Type 005 Degree  
Competency Code BSBA Bach of Sci in Business Admin  
Competency Level 3.000 Obtained

Records 1 - 2 Customize Grid

	Degree Date	Institution Code	Location	GPA Rating	Grade Base	Honorary
<input checked="" type="radio"/>	05/05/90	CU	Boulder, CO	0.004	3.850	MAGNA
<input type="radio"/>						

Review Education: Education tab

To assign education competencies:

- Complete these fields:
  - Address Number
  - Competency Code

2. Review the Competency Level field.
3. To attach a document that provides more detailed information about the employee level of competency, select Header Attachment from the Form menu.
4. On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
5. On the Review Education form, complete these fields in the detail area:
  - Degree Date
  - Institution Code
  - Location
  - GPA Rating
  - Grade Base
  - Honorary
6. To attach a document that provides more detailed information about a record in the detail area, select the record, and then select Detail Attachment from the Row menu.
7. On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
8. Repeat steps 5 through 7 for as many educational entries as you need to make for this employee and competency code.
9. To review the available courses for the competency area, select Course Information from the Form menu.
10. On the Search & Select Competency/Course form, click Find and review the course information in the detail area.
11. To return to the Review Education form, click Close.
12. On the Review Education form, click OK.

<b>Degree Date</b>	Enter the date on which the employee graduated and earned a degree.
<b>Institution Code</b>	Enter a defined code (05/IC) that represents an educational institution from which employees obtained their degrees.
<b>Location</b>	Enter the city or region where the educational institution is located.
<b>GPA Rating</b> (grade point average rating)	Enter the overall grade or scale on which a student's grade point average is based.
<b>Grade Base</b>	Enter the mathematical average of all of the grades that a student earns in a class.
<b>Honorary</b>	Enter a value that indicates whether the student graduated with honors.

## Assigning Language Competencies

Access the Review Languages form.

**Resource Competency Information - Review Languages**

OK Find Delete Cancel Form Row Tools

**Language** Attachments

Resource Type 01 Individual

Address Number 7505 Mastro, Robert

Competency Type 006 Language

Competency Code SPA Spanish

Competency Level 4.000 Accomplished

**Records 1 - 2**

	Status Date	Status	Status Description
<input checked="" type="radio"/>	01/03/01	S	Speaks Only
<input type="radio"/>			

Review Languages form: Language tab

To assign language competencies:

- Complete these fields:
  - Address Number
  - Competency Code
- Review these fields:
  - Resource Type
  - Competency Level
- To attach a document that provides more detailed information about the employee level of competency, select Header Attachment from the Form menu.
- On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
- Complete these fields in the detail area:
  - Status Date
  - Status
- To attach a document that provides more detailed information about a record in the detail area, select the record, and then select Detail Attachment from the Row menu.
- On the Attachment Revision form, enter or paste the text of the attachment into the text window, and then click OK.
- Repeat steps 5 through 7 for as many languages as you need to enter for this employee and competency code.

9. To review the available courses for the competency area, select Course Information from the Form menu.
10. On the Search & Select Competency/Course form, click Find and review the course information in the detail area.
11. To return to the Review Languages form, click Close.
12. On the Review Languages form, click OK.

## Setting Processing Options for the Competency History Program (P05120)

Processing options enable you to specify the default processing for programs and reports.




### Defaults

- |                         |   |
|-------------------------|---|
| <b>1. Resource Type</b> | Specify a code that identifies the type of resource for which you are entering competency information. This is a user-defined code (05/RT). Values are:<br><br>01: Individual<br>02: Asset, such as equipment |
|-------------------------|---|

## Reviewing Competency History for Employees

Access the Work With Competency History form.

**Competency History - Work With Competency History**



Find  Close  Tools 

Resource Type  *Individual*

Address Number  *McDougle, Cathy*

Competency Type

Competency Code

Records 1 - 10   [Customize](#)

Competency Type	Competency Type Description	Competency Code	Competency Code Description	Competency Level
001	Training	BENST	Benefits Study	2.000
001	Training	WRIT	Writing Skills Training	2.000
002	Skill	ACCOUNT	Accountable	1.000
002	Skill	ANALY	Analytical	5.000
002	Skill	COMM	Communications	5.000
002	Skill	COMMIT	Commitments	2.000
002	Skill	CONFRES	Conflict Resolution	4.000
002	Skill	CONT	Focused Content	1.000
002	Skill	COURT	Courteous	3.000
002	Skill	CREAT	Creative	2.000

Work With Competency History form





## CHAPTER 21

# Working with Employee Competency Information

This chapter provides an overview of working with employee competency information and discusses how to:

- Review gap analysis online
- Define competency aggregates
- Approve employee-entered codes for external learning.

---

## Understanding Gap Analysis

*Gap analysis* is the process of comparing the competencies that an employee possesses to the competencies that are required for the current job, or for a job to which the employee aspires. Managers and employees can use gap analysis to develop training plans and career paths for employees who want to examine the possible career opportunities within the organization.

The system includes an online review program that you can use to review gap analysis information for individual employees. The organization can set up this online review program for self service so that managers and employees also can access the gap analysis information that is relevant to them.

When you need to review gap analysis information for a group of employees, you can print the Gap Analysis report (R080013). To determine which employees are qualified for a particular job, you can print the Job Match report (R080016).

To help you determine which employees are competent for a particular type of job, you can define *competency aggregates*, that is, groups of related competencies. You can use the Review Competency Aggregates report (R05100A) to determine whether an employee has competencies in a particular competency aggregate.

---

## Prerequisite

Enter employee and job competency information.

See [Chapter 22, “Working with Job Competency Information,” page 249](#).

---

## Reviewing Gap Analysis Online

This section provides an overview of online gap analysis review and discusses how to review gap analysis online.

## Understanding Online Gap Analysis Review

When you need to compare the competencies that an employee possesses with those that are required for a particular job, you can review gap analysis information online. You can use this information to help employees set competency goals. For each employee and job, you can determine whether the employee possesses the required competencies. You can also determine whether the employee's level of competence is sufficient to meet the competency level that is required for the job by reviewing the Gap Analysis Report (R080013).

See [Appendix B, "JD Edwards EnterpriseOne Human Resources Reports," JD Edwards EnterpriseOne Human Resources Reports: A to Z, page 341](#).

### Self Service Considerations for Reviewing Gap Analysis Online

The organization might have set up the Gap Analysis program (P08008) as a self service application for managers and employees. When you access the Gap Analysis program from employee self service, you can review information about the self only. If you are a manager who is accessing gap analysis from the Row menu on the Managers Workbench program (P08712), you can review information only for those employees who report to you.

### Form Used to Review Gap Analysis Online

Form Name	FormID	Navigation	Usage
Employee Gap Analysis Detail	W08008B	Competency Mgmt Periodic Processing (G05BC2), Gap Analysis  On the Work With Employee Competency Gap Analysis form, locate the record you wish to review and click Select.	Review gap analysis online.

### Reviewing Gap Analysis Online

If you are accessing gap analysis from the Managers Workbench program (P08712) or employee self service, the Effective Date and Type Structure fields are not available to you.

Access the Employee Gap Analysis Detail form.

**Gap Analysis - Employee Gap Analysis Detail**

Work with Employee Competency Gap Analysis   **Employee Gap Analysis Detail**

OK Cancel Row Previous Next Tools

Employee Identification 7500 McDougle, Cathy

Job Type/Step 2H-1 Human Resources Manager

Organizational Business Unit 9 Corporate Administration

Job Competency Code ACH Achievement Orientation

Effective Date

Highest Score (%) 85.00 From Option 1

Records 1 - 3 [Customize](#)

	Option	Competency Type	Competency Type Description	Employee Competency Code	Employee Competency Code Description
<input type="radio"/>	1	002	Skill	FORW	Forward Looking
<input type="radio"/>	1	002	Skill	INNOV	Innovative
<input checked="" type="radio"/>			<b>Weighted Total</b>		

Employee Gap Analysis Detail form

## Defining Competency Aggregates

This section provides an overview and discusses how to define competency aggregates.

### Understanding Competency Aggregates

To help you determine which employees are competent for a particular project, you can define *competency aggregates*. A competency aggregate is a group of related competencies. These competencies can be from different competency types. For example, you might create a competency aggregate called System Implementation that includes all of the competencies that are needed by someone who will be doing a system implementation.

This table illustrates the competencies that you might include in a System Implementation aggregate:

Competency	Competency Details
Skills	<ul style="list-style-type: none"> <li>Leadership ability</li> <li>Organizational skills</li> <li>Communication skills</li> </ul>
Training	Managing at XYZ company
Degree	MBA

## Forms Used to Define Competency Aggregates

Form Name	FormID	Navigation	Usage
Work With Competency Aggregates	W05118A	Competency Setup (G05BC4), Competency Aggregates  On the Work With Competency Aggregates form, click Find to review any existing competency aggregates.	Review competency aggregates.
Review Competency Aggregates	W05118B	Competency Setup (G05BC4), Competency Aggregates  On the Work With Competency Aggregates form, click Add.	Define competency aggregates.

## Defining Competency Aggregates

Access the Review Competency Aggregates form.

**Competency Aggregates - Review Competency Aggregates**

OK Find Delete Cancel Tools

Aggregate Code

Description

Records 1 - 10 ▶ ⌂ Customize Grid ☐

	Competency Type	Competency Type Description	Competency Code	Competency Code Description
<input checked="" type="radio"/>	001	Training	MGMT	Management Training
<input type="radio"/>	002	Skill	ACCOUNT	Accountable
<input type="radio"/>	002	Skill	ADHER	Adherence
<input type="radio"/>	002	Skill	COMM	Communications
<input type="radio"/>	002	Skill	DELEG	Delegating
<input type="radio"/>	002	Skill	FEED	Provides Feedback
<input type="radio"/>	002	Skill	FORW	Forward Looking
<input type="radio"/>	002	Skill	IMP	Impact of Department
<input type="radio"/>	002	Skill	MULJOB	Work Multiple Jobs
<input type="radio"/>	002	Skill	MULTI	Work Multiple Tasks

Review Competency Aggregates form

**Aggregate Code**

Enter a code that unifies individual competencies based on certain criteria.

---

## Approving Employee-Entered Codes for External Learning

This section provides an overview of employee-entered codes for external learning and discusses how to:

- Approve employee-entered courses and providers.
- Approve employee-entered institutions.

## Understanding Employee-Entered Codes for External Learning

Employees can use self-service programs to enter and revise their competency information for external education and training. When employees update their training or educational degree information, they might find that the training course, provider, or educational institution does not exist in the predefined list and, therefore, they add a code to the external training list. After an employee enters a new code for external learning, the administrator can change, approve, or reject the code. If the administrator accepts the code, it appears in the predefined list and is available to other employees who subsequently update their external learning information. If the code is rejected, the administrator must notify the employee of the reason. The administrator can also view the competencies associated with an external training course, provider, or educational institution entered by an employee.

See *JD Edwards EnterpriseOne Human Capital Management Self Service 8.12 Implementation Guide*, “Employee self service,” Entering Competency Information Using self service.

## Forms Used to Approve Employee—Entered External Learning

Form Name	FormID	Navigation	Usage
Administer Employee Entered Courses	W05108A	Competency Management Daily Processing (G05BC1), Administer Employee Entered Courses  On the Administer Employee Entered Courses form, click Find.	Review employee-entered training courses and providers.
Competencies Associated with Training Course	W05108B	On the Administer Employee Entered Courses form, select View Competencies from the Row menu.	View competencies associated with an employee-entered course.
Administer Employee Entered Institutions	W05109A	Competency Management Daily Processing (G05BC1), Administer Employee Entered Institutions  On the Administer Employee Entered Institutions form, click Find.	Review employee-entered educational institutions.
Competencies Associated with Educational Institution	W05108B	On the Administer Employee Entered Institutions form, select View Competencies from the Row menu.	Review the competencies associated with the institution.

## Approving Employee-Entered Courses and Providers

Access the Administer Employee Entered Courses form.

To approve an employee-entered course or provider code:

1. On Administer Employee Entered Courses, click Find.

Alternatively, enter a value in Date Entered field and click Find to review employee-entered courses for a specific date or a date that is greater than or less than a specific date.

2. To accept the employee-entered course or provider, select the course or provider record and click the Accept Course button.

---

**Note.** When you accept the course or provider code, the special handling code 1, which indicates that this is an employee-entered course or provider, is removed.

---

3. To reassign the employee-entered course or provider code to an existing course or provider, click the Reassign to Existing Course button.

4. To reject the employee-entered course or provider code, click the Reject Course button.

Clicking the Reject Course button deletes the external learning source, as well as the competency detail records associated with the source.

5. To review the competencies associated with this course, select View Competencies from the Row menu.
6. To review the course master information, select Competency Information from the Row menu.

7. To review the attachments entered by the employee for the course or provider code, select Attachments from the Row menu.

## **Approving Employee-Entered Institutions**

Access the Administer Employee Entered Institutions form.

The task of approving employee-entered institutions is similar to approving employee-entered courses and providers.

See Reviewing employee-entered Courses and Providers.





## CHAPTER 22

# Working with Job Competency Information

This chapter provides an overview of job competency information and discusses how to:

- Define job competencies and descriptions.
- Define job competency options.
- Translate job competency descriptions.

---

## Understanding Job Competency Information

You use competency management to track the competencies that employees possess and to compare these competencies with those that are required for the job. You define job competencies to establish the criteria required for each job in the organization. You can make job competencies as specific or general as you select. Job Competencies are a higher level grouping of employee competencies. To ensure that job competencies apply to a variety of employees in many different jobs, you might decide to define job competencies more broadly than employee competencies.

When you define job competencies, you can enter detailed descriptions for them. These descriptions are electronic attachments to the form. Then, use competency options to indicate the employee competencies that fulfill a particular job competency. To review a written summary of all of the competency descriptions that are associated with a particular job, print the Job Profile report (R080021).

---

## Defining Job Competencies and Descriptions

This section provides an overview and discusses how to:

- Set processing options for the Job Competency program (P08009).
- Define job competencies and descriptions.

## Understanding Job Competencies and Descriptions

Before you assign job competencies to jobs and business units, you must define job competencies and enter descriptions of them. You can enter detailed descriptions for job competencies that explain the criteria on which each competency is based. These descriptions simplify the process of differentiating between similar job competencies. You can create multiple competency descriptions for each job competency and customize each description to a specific audience.

For example, you might define these descriptions and audiences for the Negotiation Skills competency:

- Human Resources Administrator

Those who possess negotiation skills are able to work with other parties to obtain mutually beneficial objectives. Negotiation requires assertiveness to achieve goals while being considerate of the other party.

- Managers

Employees who have good negotiation skills show a willingness to work with others to obtain a desired objective.

- Employees

When demonstrating negotiation skills, you remain focused on the desired result and recognize when the process is moving in an appropriate direction. You are able to appreciate the needs of others and assume that the negotiation will end in a decision that is agreeable to all of the parties involved.

To simplify the process of locating and comparing job competencies, you can use category codes to group descriptions for similar job competencies. For example, you might set up a category code called Technical that you use to group all job competencies that apply to the technical jobs within the organization.

## Prerequisites

Before you complete the tasks in this section:

- Set up the category codes for job competencies (UDC 08/C0 through 08/C9).

See [Chapter 21, “Working with Employee Competency Information,” page 241](#).

- Set up processing options for the codes for the Job Competencies in an Organization program (P08006). These options determine the types of views for which you will be creating job competency descriptions. For example, you might have a Human Resources view and a Manager view. If you need to add a view or change the existing views, you can add codes to defined code list 08/UD.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up User-Defined Information,” User-Defined Codes for Human Capital Management Systems.

- If you want the system to default job competency weights when they are not already assigned, you must set data item DJCW (Default Job Competency Weights?) to Yes in the HRM Common Settings program (P05004). When this value is set to No, the default value for unassigned competency weights is zero.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up System Options”.

## Form Used to Define Job Competencies and Descriptions

Form Name	FormID	Navigation	Usage
Work With Job Competencies	W08009A	Competency Mgmt Periodic Processing (G05BC2), Job Competency	Define job competencies and descriptions.

## Setting Processing Options for the Job Competency Program (P08009)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Version

Use these processing options to specify the versions that the system uses for the Job Competency program.

- 1. Job Competencies in an Organization Version** Use this processing option to specify the version of the Job Competencies in an Organization program (P08006) to use. The default is *ZJDE0001*.
- 2. Jobs in an Organization Version** Use this processing option to specify the version of the Jobs in an Organization program (P08007) to use. The default is *ZJDE0001*.
- 3. Copy Job Competencies Version** Use this processing option to specify the version of the Copy Job Competencies program (P080020) to use. The default is *ZJDE0001*.

## Defining Job Competencies and Descriptions

Access the Work With Job Competencies form.

**Job Competency - Work With Job Competencies** i

OK Find Delete Cancel Form Row Tools

Job Competency Code \*

Records 1 - 10 Customize Grid

	Job Competency Code	Description	Include in Gap/ Performance Appraisal	Include in Gap/ Performance Appraisal
<input checked="" type="radio"/>	ACCT	Accounting Skills	1	Yes
<input type="radio"/>	ACH	Achievement Orientation	1	Yes
<input type="radio"/>	ASSERT	Assertiveness	1	Yes
<input type="radio"/>	COMP	Compliance Issues	1	Yes
<input type="radio"/>	CS	Customer Service Skills	1	Yes
<input type="radio"/>	DET	Attention to Detail	1	Yes
<input type="radio"/>	EDUC	Education Level	1	Yes
<input type="radio"/>	JOB	Job Knowledge	1	Yes
<input type="radio"/>	LANG	Foreign Language Ability	1	Yes
<input type="radio"/>	LEAD	Leadership Qualities	1	Yes

Work With Job Competencies form (1 of 2)

Work With Job Competencies form (2 of 2)

To define job competencies and descriptions:

1. Click Find to review any existing job competencies.
2. Move the cursor to the first blank record in the detail area and then complete these fields:
  - Job Competency Code
  - Description
  - Include in Gap and Performance Apprais
3. Complete any of these fields that apply to the organization:
  - Job Competency Category Code 001
  - Job Competency Category Code 002
  - Job Competency Category Code 003
  - Job Competency Category Code 004
  - Job Competency Category Code 005
  - Job Competency Category Code 006
  - Job Competency Category Code 007
  - Job Competency Category Code 008
  - Job Competency Category Code 009
  - Job Competency Category Code 010
4. To indicate the audience for this job competency description, select an option that corresponds to a type of view, such as one of these:
  - Human Resource View
  - Manager Coaching View
  - Employee View

You define these views in the processing options for the Job Competencies in an Organization program (P08006). You can create a maximum of six different views.
5. Select Edit Description from the Row menu.
6. On the Job Competency Description Maintenance form, enter a text description in the media attachment area at the bottom of the form.

7. To attach other types of electronic attachments, such as pictures and links to internet pages, right click in the exit bar to the left of the media object, select New from the menu, and then select the type of object that you want to attach.
8. When you have finished entering attachments, click OK.
9. To enter another job competency and description, repeat steps 1 through 8.

Repeat these steps until you have entered a description for each of the audiences.

**Include in  
Gap/Performance  
Appraisal**

Enter an option that specifies whether a competency is included in a gap analysis evaluation. A gap analysis measures how the competencies of an employee compare with the competencies required by a particular job. Values are:

*1*: Include the job competency code in the gap analysis evaluation.

*0*: Do not include the job competency code in the gap analysis evaluation.

**Job Competency Category  
Code 001**

Use these defined codes (codes 01 through 10) to define categories and groupings of skills or knowledge that are related to the job competency and that suit the company needs. A limited sample of groups for which you might want to define job competency category codes could include:

- Technical (discipline example)
- Marketing (departmental example)
- Western Europe (regional example)
- Medical (industry example)

For example, if you assign Technical to Category Code 001, then Technical will replace Category 01 as the field name. After assigning a category name, you may then set up a list of values for the category. Samples of values for Technical might include:

- Hardware
- Software
- C programming (programming language example)
- Unix (operating system example)

Job competency category codes were not designed to track levels of proficiency, skill, or expertise demonstrated or required for a competency.

Those levels required for a competency are attributes of Competency Rules.

---

## Defining Job Competency Options

This section provides an overview of job competency options and discusses how to define them.

## Understanding Job Competency Options

Typically, job competencies represent broad categories of knowledge or experience, while employee competencies represent measurable and observable traits and behaviors that demonstrate proficiency in one or more job competencies. While employee competencies are usually closely related to job competencies, they might not correspond exactly. In many cases, two or more employee competencies combine to satisfy a job competency, and a single employee competency can fulfill multiple job competencies. For example, the job competency Negotiation Skills might require that employees be proficient in the employee competencies Communication Skills and Conflict Management Skills. The employee competency Communication Skills might also apply to other job competencies, such as Management Skills and Team Work.

To associate employee competencies with the job competencies that they fulfill, you enter options for job competencies. A job competency option represents a group of employee competencies that can be combined to fulfill a job competency. When more than one combination of employee competencies can be used to fulfill a job competency, you can create multiple options for that job competency. For a job competency that has multiple options, you can indicate which option is the preferred option.

For example, the job of Human Resources Generalist for Company A requires the job competency of a college degree in human resources or the job competency option of five years of related experience.

---

**Note.** You must set up at least one competency option for each job competency. If a job competency does not have any options, performance appraisal ratings might produce inaccurate results.

---

## Prerequisites

Before you complete the tasks in this section:

- Define job competencies and descriptions.

See [Chapter 22, “Working with Job Competency Information,” Defining Job Competencies and Descriptions, page 249.](#)

- Define employee competencies.

See [Chapter 20, “Working with Employee Competencies,” Defining Employee Competencies, page 219.](#)

## Forms Used to Define Job Competency Options

Form Name	FormID	Navigation	Usage
Job Competency Option Changes	W08007D	<p>Competency Mgmt Periodic Processing (G05BC2), Job Competency</p> <p>On the Work With Job Competencies form, click Find to review the existing job competencies.</p> <p>Select a record in the detail area, and then select Competency Options from the Row menu.</p> <p>On the Work With Job Competency Options form, click Add.</p>	Define job competency options.

## Defining Job Competency Options

Access the Job Competency Option Changes form.

<b>Option Number</b>	Enter a number that represents a defined approach that an employee can use to demonstrate proficiency in a particular job competency. There can be more than one option for a job competency.
<b>Preferred Method</b>	Enter a code that indicates what option in the Competency Options - Overrides table (F0800606) is the preferred method to achieve the competency. For example, if the job requires either a degree or equivalent work experience, you can indicate a preference between these two options. It is for informational purposes only and does not impact processes that use competencies.
<b>Required Competency Level</b>	Enter the required competency level for a particular job.
<b>Competency Level Acceptable Low</b>	Enter the low point in a range for a particular job competency. For example, if employee competency levels falls above the low competency level and below the high competency level, the employee job competency level is sufficient.
<b>Competency Level Acceptable High</b>	Enter the high point in a range for a particular job competency. For example, if an employee competency level falls above the low competency level and below the high competency level, the employee job competency level is sufficient.
<b>Competency Level Rule Weight Percent</b>	Enter the relative value of each option within a job competency code. The weights of the combined options add up to 100 percent.

---

## Translating Job Competency Descriptions

This section provides an overview of job competency description translations and discusses how to:

- Set processing options for Job Competency Description Translations (P080019).
- Translate job competency descriptions.

## Understanding Job Competency Description Translations

When you enter descriptions for job competencies, the system stores those descriptions in the domestic language that is specified in the user profile. If the organization has employees in more than one country, you might need to translate these descriptions into one or more additional languages. Because the system stores job competency descriptions as media objects, they are not translated along with the rest of the software. You enter translated descriptions manually, using the Job Competencies Description Translation program (P080019).

### Related Topics

You can revise existing descriptions for a job competency. To revise an existing description for a job competency, select the Update Description option from the Form menu of Job Competency Description Review.

## Form Used to Translate Job Competency Descriptions

Form Name	FormID	Navigation	Usage
Work With Job Competencies Description Translation	W080019A	Competency Mgmt Advanced & Tech Oper (G05BC3), Job Competency Description Translation	Translate job competency descriptions.

## Setting Processing Options for the Job Competency Description Translations Program (P080019)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Versions

This processing option specifies the version of the Job Competencies in an Organization program (P08006) to use.

**1) Job Competencies in an Organization** Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is *ZJDE0001*.

## Translating Job Competency Descriptions

Access the Work With Job Competencies Description Translation form.

To translate job competency descriptions:

- Complete these fields and then click Find to locate the job competency description that you need to translate:
  - Type Structure
  - Job Competency Code
- To narrow the search, complete any of these fields or options, and then click Find:
  - Organizational Business Unit
  - Effective Date
  - Job Group
  - Job Type
  - Job Step
  - Language
  - Descriptions Not Translated



3. Select an option from the version of Job Competencies in an Organization (P08006) that is specified in the processing options to specify the audience for the description. Options may include:
  - Human Resources View
  - Manager Coaching View
  - Manager View
  - Employee View
4. Select a record in the detail area and then click Select.
5. On the Job Competency Description Review form, to add a new, translated description for this view, select Add Description from the Form Menu.
6. On the Job Competency Description Maintenance form, complete the Language field.
7. Enter the translated description in the media attachment area at the bottom of the form.
8. To attach other types of electronic attachments, such as pictures and links to internet pages, click the button above the media attachment area, and then enter the attachment.
9. When you have finished entering attachments, click OK.
10. To enter a translated description for another audience, repeat steps 1 through 9.

Repeat these steps until you have entered a translated description for each of the audiences.

### **Type Structure**

Enter a defined code (00/TS) that identifies the type of organization structure, such as financial or responsibility. Each type of organization structure can have a separate hierarchy. The purpose of this type structure in the context of job competencies is to optimize the ability for jobs to inherit competencies from organizational business units in the type structure.

### **Job Group**

Enter a grouping of similar jobs that are linked together to form a unit. The jobs might be similar in functions within the organization, job duties, tasks, responsibilities, job evaluation methods, or pay philosophies. Typical job units are clerical or administrative; technical, engineering, scientific, and professional; factory jobs; management; and executive.

Consider dividing groups into separate populations based on the differences between exempt and nonexempt employees, according to the rules and regulations of the Fair Labor Standards Act. For example, consider assigning all the managers to the Managers job group.

A job category defines a specific job, and all related job categories are classified by a job group. You can define job group codes using defined code table 08/JG.

Job competencies related to specific groupings of similar jobs should be attached to the job group. All jobs in a job group will inherit the job competencies attached to the job group. This simplifies the maintenance of job competencies. If you need to change a job competency that is attached to a job group, change the job competency just once where it is attached to the job group instead of for all jobs in that job group.

### **Job Type**

Enter a defined code (07/G) that defines the jobs within the 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.

**Language**

Enter a defined code (01/LP) that specifies the language to use on forms and printed reports. Before you specify a language, a code for that language must exist at either the system level or in the user preferences. A blank value indicates the domestic language.

**Descriptions Not Translated**

Enter an option that specifies whether to view job competency descriptions that have not been translated. When this option is turned on and there is a language specified in the language control field, the detail area displays all of the descriptions that exist in the domestic language that have not been translated into the specified language.

## CHAPTER 23

# Working with Competencies in Organizational Structures

This chapter provides an overview of competencies in organizational structures and discusses how to:

- Attach job competencies to organizational levels.
- Attach jobs to organizational levels.
- Attach additional job competencies.
- Override inherited job competencies.
- Review job competency information.

---

## Understanding Competencies in Organizational Structures

To simplify the process of tracking and maintaining job competencies within the organization, you can attach jobs and job competencies to the hierarchical levels within the organizational structure that you created for job competencies.

When you attach a job competency to the entity that is at the top of an organizational structure, the system applies that competency to all of the jobs that are attached to the organizational structure. Likewise, when you attach a competency to an organizational business unit within an organizational structure, the competency applies to all of the jobs within that organizational business unit. This feature, called *inheritance*, reduces much of the administrative work that is associated with attaching job competencies and helps you ensure that competencies are attached consistently throughout the organization.

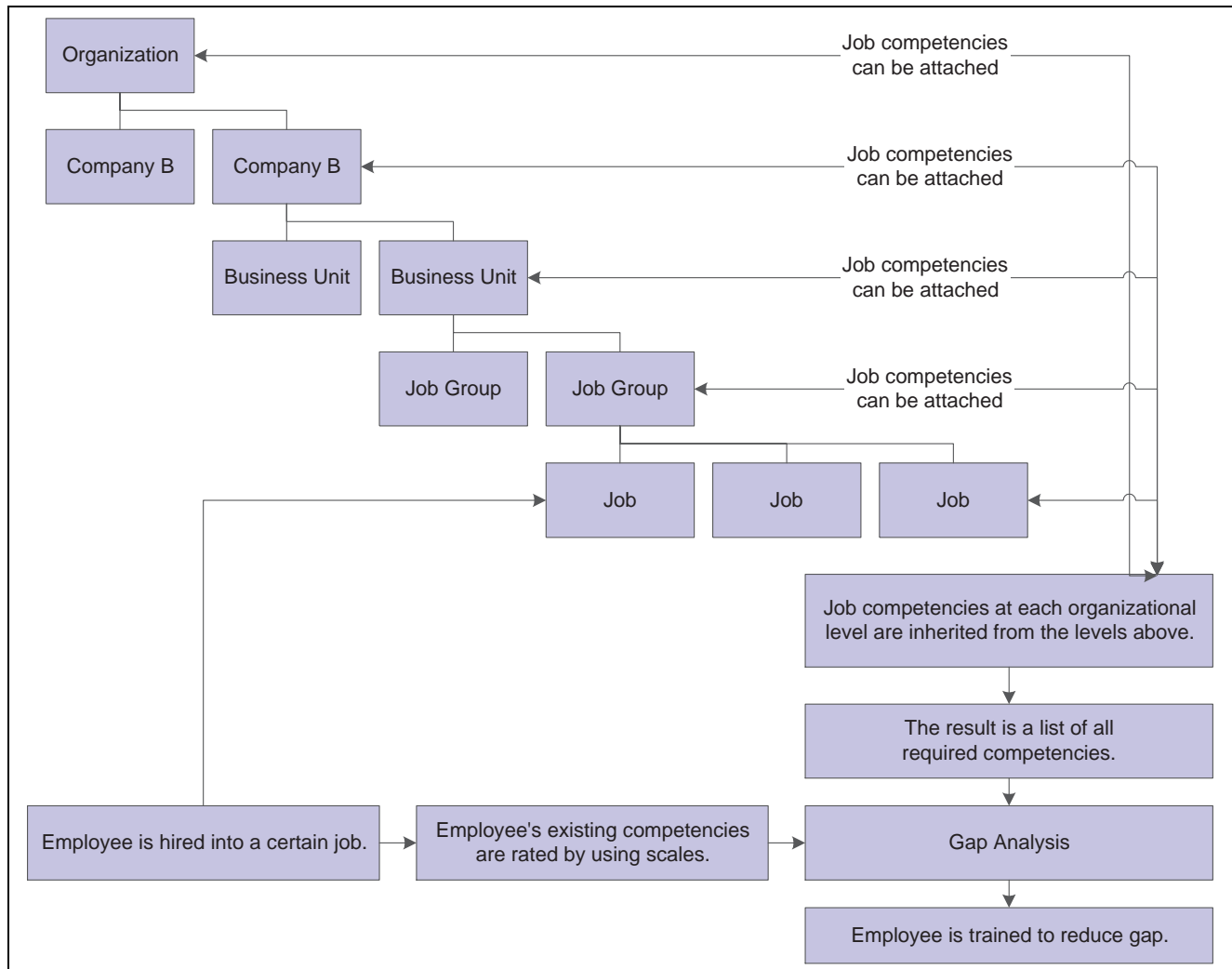
Attaching job competencies to organizational structures saves you time by reducing the number of competencies that you need to assign to each job. Attaching jobs to organizational levels enables you to take advantage of the inheritance feature, as well as to indicate the organizational business unit in which the job resides. A job can reside in more than one organizational business unit within the structure.

For each organizational business unit, job group, and job, you can override certain information for inherited competencies, when necessary. To verify that inherited and overridden job competencies occur where you are expecting them, you can review override information by job, job group, and organizational business unit. If necessary, you can revise this information. You can also attach different job competencies for each organizational business unit, job in an organizational business unit, job group, and job.

If the organization has employees in more than one country, you might want to translate the competency descriptions so that all employees can understand them. After you have reviewed job competencies and their overrides, you can enter these translated versions of the competency descriptions and attach them to the job competencies.

Typically, when you are working with competencies in organizational structures, you use a draft structure. When you have finished attaching jobs and job competencies to organizational levels and are satisfied with the results, you are ready to activate the draft organizational structure.

This graphic illustrates competencies at the various levels in an organization:



Competencies at various levels of an organization

## Attaching Job Competencies to Organizational Levels

This section provides an overview of attaching job competencies to organizational levels and discusses how to:

- Set processing options for Job Competencies in an Organization (P08006).
- Attach a job competency to an organizational level.

## Understanding Job Competencies to Organizational Levels Attachments

To reduce data entry and simplify the process of updating competencies as the goals and objectives of the organization change, you can attach job competencies to the hierarchical levels in the organizational structure. You perform this task after you have created an organizational structure for job competencies and defined the job competencies that the organization uses. Each level in the organizational structure can represent an organizational business unit within the organization but this is not required. The main purpose of each organizational business unit in the organizational structure is to facilitate inheritance of job competencies. Therefore, each level in the organizational structure may look different from the actual company organizational structure.

You can use the Job Competencies in an Organization program (P08006) to assign core competencies (the competencies that apply to all of the employees in the organization) to the organizational structure itself. When you assign a competency to an organizational structure, all of the jobs that are attached to the structure inherit those competencies.

For competencies that apply only to specific organizational business units within the structure, you can also use this program to attach job competencies to those individual organizational business units. After you attach competencies to the organizational structure and the levels (organizational business units) within it, you can use the Jobs in an Organization program (P08007) to attach additional, more specific competencies to job groups and individual jobs. You can also override certain job competency information at these lower levels.

You can attach job competencies to the current, active organizational structure or to a draft structure. When you attach a job competency to an organizational level, all of the subordinate organizational levels inherit that job competency. Therefore, we recommend that you begin attaching competencies at the organizational structure level and then work down through the organizational business units in each subordinate level. After you attach a competency to an organizational business unit, you cannot attach that competency to an organizational business unit that is at a subordinate or superior level within the organizational structure.

### Self Service Considerations

The organization might have set up the Job Competencies in an Organization program (P08006) as a self service application that managers and employees can use to determine where competencies are assigned within the organizational structure. If you are accessing Job Competencies in an Organization from a self service program, such as the Form menu in the Managers Workbench program (P08712), you can review the organizational structure to see the level to which each competency is attached, but you cannot attach or delete any competencies within the structure.

### See Also

[Chapter 23, “Working with Competencies in Organizational Structures,” Overriding Inherited Job Competencies, page 271](#)

## Prerequisites

Before you complete the tasks in this section:

- Define the organizational structure for job competencies.

See [Chapter 19, “Defining Organizational Structures for Job Competencies,” page 203.](#)

- Define the job competencies for the organization.

See [Chapter 22, “Working with Job Competency Information,” Defining Job Competencies and Descriptions, page 249.](#)

## Form Used to Attach Job Competencies to Organizational Levels

Form Name	FormID	Navigation	Usage
Work With Job Competencies In An Organization	W08006A	Competency Mgmt Periodic Processing (G05BC2), Job Competencies In An Organization	Attach job competencies to organizational levels.

## Setting Processing Options for the Job Competencies in an Organization Program (P08006)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

This processing option specifies the functions that the user can access and change.

- 1) Audience Flag** Use this processing option to specify who is going to use the application to what capacity. Values are:
- 1: Employee
  - 2: Manager
  - 3: Human Resources

### Competency Descriptions

These processing options specify defined competency information.

- 1) Defined Competency Description** Code 1
- Use this processing option to list the code for the first Job Competency Code description to show. This code is associated with the first radio button on the form. When a Job Competency Code and the first radio button are selected, the associated description is displayed. Values are:
- Blank: Do not display description 1
  - A valid Competency Description Code
- 2) Defined Competency Description** Code 2
- Use this processing option to list the code for the second Job Competency Code description to show. This code is associated with the second radio button on the form. When a Job Competency Code and the second radio button are selected, the associated description is displayed. Values are:

	Blank: Do not display description 2 A valid Competency Description Code
<b>3) Defined Competency Description</b>	Code 3 Use this processing option to list the code for the third Job Competency Code description to show. This code is associated with the third radio button on the form. When a Job Competency Code and the third radio button are selected, the associated description is displayed. Values are: Blank: Do not display description 3 A valid Competency Description Code
<b>4) Defined Competency Description</b>	Code 4 Use this processing option to list the code for the fourth Job Competency Code description to show. This code is associated with the fourth radio button on the form. When a Job Competency Code and the fourth radio button are selected, the associated description is displayed. Values are: Blank: Do not display description 4 A valid Competency Description Code
<b>5) Defined Competency Description</b>	Code 5 Use this processing option to list the code for the fifth Job Competency Code description to show. This code is associated with the fifth radio button on the form. When a Job Competency Code and the fifth radio button are selected, the associated description is displayed. Values are: Blank: Do not display description 5 A valid Competency Description Code
<b>6) Defined Competency Description</b>	Code 6 Use this processing option to list the code for the sixth Job Competency Code description to show. This code is associated with the sixth radio button on the form. When a Job Competency Code and the sixth radio button are selected, the associated description is displayed. Values are: Blank: Do not display description 6 A valid Competency Description Code
<b>7) View Language Specific Defined Competency Description.</b>	Use this processing option to indicate whether language specific descriptions should be used. If this flag is set to <i>1</i> , the program will look for a description in the user language. If this language is not found, the default language will be used. If this flag is set to <i>0</i> , the default language will always be used. Values are: <i>1</i> : Yes <i>0</i> : No

## Versions

These processing options specify the versions of other programs that the Job Competencies in an Organization program uses.

- 1) Jobs in an Organization Version** Use this processing option to specify the version of the Jobs Workbench program (P08007) to use. The default is *ZJDE0001*.
- 2) Job Competencies Version** Use this processing option to specify the version of the Job Competencies program (P08009) to use. The default is *ZJDE0003*.
- 3) Gap Analysis Version** Use this processing option to specify the version of the Gap Analysis program (P08009) to use. The default is *ZJDE0001*.
- 4) Organizational Structure Version** Use this processing option to specify the version of the Organizational Structure program (P0050) to use. The default is *ZJDE0001*.
- 5) Copy Job Competencies Version** Use this processing option to specify the version of the Copy Job Competencies program (P080020) to use. The default is *ZJDE0001*.
- 6) Job Competency Defaults and or Overrides Version** Use this processing option to specify what version of Job Competency Defaults and or Overrides (P080018) to use when exiting to that program. The default is *ZJDE0003*.

## Attaching Job Competencies to Organizational Levels



Access the Work With Job Competencies form.

**Job Competencies In An Organization - Work With Job Competencies In An Organization**

Find Add Delete Close Submit Form Row Report Tools



Effective Date

Type Structure  Corporate Competency Structure

Find Or Refresh Organizational Structure  Find Or Refresh Job Competencies 

**Organizational Structure**

- ☐ 1 Financial/Distribution Company
- ☐ 9 Corporate Administration
  - ☐ ACH Achievement Orientation
  - ☐ JOB Job Knowledge
- ☐ M30 Eastern Manufacturing Cent

**Records 1 - 10**   [Customize](#)

Job Competency Code	Job Competency
<input checked="" type="radio"/> ACCT	Accounting Skills
<input type="radio"/> ACH	Achievement Orientation
<input type="radio"/> ASSERT	Assertiveness
<input type="radio"/> COMP	Compliance Issues
<input type="radio"/> CS	Customer Service Skills
<input type="radio"/> DET	Attention to Detail
<input type="radio"/> EDUC	Education Level
<input type="radio"/> JOB	Job Knowledge
<input type="radio"/> LANG	Foreign Language Ability
<input type="radio"/> LEAD	Leadership Qualities

Work With Job Competencies in An Organization form

To attach a job competency to an organizational level:

1. Complete these fields and click Find:



- Effective Date
- Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates an organizational business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To attach a job competency to a level in the structure, click once on the level to select it, click once on the competency to select it, and then click Add.

The competency appears in the tree view under the level that you chose.

4. To remove a job competency from a level in the structure, click once on the competency in the tree view and then click Delete.
5. Complete steps 3 and 4 for as many competencies as you need to add or delete.
6. To save the work, select Submit from the Form menu.

#### **Type Structure**

Enter a defined code (00/TS) that identifies the type of organization structure, such as financial or responsibility. Each type of organization structure can have a separate hierarchy.

---

## **Attaching Jobs to Organizational Levels**

This section provides an overview and discusses how to attach jobs to organizational levels.

### **Understanding Jobs to Organizational Levels Attachments**

To reduce data entry and simplify the process of attaching job competencies to the jobs within the organization, you can attach jobs to the organizational business units that compose the hierarchical levels of an organizational structure. You perform this task after you have created an organizational structure for job competencies.

When you attach a job to an organizational business unit, the job inherits all of the competencies that are attached to that organizational business unit and to all of the organizational business units above it, up to the highest level of the organizational structure. Regardless of the organizational business unit to which the job is attached, the job also inherits the competencies that are attached to its job group. If necessary, you can attach additional competencies to the job or override certain information for the inherited competencies.

When the organization restructures, you can easily move a job from one organizational business unit in the organizational structure to another.

### **Self Service Considerations for Attaching Jobs to Organizational Levels**

The organization might have set up the Jobs in an Organization program (P08007) as a self service application that managers and employees can use to review jobs within the organizational structure. If you are accessing Jobs in an Organization from a self service program, such as the Form menu on Managers Workbench (P08712), you can review the organizational structure to see the level to which each job is attached, but you cannot attach or delete any jobs within the structure.

## See Also

Chapter 23, “Working with Competencies in Organizational Structures,” Overriding Inherited Job Competencies, page 271

Chapter 23, “Working with Competencies in Organizational Structures,” Attaching Additional Job Competencies, page 268

## Prerequisites

Before you complete the tasks in this section:

- Define the jobs for the organization.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Defining Jobs,” Entering Job Information.

- Define the organizational structure for job competencies.

See Chapter 19, “Defining Organizational Structures for Job Competencies,” page 203.

## Form Used to Attach Jobs to Organizational Levels

Form Name	FormID	Navigation	Usage
Work With Jobs In An Organization	W08007A	Competency Mgmt Periodic Processing (G05BC2), Jobs In An Organization	Attach jobs to organizational levels.

## Attaching Jobs to Organizational Levels



Access the Work With Jobs In An Organization form.

**Job Competencies In An Organization - Work With Job Competencies In An Organization**

Find Add Delete Close Submit Form Row Report Tools



Effective Date

Type Structure  Corporate Competency Structure

Find Or Refresh Organizational Structure  Find Or Refresh Job Competencies 

Organizational Structure

- 1 Financial/Distribution Company
  - 9 Corporate Administration
    - ACH Achievement Orientation
    - JOB Job Knowledge
  - M30 Eastern Manufacturing Cent

Records 1 - 10   [Customize](#)

Job Competency Code	Job Competency
<input checked="" type="radio"/> ACCT	Accounting Skills
<input type="radio"/> ACH	Achievement Orientation
<input type="radio"/> ASSERT	Assertiveness
<input type="radio"/> COMP	Compliance Issues
<input type="radio"/> CS	Customer Service Skills
<input type="radio"/> DET	Attention to Detail
<input type="radio"/> EDUC	Education Level
<input type="radio"/> JOB	Job Knowledge
<input type="radio"/> LANG	Foreign Language Ability
<input type="radio"/> LEAD	Leadership Qualities

Work With Jobs In An Organization form

To attach a job to an organizational level:

1. Complete these fields and click Find:

- Effective Date
- Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates an organizational business unit. The hammer icon indicates a job. On the right side of the detail area, the system displays the jobs that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To attach a job to a level in the structure, click once on the level to select it, click once on the job to select it, and then click Add.

The job appears in the tree view under the level that you chose.

4. To remove a job from a level in the structure, click once on the job in the tree view and then click Delete.
5. Complete steps 3 and 4 for as many jobs as you need to add or delete.
6. To save the work, select Submit from the Form menu.

---

## Attaching Additional Job Competencies

This section provides an overview of attaching additional job competencies and discusses how to complete the process.

### Understanding Additional Job Competency Attachments

After you attach competencies to the organizational structure, you can attach additional, more specific competencies to each of these:

- Organizational Business units.
- Job groups.
- Jobs.
- Individual jobs within an organizational business unit.

Attaching additional competencies gives you the flexibility to customize competencies to a particular job and still take advantage of the time saving qualities of inheritance. When you attach a job competency to the top organizational structure, organizational business unit or job group, all of the jobs within that organizational structure, organizational business unit or job group inherit the competency.

For each job, you can also attach competencies that are specific to a particular organizational business unit. For example, the job Administrative Assistant might require different competencies when it is in the Information Technology organizational business unit than it does when it is in the Finance organizational business unit. You can also override certain information for inherited competencies.

In some cases, you might want to override the decision to include a competency in gap analysis. For example, a competency such as word processing skills might be essential to the job Administrative Assistant. The job Programmer might also require word processing skills, but these skills are considered minor requirements compared to the other more essential competencies, such as programming languages and analytical thinking ability. Therefore, you might decide to include that competency in the gap analysis and performance review for administrative assistants, but not in the gap analysis and performance review for programmers.

### See Also

[Chapter 23, “Working with Competencies in Organizational Structures,” Overriding Inherited Job Competencies, page 271](#)

### Prerequisite

Attach jobs and job competencies to the levels in the organizational structure.

See [Chapter 23, “Working with Competencies in Organizational Structures,” Attaching Job Competencies to Organizational Levels, page 260](#) and [Chapter 23, “Working with Competencies in Organizational Structures,” Attaching Jobs to Organizational Levels, page 265](#).

## Form Used to Attach Additional Job Competencies

Form Name	FormID	Navigation	Usage
Attached Job Competency Codes	W08007B	<p>Competency Mgmt Periodic Processing (G05BC2), Jobs In An Organization</p> <p>On the Work With Jobs In An Organization form, complete the Effective Date and Type Structure fields and click Find.</p> <p>From the Form menu, select Competencies For, and then select one of these options:</p> <p>Organization</p> <p>Job Group</p> <p>Organizational Business Unit</p> <p>Job</p> <p>Job Within a BU</p>	Attach additional job competencies.

## Attaching Additional Job Competencies

Access the Attached Job Competency Codes form.

**Jobs In An Organization - Attached Job Competency Codes**

OK Find Delete Cancel Form Row Tools

Effective Date

Type Structure  Corporate Competency Structure

Job Group  Managers

Organizational Business Unit  Corporate Administration

Job Type/Step  Accounting Manager

**Total**

Competency Weight (%)

**Records 1 - 15** [Customize Grid](#)

	Job Competency Code	Job Competency	Include in Gap and Performance	Description
<input type="radio"/>	JOB	Job Knowledge		1 Yes
<input type="radio"/>	LEAD	Leadership Qualities		1 Yes
<input type="radio"/>	MGT	Management Skills		1 Yes
<input type="radio"/>	MNGREL	Managing Relationships		1 Yes
<input type="radio"/>	PAYR	Payroll Knowledge		1 Yes
<input type="radio"/>	PROB	Problem Solving/Decision Mkg		1 Yes
<input type="radio"/>	RESP	Responsibility/Accountability		1 Yes
<input type="radio"/>	STRAT	Strategic Agility		1 Yes
<input checked="" type="radio"/>	VCOM	Verbal Communication Skills	<input type="text"/>	1 Yes

Attached Job Competency Codes form

To attach additional job competencies:

- Complete any of these fields in the header area that correspond to the menu option that you chose, and then click Find:
  - Type Structure
  - Job Group
  - Organizational Business Unit
  - Job Type/Step

For example, if you chose Job Group from the menu, you would complete the Job Group field on Attached Job Competency Codes.
- To override the decision to include an existing competency in gap analyses and performance appraisals, change the value for that competency in the Include in Gap and Performance field in the detail area.
- To add a job competency, complete these fields in the first blank line of the detail area.
  - Job Competency Code
  - Job Competency Source
  - Include in Gap and Performance
  - Overrides Exist Flag
- When you have finished entering information, click OK.

<b>Job Group</b>	<p>Enter a grouping of similar jobs that are linked together to form a unit. The jobs might be similar in functions within the organization, job duties, tasks, responsibilities, job evaluation methods, or pay philosophies. Typical job units are clerical or administrative; technical, engineering, scientific, and professional; factory jobs; management; and executive.</p> <p>Consider dividing groups into separate populations based on the differences between exempt and nonexempt employees, according to the rules and regulations of the Fair Labor Standards Act. For example, consider assigning all the managers to the Managers job group.</p> <p>A job category defines a specific job, and all related job categories are classified by a job group. You can define job group codes using defined code table 08/JG.</p>
<b>Include in Gap and Performance</b>	<p>Enter an option that specifies whether a competency is included in a gap analysis evaluation. A gap analysis measures how the competencies of an employee compare with the competencies required by a particular job. Values are:</p> <p><i>1</i>: Include the job competency code in the gap analysis evaluation.</p> <p><i>0</i>: Do not include the job competency code in the gap analysis evaluation.</p>
<b>Job Competency Source</b>	Enter the location in the organizational structure where the competency is defined.
<b>Overrides Exist Flag</b>	Enter an option that indicates that overrides of the default competency exist.

---

## Overriding Inherited Job Competencies

This section provides an overview of inherited job competencies and discusses how to:

- Override competency descriptions.
- Override competency options.

## Understanding Inherited Job Competency Overrides

When you attach a competency to an organizational structure, organizational business unit, or job group, the jobs within that level inherit the competency. After you review the inherited competencies for a job, you might need to customize these competencies to the particular needs of an organizational structure, organizational business unit, job group, job, or job in an organizational business unit. For example, a competency such as computer skills might require a different level of proficiency for computer programmers than it does for administrative assistants. When you set up the options for this job competency, you might enter a basic level of proficiency. Then, for the job computer programmer (which inherits the competency), you can override the competency options by entering a different level of proficiency.

Whenever you add, change, or delete any descriptions or options for an inherited or attached competency, you are overriding that competency. You can override any inherited or attached competency at any level in the organizational structure.

This table describes tasks related to job competency overrides:

Task	Description
Reviewing default descriptions	From the Work with Job Competencies in an Organization form, you can review the default descriptions for a competency by choosing a competency from the list on the right side of the detail area and then choosing Default Description from the Row menu. The system displays the default descriptions for the competency that you select.
Reviewing default options	From the Work with Job Competencies in an Organization form, you can review the default options for a competency by choosing a competency from the list on the right side of the detail area and then choosing Default Options from the Row menu. The system displays the default options for the competency that you select.
Excluding a competency from gap analysis	If you want to include a competency in the gap analysis for some jobs but not all, you can enter that information when you attach an additional competency to an organizational business unit, job group, or job.

## See Also

[Chapter 22, “Working with Job Competency Information,” Defining Job Competency Options, page 253](#)

[Chapter 22, “Working with Job Competency Information,” Defining Job Competencies and Descriptions, page 249](#)

[Chapter 23, “Working with Competencies in Organizational Structures,” Attaching Additional Job Competencies, page 268](#)

## Prerequisite

Attach jobs and job competencies to the levels in the organizational structure.

See [Chapter 23, “Working with Competencies in Organizational Structures,” Attaching Job Competencies to Organizational Levels, page 260](#) and [Chapter 23, “Working with Competencies in Organizational Structures,” Attaching Jobs to Organizational Levels, page 265](#).



## Forms Used to Override Inherited Job Competencies

Form Name	FormID	Navigation	Usage
Job Competency Description Review	W080018C	<p>Competency Mgmt Periodic Processing (G05BC2), Job Competencies In An Organization</p> <p>On the Work With Job Competencies In An Organization form, complete the Effective Date and Type Structure fields and click Find.</p> <p>Select a competency in the tree structure and then select Edit Descriptions from the Row menu.</p>	Override competency descriptions.
Work With Job Competency Options	W08007C	<p>Competency Mgmt Periodic Processing menu (G05BC2), Job Competencies In An Organization</p> <p>On the Work With Job Competencies In An Organization form, complete the Effective Date and Type Structure fields and clickFind.</p> <p>Select a competency in the tree structure and then select Override Options from the Row menu.</p>	Override competency options.

## Overriding Competency Descriptions

Access the Job Competency Description Review form.

**Job Competencies In An Organization - Job Competency Description Review**

Find Close Form Tools

Type Structure  Corporate Competency Structure

Job Competency Code  Strategic Agility

Language

*Inherited Competency Description*

Job Competency Description Review form (1 of 2)

**Competency Description Overrides**

☒ Human Resource View ☐ Manager Coaching View ☐ Employee View ☐ Manager View

Text

Strategic agility is developed through experience in high levels of responsibility. Individuals possessing this trait are leaders and understand long-term goals, as well as long-term effects of decisions made in the short-term. These individuals are decisive, but have researched all aspects of the decision before implementing it.

Job Competency Description Review form (2 of 2)

To override competency descriptions:

1. Complete these fields and click Find:

- Effective Date
- Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates an organizational business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To review existing overrides, select a competency in the tree structure and then select Edit Descriptions from the Row menu. The system displays the descriptions associated with the version of Job Competencies in an Organization (P08006) that you selected in the processing option.
4. On the Job Competency Description Review form, select one of these options and then review the corresponding definition. For example, the descriptions may appear like these:
  - Human Resource View
  - Manager Coaching View

- Employee View
- To override a description, select the option for that description and then select Add Description from the Form menu.
  - On the Job Competency Description Maintenance form, enter a text description and then click OK.

## Overriding Competency Options

Access the Work With Job Competency Options form.

**Job Competencies In An Organization - Work With Job Competency Options**

Select Find Add Close Form Tools

Job Competency Code: STRAT Strategic Agility

Effective Date:

Type Structure: COR Corporate Competency Structure

Inherited Competency Option

Option Number	Preferred Method	Preferred Method Description	Competency Type	Competency Type Description	Competency Code
1	0	No	002	Skill	CREAT
			002	Skill	ENTR
			005	Degree	MBA

Work With Job Competency Options form

To override competency options:

- Complete these fields and click Find:
  - Effective Date
  - Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a organizational business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.
- To view a lower level of the structure, click the + icon to the left of a folder or icon.
- To review the current options and enter overrides, select a competency in the tree structure and then select Override Options from the Row menu.
- On the Work With Job Competency Options form, review the information in the detail area to see which competencies have been inherited or overridden.
- To add an override for an option, click Add and then complete the steps for defining job competency options.

---

**Note.** You can also delete or modify any of the existing options.

---

## Reviewing Job Competency Information

This section provides an overview of job competency information review and discusses how to review job competency information.

### Understanding Job Competency Information Review

After you attach jobs and job competencies to levels in the organizational structure and enter any overrides, you might need to review attached competencies and competency overrides to ensure that they have been applied consistently. You can review override information, such as effective dates and gap analysis inclusion, for any of these:

- Jobs
- Job groups
- Organizational Business units
- Organizational structures

If you need to add or revise any job competency information, you can use the options on the Form and Row menus to access the forms for entering job competencies, competency options, and competency descriptions. You can revise override information, as well as default information.

### Form Used to Review Competency Information

Form Name	FormID	Navigation	Usage
Work with Job Competency Attached and Overridden	W080018A	Competency Mgmt Periodic Processing (G05BC2), Job Competency Defaults and or Overrides	Review job competency information.

### Reviewing Job Competency Information

Access the Work with Job Competency Attached and Overridden form.

**Job Competency Defaults and or Overrides - Work with Job Competency Attached and Overridden** ? ?

Select Find Close Row Form Tools

Type Structure \*  ☐ Attached Competencies  
 Job Competency Code \*  ☐ Overridden Competencies  
 Job Group PROF  ☐ Attached and Overridden Competenci...  
 Organizational Business Unit \*   
 Job Type \*  \*

**Overrides:**

☐ Option ☐ Included in Gap and Performance Appraisal ☐ Description

**Records 1 - 3** [Customize Grid](#)

	Attached Competencies	Type Structure	Org. Structure Description	Job Competency Code	Job Competency Code
<input checked="" type="radio"/>	Attached Competencies	COR	Corporate Competency Struct	ACH	Achievement Ori
<input type="radio"/>	Attached Competencies	COR	Corporate Competency Struct	VCOM	Verbal Communic
<input type="radio"/>	Attached Competencies	COR	Corporate Competency Struct	WCOM	Written Communi

Work With Job Competency Attached and Overridden form

To review job competency information:

- Complete any of these fields:
  - Type Structure
  - Job Competency Code
  - Job Group
  - Organizational Business Unit
  - Job Type
  - Job Step
- Select one of these options:
  - Attached Competencies
  - Overridden Competencies
  - Both
- Click Find.
- Review the information in the detail area.

### Attached Competencies

Enter an option that specifies which job competency codes to display. Values are:

*Attached Competencies:* Displays the places in the organization where a job competency code is attached with the default values for Options, Descriptions, and Include in Gap/ Performance Appraisal flag.

*Overridden Competencies:* Displays the places in the organization where a job competency code is attached with override values for Options, Descriptions, or Include in Gap/ Performance Appraisal flag.

*Attached and Overridden Competencies:* Displays the places in the organization where a job competency is defined using the default or override values.

## CHAPTER 24

# Understanding Performance Management

This chapter provides an overview of performance management.

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## Performance Management

According to a human resources study, 52 percent of workers want their supervisors to state performance goals more clearly. Nearly 40 percent of workers want their performance on the job tied closely to their development plans and compensation. The survey also found that 42 percent of workers were at least moderately dissatisfied with the employer system of performance evaluation. The authors of the study linked this dissatisfaction to the absence of a standard appraisal process and failure to define employee performance expectations clearly.

Organizations can increase productivity, competitiveness, and profitability through the effective monitoring of job performance. Automating this process by aligning appraisal criteria with organizational goals and realities increases the use, value, and employee acceptance of this performance management tool. Managers and employees can use the performance management feature of Human Resources to automate the tedious, labor intensive process of performance appraisals. This feature integrates performance appraisal criteria with the core competencies of an organization, business unit, and individual job. By connecting appraisal criteria to the goals and objectives of the organization, you can provide a vital, strategic link to improved performance and employee job satisfaction. This integration also helps to reduce employee fears about performance appraisals. The performance management feature provides an approach that is fair, concise, and collaborative. Employees can see the links between their own performance criteria and each of these:

- Goals of the organization
- Compensation increases
- Job promotions
- Focused training
- Development programs

The performance management feature uses periodic evaluations for managers and employees to plan, evaluate, and track work performance and personal goals. The system provides an automated approach for managers and employees to electronically document their perspectives, followed by an interview. The system tracks the final ratings in an employee competency database. Managers and employees can use this approach to:

- Identify strengths.
- Identify opportunities for improvement.
- Create plans to develop new skills.
- Create plans to improve existing skills.
- Evaluate performance issues.
- Apply historical performance data for compensation considerations.

A performance diary, which documents daily activity, provides a quick method for managers and employees to document performance activities. As an employee performance is documented, these performance diary entries can be either negative or positive. Diary entries provide a systematic method for recording incidents when the manager evaluates subsequent appraisal and reward decisions. Employees can also create and attach diary entries to their self appraisals.

Employee Goals, a group of programs for setting and tracking job related objectives, is integrated with the employee competency database and provides an expanded use for the performance management feature. Managers can use Employee Goals to work closely with an employee and set goals to help the employee improve in specific requirements of a job.

The system routes in process appraisals through an appropriate approval structure, including a final approval or rejection by the employee.

Building upon the multilingual capabilities of employee and job competencies, the system also presents appraisal and competency criteria in the employee native language.

Performance management is a valuable tool for both organizations that are ready to implement a competency based approach to job descriptions, and organizations that might not be ready to implement a competency based appraisal system, but still want to automate standard appraisal templates.

## **Competency Based Performance Appraisals**

In the competency based approach to performance appraisals, a hierarchy defines job competencies. For example, a company can define:

- Core organizational competencies.
- Competencies that are specific to business units.
- Competencies that are specific to job groups.
- Competencies that are specific to a job.

You link the competency hierarchy of a job to the employees in the job. Each job description automatically inherits the competency definitions for each applicable level.

Managers use the performance appraisal to assess the current level and consistent demonstration of each competency and to assign an applicable rating. The system weighs and averages rating factors and then calculates an inclusive performance rating for each employee. The system tracks the most current performance appraisal rating in the employee competency database. The system then tracks the overall competency or performance rating in the Employee Master Information table (F060116) for subsequent consideration in compensation analysis and focal reviews.

## **Traditional (Non Competency Based) Appraisals**

For organizations that have not adopted a competency based approach to human resource management, JD Edwards EnterpriseOne provides a traditional template approach for performance appraisals. These defined templates can be specific to a particular company within an organization, a business unit, job group, or particular job. The system stores the templates as text objects.

Employees in any given job automatically inherit the performance appraisal template that is specific to their job. Employees complete a self appraisal, and managers complete a management appraisal, each based on standard templates. The system adds the overall appraisal rating to the Employee Master Information table for subsequent consideration in compensation analysis and focal reviews. As with competency based appraisals, employees and managers can collaborate electronically about their perspectives, followed by an interview.

The template based appraisal system also routes in process appraisals through the appropriate approval channels, including the final approval or contest by the employee.



Users can also use media objects to create the text templates in multiple languages. You must create a separate text media object template for each language that you support.



## CHAPTER 25

# Working With Performance Appraisals

This chapter provides an overview of performance appraisals and discusses how to:

- Generate employee performance appraisals.
- Create batch performance appraisals.
- Maintain a performance diary.
- Review a competency based performance appraisal.
- Define employee goals for competency based appraisals.
- Complete traditional performance appraisals.
- Create an employee career development plan.
- Approve appraisals on an employee behalf.

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## Understanding Performance Appraisals

You use the same process to create either competency based or traditional employee performance appraisals. Competency based appraisals use an extensive system of job and employee competencies that is defined before appraisals are created. You define most of this information when you set up the competency management features of the system.

The traditional appraisal approach uses appraisal templates that are stored in the system as text files and then completed when appraisals are due. An appraisal template can be any media object and is frequently an interactive form on the company intranet.

After you complete either a competency based or traditional appraisal, submit it for automatic approval routing, which is based on a defined approval hierarchy.

When you are using competency management, you define organizational, job, and employee competencies. The competency based performance appraisal system integrates those competencies with employee performance. You track employee activities throughout the year and create employee performance appraisals that compare employee performance with the required competencies for each job.

When employee performance appraisals are due, either a human resources system administrator or managers can create the appraisals. You can create an appraisal for any employee who is the direct or indirect subordinate. After a human resources administrator or a manager creates an employee performance appraisal, the manager reviews the appraisal, updates competency ratings as required, adds notes, and attaches pertinent diary entries.

When creating an appraisal, you can specify whether you will access the review program directly. This option is available only when you create a single appraisal. Although managers normally revise employee performance appraisals, a system administrator can perform this function, if necessary.

After you create the appraisals, the system automatically sends a message to each manager that one or more appraisals are ready for review. If you set up the system to require employee self appraisals, the system also automatically sends a message notifying each employee that a self appraisal is due.

After the manager and the employee have been able to review the appraisal, the appraisal can be approved. If you are using Employee Self Service (ESS), the employee can approve or contest their own appraisal. If you are not using ESS, you can assign delegates, which are typically human resources employees or the employee manager, who can approve or contest the appraisal on the employee behalf.

When the appraisal process is completed, the system automatically updates the performance appraisal information in the Employee Master Information table (F060116). Additionally, after the appraisal process is completed, you can access the appraisal directly from the Organizational Assignment form.

## Performance Appraisals by Managers

Either a human resources representative or managers can create employee appraisals (P087711). After you create an appraisal, you revise and approve the appraisal before scheduling a review meeting with the employee. Depending on the system settings, you can use either a competency based or traditional approach to employee performance appraisals.

A competency based employee performance appraisal automatically generates an appraisal that compares job competencies to demonstrated employee competencies. For each job and employee competency, you can add notes that explain or support the evaluation. You can also attach to each appraisal performance diary entries that cite specific examples of employee performance.

A traditional employee performance appraisal stores templates or links to online appraisal forms. You complete the template and rate employee performance manually. You can also attach to the appraisal performance diary entries that support the evaluation.

After you complete an appraisal, you submit it to the next manager level for approval. The system automatically routes the appraisal to each person who appears in the approval hierarchy (P05844), ending with the employee. At each level, the approving manager can approve the appraisal or return it to the previous level manager. When the highest level manager in the approval hierarchy approves and submits the appraisal, the system sends a message to you indicating that the performance appraisal is ready for final review. If you are using ESS, you then use the Notify Employee menu option in the Current Performance Appraisal program (P087712) to send a message to the employee that the appraisal is ready for final review. The employee can then approve or contest the appraisal.

Employees use the Current Performance Appraisal program to review performance ratings, print the appraisal, review goals, and approve or contest the currently active employee appraisal. When the employee approves or contests the appraisal, the systems indicates that it is complete and moves it to historical status. The system also sends a message to a defined address book number indicating whether the employee approves or contests the appraisal. The system prevents any changes to the appraisal after the employee approval.

If you are not using ESS, an assigned delegate can approve or contest the appraisal on the employee behalf. The employee approval is normally the final step in the approval process.

After the appraisal is approved or contested, you schedule a meeting with the employee to discuss the employee competency rating results, career planning, and performance improvement plans that are in the appraisal. If you need to make further changes to the appraisal, you must create a new appraisal and submit it for approvals.

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**Note.** If you are not using ESS to route employee performance appraisals, and you allow delegates to approve or contest appraisals on an employee behalf, you must verify that the record keeping process is in compliance with local legislation regarding email or online signatures. We strongly recommend that if you allow delegates to approve or contest appraisals on an employee behalf that you keep hard copies of signed performance appraisals.

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## Revising an Employee Performance Appraisal

Select Performance Management Daily Processing (G08PM1), Employee Performance Appraisals.

After a human resources representative generates one or more employee performance appraisals, and managers receive a message that one or more appraisals are ready for review, a manager reviews each appraisal. If the system is set up to require employee self appraisals, the manager also reviews the employee self appraisal and then adds or changes information and ratings, as appropriate. The manager then schedules a meeting with each employee to discuss the appraisal and obtain feedback.

The human resource representative or manager can use the Upcoming Reviews by Supervisor program (P052200) to determine the employees for whom a performance appraisal is due. Alternatively, they can use the Upcoming Review report in the P052200 application.

The manager uses the Employee Performance Appraisals program (P087712) to select the employees who are due for an appraisal, make changes, and adjust the ratings. If a human resources representative is responsible for locating employees whose appraisals are due and creating the appraisals, then the manager opens the current appraisal and revises the rating, if necessary. If the human resources department is not responsible for creating the appraisals, the manager can use this program to create them.

If you use traditional appraisals, managers manually complete the appraisal from a template. A manager can attach media objects to the appraisal template. An example of a media object might be a link to a report that documents the rating that you assign. If the system requires employee self appraisals, it sends a message to each employee that their self appraisal is due.

After completing an appraisal, the manager submits it for review. When the originating manager submits the appraisal, the system locks it, preventing changes. This lock also prevents changes to any performance diary entries that the manager connects to the appraisal. If the second level manager rejects the appraisal and returns it for additional changes, the system automatically unlocks the appraisal. The system routes the appraisal to each approving manager, using a defined approval hierarchy.

When the highest level manager in the approval hierarchy completes the review and approves the appraisal, the system sends the originating manager a message to notify the employee that the appraisal is ready for final review. If you are not using ESS, the manager uses a method outside of the JD Edwards EnterpriseOne system, such as email or personal contact, to notify the employee that the appraisal is ready for their review. After the employee reviews the appraisal, a delegate can approve or contest the appraisal on the employee behalf.

If you are using ESS, the manager selects the appraisal record and uses the Notify Employee menu option to send a message to the employee. The employee uses employee self service to review the manager appraisal and approve or contest it.

After the appraisal is approved or contested, the system locks the appraisal, preventing any additional changes. The manager then meets with the employee to discuss the ratings. If a manager needs to enter additional changes, then he or she must create a new appraisal, add the changes, and submit the new appraisal for approvals.

Although a human resources representative can review employee performance appraisals and make changes, most companies require that managers perform this function.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Adding Employee Records One at a Time,” Entering Organizational Assignment Information.

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## Generating Employee Performance Appraisals

This section provides an overview of employee performance appraisal generation and discusses how to:

- Set processing options for Create Performance Appraisals (P087711).
- Generate individual employee performance appraisals.
- Generate employee performance appraisals for a group.

## Understanding Employee Performance Appraisal Generation

You use the Create Performance Appraisals program (P087711) to select employees and create employee performance appraisals for a group or for an individual. When creating employee performance appraisals, you can select:

- An individual employee.
- All of the employees who report directly to you.
- All of the employees who report directly or indirectly to you.

### See Also

Chapter 25, “Working With Performance Appraisals,” Understanding Performance Appraisals, page 283

Chapter 25, “Working With Performance Appraisals,” Reviewing a Competency Based Performance Appraisal, page 295

## Forms Used to Create Employee Performance Appraisals

Form Name	FormID	Navigation	Usage
Create Group Performance Appraisals	W087711A	<p>Performance Mgmt Periodic Processing (G08PM2), Create Performance Appraisals</p> <p>On the Create Group Performance Appraisals form, complete the Supervisor field and click either the Direct Reports or the Direct and Indirect Reports option.</p> <p>From the Form menu, select Create Direct or Create All.</p> <p>On the Confirm Group Appraisal Creation form, complete the desired fields and then click OK.</p>	<p>Generate employee performance appraisals for a group.</p> <p>When you click OK the system automatically creates employee performance appraisals for the selected employees and sends a message to each employee and manager.</p>
Create Employee Performance Appraisal	W087711B	<p>Performance Mgmt Periodic Processing (G08PM2), Create Performance Appraisals</p> <p>On the Create Group Performance Appraisals form, complete the Supervisor field, select either the Direct Reports or the Direct and Indirect Reports option, and then click Find.</p> <p>Select an employee record and click Select.</p>	Generate individual employee performance appraisals.

## Processing Options for Create Performance Appraisals (P087711)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options specify the default values that the system applies when a human resources representative or a manager creates performance appraisals.

- 1) Audience Flag** Use this processing option to specify who is going to use the application to what capacity. Values are:
- Blank: Supervisor
- 2: Supervisor
- 3: Human Resources
- 2) Direct or Direct and Indirect Employees** Use this processing option to specify which group of employees should be displayed to the manager by default. Either direct reports can be displayed, or direct and indirect reports. There is an opportunity to change the displayed group when the application is running as well. Values are:
- Blank: Direct Only
- 0: Direct Only
- 1: Direct and Indirect

## Versions

This processing option specifies the version of the Create Group Performance Appraisals program (P087711) that the system uses.

- Performance Appraisal Revisions** Use this processing option to specify the version of the Performance Appraisal Revisions (P087711) to use. The default is ZJDE0001. Values are:
- Blank: *ZJDE0001*
- A valid version.

## Generating Employee Performance Appraisals for a Group

Access the Create Group Performance Appraisals form.

- From Review Date** Enter the beginning date in the range of time during which the performance of the employee is considered.
- Appraisal Due Date** Enter the date by which the performance appraisal must be completed, including the appropriate approvals.
- Thru Review Date** Enter the ending date of the period of time for which the employee performance is considered for the current review.
- Self Appraisal Due Date** Enter the date by which the employee must complete his or her self appraisal and notify his or her manager that it is completed.

## Generating Individual Employee Performance Appraisals

Access the Create Employee Performance Appraisal form.

To generate individual employee performance appraisals:

1. Complete these fields:
  - Type of Review
  - From Review Date
  - Appraisal Due Date



- Thru Review Date
  - Self Appraisal Due Date
2. If you want the system to create the appraisal and automatically proceed to the appraisal review, select the Begin Performance Appraisal Process option.

The Begin the Appraisal Process option is available only when you select one employee. When you select two or more employee records, this option is not included on the form.
  3. Click OK.

The system automatically creates an employee performance appraisal and sends a message to the employee and the manager indicating that the appraisal is ready for review. If you have selected two or more employees the system submits the Create Batch Performance Appraisals report (R087721).
  4. On the Confirmation form, click OK.

If you select the option to begin the appraisal process, either the Competency Based Performance Appraisal Revisions form or the Traditional Performance Appraisal Revision form appears. You use this form to complete the steps for revising an employee performance appraisal.

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## Creating Batch Performance Appraisals (R087722)

This section provides an overview of batch performance appraisals and discusses how to:

- Run the Batch Create Performance Appraisals program (R087722).
- Set processing options for Batch Create Performance Appraisals (R087722).
- Run the Performance Appraisal Batch Print program (R087723).
- Set processing options for Performance Appraisal Batch Print (R087723).
- Run the Upcoming Reviews Report program (R052202).
- Set processing options for Upcoming Reviews (R052202).

### Creating Batch Performance Appraisals

Use this batch process to create a group of performance appraisals for the employees that you selected from the Employee Master Information table (F060116). For each selected employee, this process creates the header for the appraisal and determines the type of performance appraisal to create, either traditional or competency based. The system notifies employees that the appraisal has been created so that they can complete their self appraisals.

### Running the Batch Create Performance Appraisals Program (R087722)

Select Performance Mgmt Periodic Processing menu (G08PM2), Batch Create Performance Appraisals.

### Setting Processing Options for the Batch Create Performance Appraisals Program (R087722)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Defaults

These processing options specify the default information that will appear on the performance appraisals.

- |  |   |
|--|---|
| <b>1) Type of Increase Next Review</b>       | Use this processing option to specify a code to define the type of salary or performance review being created. You can define this code by using defined code table 06/RV.  |
| <b>2) Date - From Review</b>                 | Use this processing option to specify the beginning date of the time period for the current performance review.   |
| <b>3) Date - Thru Review</b>                 | Use this processing option to specify the ending date of the time period for the current performance review.  |
| <b>4) Date - Employee Self Appraisal Due</b> | Use this processing option to specify the date by which the employee must complete his or her self-appraisal and notify his or her manager that it is completed.  |
| <b>5) Date - Performance Appraisal Due</b>   | Use this processing option to specify the date by which the performance appraisal must be completed, including the appropriate approvals.   |
| <b>6) Bypass Warning Errors</b>              | <p>Use this processing option to specify whether appraisals with warning errors should still be created. Values are:</p> <p>Blank: Do not create appraisals with warning errors.</p> <p>0: Do not create appraisals with warning errors.</p> <p>1: Create appraisals with warning errors.</p> |

## Process

These processing options specify the group of employees for whom you are creating the appraisals.

- |                     |  |
|---------------------|--|
| <b>1) From Date</b> | <p>Use this processing option to specify the beginning date of the time period for the next review. Values are:</p> <p>Blank: Do not use the From Date.</p> <p>A valid date</p> <p>Select employees that have a next review date equal to or greater than the From Date.</p> |
| <b>2) Thru Date</b> | <p>Use this processing option to specify the ending date of the time period for the next review. Values are:</p> <p>Blank: Do not use the Thru Date.</p> <p>A valid date</p>   |

**3) Days From Today**

Select employees that have a next review date equal to or less than the Thru Date.

Use this processing option to select employees that have a next review date equal to or less than the system date plus the number of days entered. Values are:

Blank: Do not use Days From Today

Number of days

Select employees that have a next review date equal to or less than the system date plus the number of days entered. If used, the From Date and Thru Date are ignored.

## Printing Batch Performance Appraisals

Select Performance Management Daily Processing (G08PM1), Performance Appraisal Batch Print.

The Performance Appraisal Batch Print report (R087723) provides a printed copy of a competency based employee self-appraisal or performance appraisal.

## Setting Processing Options for the Performance Appraisal Batch Print Report (R087723)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options specify security options and the type of performance appraisal that the system prints.

**1) Audience Flag**

Use this processing option to specify who is going to use this application to what capacity. Values are:

Blank: Employee

1: Employee

2: Supervisor

3: Human Resources

**2) Performance Appraisal Mode**

Use this processing option to specify which type of performance appraisal to print. Values are:

Blank: 1 (default) Employee Self Appraisal

1: Employee Self Appraisal

2: Manager Appraisal

## Running the Upcoming Reviews Report (R052202)

Select Performance Mgmt Periodic Processing (G08PM2), Upcoming Reviews.

The Upcoming Reviews report creates report versions that select groups of employees who are due to receive an employee performance appraisal as of a specific date or within a specified number of days. The report prints a list of employees based on the criteria that you specify. After you print the Upcoming Reviews report, you run the Create Performance Appraisals program (P087711) to select the employees, create appraisals, and send messages to each of the employees and managers.

You might use Upcoming Reviews report when you are generating employee performance appraisals for the whole company or a specific business unit.

## Setting Processing Options for the Upcoming Reviews Report (R052202)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options specify information about the employee and supervisor.

- |  |   |
|--|---|
| <b>1. Employee Number Display</b>  | Use this processing option to specify the employee number that you want to print on the report. Values are:<br><br>A: Address book number<br>S: Employee tax identification number<br>O: Other number |
| <b>2. URL For Supervisor Review Instructions (Uniform Resource Locator For Supervisor Review Instructions)</b> | Use this processing option to specify the uniform resource locator for the supervisor review instructions.  |

### Process

These processing options specify the dates for which you want to review appraisals and whether the system runs the workflow reminder process.

- |                                     |  |
|-------------------------------------|--|
| <b>1. Workflow Reminder Process</b> | Use this processing option to specify whether to run the workflow reminder process. Values are:<br><br>1: Run the workflow process.<br>0: Do not run the workflow process. |
|-------------------------------------|--|

- |                           |   |
|---------------------------|---|
| <b>2. From Date</b>       | Use this processing option to limit reviews. The review date must be greater than or equal to the from date.  |
| <b>3. Thru Date</b>       | Use this processing option to limit reviews processed. The review date must be less than or equal to the Thru date.   |
| <b>4. Days From Today</b> | Use this processing option to limit reviews processed. Enter Days From Today to process all new review dates that are less than or equal to the system date and the number of days entered into the processing option. Enter Date of Thru Date to ignore this option. |

---

## Maintaining a Performance Diary

This section provides an overview of performance diaries and discusses how to:

- Set processing options for Daily Diary (P087715).
- Maintain a performance diary.

## Understanding Performance Diaries

A performance diary is a collection of notes and attachments that you compile throughout the year. These notes document the activities and accomplishments that affect the job performance. You can also use the performance diary to maintain notes and attachments regarding a manager performance or another employee performance. For example, you might track job related tasks that you accomplish, the completion of a course of study, client recommendations regarding the assistance, or any other activity that might affect the performance appraisal. The Daily Diary program (P087715) records and classifies information by using these criteria:

- Employee.
- Subject.
- Subject type.
- Relation to employee.
- Relation to a performance appraisal.

Notes that you create in the Daily Diary program are private unless you attach them to a performance appraisal. The system links the diary entries to the address book number. Human Resources representatives and managers who review the appraisal can review the diary entries that you attach to a performance appraisal.

When you create the performance self appraisal or revise the employee performance appraisal, you can attach diary entries to the appraisal to document the activities. After you attach diary entries to an appraisal, you can change the text until you approve (or contest) and submit the appraisal. After you submit the appraisal, you cannot change or delete the attached entries from the performance diary.

## Form Used to Maintain Performance Diaries

Form Name	FormID	Navigation	Usage
Diary Entry Revisions	W087715B	Employee Self Service menu (G05BESS1), Daily Diary  On the Work With Diary Entries form, click Add.	Maintain performance diaries.  You can add a text note or attach a media object that documents an employee activity.

## Setting Processing Options for the Daily Diary Program (P087715)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Default

This processing option specifies the default value that the system uses each time that you create a new performance diary entry.

#### 1) Default attach to performance appraisal value

Use this processing option to specify the default value for the Attach to Performance Appraisal Flag when a new diary entry is made. The employee can also change the value. Values are:

*0*: No, entry does not apply to a performance appraisal.

*1*: Yes, entry applies to performance appraisals.

## Maintaining a Performance Diary

Access the Diary Entry Revisions form.

**Daily Diary - Diary Entry Revisions**

OK Cancel Tools

Entered By Cathy McDougale

Diary Entry For McDougale, Cathy Employee Identification 7500

Subject FMLA Workshop

Subject Type TRAIN *Training and Development*

Relation to Employee SELF *Self*

☒ Attach To Appraisal

Text

Arial 10 B I U [Color] [Align] [List] [Print]

March 3-5, I attended an FMLA workshop to get updated on current legislation.

Diary Entry Revisions form

<b>Subject</b>	Enter the subject of this entry.
<b>Subject Type</b>	Enter a defined value (08/SU) that categorizes diary entries.
<b>Relation to Employee</b>	Enter the relationship you have to the employee referred to in the diary entry. For example, you may be a manager, peer, or customer of this employee.
<b>Attach To Appraisal</b>	Enter a code that indicates whether the current entry applies to a performance appraisal event. Values are: 1: Yes, the entry applies to a performance appraisal. 0: No, the entry does not apply to a performance appraisal.

## Reviewing a Competency Based Performance Appraisal

This section provides an overview of competency based performance appraisals and discusses how to:

- Set processing options for Current Performance Appraisals (P087712).
- Review a competency based performance appraisal.

## Understanding Competency Based Performance Appraisals

If you are a manager, the system sends a message to you when an employee appraisal is ready for you to review. You use the Current Performance Appraisals program (P087712) to locate the appraisal and perform the review.

Depending on the company policies and how the system is set up, the system might also send a message to the employee that a performance self appraisal is due. However, you can begin the appraisal review immediately and then make any necessary adjustments to the appraisal when you review the employee self appraisal. When the employee completes the self appraisal and submits it, you can then review the appraisal and any diary entries that might be attached to it.

Depending on how the processing options are set up, you might be able to change the system ratings for job competencies, employee competencies, and the summary rating. You can also change the summary rating for a job competency, and the system automatically re-rates each of the employee competencies.

You can use the top note area on the appraisal form to record any comments that apply to the review. When you select a specific job or employee competency for review, the notes area applies only to the appraisal that you are reviewing and the competency that you select. You can add separate notes for each job and employee competency.

The lower note area on the appraisal form can contain a defined competency description to help you understand and work with job competencies. The notes that the system displays are based on the user profile. For example, you can set up different notes for managers and for employees. These options might be available:

- Human Resources view
- Manager view
- Employee view

### See Also

Chapter 25, “Working With Performance Appraisals,” Maintaining a Performance Diary, page 293

## Forms Used to Review Competency Based Performance Appraisals

Form Name	FormID	Navigation	Usage
Competency Based Performance Appraisal Revisions	W087712B	Manager Self Service (G05BMSS1), Current Performance Appraisals  On the Supervisor Work With Performance Appraisals form, locate an employee and click Select.	Revise competency based performance appraisals.
Work With Diary Entries For A Performance Appraisal	W087715C	On the Competency Based Performance Appraisal Revisions form, click Appraisal Diary Entries.	Attach a performance diary entry that might support the rating decision.

## Setting Processing Options for the Current Performance Appraisals Program (P087712)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.



For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Defaults

These processing options specify the default values that the system applies when a human resources representative or a manager creates performance appraisals.

- |  |  |
|--|--|
| <b>1) Audience Flag</b>                | Use this processing option to specify who is going to use the application to what capacity. Values are:<br><i>1</i> : Employee<br><i>2</i> : Manager<br><i>3</i> : Human Resources   |
| <b>2) Performance Appraisal Status</b> | Use this processing option to specify the status of performance appraisals the user displays. This will be used by the program to determine what task the employee or manager is currently completing. Values are:<br><i>0</i> : Employee Self Performance Appraisal<br><i>1</i> : Current/Active Performance Appraisals<br><i>2</i> : Historical Performance Appraisals |

## Display

These processing options specify the details that appear on the performance appraisal.

- |  |   |
|--|---|
| <b>1) Display Job Title or Job Type/Step Description</b>     | Use this processing option to specify how the employee job is displayed. Either the Job Title is displayed or the associated description for the employee Job Type/Step is displayed. Values are:<br>Blank: Display Job Title if it exists, otherwise Job Type Step Description<br><i>1</i> : Always display Job Title<br><i>2</i> : Always display the description for Job Type/Step |
| <b>2) Enter the URL for the performance appraisal guide.</b> | Use this processing option to provide the organization performance management guide. If this is provided, the employees or managers using this system will be able to click and view the guide.   |
| <b>3) Display Job Competency Level</b>                       | Use this processing option to specify whether the job competency level should be displayed on a competency based performance appraisal. Values are:<br><i>0</i> : Do not display Job Competency Level (default)<br><i>1</i> : Display Job Competency Level  |
| <b>4) Display Employee Competency Level</b>                  | Use this processing option to specify whether the employee competency level should be displayed on a competency based performance appraisal. Values are:<br><i>0</i> : Do not display Employee Competency Level (default)<br><i>1</i> : Display Employee Competency Level   |

## Process

These processing options specify the functions that can be performed, based upon the user.

- |   |  |
|---|--|
| <b>1) Update Performance Level for Job Competencies</b>   | <p>Use this processing option to indicate whether the job competency level can be changed on the performance appraisal. Values are:</p> <p><i>0</i>: No, can only change levels for employee competencies.</p> <p><i>1</i>: Yes, can change level for a job competency.</p>  |
| <b>2) Auto Calculate Employee Competency Levels</b>   | <p>Use this processing option to specify whether the employee competency levels can be automatically calculated based on the job competency level entered. This only applies if the Update Performance Level for Job Competencies is allowed. Values are:</p> <p><i>0</i>: No, if job competency levels can be changed, they cannot be used to calculate employee competencies.</p> <p><i>1</i>: Yes, if a job competency level is changed, the level is used to calculate the employee competency levels.</p>   |
| <b>3) Competency Update Event Code</b>  | <p>Use this processing option to enter a code that specifies a type of user that has access to employee competency information. The code that you enter must exist in the defined code list for competency update codes (05/CU). This code also corresponds to a code that you entered in the Competency Update Event Code field in the Competency Update Events program (P05106).</p> <p>You use this processing option in conjunction with the Competency Update Events program to control access to the Competency Level field for specific types of users. You set up different versions of Resource Competency Information for each type of user. For example, you might define a Competency Update Event Code called Train that you use to represent the organization training manager. You can use the Competency Update Events program to grant Train the ability to update competency levels for all training competencies.</p> |
| <b>4) Address Number of Individual who should be notified once the employee has approved his/her performance appraisal.</b> | <p>Use this processing option to indicate the person who should receive an email message once the performance appraisal is completely finished and the employee has signed-off. For example, this person may be responsible for printing the final appraisal for employee records. Values are:</p> <p><i>0</i>: Do not notify anyone that appraisal is complete</p> <p>A valid address number</p>  |
| <b>5) Supervisor Can Create Development Plan</b>  | <p>Use this processing option to indicate whether supervisors can create new development plans (goals) for employees while completing the performance appraisal. Values are:</p> <p><i>0</i>: No</p> <p><i>1</i>: Yes</p>  |
| <b>6) Employee Can Create Development Plan</b>  | <p>Use this processing option to indicate whether an employee can create his/her own new development plans (goals) while completing the self appraisal or reviewing the performance appraisal. Values are:</p> <p><i>0</i>: No</p> <p><i>1</i>: Yes</p>  |

## Competency Descriptions

These processing options specify the competency descriptions that appear on the performance appraisal, based on the audience.

### 1) Defined Competency Description Code 1

Use this processing option to list the code for the first Job Competency Code description to show. This code is associated with the first radio button on the form. When a Job Competency Code and the first radio button are selected, the associated description is displayed. Values are:

Blank: Do not display description 1.

A valid Competency Description Code.

### 2) Defined Competency Description Code 2

Use this processing option to list the code for the second Job Competency Code description to show. This code is associated with the second radio button on the form. When a Job Competency Code and the second radio button are selected, the associated description is displayed. Values are:

Blank: Do not display description 2.

A valid Competency Description Code.

### 3) Defined Competency Description Code 3

Use this processing option to list the code for the third Job Competency Code description to show. This code is associated with the third radio button on the form. When a Job Competency Code and the third radio button are selected, the associated description is displayed. Values are:

Blank: Do not display description 3

A valid Competency Description Code

### 4) Defined Competency Description Code 4

Use this processing option to list the code for the fourth Job Competency Code description to show. This code is associated with the fourth radio button on the form. When a Job Competency Code and the fourth radio button are selected, the associated description is displayed. Values are:

Blank: Do not display description 4

A valid Competency Description Code

### 5) Defined Competency Description Code 5

Use this processing option to list the code for the fifth Job Competency Code description to show. This code is associated with the fifth radio button on the form. When a Job Competency Code and the fifth radio button are selected, the associated description is displayed. Values are:

Blank: Do not display description 5

A valid Competency Description Code

### 6) Defined Competency Description Code 6

Use this processing option to list the code for the sixth Job Competency Code description to show. This code is associated with the sixth radio button on the form. When a Job Competency Code and the sixth radio button are selected, the associated description is displayed. Values are:

Blank: Do not display description 6

A valid Competency Description Code

## Versions

These processing options specify the version that the system uses for each program. Each version is a defined set of specifications that control how programs and reports run. You use versions to group and save a set of defined processing options, values, data selections, and sequencing options.

- |                               |  |
|-------------------------------|--|
| <b>1) Delegates Version</b>   | Use this processing option to specify the version of the Delegates program (P08750) to use. The default is <i>ZJDE0001</i> . Values are:<br>Blank: <i>ZJDE0001</i><br>A valid version    |
| <b>2) Daily Diary Version</b> | Use this processing option to specify the version of the Daily Diary program (P087715) to use. The default is <i>ZJDE0001</i> . Values are:<br>Blank: <i>ZJDE0001</i><br>A valid version |
| <b>3) Create Goal Version</b> | this processing option to specify the version of the Goals program (P05117) to use. The default is <i>ZJDE0001</i> . Values are:<br>Blank: <i>ZJDE0001</i><br>A valid version            |

## Reviewing Competency Based Performance Appraisals

Access the Competency Based Performance Appraisal Revisions form.

To review competency based performance appraisals:

1. Click the first job competency and review the rating.  
When you click a job competency, a list of related employee competencies automatically appears.
2. Click the first employee competency and review the employee competency ratings. Enter any necessary rating changes, and enter notes as appropriate.  
Depending on processing option settings, the system automatically adjusts the job competency and overall performance rating when you change an employee competency rating.
3. Alternatively, you can override the system ratings by entering a value in the Performance Appraisal Level field:  
The system automatically rates the job competencies again. If a processing option is set appropriately, you can also change the system rating for a job competency, and the system automatically rates the employee competencies again.
4. To attach a performance diary entry that might support the rating decision, click the link to Appraisal Diary Entries.  
The system displays a list of the diary records that are currently attached to the performance appraisal.
5. On the Work With Diary Entries For A Performance Appraisal form, select a diary record to review and then click Select.
6. To add diary entries that are not currently attached to the appraisal, click Add.
7. Select a diary entry and then click Select.
8. To remove an attached diary records, select a diary records and click Remove.

---

**Note.** Click Remove to remove the diary record from the performance appraisal only. It does not delete the diary entry from the system.

---

9. Review all remaining job competencies and employee competencies and change ratings, as appropriate.
10. When you have completed rating all competencies, click Submit to Next Level Manager for Approval.

The system sends a message to the next level manager to indicate that a performance appraisal is ready for approval.

**Performance Appraisal Level**

Enter 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.

---

## Defining Employee Goals for Competency Based Appraisals

This section provides an overview of employee goal definitions and discusses how to define employee goals for competency based appraisals.

### Understanding Employee Goals for Competency Based Appraisals

You can create employee goals and goal action suggestions that are linked to employee competencies. The purpose of this approach is to establish specific guidelines that an employee can follow to accomplish at least 100 percent of the organizational expectation for each employee competency. If an employee has additional goals that might or might not be directly related to job performance, you can also create a career development plan.

### Form Used to Define Employee Goals for Competency Based Appraisals

Form Name	FormID	Navigation	Usage
Goal Action Plans	W05117B	<p>Manager Self Service (G05BMSS1), Current Performance Appraisals</p> <p>On the Supervisor Work With Performance Appraisals form, select an employee for whom a current appraisal exists, and then click Select.</p> <p>On the Competency Based Performance Appraisal Revisions form, select a job competency and then click Create a Career Development Plan for the Selected Competency.</p>	Define employee goals for competency based appraisals.

## Defining Employee Goals for Competency Based Appraisals

Access the Goal Action Plans form.

Level you would like to achieve:  *Meets requirement...* Guidelines to consider when setting your level:

Performance Appraisal Level 3.050 *Above required level (>100%)*

Required Competency Level 2.000 *Meets requirements (=100%)*

**Accounting Skills**  
Suggestions:  
• [GENERAL FORMAT](#)  
[Top](#)

**Action Workspace**

Text1

Courier New 10 B U

Complete General Accounting and Advanced Accounting classes by year end.

Action Description

Action Status

Change Reason

Estimate Start Date  Start Date

Estimate End Date  End Date

**Actions:** [Top](#)

Goal Action Plans form

To define employee goals for competency based appraisals:

1. Complete these fields to create a new employee goal:
  - Goal Status
  - Goal Type
  - Level you would like to achieve
2. To create a new goal action suggestion, complete these fields:
  - Action Description
  - Action Status
  - Change Reason
  - Estimate Start Date
  - Estimate End Date
3. If you are updating an existing action suggestion, complete these fields:
  - Start Date
  - End Date
4. To move the current goal action suggestion to the Actions list, click the arrow.
5. To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 2 through 4.
6. When the list of goal action suggestions is complete, click Submit to save, and then click Cancel to return to the appraisal form.

<b>Goal Description</b>	Enter a brief description of the goal, which is contained in the Goal Master table (F05102).
<b>Goal Status</b>	Enter a code that identifies the status of the goal. It is a defined code (05/G3).
<b>Goal Type</b>	Enter a defined code (05/GT) that you use to define the type of goal that the employee is working towards. For example, you might define a goal type for moving to the next pay grade.
<b>Level you would like to achieve:</b>	Enter a code that refers to the level of proficiency that a person or asset has demonstrated for a specific competency type and competency code.
<b>Action Description</b>	Enter a defined code (05/S3) that specifies a goal action. This value is initially copied from the Goal Suggestions table (F05105).
<b>Action Status</b>	Enter a defined code (05/G3) that specifies the current status of the Goal Action record.
<b>Change Reason</b>	Enter a defined code (05/CH) that represents the reason why the employee changed the goal.
<b>Estimate Start Date</b>	Enter the date when the goal becomes effective.
<b>Estimate End Date</b>	Enter the date on which the goal is either completed or becomes ineffective.
<b>Start Date</b>	Enter the date on which the training course started.
<b>End Date</b>	Enter the date on which the training course ended.

---

## Completing Traditional Performance Appraisals

This section provides an overview of traditional performance appraisals and discusses how to complete traditional performance appraisals.

### Understanding Traditional Performance Appraisals

You use the Current Performance Appraisals program (P087712) to display a traditional performance appraisal template, manually complete all the categories, enter an appropriate rating, and then save it as a new appraisal. You also use the Current Performance Appraisals program to revise the appraisal and enter the rating. You can also attach performance diary entries to the appraisal to support the evaluation.

If you set up system options appropriately, when you create a performance appraisal, the system sends a message to the employee that the performance self appraisal is due. You can begin the appraisal review immediately and then make any necessary adjustments to the appraisal when you review the employee self appraisal. When the employee completes the self appraisal and submits it, you can then review it and any diary entries that might be attached.

When you submit the appraisal, the system automatically sends a message to the next level manager that an appraisal is ready for review.

## Form Used to Complete Traditional Performance Appraisals

Form Name	FormID	Navigation	Usage
Traditional Performance Appraisal Revision	W087712D	<p>Manager Self Service (G05BMSS1), Current Performance Appraisals</p> <p>On the Supervisor Work With Performance Appraisals form, select the All Appraisals option to select the type of appraisals that you want to review.</p> <p>Select the Appraisals to Complete OR Appraisals For Current Indirect Reports option to select whether to review appraisals for the direct or indirect reports.</p> <p>Complete the Employee Identification field to find an employee record and then click Select.</p>	Complete traditional performance appraisals.

## Completing Traditional Performance Appraisals

Access the Traditional Performance Appraisal Revision form.



**Current Performance Appraisals - Traditional Performance Appraisal Revision**

OK Cancel Tools

Brown, Harvey J.

Appraisal Type *90 Day Start Up* Supervisor *Nguyen, Daniel* Review Dates From *1/1/95* Thru *12/31/07*  
 Job Title *Maintenance Electrician Junior* Self-Appraisal Due Date *12/31/05* Appraisal Due Date *12/31/05*

---

Performance Appraisal Level

**Performance Appraisal**

Text

Times New Roman 12 **B** U

**Performance Review**

EMPLOYEE NAME \_\_\_\_\_  
 EMPLOYEE JOB TITLE \_\_\_\_\_  
 DATE HIRED \_\_\_\_\_

**DEFINITION OF RATINGS :**

**EXCEPTIONAL (5):** Consistently meets and often exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work. Active in industry-related professional and/or community groups.

**EXCEEDS EXPECTATIONS (4):** Consistently meets and sometimes exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.

**MEETS EXPECTATIONS (3):** Meets all relevant performance standards. Seldom exceeds or falls short of

[Submit Approval to Next Level Manager](#) [Approval History](#) [View Development Plan from Historical Appraisal](#) [Create a Career Development Plan](#) [View Development Plan for this Appraisal](#) [Appraisal Diary Entries](#) [View Historical Appraisal for Employee](#)

Traditional Performance Appraisal Revision form

To complete traditional performance appraisals:

1. On the Traditional Performance Appraisal Revision form, manually complete a performance appraisal template.  
 Alternatively, if you set up another media object or URL link to an interactive appraisal form, complete the appropriate form.
2. To enter the overall performance rating, complete the Performance Appraisal Level field.
3. To attach a performance diary entry that might support the rating decision, select the Appraisal Diary Entries link at the bottom of the form.
4. On the Work With Diary Entries For A Performance Appraisal form, click Add.

5. On the Daily Diary Search form, select a diary record, and then click Select.
6. To remove an attached diary record, select a diary record on the Work With Diary Entries For A Performance Appraisal form and then click Remove.

---

**Note.** This action removes the diary record from the performance appraisal only. It does not delete the diary entry from the system.

---

7. When you are finished working with diary entries, click Close.
8. On the Traditional Performance Appraisal Revision form, click the link Submit to Next Level Manager.
9. On the Submit Performance Appraisal form, click Yes.

The system automatically routes the appraisal and diary entries to the next level manager in the approval hierarchy.

<b>Direct/Indirect Indicator</b>	Enter a code that specifies whether to display only employees who report directly, or to display direct and indirect employees.  The Appraisals to Complete option includes employees who report to you directly or indirectly. The Appraisals For Current Indirect Reports option includes only employees who report indirectly to you.
<b>Appraisals For Current Indirect Reports</b>	Enter a code that specifies whether to display only employees who report directly, or to display direct and indirect employees.
<b>Performance Appraisal Level</b>	Enter 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.

---

## Creating an Employee Career Development Plan

This section provides an overview of employee career development plan and describes how to create employee career development plans.

### Understanding Employee Career Development Plans

You can create a career development plan when you use either competency based or traditional performance appraisals. You use this tool to track employee goals and progress toward the goals. These goals can be linked to required job skills, or they can support goals that the employee might have that are not related to the organization.

## Form Used to Create Employee Career Development Plans

Form Name	FormID	Navigation	Usage
Goal Action Plans	W05117B	<p>Manager Self Service (G05BMSS1), Current Performance Appraisals</p> <p>On the Supervisor Work With Performance Appraisals form, select an employee for whom a current, traditional appraisal exists, and then click Select.</p> <p>On the Traditional Performance Appraisal Revision form, select the Create a Career Development Plan link at the bottom of the form.</p> <p>On the Goal Action Plans form, to move the current goal action suggestion to the Actions list, click the arrow.</p> <p>When the list of goal action suggestions is complete, click Submit to save, and then click Cancel to return to the appraisal form.</p>	Create an employee career development plan.

## Creating an Employee Career Development Plan

Access the Goal Action Plans form

<b>Goal Status</b>	Enter a code that identifies the status of the goal. It is a defined code (05/G3).
<b>Goal Type</b>	Enter a defined code (05/GT) that you use to define the type of goal that the employee is working towards. For example, you might define a goal type for moving to the next pay grade.
<b>Action Description</b>	Enter a defined code (05/S3) that specifies a goal action. This value is initially copied from the Goal Suggestions table (F05105).
<b>Action Status</b>	Enter a defined code (05/G3) that specifies the current status of the Goal Action record.
<b>Change Reason</b>	Enter a defined code (05/CH) that represents the reason why the employee changed the goal.
<b>Estimate Start Date</b>	Enter the date when the goal becomes effective.
<b>Estimate End Date</b>	Enter the date on which the goal is either completed or becomes ineffective.
<b>Start Date</b>	Enter the date on which the training course started. Complete this field if you are updating an existing action suggestion.
<b>End Date</b>	Enter the date on which the training course ended.

Complete this field if you are updating an existing action suggestion.

## Approving Appraisals on an Employee Behalf

This section provides an overview of appraisal approval on the employee behalf, lists prerequisites, and discusses how to:

- Approve or contest appraisals for multiple employees.
- Approve or contest an appraisal for an employee.

## Understanding Appraisal Approval on an Employee Behalf

If the organization, or part of the organization, does not use Employee Self Service (ESS) during the performance appraisal process, you can allow managers or human resources representatives to approve or contest the appraisals on an employee behalf.

If you are not using ESS, many of the steps in the appraisal process are the same, but they are done outside of the system. This table illustrates how the steps in the appraisal process might differ when you are not using ESS:

Using ESS	Not Using ESS
The system sends an automated message to the employee notifying them that their appraisal is available for review.	The manager gives the appraisal to the employee, notifying them that they should review the contents of the appraisal.
The employee reviews the appraisal using the JD Edwards EnterpriseOne ESS system.	The employee reviews the paper copy of the appraisal outside of the JD Edwards EnterpriseOne system.
The employee specifies whether they approve or contest the appraisal using the JD Edwards EnterpriseOne ESS system.	The employee notifies the appropriate manager or human resources representative when they want to approve or contest the appraisal. The manager or human resources representative approves or contests the appraisal in the JD Edwards EnterpriseOne system on the behalf of the employee.

You can use the Row menu on the Supervisor Work With Performance Appraisals form to approve or contest any appraisal on the employee behalf. You can also use links from the Competency Based Performance Appraisal Revisions form to approve or contest competency based appraisals, or you can use links from the Traditional Performance Appraisal Revision form to approve or contest traditional appraisals.

After you select the appropriate option, the system displays a confirmation message on the Submit/Return Message form, regarding the action you want to take. This table lists the messages that will appear for each situation, and the actions the system performs:

Situation	Message and Actions
You approve a performance appraisal on behalf of one employee.	<p>The system produces this message:</p> <p>The employee being appraised has seen this appraisal and you are approving this appraisal on behalf of the employee. Once you finish, no one will be able to make any further changes to this appraisal. Do you wish to Continue?</p>
You contest a performance appraisal on behalf of one employee.	<p>The system produces this message:</p> <p>The employee being appraised has seen this appraisal and you are contesting some or all of its contents on behalf of the employee. Once you finish, no one will be able to make any further changes to this appraisal. Do you wish to Continue?</p>
You approve performance appraisals on behalf of multiple employees.	<p>The system produces this message:</p> <p>The group of employees being appraised have seen their appraisals and you are approving the appraisals on behalf of the employees. Once you finish, no one will be able to make any further changes to these appraisals. Do you wish to Continue?</p>
You contest performance appraisals on behalf of multiple employee.	<p>The system produces this message:</p> <p>The employees being appraised have seen their appraisals and you are contesting some or all of the contents on behalf of the employee. Once you finish, no one will be able to make any further changes to these appraisals. Do you wish to Continue?</p>

## Prerequisites

Before you complete the tasks in this section, you must set the Manager Signoff for EE option using one or more of these programs:

- Performance Management Company Constants (P08771).
- Performance Management Business Unit Overrides (P08772).
- Performance Management Appraisal Type Overrides (P08773).

You must also complete performance appraisals, which includes completing all approvals for each specified level of management.

## See Also

Chapter 4, “Setting Up Performance Management,” page 29

## Forms Used to Approve Appraisals on an Employee Behalf

Form Name	FormID	Navigation	Usage
W087712A	Supervisor Work With Performance Appraisals	Manager Self Service (G05BMSS1), Current Performance Appraisals	Select appraisals for approval.
W087712B	Competency Based Performance Appraisal Revisions	On the Supervisor Work With Performance Appraisals form, select the Appraisals to Complete OR Appraisals for Current Indirect Reports option to select whether to review appraisals for the direct or indirect reports.  Select an employee with a competency based appraisal, and then click Select.	Approve or contest a competency based appraisal for one employee.

## Approving or Contesting Appraisals for Multiple Employees

Access the Supervisor Work With Performance Appraisals form.

1. Using the options in the header section of the form, determine which appraisals you want to approve or contest, and then click Find.
2. In the detail area of the form, select each appraisal that you want to approve or contest.
3. To approve all of the selected appraisals, select Approve for EE from the Row menu.
4. To contest all of the selected appraisals, select Contest for EE from the Row menu.
5. To confirm that you are approving or contesting the appraisals, click Yes on the Submit/Return Message form.

The system returns to the Supervisor Work With Performance Appraisals form. All appraisals that did not have a valid status for the requested action will include an error message. You must update each of these appraisals and approve or contest it again once it is at a valid status.

---

**Note.** The row menu options are enabled only if:

---

- The Audience Flag processing option for P087712 is set to 3 (HR), and the Appraisal Status is 3, 4, or 5.
- The Audience Flag processing option for P087712 is set to 2 (Manager), and the Appraisal Status is 5.

## Approving or Contesting an Appraisal for an Employee

For competency based appraisals, access the Competency Based Performance Appraisal Revisions form.

For traditional appraisals, access the Traditional Performance Appraisal Revision form.

1. Click one of these links at the bottom of the form to approve or contest the appraisal:
  - Approve
  - Contest
2. On the Submit/Return Message form, click Yes to process the requested action.

---

**Note.** The Approve and Contest links appear only if:

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- The Audience Flag processing option for P087712 is set to 3 (HR), and the Appraisal Status is 3, 4, or 5.
- The Audience Flag processing option for P087712 is set to 2 (Manager), and the Appraisal Status is 5.





## CHAPTER 26

# Working With Employee Self Service Performance Appraisals

This chapter provides an overview of employee self service performance appraisals and discusses how to:

- Review a competency based performance self appraisal.
- Review a traditional performance self appraisal.
- Review a performance appraisal from the manager.
- Define employee goals using Employee Self Service.
- Create employee performance appraisals.

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## Understanding Employee Self Service Performance Appraisals

You can use employee self service (ESS) to manage performance appraisals. When a performance appraisal is due, either a human resources representative or a manager creates an employee performance appraisal and notifies you when it is ready for the review. If the company also uses performance self appraisals, you receive a message indicating that you are required to prepare and submit a performance self appraisal.

A performance self appraisal evaluates the job performance and provides historic examples of activities that you completed. After you submit the self appraisal, the system sends a message to the manager indicating that the appraisal is ready for review. If you need to make additional changes to the self appraisal after you submit it, the manager can reset the appraisal status so that you can enter changes and resubmit it.

After you submit the performance self appraisal to The manager, the manager reviews it and prepares an employee performance appraisal. The manager submits the appraisal for approval using a predefined approval hierarchy. When all approvals are complete, the manager sends a message to you indicating that the appraisal is ready for the review. You then review the appraisal, and either accept or contest it. The manager then schedules a meeting with you to review the appraisal and obtain feedback. You are normally the final step of the approval process.

Depending on the system settings, you can use one of two types of performance self appraisals: competency based or traditional (text based). A competency based performance self appraisal generates an appraisal that compares required job competencies to the demonstrated employee competencies. To complete a traditional performance self appraisal, you manually complete an appraisal template. You then review the performance self appraisal and make appropriate changes. You can also attach appropriate diary entries that provide examples of performance activities.

If you are not using ESS, you can still utilize the automated performance management system by performing pieces of the review process outside of the JD Edwards EnterpriseOne system. You then can set up the system to allow managers or human resources representatives to approve or contest the appraisals online on behalf of an employee.

**See Also**

Chapter 25, “Working With Performance Appraisals,” Maintaining a Performance Diary, page 293

Chapter 24, “Understanding Performance Management,” page 279

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## Reviewing a Competency Based Performance Self Appraisal

This section provides an overview of competency based performance self appraisals.

### Understanding Competency Based Performance Self Appraisal Reviews

Either a human resources representative or a manager creates the competency based performance appraisal. The appraisal is a system generated comparison of job competencies and demonstrated employee competencies. When you receive an email message indicating that a performance self appraisal is due, you use the Complete My Self Appraisal program (P087712) to:

- Select the current self appraisal for review
- Review the self appraisal for accuracy
- Revise the self appraisal based on the knowledge of the performance
- Add notes that document reasons for the changes
- Attach performance diary entries that document work or personal activities that support changes to the ratings
- Submit the self appraisal to the manager for review

When you enter the Complete My Self Appraisal program, the system automatically recognizes the address book number and displays the currently active appraisal. When the processing options are set appropriately, you can change the system generated ratings for each job and employee competency. You can also change the overall performance rating and enable the system to change the ratings for each of the job and employee competencies.

**See Also**

Chapter 25, “Working With Performance Appraisals,” Reviewing a Competency Based Performance Appraisal, page 295

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## Reviewing a Traditional Performance Self Appraisal

This section provides an overview of traditional performance self appraisal reviews.

## Understanding Traditional Performance Self Appraisal Reviews

Either a human resources representative or a manager initiates the traditional performance appraisal. The appraisal is a template that is stored as text in the software. When you receive an email message that a performance self appraisal is due, use the Complete My Self Appraisal program (P087712) to:

- Select the current self appraisal for review
- Manually complete all sections of the self appraisal, including ratings, if appropriate
- Add notes that document reasons for the evaluations
- Attach performance diary entries that document work or personal activities that support changes to the ratings
- Submit the self appraisal to the manager for review

When you enter the Complete My Self Appraisal program, the system automatically recognizes the address book number and displays the appropriate appraisal template.

### See Also

Chapter 25, “Working With Performance Appraisals,” Completing Traditional Performance Appraisals, page 303

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## Reviewing a Performance Appraisal From The Manager

This section provides an overview of performance appraisal from the manager reviews.

### Understanding Performance Appraisal From The Manager Reviews

Select Employee Self Service menu (G05BESS1), Current Performance Appraisal.

When you receive a message indicating that an employee performance appraisal is ready for the review, you use the Current Performance Appraisal program (P087712) to select the appraisal and review it.

Performance reviews can be either competency based or traditional. You can add notes and attach performance diary entries to either type of performance appraisal to document the views of the ratings that appear in the appraisal.

### See Also

Chapter 25, “Working With Performance Appraisals,” Maintaining a Performance Diary, page 293

Chapter 25, “Working With Performance Appraisals,” Reviewing a Competency Based Performance Appraisal, page 295

Chapter 25, “Working With Performance Appraisals,” Completing Traditional Performance Appraisals, page 303

## Defining Employee Goals Using Employee Self Service

This section provides an overview of employee goal definitions using employee self service and discusses how to:

- Define employee goals using Employee Self Service.
- Create a career development plan.

## Understanding Employee Goal Definitions Using Employee Self Service

You can create and track personal goals as part of the performance appraisal process. Working closely with the manager, you use the employee goals feature to create an action plan for achieving higher levels of performance. You can also use this feature to track personal objectives that are not related to the organization. If the organization uses only a performance appraisal that the manager creates for you, you can work with the manager to create and track the goals. If you also complete a self appraisal, you can create and track goals for Theself.

Employee goals are linked to a current appraisal. Although the system locks the appraisal after you approve the information that the manager enters, you can still create and change the goals and goal actions throughout the year.

## Forms Used to Define Goals for Competency Based Appraisals

Form Name	FormID	Navigation	Usage
Goal Action Plans	W05117B	Employee Self Service (G05BESS1), Complete My Self Appraisal  On the Employee Work With Performance Appraisals form, select an appraisal record and then click Select.  Select an employee competency and select the link to Create a Development Plan for the Selected Competency.	Define employee goals for competency based appraisals
Goal Action Plans	W05117B	Employee Self Service menu (G05BESS1), Complete My Self Appraisal  On the Employee Work With Performance Appraisals form, select an appraisal record and then click Select.	Create a career development plan.

## Defining Employee Goals for Competency Based Appraisals

Access the Goal Action Plans form.

To define goals for competency based appraisals :

1. Complete these fields to create a new employee goal:
  - Goal Status
  - Goal Type
  - Level you would like to achieve:
2. To create a new goal action suggestion, complete these fields:
  - Action Description
  - Action Status
  - Change Reason
  - Estimate Start Date
  - Estimate End Date
3. If you are updating an existing action suggestion, complete these fields:
  - Start Date
  - End Date
4. To move the current goal action suggestion to the Actions list, click the arrow.
5. To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 2 through 4.
6. When the list of goal action suggestions is complete, click Submit to save, and then click Cancel to return to the appraisal form.

## Creating a Career Development Plan

Access the Goal Action Plans form.

To create a career development plan:

1. Complete these fields:
  - Goal Status
  - Goal Type
2. Select the Free Form option for the Suggestion Type field.
3. To create a new goal action suggestion, complete these fields:
  - Action Description
  - Action Status
  - Change Reason
  - Estimate Start Date
  - Estimate End Date
4. If you are updating an existing action suggestion, complete these fields:
  - Start Date
  - End Date
5. To move the current goal action suggestion to the Actions list, click the arrow.

6. To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 3 through 5.
7. When the list of goal action suggestions is complete, click Submit to save. Then click Cancel to return to the appraisal form.

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## Creating Employee Performance Appraisals

This section provides an overview of self service employee performance appraisals creation.

### Understanding Self Service Creation of Employee Performance Appraisals

Human resources representatives and managers can use the performance appraisal management system to create, manage, and print performance appraisals. You use the Create Performance Appraisals program (P087711) to generate appraisals and evaluate employee job performance. These appraisals provide historic examples of activities that employees complete. Depending on the system settings, employees might be able to create performance self appraisals. After the employee submits the performance self appraisal to the manager, the manager reviews the self evaluation and prepares the manager performance appraisal.

#### See Also

Chapter 25, “Working With Performance Appraisals,” Generating Employee Performance Appraisals, page 286

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## Defining Employee Goals Using Manager Self Service

This section provides an overview of defining employee goals using Manager Self Service.

### Understanding Employee Goals Using Manager Self Service

Human resources specialists know that when organizations treat employees who contribute to the success of an organization as valuable assets, the organization and the employees mutually benefit. Employees benefit from establishing specific goals that help increase their skills, perform their jobs at a higher level, and advance their careers.

The employee goals system is linked to the performance management system so that managers have a concise method of measuring employee performance and improvement. You can create employee goals for either competency based or traditional performance appraisals. When you create a competency based appraisal, you can create employee goals for each employee competency. You can also create a separate, personalized career development plan. Using either appraisal approach, the employee goals feature is a tool that you can use to help the employees reach personal and corporate objectives.

You use the Current Performance Appraisals program (P087712) to review an employee appraisal and add employee goals. Although you normally create goals at the same time that you are reviewing an appraisal, you can add and revise them after you finish the appraisal process. After you submit the appraisal and the system locks it to prevent changes to the appraisal, you can still review and change employee goal suggestions.

The human resources department defines the competency information that is used in competency based performance appraisals and employee goals. You can use existing goal suggestions that might already exist, or you can use the Work With Competency Information form (W05104A) to add new ones. You can also create additional items in the UDC tables to support employee goals.

## Prerequisites

Before you complete the tasks in this section:

- Attach goals to competencies, as needed.

See Chapter 20, “Working with Employee Competencies,” Defining Employee Competencies, page 219.

- Set up the category codes for employee goals (UDC 05/G1 through 05/G3, and 05/GT).

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Setting Up Employee Information,” Defining Category Codes.

- Create, review, and revise an employee performance appraisal.

See Chapter 25, “Working With Performance Appraisals,” Generating Employee Performance Appraisals, page 286.





## CHAPTER 27

# Working With Health Safety Management

This chapter provides an overview of health safety management and discusses how to:

- Work with injury and illness information.
- (USA) Report Injury and Illness Information to OSHA (Occupational Safety and Health Administration).

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## Understanding Health Safety Management

Most employers are required to maintain information about injuries and illnesses sustained by employees as a result of performing their job duties.

(USA) In the United States the Occupational Safety and Health Administration (OSHA) requires most employers to maintain information about injuries and illnesses sustained by employees as a result of performing their job duties. OSHA requires employers to record all occupational illnesses, regardless of severity, and occupational injuries that result in death, loss of one or more workdays, restriction of work or motion, loss of consciousness, transfer to another job, or medical treatment other than first aid.

To satisfy government reporting requirements, you can perform these tasks with Human Resources:

- Track detailed information about any injuries or illnesses suffered by employees while performing their jobs.
- Enter supplemental data that includes any additional information that you want to track about injuries or illnesses, regardless of whether you must report this information to the government.
- Use the reports provided by the system to satisfy all governmental reporting requirements.

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## Working With Injury and Illness Information

This section provides an overview of injury and illness information and discusses how to:

- Open an injury or illness case.
- (USA) Open an injury or illness case for the United States.

## Understanding Injury and Illness Information

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

- Date of incident

- Time of incident
- Description of incident
- Employee name
- Employee occupation
- Employee department
- Part of body affected
- Action taken
- Lost or restricted time

You use this information to create and print health safety management reports. Reviewing these reports can help you to identify potential safety hazards.

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

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

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

## **Opening an Injury or Illness Case**

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

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

- Identify hazards
- Increase safety awareness
- Evaluate safety procedures

## **Reviewing Injury and Illness Cases by Establishment**

An establishment is any single location where the organization conducts business or performs services. To determine the relative safety of each of the organization 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.

## **Entering Supplemental Data for Injury and Illness Cases**

Supplemental data is any additional information that you want to track, such as:

- Employees
- Applicants
- Jobs
- Dependents

- Beneficiaries
- Requisitions
- Health safety management cases

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

For health safety management cases, you might track these types of supplemental data:

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

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

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Supplemental Data.

## 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 that you use to review supplemental data for employees.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Supplemental Data.

## Prerequisites

Before you complete the tasks in this section:

- Set up the defined code list for establishment search types (08H/ES).

Establishments are the places in the organization where the employees report for work or perform their duties, or are the business units from which they are paid.

See *JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

- Set up the defined code list for establishment conditions (05/CO).

Establishment conditions note whether unusual occurrences, such as a strike or lockout, occurred at the establishment.

See *JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

- (USA) Verify that the system is set up to track supplemental data for establishment number, as follows:
- Display Mode: C

- Type Data: *EN*
- Description: *Establishment Number*

Column Headings should appear as follows:

- Quantity = Est. No.
- Effective From = Beginning
- Effective Thru = Ending

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Reviewing and Revising Employee Information,” Working with Supplemental Data.

- (USA) Verify that each employee has been added to an establishment.

You track this information through supplemental data to provide the Average Number of Employees and Total Hours Worked information on the OSHA 300 report.

See *JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Understanding Supplemental Data”.

## Forms Used to Work With Injury and Illness Information

Form Name	FormID	Navigation	Usage
Injury/Illness Case	W08601A	Daily Processing (G08BH1), Injury/Illness Case Information  On the Work With Injury/Illness Cases form, click Add.	Open an injury or illness case.
Injury/Illness Case	W08601A	Daily Processing (G08BH1), Injury/Illness Case Information  On the Work With Injury/Illness Cases form, select the case that you want to close.  On the Injury/Illness Case form, complete the Case Status and Date Closed fields, and then click OK.	Close an injury or illness case.
Injury/Illness Case	W08601A	Daily Processing (G08BH1), Injury/Illness Case Information  On the Work With Injury/Illness Cases form, complete the Establishment field and click Find.	Review injury/illness cases by establishment.

## Opening an Injury or Illness Case

Access the Injury/Illness Case form.

**Injury/Illness Case Information - Injury/Illness Case**

Work With Injury/Illness Cases **Injury/Illness Case**

OK Cancel Form Previous Next Tools

Case Number/Description 105 Sat on broken chair; chair collapsed

Individual 7500 McDougle, Cathy

Case Status OP Open

Default Auto Pay Type Leave Begin Date

Union Code Leave End Date

Pay Status Active Pay Class Salaried

Case Information **Injury/Illness Information** Individual Information Category Codes Additional Category Codes

Injury or Illness IN Time of Accident 10:40 Time Employee Began Work 00:00

Injury/Illness Date 04/07/05 Day of Week 5 Thursday

Part of Body 003 Back

Injury or Illness Type 01 Injury

Occurrence Type

Establishment 1 Financial/Distribution Company

Occurrence Location OTR Other

Country of Occurrence USA ☐ Incident Occurred On Employer's Premises

Facility ☐ Hospitalized Overnight ☐ Emergency Room

Injury/Illness Case Form

- Case Number/Description** Enter a unique number assigned to identify the injury or illness case. You can enter a number or let the system assign one. If you leave this field blank, the system assigns the next available number.
- Case Description** Enter a brief description of the occupational injury or illness, including the part or parts of the employee body that are affected.
- Individual** Enter the employee number, TAX ID (Tax Identification), or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.
- Case Status** Enter a code that indicates the current status of the occupational injury or illness case. You define this code using 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.

### Case Information

Select the Case Information tab

- Government Reportable** Enter 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**

Enter the date that the occupational injury or illness was reported.

**Involved Days Away from Work**

Enter a code that specifies whether the employee lost any days of work as a result of the injury or illness. This field is required when reporting OSHA 200 incidents. Values 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.

**No. Days Away from Work  
(Number of Days Away  
from Work)**

Enter 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.

---

**Involved Restricted Work**

Enter 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 permanently assigned job but not being able to perform all the duties normally connected to it.

This field is required when reporting OSHA 200 incidents.

**No. Days Restricted Work  
Activity (Number of  
Days of Restricted Work  
Activity)**

Enter the number of workdays (consecutive or not) on which the employee has work restrictions as a result of the injury or illness. Work restrictions include:

- Assignment to another job on a temporary basis.
- Working at a permanent job less than full time.
- Working at a permanently assigned job but not being able to perform all the duties normally connected to it.

**Date Closed**

Enter the date all matters concerning the occupational injury or illness case are settled and the case is closed.

**Date Returned to Work** Enter 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.

**Date Deceased** Enter the date of the employee death.

### **Injury/Illness Information**

Select the Injury/Illness Information tab

**Injury or Illness** Enter a defined code (08/IR) 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.

**Time of Accident** Enter the time of day the occupational injury or illness occurred.

**Time Employee Began Work** Enter the computer clock in hours:minutes:seconds.

**Injury/Illness Date** Enter 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.

**Part of Body** Enter a code that indicates the part of body affected by the injury or illness. You can define this code using defined code table 08/H4.

**Injury or Illness Type** Enter a defined code (UDC 08/H5) that defines the exact nature of an occupational illness.  
The sequence of the illness codes that Human Resources provides corresponds exactly to the sequence on the OSHA 200 Summary report. If you plan to print the OSHA 200 Summary report that Human Resources provides and send it to the US Department of Labor, you should not change the sequence of the codes.

For example, you can change defined code A, Skin Disease or Disorder, to code R (Rash), if that description better meets the 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 the Department of Labor, then changing the codes, descriptions, and sequence does not produce a conflict between the system description and the OSHA 200 Summary report.

**Occurrence Type** Enter a further explanation of the occurrence. You can define this code using defined code table 08/H3.

<b>Establishment</b>	Enter the establishment where the accident or illness occurred.
<b>Occurrence Location</b>	Enter 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 defined code table 08/H2.
<b>Country of Occurrence</b>	Enter a defined code (00/CN) that identifies a country. The country code has no effect on currency conversion.  Address Book uses the country code for data selection and address formatting.
<b>Facility</b>	Enter a number that identifies the facility where the employee was treated for an Injury/Illness case.
<b>Incident Occurred on Employer Premises</b>	Enter a value that indicates whether the incident occurred on the employer premises. Values are:  <i>1</i> : Yes, the incident occurred on the premises. <i>0</i> : No, the incident did not occur on the premises.
<b>Hospitalized Overnight</b>	Select this option to indicate that the employee was hospitalized overnight as an inpatient.
<b>Emergency Room</b>	Select this option to indicate that the employee was treated in an emergency room.

## Individual Information

Select the Individual Information Tab

<b>Job Type/Step</b>	Enter a defined code (07/G) that defines the jobs within the organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
<b>Workers Comp</b> (workers compensation)	Enter a defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on the periodic workers compensation insurance reports.
<b>Home Company</b>	Enter the company number where the employee records generally reside.
<b>Home Business Unit</b>	Enter the number of the business unit in which the employee generally resides.
<b>Supervisor</b>	Enter the address book number of the supervisor.
<b>Foreman</b>	Enter the address book number of the employee foreman, if applicable.

## Category Codes

Select the Category Codes tab

<b>Term/Transfer</b>	Enter 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 Human Resources provides. This information prints on the OSHA 200 Log report if the case is an illness. If the occupational illness did not result in termination or permanent transfer, you must leave this field blank.
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<b>Safety Group</b>	Enter a code that identifies the safety group, if any, to which the employee belongs. You can define this code using defined code table 08/H1.
<b>H &amp; S Category Code 07</b> (Health and Safety Category Code 07)	Enter a defined code (table 08/H8) available for you to define according to the needs of the organization.
<b>H &amp; S Category Code 08</b> (Health and Safety Category Code 08)	Enter a defined code (table 08/H8) available for you to define according to the needs of the organization.
<b>H &amp; S Category Code 09</b> (Health and Safety Category Code 09)	Enter a defined code (table 08/H9) available for you to define according to the needs of the organization.
<b>H &amp; S Category Code 10</b> (Health and Safety Category Code 10)	Enter a defined code (table 08/H0) available for you to define according to the needs of the organization.

### Additional Category Codes

Select the Additional Category Codes tab

<b>H &amp; S Category Code 11</b> (Health and Safety Category Code 11)	A defined code (08/HA) available for you to define according to the needs of the organization.
<b>H &amp; S Category Code 12</b> (Health and Safety Category Code 12)	A defined code (08/HB) available for you to define according to the needs of the organization.
<b>H &amp; S Category Code 13</b> (Health and Safety Category Code 13)	A defined code (08/HC) available for you to define according to the needs of the organization.
<b>H &amp; S Category Code 14</b> (Health and Safety Category Code 14)	A defined code (08/HD) available for you to define according to the needs of the organization.
<b>H &amp; S Category Code 15</b> (Health and Safety Category Code 15)	A defined code (08/HE) available for you to define according to the needs of the organization.

## (USA) Opening an Injury or Illness Case for the United States

Access the Injury/Illness Case form.

(USA) To open an injury or illness case for the United States:

1. Complete the Case Number/Description field.  
If you leave this field blank, the system assigns the next available number.
2. Complete these fields:
  - Individual
  - Case Status

3. Select Case Information and select these options, if necessary:
  - Government Reportable
  - Involved Days Away from Work
  - Involved Restricted Work
4. If you select the Involved Days Away From Work option, complete the No. Days Away from Work field. Additionally, if you select the Involved Restricted Work option, complete the No. Days Restricted Work Activity field.
5. Complete these fields, if necessary:
  - Date Reported
  - Date Closed
  - Date Returned to Work
  - Date Deceased
6. Select Injury/Illness Information and complete these fields:
  - Injury or Illness
  - Injury/Illness Date

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**Note.** Steps 7 through 10 indicate the various methods that you need to use when completing the Injury or Illness Type field in order to comply with changes in OSHA regulations and retain history for a five year period.

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7. If you are entering an injury that occurred prior to January 1, 2002, leave the Injury or Illness Type field blank.
8. If you are entering an illness that occurred prior to January 1, 2002, complete the Injury or Illness Type field using codes *A* through *G*.
9. If you are entering an illness that occurred on or after January 1, 2002 and before January 1, 2004, complete the Injury or Illness Type field using codes *01* through *05*.
10. If you are entering an illness that occurred after January 1, 2004, complete the Injury or Illness Type field using codes *01*, *02*, *03*, *04*, *05A*, or *06*.
11. Complete these fields, if necessary:
  - Time of Accident
  - Part of Body
  - Occurrence Type
  - Establishment
  - Occurrence Location
  - Country of Occurrence
12. Select the Incident Occurred on Employer Premises option, if necessary.
13. Complete these fields or select the option to retain additional information required by legislative changes to OSHA:
  - Time Employee Began Work
  - Facility

- Hospitalized Overnight
  - Emergency Room
14. Select Individual Information and complete this information:
- Home Company
  - Home Business Unit
15. Complete these fields, if necessary:
- Job Type/Step
  - Workers Comp
  - Supervisor
  - Foreman
16. Select Category Codes and complete any of the optional fields.
17. Click OK.

---

## (USA) Reporting Injury and Illness Information to OSHA

This section provides an overview of OSHA reporting requirements and discusses how to generate OSHA 200 and 300 reports.

### Understanding OSHA Injury and Illness Reporting

The Occupational Safety and Health Administration (OSHA) requires that certain establishments in the United States report injury and illness information. If the organization must report injury and illness statistics to OSHA, you can use the reports that Human Resources provides to satisfy all of the OSHA reporting requirements. Human Resources provides the OSHA 200 Log and Summary reports, OSHA 300 Summary and Log reports, and the OSHA101 Occupation Illness/Injury report (R086415) to meet these requirements. All of the Human Resources OSHA reports meet OSHA requirements and can be used in place of government issued paperwork to satisfy reporting requirements.

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

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**Note.** OSHA reporting requirements changed as of January 1, 2002. To report injuries or illnesses that occurred before January 1, 2002, you must use the OSHA 200 Log or the OSHA 200 Summary report. To report injuries and illnesses that occur on or after January 1, 2002, use the OSHA 300 Log or the OSHA 300A Summary report along with the OSHA101 Occupation Illness/Injury report.

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

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

You generate the OSHA101 Occupation Illness/Injury report to satisfy OSHA record keeping requirements. When you generate this report, the system retrieves the information that you entered in the Injury/Illness Case Information program (P08601). This report includes only those cases that have been defined as government reportable; that is, cases for which the Government Reportable option on the Injury/Illness Case form is turned on.

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

## Generating OSHA 200 and 300 Reports

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

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

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

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

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See [Appendix B, “JD Edwards EnterpriseOne Human Resources Reports,” page 341](#).

## Prerequisites

Before you complete the tasks in this section:

- Set up UDC table 08H/ES to define all of the physical locations that you want to use as establishments for OSHA reporting.
- (USA) Verify that Privacy Case has been added to UDC table 08/H4 and contains this information:
  - Codes: *PRI*
  - Description 01: *Privacy Case*
  - Special Handling: *Y*

You must verify that the Special Handling value is set to *Y* to ensure that the employee name does not appear in the log.

  - Hard Coded: *Y*

See *JD Edwards EnterpriseOne Tools 8.96 Foundation Guide*

- Set up establishment information for employees.

See [Chapter 6, “\(USA\) Setting up OSHA Reporting Information,” page 63](#).

- Map the OSHA reports to run in the local environment.

See *JD Edwards EnterpriseOne Tools 8.96 Configurable Network Computing Implementation Guide*

## Forms Used to Generate OSHA 200 and 300 Reports

Form Name	FormID	Navigation	Usage
OSHA Establishment Reporting	W086400A	Governmental Reporting (G05BG), OSHA Reporting  On the Work With Establishment Groups form, click Add.	Generate OSHA 200 and 300 reports.

## Generating OSHA 200 and 300 Reports

Access the OSHA Establishment Reporting form.

**OSHA Reporting - OSHA Establishment Reporting**

OK Delete Cancel Submit Form Tools

Group Number: 15247

Group Name: OSHA 200 Log

Effective From Date: 01/01/01 Effective Thru Date: 12/31/01

☒ 200 Log
 ☐ 300 Log  
☐ 200 Summary
 ☐ 300A Summary

**Records 1 - 2** [Customize Grid](#)

	Establishment	Establishment Description	Search Type	Search Type Description	Address Line 1
<input type="radio"/>	1	Financial/Distribution Company	O	Company	8055 East Tufts Avenue, Suite
<input checked="" type="radio"/>					

OSHA Establishment Reporting form

To generate OSHA 200 and 300 reports:

- Complete these fields to identify the date range that you want to report:
  - Effective From Date
  - Effective Thru Date
- To report injuries and illnesses that occurred before January 1, 2002, select either one of these options:
  - 200 Log
  - 200 Summary
- To report injuries and illnesses that occurred on or after January 1, 2002, select any of these options:
  - 300 Log
  - 300A Summary
- Complete the Establishment field to identify each physical location that you want to include in the reports, and then click OK.

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

## APPENDIX A

# Delivered Workflow for JD Edwards EnterpriseOne Human Resources

This appendix discusses the delivered workflow for JD Edwards EnterpriseOne Human Resources.

### See Also

*JD Edwards EnterpriseOne Tools 8.96 Workflow Tools Guide*

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## Delivered Workflow for JD Edwards EnterpriseOne Human Resources

This section discusses the JD Edwards EnterpriseOne Human Resources workflow.

### Employee Salary Change Approval Process

This section discusses the Employee Salary Change Approval Process workflow.

#### Description

<b>Workflow Description</b>	If one or both of the threshold values designated in the processing options for the Employee Basic Compensation program (P0801CMP) are greater than zero, the system sends a workflow message to a specified approver when a secured user changes the salary for an individual.
<b>Workflow Trigger</b>	A secured user changes the salary for an individual.
<b>Workflow Action</b>	The approver for the secured user receives a message in the Work Center to approve the salary change. When the approver selects the message in the Work Center, the system displays the menu where the user can select the Workflow Approval application. Within this application the user can approve or reject the salary change.

## Workflow Objects

<b>System</b>	08
<b>Workflow Object Name</b>	EEMAST1
<b>Object ID</b>	W0801CMPB
<b>Event Description / Function Name</b>	Update Data to DB - Before
<b>Sequence / Line Number</b>	100

## Termination Initialization

This section discusses the Termination Initialization workflow.

### Description

<b>Workflow Description</b>	The system initiates the termination of an employee.
<b>Workflow Trigger</b>	An HR representative uses the Employee/Personal program (P0801EMP) to change these values:  – Pay Status for an individual to T (terminated)  – Benefit Status: 9  – Termination Date: Any valid date.
<b>Workflow Action</b>	As the starting point for an employee termination, the system: 1. Processes unpaid DBAs. 2. Locates cost center master information. 3. Retrieves the company constants record. 4. Locates the employee supervisors. 5. Locates the employee address book number. 6. Reads the HRM workflow processing options. 7. Starts the employee termination notification workflow process (TERMNTFY01). 8. Starts the employee termination workflow subprocess (TERMEMP03).

## Workflow Objects

<b>System</b>	08
<b>Workflow Object Name</b>	TERMEMP01
<b>Object ID</b>	W0801EMPA
<b>Event Description / Function Name</b>	Update Data to DB - Before
<b>Sequence / Line Numbers</b>	111

## Employee Review Reminder Workflow

This section discusses the Employee Review Reminder workflow.



## Description

<b>Workflow Description</b>	Notifies the employee supervisor of an upcoming performance review.
<b>Workflow Trigger</b>	When the processing option for Reminder is set to <i>1</i> and the supervisor has at least one employee with an upcoming review, the system notifies the employee supervisor of an upcoming performance review.
<b>Workflow Action</b>	The system sends a message to the employees supervisor with P052200 attached.

## Workflow Objects

<b>System</b>	08
<b>Workflow Object Name</b>	REVIEWRMD
<b>Object ID</b>	R052202
<b>Event Description / Function Name</b>	Do Section
<b>Sequence / Line Numbers</b>	15, 17

## Employee Setup Approval

This section discusses the Employee Setup Approval workflow.

### Description

<b>Workflow Description</b>	If the Require Process Approval processing option on the Employee Setup Workbench program (P08710) is set to <i>1</i> (yes), the system sends a message to the hiring manager supervisor.
<b>Workflow Trigger</b>	The Require Process Approval processing option is set to <i>1</i> (yes) and a manager adds one or more new tasks to a setup process. The workflow is triggered when: <ol style="list-style-type: none"> <li>1. The system prompts the manager to process the tasks and the manager selects Yes.</li> <li>2. A user clicks the Process Tasks button on the Work With Employee Setup form (W08710C).</li> </ol>
<b>Workflow Action</b>	The system updates the status in the F08710 table to W and sends an approval message to the hiring managers supervisor.

## Workflow Objects

<b>System</b>	08
<b>Workflow Object Name</b>	EESETUP01
<b>Object IDs</b>	W08710C, W08710AB
<b>Event Description / Function Name</b>	<p>1) Process Task, Button Clicked</p> <p>- StartWorkflow</p> <p>Button Clicked</p> <p>- N0800129 Start Setup Tasks</p> <p>2) Ok Post Button Clicked</p>
<b>Sequence / Line Numbers</b>	5, 65, 42

## Employee Status Change

This section discusses the Employee Status Change workflow.

### Description

<b>Workflow Description</b>	The system completes the employee status change process.
<b>Workflow Trigger</b>	The Submit button is pressed on the Status Change Review program (P087201).
<b>Workflow Action</b>	<p>When the Submit Button is clicked, these processes are activated:</p> <ol style="list-style-type: none"> <li>OK Post Button Clicked <ul style="list-style-type: none"> <li>– ProcessStatusChange</li> <li>– SetupAddMode</li> <li>– SubmitChange</li> <li>– B0800198</li> </ul> </li> <li>LaunchEmployeeStatusChangeBSFN <ul style="list-style-type: none"> <li>– N0800206 InitiateStatusChang</li> </ul> </li> <li>Submit Button Clicked</li> </ol>

## Workflow Objects

<b>System</b>	08
<b>Workflow Object Name</b>	EESTSCHG
<b>Object IDs</b>	W08720B, W087201A
<b>Event Description / Function Name</b>	<p>Submit Button Clicked</p> <p>– OK Post Button Clicked</p> <p>– ProcessStatusChange</p> <p>– SetupAddMode</p> <p>– SubmitChange</p> <p>– B0800198</p> <p>LaunchEmployeeStatusChangeBSFN</p> <p>– N0800206</p> <p>InitiateStatusChange</p> <p>Submit Button Clicked</p>
<b>Sequence / Line Numbers</b>	6, 2, 25, 24, 4, 81, 44, 18

## Requisition Approval

This section discusses the Requisition Approval workflow.

### Description

<b>Workflow Description</b>	The system sends a workflow message to the employee listed in the processing options. The status of the requisition record (F08102) stays at WW until the message is approved.
<b>Workflow Trigger</b>	The approving manager approves a setup process on W08710AB.
<b>Workflow Action</b>	The approver manager receives a message in the workcenter to approve the requisition. After entering a new requisition status and clicking the OK button the workflow process sends a notification to the recruiter and updates the database with new status.

## Workflow Objects

<b>System</b>	08
<b>Workflow Object Name</b>	REQAPPRVL
<b>Object ID</b>	W08102E
<b>Event Description / Function Name</b>	LaunchEmployeeStatusChangeBSFN
<b>Sequence / Line Number</b>	2

## COBRA Letter

This section discusses the COBRA Letter workflow.

### Description

<b>Workflow Description</b>	The system sends a notification reminding the employee manager to print the COBRA mail merge letter.
<b>Workflow Trigger</b>	The process is initiated by changed fields in the employee master (F060116 or F060120) according to the setup in the Qualifying Event Rules program (P08992).
<b>Workflow Action</b>	This system checks the date mailed field (QDM1,QDM2) in F08910 and F089101. If the field contains a value the process ends. If the field does not contain a value, the system sends a message to the employee direct managers. The system will then wait one day and check the date mailed field again. The system sends a new message to the employee second level manager if the field still contains no value. This process repeats sending messages to the next hire manager until the letter is printed or the top level manager has been notified.

## Workflow Objects

<b>System</b>	08
<b>Workflow Object Name</b>	COBRA
<b>Object IDs</b>	1. F060116, F060120, P089101, N0800270
<b>Event Description / Function Name</b>	After Record is Updated After Record is Updated Update Record to DB After StartCOBRAWorkflowProcess

## APPENDIX B

# JD Edwards EnterpriseOne Human Resources Reports

This appendix provides an overview of human resources reports and enables you to:

- View summary tables of all reports.
- View details for selected reports.

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## JD Edwards EnterpriseOne Human Resources Reports: A to Z

This table lists reports related to the recruitment process. The reports listed in each table are sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation
R080401 Applicant Data by Data Type	Use this program to review a list of all of the applicants who have information entered in a particular supplemental data type.	Applicant Supplemental Data (G08BSDA1), Applicant Data by Data Type
R080406 Requisition Data by Data Type	Use this program to review a list of all of the requisitions that contain information in a particular supplemental data type.	Requisition Supplemental Data (G08BSDR1), Requisition Data by Data Type
R080416 Requisition Supplemental Data Report	Use this program to review information for one or more requisitions.	Requisition Supplemental Data (G08BSDR1), Requisition Supplemental Data Report
R081490 Requisition Review - Position	Use this program to determine the approval status of a group of requisitions. You can print two versions of this report. One version lists the requisitions by job description, and the other version lists them by position description.	Requisitions (G08BR1), Requisition Review - Position

Report ID and Report Name	Description	Navigation
R084480 Applicant List	Use this program to review detailed applicant information. You can use this report to list all of the applicants or just specific applicants, such as those who have reached a certain point in the hiring process. This report lists detailed information, such as the applicant available date and asking salary.	Applicants (G08BA1), Applicant List
R084481 Applicant Listing by Position	Use this program to review a list of all applicants who have applied for a specific position.	Applicants (G08BA1), Applicant Listing by Position
R084482 Applicant List-Job Type/Step	Use this program to review a list of all of the applicants, arranged according to their job type and step. This report includes the number of applicants in each job type and step, along with the status of each applicant.	Applicants (G08BA1), Applicant List-Job Type/Step
R084483 (USA) Applicant List-EEO Listing	Use this program to analyze the number of female, minority, veteran, or disabled applicants who have applied to the organization. You can also use this report for Affirmative Action reporting purposes.	Applicants menu (G08BA1), Applicant List-EEO Listing
R080411 Applicant Supplemental Data Report	Use this program to review complete supplemental information for one or more applicants.	Applicant Supplemental Data (G08BSDA1), Applicant Supplemental Data Report

This table lists government related reports for human resources, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation
R058514 (USA) EEO-4 Annual Report	Use this program to verify compliance with EEOC nondiscrimination requirements.	Government Reporting (G05BG), EEO-4 Annual Report
R058514D (USA) Point in Time EEO-4	Use this program to follow up EEOC nondiscrimination requirements for private employers. You might want to use this report to capture a picture of EEO information for specific individuals or groups of employees to prepare a response to an EEO inquiry.	Point in Time Employee Master (G05B31), Point in Time EEO-4
R058515 (USA) EEO-1 Annual Report	Use this program to update the report with the prior year information and calculate gender and ethnicity information for the current year.	Government Reporting (G05BG), EEO-1 Annual Report

Report ID and Report Name	Description	Navigation
R058515D (USA) Point-In-Time EEO-1	Use this program to follow up EEOC nondiscrimination requirements for private employers. You might want to use this report to capture a picture of EEO information for specific individuals or groups of employees to prepare a response to an EEO inquiry.	Point in Time Employee Master (G05B31), Point in Time EEO-1
R058516 (USA) EEO-5 Annual Report	Use this program to verify compliance with EEOC nondiscrimination requirements for public school systems and districts.	Government Reporting (G05BG), EEO-5 Annual Report
R068910 (USA) EEO Staff Utilization Report	Use this program to review the number of hours that employees worked by ethnic group for each job category	Employee Adv & Technical Operations (G05BE3), EEO Staff Utilization Report
R080434 (USA) Veteran Employment (VETS-100)	Use this program to review employees in each EEO job category per home company and home business unit who are disabled veterans, Vietnam veterans or Other Veterans.	Government Reporting (G05BG), Veteran Employment (VETS-100)
R080434D (USA) Point in Time Veteran Employment	Use this program to follow up EEOC nondiscrimination requirements for private employers. Run this report to review employees, as of a specific date, in each EEO job category per home company and home business unit who are disabled veterans or Vietnam veterans.	Point in Time Employee Master (G05B31), Point in Time Veteran Employment
R080435 (USA) Workforce Analysis Report	Use this program to review a summary of employees by gender, ethnic code, job type, and job step for each home business unit within the home company.	Government Reporting (G05BG), Workforce Analysis Report
R084400 (USA) Hired Applicants by EEO Job Category	Use this program to show how the organization is performing as an equal opportunity employer	Government Reporting (G05BG), Hired Applicants by EEO Job Category
R084411 (USA) Applicant Flow Analysis	Use this program to review the number of applicants in each EEO job category by ethnicity and gender who have received offers, been hired, or been rejected. This report shows how the organization is performing as an equal opportunity employer.	Government Reporting (G05BG), Applicant Flow Analysis

Report ID and Report Name	Description	Navigation
R084412 (USA) Adverse Impact Analysis	Use this program to review the number of male, female, and ethnic applicants for each EEO job category against those applicants who were hired.	Government Reporting (G05BG), Adverse Impact Analysis
R084422 (USA) Affirmative Action Exception Report	Run the Affirmative Action Exception Report (R084422) before you run the Hired Applicants by EEO Job Category, Applicant Flow Analysis, or Adverse Impact Analysis reports. The Affirmative Action Exception Report lists applicants with missing values in any of these fields: <ul style="list-style-type: none"> <li>• EEO Job Category (from defined code list (06/J)</li> <li>• Home Business Unit</li> <li>• Gender</li> <li>• Ethnic Code (a code other than defined codes 01-05 from 06/M)</li> </ul>	Government Reporting (G05BG), Affirmative Action Exception Report

This table lists reports related to position budget management, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation
R081420 Open Amounts by Position	Use this program to review position information for salaries, FTEs, and hours worked.	Daily Processing (G08BP1), Open Amounts by Position
R081430 Cross-Year Budget Comparison	Use this program to simultaneously review the position budgets for two fiscal years. 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 budget amount, as it appears in the left column of the report.	Daily Processing (G08BP1), Cross Year Budget Comparison
R081440 Position Control Comparison	Use this program to run one of these versions for position control comparison: <ul style="list-style-type: none"> <li>• Position Control Headcount</li> <li>• Position Control Budgeted FTE (Position Control Budgeted Full-Time Equivalent)</li> <li>• Position Control Effective FTE</li> </ul>	Daily Processing (G08BP1), Position Control Comparison



Report ID and Report Name	Description	Navigation
R081460 Position Budgets	Use this program to review by fiscal year the position budgets that are established for all business units and positions.	Daily Processing (G08BP1), Position Budgets
R081470 Position Budgets by Job Type & Step	Use this program to review the position budgets for all business units and positions for each job type and job step within the organization by fiscal year.	Daily Processing (G08BP1), Position Budgets by Job Type & Step
R081480 Employee Position Activity	Use this program to review all of the position activity for each employee within the organization. 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 sort this report either by employee last name or by employee number.	Daily Processing (G08BP1), Employee Position Activity

This table lists reports related to competencies and performance management, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation
R05100A Review Competencies	Use this program when you need to determine the employees who have competencies in a particular competency aggregate.	Competency Management (G05BC1), Review Competency Aggregates
R052202 Upcoming Reviews	Use this program when you need to view a list of employees whose performance appraisals are due in 90 days, overdue or are upcoming for the whole company or a specific business unit. The Upcoming Reviews report can use workflow to send a reminder to the supervisor message center so that the supervisor can create the necessary performance appraisals.	Performance Mgmt Periodic Processing (G08PM2), Upcoming Reviews
R080013 Gap Analysis	Use this program when you need to compare the competencies that employees possess with those that are required for a particular job.	Competency Mgmt Periodic Processing (G05BC2), Gap Analysis Report

Report ID and Report Name	Description	Navigation
R080016 Job Match Report	Use this program when you need to determine the employees who are qualified for a particular job. This report lists all of the required competencies for the job and the proficiency level that the employee has attained in each of these competencies.	Competency Mgmt Periodic Processing (G05BC2), Job Match Report
R080021 Job Profile Report	Use this program when you need a formal description of a job, such as when you are advertising a job opening.	Competency Mgmt Periodic Processing (G05BC2), Job Profile Report

This table lists reports related to health safety management, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation
P086400 BLS Survey of Occupational Injuries and Illnesses	Use this program to generate the BLS Survey of Occupational Injuries and Illnesses.	Government Reporting (G05BG), BLS Survey of Occupational Injuries and Illnesses  On Work With Establishment Groups, click Find.  Select a group in the detail area, and then select Submit from the Row menu.
R080403 Case Report by Data Type	Use this program to review a list of all of the injury and illness cases with information in a particular data type (such as physical object involved or medical expenses).	Case Supplemental Data (G08BSDS1), Case Report by Data Type
R080413 Case Supplemental Data Report	Use this program to review complete information for each injury or illness case that you specify.	Case Supplemental Data (G08BSDS1), Case Supplemental Data Report
R086415 OSHA 301 Injury and Illness Report	Use this program to generate the OSHA 301 Injury and Illness Report.	Governmental Reporting (G05BG), OSHA 101 Occupation Illness/Injury Report
R086420 Occupational Illness/Injury Report	Use this program to analyze health safety management statistics for the organization.	Case Supplemental Data (G08BSDS1), Occupational Illness/Injury Report
R086421 Government Reportable Illness/Injury	Use this program to analyze health safety management statistics for the organization.	Case Supplemental Data (G08BSDS1), Government Reportable Illness/Injury

## JD Edwards Human Resources Reports: Selected Reports

Some reports include a more detailed description, as well as information about processing options. These reports are listed alphanumerically by report ID in this appendix.

### P086400 - BLS Survey of Occupational Injuries and Illnesses

The U.S. Department of Labor Bureau of Labor Statistics (BLS) collects and maintains statistics and prepares reports regarding work related injuries and illnesses. The BLS and participating state agencies send the Survey of Occupational Injuries and Illnesses to a sample of private industry employers in order to gather the data that is used to prepare estimates of occupational injuries and illness. Policy makers collect data so that they can track trends in occupational safety and health problems. The BLS publishes the estimates generated by this process in a variety of online and published formats. Participation is mandatory for employers who receive the survey, even if they experience no instances of occupational injury or illness during the reporting year.

Verify that you have set up OSHA establishment information.

See [Chapter 6, “\(USA\) Setting up OSHA Reporting Information,” page 63](#).

### Processing Options for OSHA Reporting (P086400)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

#### Display

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- |                             |  |
|-----------------------------|--|
| <b>1. Select the report</b> | Use this processing option to specify which report to run. Values are: |
|                             | Blank: OSHA Report   |
|                             | 1: OSHA Report   |
|                             | 2: BLS Survey Report   |

#### Versions

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- |  |  |
|--|--|
| <b>1. OSHA 200 Injury and Illness Report (R086400) Version</b> | Use this processing option to specify the version of the OSHA Injury and Illness report (R086400) that you want to run. The default version is <i>XJDE0001</i> . |
|--|--|

- |   |   |
|---|---|
| <b>2. OSHA 300 Injury and Illness Report (R086401) Version</b>    | Use this processing option to specify the version of the OSHA - 300 Injury and Illness report (R086401). The default version is <i>XJDE0001</i> .   |
| <b>3. Survey of Occupational Injuries and Illnesses (R086402)</b> | Use this processing option to specify the version of the BLS: Survey of Occupational Injuries and Illnesses report (R086402) that you want to run. The default version is <i>XJDE0001</i> . |

## R05100A - Review Competencies

When you need to determine the employees who have competencies in a particular competency aggregate, you can review the Review Competency Aggregates report (R05100A). For a particular competency aggregate, this report lists each employee competency, including the proficiency level that the employee has attained in the competency.

## Processing Options for Review Competencies (R05100A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Default

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- |                          |  |
|--------------------------|--|
| <b>1. Aggregate Code</b> | Use this processing option to specify a code that unifies individual competencies based on certain criteria. |
|--------------------------|--|

## R052202 - Upcoming Reviews

The Upcoming Reviews report lists employees who are due to receive an employee performance appraisal as of a specific date or within a specified number of days. The report prints a list of employees based on the criteria that you specify. After you print the Upcoming Reviews report, you run the Create Performance Appraisals program (P087711) to select the employees, create appraisals, and send messages to each of the employees and managers.

This report can use workflow to send a reminder to the supervisor message center so that the supervisor can create the necessary performance appraisals.

You might use Upcoming Reviews report when you are generating employee performance appraisals for the whole company or a specific business unit.

## Processing Options for Upcoming Reviews (R052202)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Defaults

These processing options specify information about the employee and supervisor.

- |  |   |
|--|---|
| <b>1. Employee Number Display</b>  | Use this processing option to specify the employee number that you want to print on the report. Values are:<br><i>A</i> : Address book number<br><i>S</i> : Employee tax identification number<br><i>O</i> : Other number |
| <b>2. URL For Supervisor Review Instructions (Uniform Resource Locator for Supervisor Review Instructions)</b> | Use this processing option to specify the uniform resource locator for the supervisor review instructions.  |

## Process

These processing options specify the dates for which you want to review appraisals and whether the system runs the workflow reminder process.

- |                                     |   |
|-------------------------------------|---|
| <b>1. Workflow Reminder Process</b> | Use this processing option to specify whether to run the workflow reminder process. Values are:<br><i>1</i> : Run the workflow process.<br><i>0</i> : Do not run the workflow process.  |
| <b>2. From Date</b>                 | Use this processing option to limit reviews. The review date must be greater than or equal to the From Date.  |
| <b>3. Thru Date</b>                 | Use this processing option to limit reviews processed. The review date must be less than or equal to the Thru Date.   |
| <b>4. Days From Today</b>           | Use this processing option to limit reviews processed. Enter Days From Today to process all new review dates that are less than or equal to the system date and the number of days entered into the processing option. Enter Date of Thru Date to ignore this option. |

## R058514 - (USA) EEO-4 Annual

State and local governments are required to run the EEO-4 Annual Report (R058514) to verify compliance with EEOC nondiscrimination requirements. Run the EEO-4 Report (R058514) every odd numbered year if you are a state or local government. State and local government employers are required to file an EEO-4 report biennially, using data from the fiscal year July 1 through June 30.

This five page report separates employees into the standard EEO job categories and then sorts employees by EEO ethnic codes and salary ranges by gender. The total for each job category is calculated and printed, as is the total for each home company or home business unit. The report prints totals by job description and company for full time employees.

Information for this report is based on the Employee Master Information table (F060116). Defined codes 06/J, used for EEO-4 reporting, are hard coded and should not be changed.

## Processing Options for EEO-4 Annual (R058514)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### General

These processing options specify the default values that the system applies when you run the report.

#### 1. Begin Date

Use this processing option to specify the beginning date of the fiscal year that the system will use for employment figures. If you are using Payroll, the report lists only those employees who were included in the pay period as of the last day of the fiscal year. If you are not using Payroll, the report includes only those employees whose employment status is active (not terminated or on leave of absence) on the last day of the fiscal year. New hire figures include the entire fiscal year.

The Equal Employment Opportunity Commission recommends that you use July 1 as the beginning date of the fiscal year.

#### 2. End Date

Use this processing option to enter the ending date of the fiscal year to be used for employment figures. If you are using Payroll, the report lists only those employees who were included in the pay period that includes the last day of the fiscal year. If you are not using Payroll, the report includes only those employees whose employment status is active (not terminated or on leave of absence) on the last day of the fiscal year. New hire figures include the entire fiscal year.

The Equal Employment Opportunity Commission recommends that you use June 30 as the ending date of the fiscal year.

#### 3. Company

Use this processing option to specify the code that represents the company.

This code is assigned by the Equal Employment Opportunity Commission (EEOC) to identify a specific organization, fund, or other entity. The code is used for government reports, such as EEO-1. Do not include hyphens in the value that you enter. The system will add appropriate hyphens when you print reports.

**4. EEOC Control Number  
(Equal Employment  
Opportunity Commission  
Control Number)**

Use this processing option to enter the unique, 8 digit number that the State and Local Reporting Committee of the Equal Employment Opportunity Commission (EEOC) assigns to a jurisdiction. The 8th position of the number may be alphabetic for special districts. The first through seventh digits are always numeric. If you are unsure of the control number, consult the EEO-4 coordinator.

**5. Report Function(s)**

Use this processing option to enter the function codes that are defined by the Equal Employment Opportunity Commission (EEOC). Each code represents a job function that is performed by employees in an jurisdiction. When you enter more than one code, enter a space between codes. Values are:

- 1: Financial Administration/General Control*
- 2: Streets and Highways*
- 3: Public Welfare*
- 4: Police Protection*
- 5: Fire Protection*
- 6: Natural Resources/Parks and Recreation*
- 7: Hospitals and Sanatoriums*
- 8: Health*
- 9: Housing*
- 10: Community Development*
- 11: Corrections*
- 12: Utilities and Transportation*
- 13: Sanitation and Sewage*
- 14: Employment Security State Governments Only*
- 15: Other*

Jurisdictions with fewer than 1000 full time employees can print the report in these two ways:

- Print one report for all functions that includes all employees who perform functions with fewer than 100 employees.
- Print a separate report for each function that is performed by 100 or more employees.

Jurisdictions with 1000 or more full time employees must print a separate report for each function that is performed by the employees in the jurisdiction. If more than one function is performed by the jurisdiction, complete the summary sheet that is provided by the EEOC, which enables you to specify all of the functions that are performed by the employees in the jurisdiction. Submit the summary sheet and up to 15 separate function reports in one package.

The function codes that you enter in this processing option are used for report headings only. The codes are not used for selecting the records that appear on the report. The method that you use to identify the functions that employees perform varies by organization. You can use the data selection for the report to accommodate the organization rules for function identification. You must run the report for each function individually.

- 6. Full time Code(s)** Use this processing option to enter the codes that the organization uses to identify full time employees. If an employee who is included on the report has an employment status (EST) code that does not match one of the codes in this processing option, the employee will be included in the other than full time employees section of the report. If blank is a valid code, enter it in this format: ' ' (single quote followed by a space and then another single quote). When you enter multiple codes, enter a space between each code (for example, 1 2 3).
- 7. Page Number** Use this processing option to enter the page number to print on the first page of the EEO-4 report. Subsequent page numbers will increment by 1.

## Certification

These processing options specify the names and related information for the individuals whom the Equal Opportunity Commission can contact for further information, if needed.

- 1. Certifier** Use this processing option to enter the address book number of the person who certifies that the EEO-4 report is accurate and truthful.
- 2. Certifier Title** Use this processing option to enter a description of the duties performed by the person who certifies the report. If this person is an employee of the company, you can leave this processing option blank and the system prints the employee job description from the Employee Master table (F060116) on the EEO-4 report.
- 3. Contact** Use this processing option to enter the address book number of the person whom the Equal Employment Opportunity Commission would contact for additional information about the report, if necessary.
- 4. Contact Title** Use this processing option to enter a description of the job duties that the contact person performs. If the contact person is an employee of the company, you can leave this processing option blank to have the system print the job description entered in the employee Employee Master record.
- 5. Company Address** Use this processing option to specify whether the establishment mailing address should be used for the contact person. Values are:  
 0: No  
 1: Yes  
 The system stores the values in UDC 00/NY.
- 6. Contact Phone** Use this processing option to specify the area code and telephone number of the contact person. For example, this format: (xxx) xxx-xxxx.  
 Include appropriate parentheses and dashes. Do not include an extension number.

## R058514D - Point-In-Time EEO-4 Annual Report

Use the Point-In-Time EEO-4 Report (R058514D) to follow up EEOC nondiscrimination requirements for private employers. You might want to use this report to capture a picture of EEO information for specific individuals or groups of employees to prepare a response to an EEO inquiry.

The Point-In-Time EEO-4 Report contains the same information as the EEO-4 Annual Report; however, the point-in-time report enables you to review information as of a specific date.



The Point-In-Time EEO-4 Report is not a replacement for the EEO-4 Employment Data report. Use the EEO-4 Annual report to verify that you are in compliance with the EEOC nondiscrimination requirements for private employers.

Before you run the Point-In-Time EEO-4 Report, prepare a new point-in-time version (employee group or specific date), and review the data. In addition to the other processing option tabs, set appropriate options on the Point in Time tab.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Working with Point-in-Time Employee Reports”.

## Processing Options for Point-In-Time EEO-4 Annual Report (R058514D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Point in Time

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

**Effective Date:** Use this processing option to specify a future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

**Version Name:** Use this processing option to specify the version name that you assigned to a date effective snapshot of a business unit category code structure when you created the snapshot.

### General

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

**1. Begin Date** Use this processing option to specify the beginning date of the fiscal year that the system will use for employment figures. If you are using JD Edwards EnterpriseOne Payroll, the report lists only those employees who were included in the pay period as of the last day of the fiscal year. If you are not using JD Edwards EnterpriseOne Payroll, the report includes only those employees whose employment status is active (not terminated or on leave of absence) on the last day of the fiscal year. New hire figures include the entire fiscal year.

The Equal Employment Opportunity Commission recommends that you use July 1 as the beginning date of the fiscal year.

**2. End Date**

Use this processing option to enter the ending date of the fiscal year to be used for employment figures. If you are using JD Edwards EnterpriseOne Payroll, the report lists only those employees who were included in the pay period that includes the last day of the fiscal year. If you are not using JD Edwards EnterpriseOne Payroll, the report includes only those employees whose employment status is active (not terminated or on leave of absence) on the last day of the fiscal year. New hire figures include the entire fiscal year.

The Equal Employment Opportunity Commission recommends that you use June 30 as the ending date of the fiscal year.

**3. Company**

Use this processing option to specify a code that identifies a specific organization, fund, or other reporting entity. 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.

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**Note.** You can use company 00000 for default values such as dates and AAIs. You cannot use company 00000 for transaction entries.

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**4. EEOC Control Number (Equal Employment Opportunity Commission Control Number)**

Use this processing option to enter the unique, 8 digit number that the State and Local Reporting Committee of the Equal Employment Opportunity Commission (EEOC) assigns to a jurisdiction. The 8th position of the number may be alphabetic for special districts. The first through seventh digits are always numeric. If you are unsure of the control number, consult the EEO-4 coordinator.

**5. Report Function(s)**

Use this processing option to enter the function codes that are defined by the Equal Employment Opportunity Commission (EEOC). Each code represents a job function performed by employees in an jurisdiction. When you enter more than one code, enter a space between codes. Values are:

- 1: Financial Administration/General Control
- 2: Streets and Highways
- 3: Public Welfare
- 4: Police Protection
- 5: Fire Protection
- 6: Natural Resources/Parks and Recreation
- 7: Hospitals and Sanatoriums
- 8: Health
- 9: Housing
- 10: Community Development
- 11: Corrections
- 12: Utilities and Transportation
- 13: Sanitation and Sewage
- 14: Employment Security State Governments Only
- 15: Other

Jurisdictions with fewer than 1000 full time employees can print the report in one of these ways:

- Print one report for all functions that includes all employees who perform functions with fewer than 100 employees.
- Print a separate report for each function that is performed by 100 or more employees.

Jurisdictions with 1000 or more full time employees must print a separate report for each function that is performed by the employees in the jurisdiction. If more than one function is performed by the jurisdiction, complete the summary sheet provided by the EEOC, which enables you to specify all of the functions performed by the employees in the jurisdiction. Submit the summary sheet and up to 15 separate function reports in one package.

The function codes that you enter in this processing option are used for report headings only. The codes are not used for selecting the records that appear on the report. The method that you use to identify the functions that employees perform varies by organization. You can use the data selection for the report to accommodate the organization rules for function identification.

#### **6. Full time Code(s)**

Use this processing option to enter the codes that the organization uses to identify full time employees. If an employee who is included on the report has an employment status (EST) code that does not match one of the codes in this processing option, the employee will be included in the "other than full time employees" section of the report. If blank is a valid code, enter it in this format: ' ' (single quote followed by a space and then another single quote). When you enter multiple codes, enter a space between each code (for example, 1 2 3).

#### **7. Page Number**

Use this processing option to enter the page number to print on the first page of the EEO-4 report. Subsequent page numbers will increment by 1.

### **Certification**

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

#### **1. Certifier**

Use this processing option to enter the address book number of the person who certifies that the EEO-4 report is accurate and truthful.

#### **2. Certifier Title**

Use this processing option to enter a description of the duties performed by the person who certifies the report. If this person is an employee of the company, you can leave this processing option blank and the system prints the employee job description from the Employee Master table (F060116) on the EEO-4 report.

#### **3. Contact**

Use this processing option to enter the address book number of the person whom the Equal Employment Opportunity Commission would contact for additional information about the report, if necessary.

#### **4. Contact Title**

Use this processing option to enter a description of the job duties that the contact person performs. If the contact person is an employee of the company, you can leave this processing option blank to have the system print the job description entered in the employee Employee Master record.

#### **5. Company Address**

Use this processing option to specify whether the establishment mailing address should be used for the contact person. Values are:

0: No

1: Yes

The system stores the values in UDC 00/NY.

## 6. Contact Phone

Use this processing option to specify the area code and telephone number of the contact person. For example, use this format: (xxx) xxx-xxxx. Include appropriate parentheses and dashes. Do not include an extension number.

## R058515 - (USA) EEO-1 Report

Run the EEO-1 Report (R058515) to verify that the organization complies with the nondiscrimination requirements for private employers that the Equal Employment Opportunity Commission (EEOC) established. EEOC specifications require that you use data from the months of July through September. The EEOC also requires reporting totals from the prior year.

This report separates employees into the standard EEO job categories and then sorts employees by EEO ethnic codes and gender. The total for each job category is calculated and printed, as is the total for each home company or home business unit. The report starts a new page and prints totals for each new company.

When you run the EEO-1 Report (R058515), the EEO-1 Annual Data table (F05850) updates the report with the prior year information and calculates gender and ethnicity information for the current year.

If you use Payroll, the system verifies whether an employee should be included in the report by validating payment dates from the Pay Check History Summary table (F06156) using the reporting dates as defined in the processing options. If you do not use Payroll, the system determines whether an employee should appear on the report using individual employment dates in the Employee History table (F08042).

If the system finds that an employee was paid during the reporting dates, the employee is automatically included on the report, provided that the employee has a record of an EEO code, gender, and ethnicity in the Employee Master Information table.

When you run the report, you can set up the processing options to print an EEO-1 report for establishments with 50 or fewer employees. To create reports that include separate establishments for a company with multiple establishments, you can use the Employee Master program (P0801) to create defined codes that designate establishment numbers for each individual. You can then use the report data selection to select appropriate category codes to sort individual establishments for display on the report.

If this is the first filing year for which you are using the JD Edwards EnterpriseOne system, you must enter EEO information for the company before you run the report for the first time.

See Chapter 10, "Entering Data for Human Resources Government Reports," (USA) Entering EEO-1 Information, page 99.

## Processing Options for EEO-1 Report (R058515)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## General

These processing options specify additional information and default values that the system applies when you generate this report.

- 1. Begin Date**

Use this processing option to specify the beginning date of the pay period to be used for employment figures. If you are using Payroll, only those employees who received payments during the pay period are included on the report. If you are not using Payroll, only those employees who were active (not terminated or on leave of absence) during the pay period are included on the report.
- 2. End Date**

Use this processing option to specify the ending date of the pay period to be used for employment figures. If you are using Payroll, only those employees who received payments during the pay period are included on the report. If you are not using Payroll, only those employees who were active (not terminated or on leave of absence) during the pay period are included on the report.
- 3. Report Type**

Use this processing option to select the type of report that fits the needs of the organization. Values are:

  - 1: Single Establishment Report
  - 2: Consolidated Report
  - 3: Headquarters Report
  - 4: Individual Establishment Report
  - 5: Small Establishment Report

The system stores the values in UDC 05U/ET.
- 4. Establishments Covered**

Use this processing option to specify the number of establishments that are included in the EEO-1 Consolidated Report. The system generated consolidated report cannot be submitted to the Equal Employment Opportunity Commission. Use this report only to review the information and verify that it is correct.

Information from the system generated consolidated report must be transferred and submitted on the actual EEO-1 form.
- 5. Parent Employs 100+**

Use this processing option to specify whether 100 or more people worked for the parent company during the reporting period. The value that you enter in this processing option appears as Y or N in Section C, Question 1 of the EEO-1 report. This value is used to determine whether the establishment must file an EEO-1 report. Values include:

  - 0: No
  - 1: Yes

The system stores the values in UDC 00/NY.
- 6. Affiliate Employs 100+**

Use this processing option to specify whether 100 or more people worked for an affiliated company during the reporting period. The value that you enter in this processing option appears as Y or N in Section C, Question 2 of the EEO-1 report. This value is used to determine whether the establishment must file an EEO-1 report. Values include:

  - 0: No
  - 1: Yes

The system stores the values in UDC 00/NY.

## 7. Government Contracts

Use this processing option to specify whether the parent company was involved in any government contract during the reporting period. The value that you enter in this processing option appears as Y or N in section C, Question 3 of the EEO-1 report. This value is used to determine whether the establishment must file an EEO-1 report. Values include:

0: No

1: Yes

The system stores the values in UDC 00/NY.

## 8. Employ Apprentice(s)

Use this processing option to specify whether the establishment employed one or more apprentices during the reporting period. The value that you enter in this processing option appears as Y or N in the Other Questions section of the EEO-1 report. Values include:

0: No

1: Yes

The system stores the values in UDC 00/NY.

## 9. Page Number

Use this processing option to specify the beginning page number to print on the EEO-1 reports, except the single establishment report.

## Company

These processing options specify the default values that the system applies when you generate this report.

### 1. Parent Company

Use this processing option to specify the code that was assigned for the parent company of the organization, if any.

### 2. Establishment

Use this processing option to enter the address book number of the establishment for which you are generating the EEO-1 report. If you enter zero in this processing option, the system uses the parent company address book number.

### 3. EEO Company ID (Equal Employment Opportunity Company Identification)

Use this processing option to specify the code assigned by the U. S. Equal Employment Opportunity Commission (EEOC) that identifies a specific organization, fund, or entity. The code is used for government reports, such as EEO-1.

### 4. EEO Unit Number (Equal Employment Opportunity Unit Number)

Use this processing option to specify the code assigned by the U. S. Equal Employment Opportunity Commission (EEOC) to identify a specific business unit, location, or establishment. The code is used for government reports, such as EEO-1.

### 5. SIC Code (Standard Industrial Code)

Use this processing option to specify the Standard Industrial Code (SIC) that represents the company or division. The SIC code classifies goods and services. This code can be found in any of these formats:

- Standard Industrial Code (SIC).

SIC codes are a method used in the United States to classify goods and services. This code normally has four digits, although some codes have extension digits that serve as qualifiers.

- Harmonized System (HS).

HS codes are an international method of classifying goods. More than fifty countries use this code system. Each code can contain up to 10 digits.

- Standard Industrial Trade Classification (SITC).

SITC codes, developed by the United Nations, are a numerical code system used to classify goods in international trade. These codes are used by international organizations and can contain up to six digits.

The system stores the values in UDC 01/SC.

## **6. North American Industry Classification System (NAICS)**

Use this processing option to specify a code that classifies goods and services. The North American Industry Classification System is the new standard code system to describe business establishments and industries, replacing the Standard Industrial Classifications \*SIC Codes). This code may be formatted as follows:

- Standard Industrial Classification (SIC).

A 4 digit code used in the United States to classify goods and services.

- North American Industry Classification System (NAICS).

A code of up to six digits currently used in the United States to classify goods and services.

The system stores the values in UDC 08/NC.

## **7. Dun and Bradstreet**

Use this processing option to enter a number used by Dun and Bradstreet to identify the company. Complete this processing option for a company that is involved in government contracts, provided that the company has a Dun and Bradstreet number. When you enter the number, include the appropriate dashes (for example, 9-999-9999).

## **Certification**

These processing options specify the names and related information for the individuals whom the Equal Opportunity Commission can contact for further information, if needed.

### **1. Certifier**

Use this processing option to enter the address book number of the person who certifies that the EEO-1 report is accurate and truthful. This number is required only for single establishment EEO-1 reports.

### **2. Certifier Title**

Use this processing option to enter a description of the duties that the certifying person performs. If the certifying person is an employee of the company, you can leave this processing option blank to have the system print the job description entered in the employee record on the EEO-1 report. This title prints only for single establishment reports. It is not required for multiple establishment reports.

### **3. Contact**

Use this processing option to enter the address book number of the person whom the Equal Employment Opportunity Commission would contact for additional information about the report, if necessary. This number is required only for single establishment EEO-1 reports.

### **4. Contact Title**

Use this processing option to enter a description of the duties that the contact person performs. If the contact person is an employee of the company, you can leave this processing option blank to have the system print the job description entered in the employee record on the EEO-1 report. This title

prints only for single establishment reports. It is not required for multiple establishment reports.

#### **5. Establishment Address**

Use this processing option to specify whether the establishment mailing address should be used for the contact person. Values are:

*0*: No

*1*: Yes

These values are stored in defined code list 00/NY.

#### **6. Contact Phone**

Use this processing option to specify the area code and phone number of the contact person. For example, use this format: (xxx) xxx-xxxx. Include parentheses and dashes. Do not include an extension number. The phone number is required only for single establishment reports.

#### **7. Contact Extension**

Use this processing option to enter the phone number extension of the contact person. The extension number is required only for single establishment reports.

### **Information**

These processing options specify information that you want to include in section E of the EEO-1 report.

#### **1. Information - Line 1**

Use this processing option to enter information that you want to include in section E of the EEO-1 report. You can enter up to 40 characters. The processing option description corresponds to the line of the report on which the information appears.

#### **2. Information - Line 2**

Use this processing option to enter information that you want to include in section E of the EEO-1 report. You can enter up to 40 characters. The processing option description corresponds to the line of the report on which the information appears.

#### **3. Information - Line 3**

Use this processing option to enter information that you want to include in section E of the EEO-1 report. You can enter up to 40 characters. The processing option description corresponds to the line of the report on which the information appears.

#### **4. Information - Line 4**

Use this processing option to enter information that you want to include in section E of the EEO-1 report. You can enter up to 40 characters. The processing option description corresponds to the line of the report on which the information appears.

### **Multi Establishment**

This processing option specifies whether you want to include information on individual establishments in the report.

#### **1. Multi Establishment**

Use this processing option to specify whether the report includes category codes 11 through 20. For example, to report on individual establishments, a multi establishment company might link individual establishment numbers to category codes 11 through 20. Values are:

*Y*: The system included category codes 11 through 20 in the report.

*N*: The system does not include category codes 11 through 20 in the report.



To link individual establishment numbers to category codes, an administrator can enter one or more individual establishment numbers in the UDC tables for category codes 11 through 20. To select a value for each category code, the administrator can access the Defined Category Codes 11 through 20 form (W0801EMPC) from a Row menu on the Employee Master program (P0801). To create a report for individual establishments, the report data selection can be used to select appropriate category codes.

## R058515D - (USA) Point-In-Time EEO-1

Use the Point-In-Time EEO-1 Report (R058515D) to follow up EEOC nondiscrimination requirements for private employers. You might want to use this report to capture a picture of EEO information for specific individuals or groups of employees to prepare a response to an EEO inquiry.

The Point-In-Time EEO-1 Report contains the same information as the EEO-1 report; however, the point-in-time report enables you to review information as of a specific date.

The Point-In-Time EEO-1 Report is not a replacement for the EEO-1 report. Use the EEO-1 report to verify that you are in compliance with the EEOC nondiscrimination requirements for private employers.

Before you run the Point-In-Time EEO-1 Report, prepare a new point-in-time version (employee group or specific date), and review the data. In addition to the other processing option tabs, set appropriate options on the Point in Time tab.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Working with Point-in-Time Employee Reports”.

## Processing Options for Point-In-Time EEO-1 (R058515D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### General

These processing options specify additional information and default values that the system applies when you generate this report.

#### 1. Begin Date

Use this processing option to specify the beginning date of the pay period to be used for employment figures. If you are using Payroll, only those employees who received payments during the pay period are included on the report. If you are not using Payroll, only those employees who were active (not terminated or on leave of absence) during the pay period are included on the report.

#### 2. End Date

Use this processing option to specify the ending date of the pay period to be used for employment figures. If you are using Payroll, only those employees who received payments during the pay period are included on the report. If you

- are not using Payroll, only those employees who were active (not terminated or on leave of absence) during the pay period are included on the report.
- 3. Report Type** Use this processing option to select the type of report that fits the needs of the organization. Values are:
- 1*: Single Establishment Report
  - 2*: Consolidated Report
  - 3*: Headquarters Report
  - 4*: Individual Establishment Report
  - 5*: Small Establishment Report
- The system stores the values in UDC 05U/ET.
- 4. Establishments Covered** Use this processing option to specify the number of establishments that are included in the EEO-1 Consolidated Report. The system generated consolidated report cannot be submitted to the Equal Employment Opportunity Commission. Use this report only to review the information and verify that it is correct.
- Information from the system generated consolidated report must be transferred and submitted on the actual EEO-1 form.
- 5. Parent Employs 100+** Use this processing option to specify whether 100 or more people worked for the parent company during the reporting period. The value that you enter in this processing option appears as Y or N in Section C, Question 1 of the EEO-1 report. This value is used to determine whether the establishment must file an EEO-1 report. Values are:
- 0*: No
  - 1*: Yes
- The system stores the values in UDC 00/NY.
- 6. Affiliate Employs 100+** Use this processing option to specify whether 100 or more people worked for an affiliated company during the reporting period. The value that you enter in this processing option appears as Y or N in Section C, Question 2 of the EEO-1 report. This value is used to determine whether the establishment must file an EEO-1 report. Values include:
- 0*: No
  - 1*: Yes
- The system stores the values in UDC 00/NY.
- 7. Government Contracts** Use this processing option to specify whether the parent company was involved in any government contract during the reporting period. The value that you enter in this processing option appears as Y or N in section C, Question 3 of the EEO-1 report. This value is used to determine whether the establishment must file an EEO-1 report. Values include:
- 0*: No
  - 1*: Yes
- The system stores the values in UDC 00/NY.

- 8. Employ Apprentice(s)** Use this processing option to specify whether the establishment employed one or more apprentices during the reporting period. The value that you enter in this processing option appears as Y or N in the Other Questions section of the EEO-1 report. Values include:

0: No

1: Yes

The system stores the values in UDC 00/NY.

- 9. Page Number** Use this processing option to specify the beginning page number to print on the EEO-1 reports, except the single establishment report.

## Point in Time

These processing options specify the point-in-time information to use when processing the report.

- 1. Effective Date:** Use this processing option to specify a point-in-time date. The system uses this date to sort information as of a certain calendar date.
- 2. Version Name:** Use this processing option to specify the name that you assigned to a date effective report version.
- This processing option works with the Multi Establishment processing option where you might use category codes 11 through 20 for reporting on individual establishments.

## Company

These processing options specify the default values that the system applies when you generate this report.

- 1. Parent Company** Use this processing option to specify the code that was assigned for the parent company of the organization, if any.
- 2. Establishment** Use this processing option to enter the address book number of the establishment for which you are generating the EEO-1 report. If you enter zero in this processing option, the system uses the parent company address book number.
- 3. EEO Company ID (Equal Employment Opportunity Company Identification)** Use this processing option to specify the code assigned by the U. S. Equal Employment Opportunity Commission (EEOC) that identifies a specific organization, fund, or entity. The code is used for government reports, such as EEO-1.
- 4. EEO Unit Number (Equal Employment Opportunity Unit Number)** Use this processing option to specify the code assigned by the U. S. Equal Employment Opportunity Commission (EEOC) to identify a specific business unit, location, or establishment. The code is used for government reports, such as EEO-1.
- 5. SIC Code (Standard Industrial Code)** Use this processing option to specify the Standard Industrial Code (SIC) that represents the company or division. The SIC code classifies goods and services. This code can be found in any of these formats:
- Standard Industrial Code (SIC).
- SIC codes are a method used in the United States to classify goods and services. This code normally has four digits, although some codes have extension digits that serve as qualifiers.

- Harmonized System (HS).

HS codes are an international method of classifying goods. More than fifty countries use this code system. Each code can contain up to 10 digits.

- Standard Industrial Trade Classification (SITC).

SITC codes, developed by the United Nations, are a numerical code system used to classify goods in international trade. These codes are used by international organizations and can contain up to six digits.

The system stores the values in UDC 01/SC.

## 6. Dun and Bradstreet

Use this processing option to enter a number used by Dun and Bradstreet to identify the company. Complete this processing option for a company that is involved in government contracts, provided that the company has a Dun and Bradstreet number. When you enter the number, include the appropriate dashes (for example, 9-999-9999).

## Certification

These processing options specify the names and related information for individuals whom the Equal Opportunity Commission can contact for further information, if needed.

### 1. Certifier

Use this processing option to enter the address book number of the person who certifies that the EEO-1 report is accurate and truthful. This number is required only for single establishment EEO-1 reports.

### 2. Certifier Title

Use this processing option to enter a description of the duties that the certifying person performs. If the certifying person is an employee of the company, you can leave this processing option blank to have the system print the job description entered in the employee record on the EEO-1 report. This title prints only for single establishment reports. It is not required for multiple establishment reports.

### 3. Contact

Use this processing option to enter the address book number of the person whom the Equal Employment Opportunity Commission would contact for additional information about the report, if necessary. This number is required only for single establishment EEO-1 reports.

### 4. Contact Title

Use this processing option to enter a description of the duties that the contact person performs. If the contact person is an employee of the company, you can leave this processing option blank to have the system print the job description entered in the employee record on the EEO-1 report. This title prints only for single establishment reports. It is not required for multiple establishment reports.

### 5. Establishment Address

Use this processing option to specify whether the establishment mailing address should be used for the contact person. Values are:

0: No

1: Yes

The system stores the values in UDC 00/NY.

### 6. Contact Phone

Use this processing option to specify the area code and phone number of the contact person. For example, use this format: (xxx) xxx-xxxx. Include

parentheses and dashes. Do not include an extension number. The phone number is required only for single establishment reports.

#### 7. Contact Extension

Use this processing option to enter the phone number extension of the contact person. The extension number is required only for single establishment reports.

### Information

These processing options specify information that you want to include in section E of the EEO-1 report.

- |                                |   |
|--------------------------------|---|
| <b>1. Information - Line 1</b> | Use this processing option to enter information that you want to include in section E of the EEO-1 report. You can enter up to 40 characters. The processing option description corresponds to the line of the report on which the information appears. |
| <b>2. Information - Line 2</b> | Use this processing option to enter information that you want to include in section E of the EEO-1 report. You can enter up to 40 characters. The processing option description corresponds to the line of the report on which the information appears. |
| <b>3. Information - Line 3</b> | Use this processing option to enter information that you want to include in section E of the EEO-1 report. You can enter up to 40 characters. The processing option description corresponds to the line of the report on which the information appears. |
| <b>4. Information - Line 4</b> | Use this processing option to enter information that you want to include in section E of the EEO-1 report. You can enter up to 40 characters. The processing option description corresponds to the line of the report on which the information appears. |

## R058516 - EEO-5 Annual Report

Public school systems and districts might be required to run the EEO-5 Annual Report (R058516) in the even numbered years to verify compliance with EEOC nondiscrimination requirements. The School Reporting Committee (EEO-5) determines which school systems and districts are required to complete the report and notifies them by sending the form to them. This committee represents the Equal Employment Opportunity Commission (EEOC), Office for Civil Rights (OCR), and the National Center for Education Statistics (NCES) for the purpose of jointly sponsoring the EEO-5 report.

The report provides summary data for all full time and part time employees. Information for this report is based on the Employee Master Information table (F060116).

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**Note.** Defined codes 06/J, which are used for EEO reporting, are hard coded and should not be changed.

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## Processing Options for the EEO-5 Annual Report (R058516)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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## Defaults

These processing options specify the information that prints on the report.

<b>1. Address Number of Person Responsible for Report</b>	Use this processing option to specify the address book number of the person responsible for certifying the EEO-5 Report (R058516).
<b>2. Survey Year</b>	Use this processing option to specify the survey year for which the EEO-5 Report (R058516) gathers employee information.
<b>3. School District Code</b>	Use this processing option to specify the code (UDC 07/SS) for the school district in which employees work.
<b>4. EEO District Name</b> (Equal Employment Opportunity District Name)	Use this processing option to specify the Equal Employment Opportunity (EEO) district name that the system includes on the EEO-5 Report (R058516).
<b>5. Payroll Date</b>	Use this processing option to specify the payroll date from which the staff statistics are drawn.
<b>6. Number of Schools Operated</b>	Use this processing option to specify the number of schools that the school district operates.
<b>7. Number of Annexes Operated</b>	Use this processing option to specify the number of building annexes that the school district operates.
<b>8. School District Address - Line 1</b>	Use this processing option to specify the street name and number or post office box of the school district.
<b>9. School District Address - Line 2 (City, County, State, Zip)</b>	Use this processing option to specify the city, county, state, and zip code of the school district.
<b>10. Student Enrollment as of October 1st of the Survey Year</b>	Use this processing option to specify the number of enrolled students in the school district as of the first day of October of the survey year.

## R068910 - (USA) EEO Staff Utilization Report

Run the EEO Staff Utilization Report (R068910) to review the number of hours that employees worked by ethnic group for each job category. If an employee works in different job categories, the employee appears twice on the report with the hours worked for each job category. For example, an employee appears twice on the report if he works ten hours for job category A and thirty hours for job category B.

The system uses the Employee Master Information table (F060116) and the Employee Transaction History table (F0618) to compile the information. The types of information that the report creates for each job category are as follows:

- Hours worked by females.
- Hours worked by males.
- Total hours.

- Total employees.
- Male employees.
- Female employees.
- Totals for all job categories.

## Processing Options for EEO Staff Utilization Report (R068910)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### EEO Staff

Use these processing options to define the defaults that will be applied when you run the report.

- 1. From Date:** Use this processing option to specify whether system enables users to filter report records from a certain begin date.
- 2. To Date:** Use this processing option to specify whether the system enables users to filter report records to a certain end date. Enter an end date to filter the report records. If left blank, the system supplies today's date.
- 3. Non Ethnic Code:** Use this processing option to enter a code (UDC 06/M) that specifies whether the system enables users to filter records in the report by Non Ethnic Code (EEO).
- 4. Business Unit:** Use this processing option to specify whether the system enables users to filter report records by Business Unit. (A blank defaults all business units)

## R080013 - Gap Analysis

When you need to compare the competencies that employees possess with those that are required for a particular job, you can review the Gap Analysis report (R080013). This report lists detailed gap analysis information for a group of employees. You can use this information to help employees set competency goals. For each employee and job, you can determine whether the employee possesses the required competencies. You can also determine whether the employee level of competency is sufficient to meet the competency level that is required for the job.

See Reviewing Gap Analysis Online in the Human Resources Guide.

## Processing Options for Gap Analysis Report (R080013)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Defaults

These processing options specify the types of job related information that appear on the report.

- |  |  |
|--|--|
| <b>1. Organization Type Structure</b>  | <p>Use this processing option to specify the organizational structure to be used in the Gap Analysis report (R080013). This will report the gap analysis of employee competencies as it relates to job competencies for the specified organizational structure.</p> <p>If this is left blank, the default organizational structure will be used.</p> <p>The system stores the values in UDC 00/TS.</p> |
| <b>2. Job Type</b>                     | <p>Use this processing option to produce a Gap Analysis report (R080013) on a specific job type. If a value is entered, it is also necessary to specify an organizational business unit.</p> <p>Blank will produce a Gap Analysis report (R080013) of employees in their current job.</p>  |
| <b>3. Job Step</b>                     | <p>Use this processing option to produce a Gap Analysis report (R080013) on a specific job step. If a value is entered, it is also necessary to specify an organizational business unit and the job type.</p> <p>If left blank, the system uses the employee current job step.</p>   |
| <b>4. Organizational Business Unit</b> | <p>Use this processing option to identify the organizational business unit for which you want to produce a Gap Analysis report (R080013). If a value is entered, it is also necessary to specify a job type and job step. The default value of Blank will produce the Gap Analysis report (R080013) of all employees in their current job type and step.</p>   |
| <b>5. Date - Effective</b>             | <p>Use this processing option to produce a Gap Analysis report (R080013) at a specific point in time. The default value of Blank will produce a Gap Analysis report (R080013) of employees for today's date.</p>   |

## Display

This processing option specifies whether job option details appear on the report.

- |                                   |  |
|-----------------------------------|--|
| <b>1. Show Job Option Details</b> | <p>Use this processing option to indicate whether to show details about job competency options. Values are:</p> <p><i>1</i>: Yes, show the option details (employee competencies) for each job competency. This value is the default.</p> <p><i>0</i>: No, do not show detail information.</p> <p>The system stores the values in UDC 00/NY.</p> |
|-----------------------------------|--|



## R080016 - Job Match

When you need to determine the employees who are qualified for a particular job, you can review the Job Match report. This report lists all of the required competencies for the job and the proficiency level that the employee has attained in each of these competencies. You can use a processing option to specify the minimum proficiency level that the job requires, and the report will include only those employees who have attained that minimum proficiency level. When you have a job opening within the organization, you can use this information to help you determine which employees are qualified to fill the opening.

### Processing Options for Job Match Report (R080016)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

#### Select

These processing options specify job related information that appears on the report.

- |   |   |
|---|---|
| <b>1. Minimum Job Competency Percent Achieved</b> | Use this processing option to indicate the minimum job competency percent achieved. The jobs that will be reported on the Job Match report (R080016) will be those where the employee competencies are high enough that the minimum job competency percent achieved has been reached or exceeded. |
| <b>2. Job Type</b>                                | Use this processing option to search a specific job for the Job Match report (R080016). A blank value has the Job Match report (R080016) search through all jobs.   |
| <b>3. Job Step</b>                                | Use this processing option to search a specific job for the Job Match report (R080016). A blank value has the Job Match (R080016) report search through all jobs.   |
| <b>4. Job Group</b>                               | Use this processing option to search a specific job group for the Job Match report (R080016). An asterisk (*) has the Job Match report (R080016) search through all job groups. The system stores the job groups in UDC 08/JG.  |
| <b>5. Organizational Business Unit</b>            | Use this processing option to search through jobs that are in the specified organizational business unit. A blank value indicates that all jobs in all organizational business units will be searched.  |
| <b>6. Date - Effective</b>                        | Use this processing option to select jobs and job competencies as of a specified date. A blank value will report jobs and job competencies for the current date.  |

#### Default

This processing specifies the type of organizational structure that is related to this job.

- |                                       |   |
|---------------------------------------|---|
| <b>1. Organization Type Structure</b> | Use this processing option to specify the organizational structure. A blank value will produce the organizational structure setup in the HR Constants. The system stores the values in UDC 00/TS. |
|---------------------------------------|---|

## Display

These processing options specify whether job option and job competency details appear on the report.

- |                                       |   |
|---------------------------------------|---|
| <b>1. Show Job Option Details</b>     | <p>Use this processing option to indicate whether to hide or show job option details. Values are:</p> <p>Blank: Show the option details (employee competencies).</p> <p><i>1</i>: Show the option details (employee competencies).</p> <p><i>0</i>: Do not show the option details.</p> <p>The system stores the values in UDC 00/NY.</p> |
| <b>2. Show Job Competency Details</b> | <p>Use this processing option to hide or show job competency details. Values are:</p> <p>Blank: Show the job competency details.</p> <p><i>1</i>: Show the job competency details.</p> <p><i>0</i>: Do not show the job competency details.</p>   |

## R080021 - Job Profile

When you need a formal description of a job, such as when you are advertising a job opening, you can print the Job Profile report. This report displays detailed information about the job, such as job competencies, job competency options, and job competency descriptions. It also displays the employee competencies and competency levels that are required for the job.

## Processing Options for Job Profile Report (R080021)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Select

Use these processing options to specify information that will be included in the report.

- |                                       |  |
|---------------------------------------|--|
| <b>1. Organization type structure</b> | <p>Use this processing option to specify the organizational structure to use in the Job Profile Report (R080021). This option produces a report of the job descriptions for selected jobs and organizational business units.</p> <p>If this processing option is left blank, the default organizational structure is used.</p> |
|---------------------------------------|--|

The system stores the values in UDC 00/TS.

## 2. Job type

Use this processing option to produce the Job Profile Report (R080021) on a specific job type. If a value is entered, it must also specify an organizational business unit.

If this processing option is left blank, a Job Profile Report of all jobs in an organizational business unit and organizational structure is produced.

## 3. Job step

Use this processing option to produce the Job Profile Report (R080021) on a specific job step. If a value is entered, you must also specify an organizational business unit and the job type.

An \* specifies that a Job Profile Report is created on all of the job steps within a job type.

## 4. Organizational business unit

Use this processing option to create the Job Profile Report (R080021) based on a specific organizational business unit.

If this processing option is left blank, a Job Profile Report is created for all of the specified jobs in all of the organizational business units.

## 5. Date - effective

Use this processing option to produce the Job Profile Report (R080021) at a specific time.

If this processing option is left blank, a Job Profile Report is produced of jobs on the current date.

## Versions

Use this processing option to specify version information for the report.

### 1. Job Competencies in an Organization Version

Use this processing option to specify the version of the Job Competencies In An Organization program (P08006) to use. The default is *ZJDE0001*.

## Display

Use these processing options to select competency descriptions that will appear on the report.

### 1. First job competency description

Use this processing option to specify whether to display the description for the first defined description as specified in the Job Competencies In An Organization program (P08006). Values are:

Blank: Displays the description for the first defined description as specified in the Job Competencies In An Organization program.

1: Displays the description for the first defined description as specified in the Job Competencies In An Organization program.

0: Does not display the description.

The system stores the values in UDC 00/NY.

### 2. Second job competency description

Use this processing option to specify whether to display the description for the second defined description as specified in the Job Competencies In An Organization program (P08006). Values are:

Blank: Displays the description for the second defined description as specified in the Job Competencies In An Organization program.

	<p><i>1</i>: Displays the description for the second defined description as specified in the Job Competencies In An Organization program.</p> <p><i>0</i>: Does not display the description.</p> <p>The system stores the values in UDC 00/NY.</p>
<b>3. Third job competency description</b>	<p>Use this processing option to specify whether to display the description for the third defined description as specified in the Job Competencies In An Organization program (P08006). Values are:</p> <p>Blank: Displays the description for the third defined description as specified in the Job Competencies In An Organization program.</p> <p><i>1</i>: Displays the description for the third defined description as specified in the Job Competencies In An Organization program.</p> <p><i>0</i>: Does not display the description.</p> <p>The system stores the values in UDC 00/NY.</p>
<b>4. Fourth job competency description</b>	<p>Use this processing option to specify whether to display the description for the fourth defined description as specified in the Job Competencies In An Organization program (P08006). Values are:</p> <p>Blank: Displays the description for the fourth defined description as specified in the Job Competencies In An Organization program.</p> <p><i>1</i>: Displays the description for the fourth defined description as specified in the Job Competencies In An Organization program.</p> <p><i>0</i>: Does not display the description.</p> <p>The system stores the values in UDC 00/NY.</p>
<b>5. Fifth job competency description</b>	<p>Use this processing option to specify whether to display the description for the fifth defined description as specified in the Job Competencies In An Organization program (P08006). Values are:</p> <p>Blank: Displays the description for the fifth defined description as specified in the Job Competencies In An Organization program.</p> <p><i>1</i>: Displays the description for the fifth defined description as specified in the Job Competencies In An Organization program.</p> <p><i>0</i>: Does not display the description.</p> <p>The system stores the values in UDC 00/NY.</p>
<b>6. Sixth job competency description</b>	<p>Use this processing option to specify whether to display the description for the sixth defined description as specified in the Job Competencies In An Organization program (P08006). Values are:</p> <p>Blank: Displays the description for the sixth defined description as specified in the Job Competencies In An Organization program.</p> <p><i>1</i>: Displays the description for the sixth defined description as specified in the Job Competencies In An Organization program.</p> <p><i>0</i>: Does not display the description.</p> <p>The system stores the values in UDC 00/NY.</p>

## R080401 - Applicant Data by Data Type

To review a list of all of the applicants who have information entered in a particular supplemental data type, you can print the Applicant Data by Data Type report. For example, you can review applicants whose supplemental data includes job skills information. The information that prints on this report is the same information that you can review online using Applicant Data by Data Type program (P050210).

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

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

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Narrative

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

<b>1. Enter a '1' to bypass printing text information on the report.</b>	Use this processing option to specify whether to print text information on the report. If left blank (default), the system prints the text.
--	---

## R080403 - Case Report by Data Type

To review a list of all of the injury and illness cases with information in a particular data type (such as physical object involved or medical expenses), print the Case Report by Data Type. The information that prints on this report is the same information that you can review online using Case Supplemental Data Entry (P080913).

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

## Processing Options for Case Report by Data Type (R080403)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Narrative

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

**1. Enter a '1' to bypass printing text information on the report.** Use this processing option to specify whether to print text information on the report. If left blank, the system prints the text.

## R080406 - Requisition Data by Data Type

To review a list of all of the requisitions that contain information in a particular supplemental data type, print the Requisitions by Data Type report. You can review this same information online using the Requisition Data by Data Type program (P050210).

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

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Options

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

**Enter a '1' to bypass printing text information on the report.** Use this processing option to specify whether to print text information on the report. Default of blank will print the text.

## R080411 - Applicant Supplemental Data

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

The information that prints on this report is the same information that you can review online by using Applicant Supplemental Data Inquiry program (P08401). However, the report enables you to print information for multiple applicants at the same time.

## Processing Options for Applicant Supplemental Data (R080411)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Processing

These processing options specify the information that prints on the report.

- |   |  |
|---|--|
| <b>1. Enter a '1' if you wish to bypass printing the Tax ID (Tax Identification).</b>                 | Use this processing option to specify whether to print the tax ID on the report. A default of blank automatically prints the tax ID. Values are:<br><br>Blank: Print the tax ID (default).<br><i>1</i> : Do not print the tax ID.  |
| <b>2. Enter a '1' if you wish to bypass printing the Asking Salary.</b>                               | Use this processing option to specify whether to print the asking salary. A default of blank automatically prints the asking salary. Values are:<br><br>Blank: Print the asking salary (default).<br><i>1</i> : Do not print the asking salary.  |
| <b>3. Enter a '1' if you wish to bypass printing any extended narrative associated with the data.</b> | Use this processing option to specify whether to print any extended narrative text that is associated with the data. A default of blank automatically prints any extended narrative text. Values are:<br><br>Blank: Print extended narrative text<br><i>1</i> : Do not print extended narrative text |

## R080413 - Case Supplemental Data

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 the organization safety record.

The information that prints on this report is the same information that you can review online using the Case Supplemental Data Inquiry program (P080203). However, the report enables you to print information for several cases at one time.

## Processing Options for Case Supplemental Data Report (R080413)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Narrative

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

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

Use this processing option to specify whether to print text information on the report.

## R080416 - Requisition Supplemental Data

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 the Requisition Supplemental Data Inquiry program (P08102). However, this report enables 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 select the report text information.

## Processing Options for Requisition Supplemental Data (R080416)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Printing Text

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

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

Use this processing option to specify whether to print text information on the report.

## R080434 - (USA) Veteran Employment (VETS-100)

Run the Veterans Employment Report (VETS-100) program (R080434) to review employees in each EEO job category per home company and home business unit who are disabled veterans, Vietnam veterans or other veterans. The report also singles out new hires (those employees who were hired during the reporting period that you specified in the processing options) including newly separated veterans. Multiple statuses can exist for a veteran and are counted twice on the report.

---

**Note.** Defined codes 05/HO, which the system uses for veteran reporting, are hard coded and should not be changed.

---



This table displays information about the totals in the report columns:

<b>Report Column Totals</b>	<b>Description</b>
Totals in the Employee column	This column includes only employees with a start date before or during the specified reporting period and who remained active for the specified reporting period. It does not include employees terminated during the reporting period.
Totals in the New Hire column	This column includes only employees with a start date during the specified reporting period, regardless of whether these new hires were also terminated within the reporting period. Employees who are hired during the reporting period and are still active employees appear in both the New Hire and the Employees columns.
Totals in the Special Disabled Veterans columns	This column includes only employees with a Yes (Y) value in the Disabled Vet field in the Employee Master Information table (F060116). Disabled veterans who are either employees or new hires have separate columns on the report.
Totals in the Vietnam Era Veterans column	This column includes only employees with a Veteran (V) status in the Veteran field in the Employee Master Information table.
Totals in the Other Eligible Veterans column	This column includes only employees with a Veteran (O) status in the Veteran field in the Employee Master Information table.
Totals in the Newly Separated Veterans column	This column includes only employees with a Veteran (S) status in the Veteran field in the Employee Master Information table. When you run this report in Final mode, the Veteran status field changes to (O).
Totals in the Other Veterans column	This column includes only employees with a Veteran (O) status in the Veteran field in the Employee Master Information table with the exception that they are New Hires.
Totals in the Total New Hires, Veterans and Non Veterans column	This column includes the total number of employees in the specified EEO Job Category, Home Business Unit, and Home company, regardless of their veteran status.

To create reports that include separate establishments for a multi establishment company, you can use the Employee Master program (P0801) to create defined codes that designate establishment numbers for each individual. You can then use the report data selection to select appropriate category codes that sort individual establishments for display on the report.

## **Processing Options for Veterans Employment Report (VETS-100) (R080434)**

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Defaults

These processing options specify the default information the system uses to process the report.

- |   |   |
|---|---|
| <b>1. Beginning Date:</b>   | Use this processing option to specify the first day of the reporting period.  |
| <b>2. Ending Date:</b>  | Use this processing option to specify the last day of the reporting period.   |
| <b>3. Dun &amp; Bradstreet ID (Dun &amp; Bradstreet Identification)</b> | Use this processing option to enter the 9 digit Dun and Bradstreet ID of the home company.  |
| <b>4. Electronic File:</b>  | This processing option stores the VETS-100 report in a table for electronic submission, based on new government requirements for 1999. Values are:<br>Y: Yes<br>N: No |

---

**Note.** This processing option only stores the report data in the Veteran Employment Reporting table (F080434A). The Department of Labor requires the report be submitted as an ASCII comma delimited text file. Users must create this file from the F080434A table themselves.

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## Electronic File

These processing options specify the information that must be submitted electronically for this report.

- |                              |  |
|------------------------------|--|
| <b>1. Build/Delete:</b>      | This processing option permits users to either build a new VETS-100 report or delete an existing VETS-100 report from the Veteran Employment Reporting table (F080434A). Values are:<br>Blank: Build the report<br>0: Build the report<br>1: Delete the report |
| <b>2. Version Name:</b>      | Use this processing option to enter a unique name for the VETS-100 report that is to be generated to or deleted from the Veteran Employment Reporting table (F080434A).  |
| <b>3. Company Number:</b>    | Use this processing option to specify the unique company number that is assigned to every business by the VETS-100 government staff.   |
| <b>4. Organization Type:</b> | Use this processing option to indicate the type of contractual relationship that the organization has with the Federal Government. Values are:<br>P: Prime Contractor  |

*S*: Subcontractor

*B*: Both

## 5. Form Type:

Use this processing option to indicate the establishment type. Establishment type is based on a valid code from the official VETS-100 form. Values are:

*S*: Single Establishment

*MHQ*: Multiple Establishment Headquarters

*MHL*: Multiple Establishment - Hiring Location

*MSC*: Multiple Establishment - State Consolidated

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**Note.** If the establishment type is state consolidated, specify the number of locations in the MSC Number processing option.

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## 6. MSC Number: (Multiple Establishment - State Consolidated Number)

Use this processing option to enter the number of locations covered if the organization is a state consolidated multiple establishment.

## 7. NAICS Code: (North American Industry Classification System Code)

Use this processing option to specify the 6 digit NAICS code applicable to the hiring location for which you are filing the report. If no separate NAICS Code exists for the hiring location, enter the NAICS code for the parent company.

## 8. Maximum Number:

Use this processing option to indicate the maximum number of regular employees during the period covered. If you leave this processing option blank, the system generates an estimated maximum number based on tax history from the Tax History table (F06136).

## 9. Minimum Number:

Use this processing option to indicate the minimum number of regular employees during the period covered. If you leave this processing option blank, the system generates an estimated minimum number based on tax history from the Tax History table (F06136).

## Multi Establishment

This processing option specifies whether you want the report to include information about individual establishments.

### 1. Show Multi Establishment

Use this processing option to specify whether the system displays the information for individual establishments on the report. Values are:

*Y*: Yes, the system displays the information.

*N*: No, the system does not display the information.

## Mode

This processing option specifies the mode to use for processing the report.

### 1. Proof or Final Mode

Use this processing option specify whether to run the report in proof mode or final mode. Running the report in final mode updates the employee veteran status in the Employee National and Fiscal Data - USA program (P0801US) to 'Other' Veteran. Values are:

Blank: Proof mode

*I*: Final mode

The system stores the values in UDC 13/M1.

## R080434D - (USA) Point-In-Time Veterans Employment

Use the Point-In-Time Veterans Employment Report (R080434D) to follow up EEOC nondiscrimination requirements for private employers. Run this report to review employees, as of a specific date, in each EEO job category per home company and home business unit who are disabled veterans or Vietnam veterans. The report also singles out new hires (those employees who were hired during the reporting period that you specified in the processing options). You might want to use this report to capture a picture of EEO information for specific individuals or groups of employees to prepare a response to an EEO inquiry.

The Point-In-Time Veterans Employment Report contains the same information as the Veterans Employment Report (VETS-100) (R080434); however, the point-in-time report enables you to review information as of a specific date.

The Point-In-Time Veterans Employment Report is not a replacement for the Veteran Employment Report (VETS-100). Use the Veteran Employment Report (VETS-100) to verify that you are in compliance with the EEOC nondiscrimination requirements for private employers.

Before you run the Point-In-Time Veterans Employment Report, prepare a new point-in-time version (employee group or specific date), and review the data. In addition to the processing option on the Default tab, set appropriate options on the Point in Time tab.

See *JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 Implementation Guide*, “Working with Point-in-Time Employee Reports”.

## Processing Options for Point-In-Time Veterans Employment Report (R080434D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

These processing options specify additional information and default values that the system applies when you generate this report.

- |   |  |
|---|--|
| <b>1. Beginning Date</b>  | Use this processing option to specify the first day of the reporting period.               |
| <b>2. Ending Date</b>   | Use this processing option to specify the last day of the reporting period.                |
| <b>3. Dun &amp; Bradstreet ID (Dun &amp; Bradstreet Identification)</b> | Use this processing option to enter the 9 digit Dun and Bradstreet ID of the home company. |

## Point in Time

These processing options specify the point-in-time information to use when processing the report.

- 1. Effective Date:** Use this processing option to specify the point in time date that the system uses to process the report.
- 2. Version Name:** Use this processing option to specify the version to use when running the report.

## R080435 - (USA) Workforce Analysis

Run the Workforce Analysis Report (R080435) to review a summary of employees by gender, ethnic code, job type, and job step for each home business unit within the home company. You can select any extra data items in the Employee Master Information table (F060116) that you would like to review in the report.

The processing options for this report enable you to include or not include white females as non ethnic employees. The system automatically locates job descriptions from the Job Information table (F08001) unless you set up the processing options otherwise.

The data that appear in the report columns is as follows:

- Job Type.
- Job Description.
- Job Step.
- EEO Job Category.
- Pay Grade.
- Pay Grade Step.
- Total employees and total ethnic employees.
- Total male employees by ethnic code.
- Total female employees by ethnic code.

For active employees who are not included in the minority codes 01 through 05 (White, Black, Hispanic, Asian, and American Indian) from defined code list 06/M, the system generates the Workforce Analysis Exception Report (R080435A) in addition to the Workforce Analysis Report. The exception report lists the name, address book number, EEO minority, and home business unit of each employee.

## Processing Options for Workforce Analysis Report (R080435)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Process

Use this processing option to define the defaults that will be applied when you run the report.

- |                            |  |
|----------------------------|--|
| <b>1. Ethnic Employees</b> | Use this processing option to specify whether a white female is included as a nonethnic employee. The default will include these employees and all others as nonwhite EEO Ethnic Group in the Total Minority Employees figure. Values are:<br><br>1: White female is non ethnic employee<br>0: White female is ethnic employee |
|----------------------------|--|

## R081420 - Open Amounts by Position

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

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

## Processing Options for Open Amounts by Position (R081420)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Options

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- |  |   |
|--|---|
| <b>1. A value of '1' will show Effective Budgeted Amounts. A default of blank will show Budgeted Amounts</b> | Use this processing option to specify whether to show Effective Budget Amounts. |
|--|---|

## R081430 - 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 budget amount, as it appears in the left column of the report.

## Processing Options for Cross Year Budget Comparison (R081430)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Options

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

**1. Enter the first fiscal year (two digits) to be displayed.** Use this processing option to specify the first fiscal year to be displayed.

**2. Enter the second fiscal year (two digits) to be displayed.** Use this processing option to specify the second fiscal year to be displayed.

### Amounts

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

**1. Effective/Budgeted Amounts** Use this processing option to specify whether to display budgeted or effective amounts. Values are:

Blank: Budgeted Amounts

/:Effective Amounts

## R081440 - Position Control Comparison

The demonstration data that is included with Human Resources includes these three versions of the Position Control Comparison report:

1. Position Control Headcount. Use this version to compare the current headcount for the positions to the budgeted headcount for the next fiscal year. Use this information to determine whether you need to do either of these:
  - Hire additional employees to fill a position.
  - Request approval for additional headcount for a position.

2. **Position Control Budgeted FTE.** Use this version to review current position activity and compare it to the FTEs that you budgeted for the upcoming fiscal year. Use the information to determine whether you need to:
  - Hire additional employees to fill a position
  - Request approval for additional FTEs for a position
3. **Position Control Effective FTE.** Use this version to review current position activity and compare it to the effective FTEs for a specific fiscal year. This version is the same as the Position Control Budgeted FTE version, except that it uses effective FTEs instead of budgeted FTEs.

## Processing Options for Position Control Comparison (R081440)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### FTE/Headcount

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- 1. Enter the fiscal year (two digits) whose budgeted FTE or Headcount will be compared to the current FTE or Headcount.** Use this processing option to specify the fiscal year to use for comparison.
- 2. Enter the Type of report you would like to see.** Use this processing option to specify the type of report. Values are:  
Blank: FTE (Default)  
/ : Headcount
- 3. For the FTE report which would you like to see Effective or Budgeted amounts.** Use this processing option to specify whether to include effective or budgeted amounts in the report. Values are:  
Blank: Effective (Default)  
/ : Budgeted

## R081460 - 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 the position budgets are correct. You might also use this information for reference when you are preparing the 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.



## Processing Options for Position Budgets (R081460)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Pos Control

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

#### 1. Budgeted/Effective Amounts

Use this processing option to specify whether to use budgeted or effective amounts. Values are:

Blank: Effective Amounts

*I*: Budgeted Amounts

## Data Selection for Position Budgets

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.

## R081470 - Position Budgets by Job Type & Step

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

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

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Budget

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- 1. Enter 0 or leave blank to show Effective Amounts, or 1 to show Budgeted Amounts**      Use this processing option to specify whether to use budgeted or effective amounts. Values are:
- Blank: Effective Amounts
  - 0: Effective Amounts
  - 1: Budgeted Amounts

## R081490 - Requisition Review - Position

Use this program to determine the approval status of a group of requisitions. You can print two versions of this report. One version lists the requisitions by job description, and the other version lists them by position description.

## Processing Options for Requisition Review - Position (R081490)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Detail Type

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- 1. Which field would you like to see on the report.**      Use this processing option to specify whether to include the Position Description or Job Description on the report. Values are:
- Blank: Position Description (Default)
  - 1: Job Description

## R084400 - (USA) Hired Applicants by EEO Job Category

The Hired Applicants by EEO Job Category report (R084400) shows how the organization is performing as an equal opportunity employer. Although the report is primarily used as an internal reference, it can be used for governmental reporting. Applicants by gender and ethnicity are reported within each job category. The report also distinguishes between applicants and applicants who were hired.

Processing options enable you to specify the report date range and whether you want the report to display the summary data and totals by EEO job category (06/M) or just the totals. You can also specify whether you want the report to total by each home business unit or by a different structure type.

An applicant is reported as a hired applicant when the system finds that the applicant start date in the Employee Master Information table (F060116) is greater than the applicant date in the Applicant Master table (F08401), and that the start date is between the date ranges specified in the processing options.

For employees (hired applicants), the employee original home business unit is used for reporting. Otherwise, the applicant home business unit is used.

Before you run the Hired Applicants by EEO Job Category report, run the Applicant EEO Exception report and correct or enter data for the applicants listed on the report.

## Processing Options for Hired Applicants by EEO Job Category Report (R084400)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

Use these processing options to define the defaults that will be applied when you run the report.

- |                                     |   |
|-------------------------------------|---|
| <b>1. Beginning Effective Date:</b> | Use this processing option to specify the beginning date for the reporting period. If the field is left blank, the system uses January 1 of the current year. |
| <b>2. Ending Effective Date:</b>    | Use this processing option to specify the ending date for the reporting period. If the field is left blank, the system date is used.                          |

### Display

Use these processing options to define the defaults that will be applied when you run the report.

- |  |   |
|--|---|
| <b>1. Organization Type Structure:</b> | <p>Use this processing option to specify the Structure Type for this report. The Structure Type will define the hierarchy of the different units within a company hierarchy. These values are defined in defined Code list 00/TS.</p> <p>This is a required field.</p> <p>The system stores the values in UDC 00/TS.</p>  |
| <b>2. Parent Business Unit:</b>        | Use this processing option to specify the Parent Business Unit for this report.   |
| <b>3. Display report totals only:</b>  | <p>Use this processing option to specify whether the report should display just the display totals or whether both the display totals and the summary counts by Job Category. Values are:</p> <p>0: Display both the report totals and the summary counts.</p> <p>1: Display the report totals only.</p> <p>If the field is left blank, both report totals and summary counts appear.</p> |

The system stores the values in UDC 00/ZO.

## R084411 - (USA) Applicant Flow Analysis

Run the Applicant Flow Analysis report (R084411) to review the number of applicants in each EEO job category by ethnicity and gender who have received offers, been hired, or been rejected.

This report shows how the organization is performing as an equal opportunity employer. Although the report is primarily used as an internal reference, it can be used for governmental reporting.

You use processing options to enter date ranges and to specify whether you want the report to display the summary data and totals by EEO job category (06/M) or just the totals. You can also specify whether you want the report to total by each home business unit or by a different structure type.

An applicant is reported as hired when the system finds that the applicant start date in the Employee Master Information table (F060116) is greater than the applicant date in the Applicant Master table (F08401), and that the start date is between the date ranges specified in the processing options.

Before you run the Applicant Flow Analysis report, run the Applicant EEO Exception report and correct or enter data for the applicants printed on the report.

## Processing Options for Applicant Flow Analysis (R084411)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Defaults

Use these processing options to define the default dates and status conditions that will be applied when you run the report.

- |                                    |  |
|------------------------------------|--|
| <b>1) Beginning Effective Date</b> | Enter the beginning date for the report period. If left blank the system uses January 1 of the current year.   |
| <b>2) Ending Effective Date</b>    | Use this processing option to specify the ending date for the report period. If left blank the system uses the current date.   |
| <b>3) Offers From Status</b>       | Enter the beginning applicant status that represents the offers condition.<br>Ranges should not overlap each other. No defaults apply.<br>The system stores the values in UDC 08/AS. |
| <b>4) Offers Thru Status</b>       | Enter the ending applicant status that represents the offer condition. Ranges should not overlap each other. No defaults apply.<br>The system stores the values in UDC 08/AS.        |
| <b>5) Rejections From Status</b>   | Enter the beginning applicant status that represents the rejection condition.  |

Ranges should not overlap each other. No defaults apply.

The system stores the values in UDC 08/AS.

#### **6) Rejections Thru Status**

Enter the ending applicant status that represents the rejection condition.

Ranges should not overlap each other. No defaults apply.

The system stores the values in UDC 08/AS.

### **Display**

Use these processing options to define defaults and required information that will be applied when you run the report.

#### **1) Organization Type Structure**

Enter the Structure Type to use for this report. This is a required field.

The system stores the values in UDC 00/TS.

#### **2) Parent Business Unit**

Enter the Parent Business Unit. This processing option is required.

#### **3) Job Category and Total**

Enter a *1* if the report should only display totals. If this processing option is left blank, the system displays the summary counts by job category, as well as the totals.

The system stores the values in UDC 00/ZO.

## **R084412 - (USA) Adverse Impact Analysis**

Run the Adverse Impact Analysis report (R084412) to review the number of male, female, and ethnic applicants for each EEO job category against those applicants who were hired. Because this report is divided into male, female, and ethnic group, an applicant can be counted in more than one group. For example, a Hispanic woman would be counted as both female and ethnic.

This report shows how the organization is performing as an equal opportunity employer. Although the report is primarily used as an internal reference, it can be used for governmental reporting.

Processing options enable you to specify date ranges and whether you want the report to display the summary data and totals by EEO job category (06/M) or just the totals. You can also specify whether you want the report to total by each home business unit or by a different structure type.

An applicant is reported as a hired applicant when the system finds that the applicant start date in the Employee Master Information table (F060116) is greater than the applicant date in the Applicant Master table (F08401), and that the start date is between the date ranges specified in the processing options.

Before you run the Adverse Impact Analysis report, run the Applicant EEO Exception report and correct or enter data for the applicants listed on the report.

## **Processing Options for Adverse Impact Analysis (R084412)**

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Defaults

Use these processing options to define the defaults that will be applied when you run the report.

- 1. Beginning Effective Date** Enter the beginning date for the report period. If this processing option is left blank, January 1 of the current year will be used.
- 2. Ending Effective Date** Enter the ending date for the reporting period. If this processing option is left blank, the current date will be used.

## Display

Use these processing options to define defaults and required information that will be applied when you run the report.

- 1. Organization Type Structure** Use this processing option to specify the structure type to use for this report. This processing option is required. The system stores the values in defined code table 00/TS.
- 2. Parent Business Unit** Use this processing option to specify the Parent Business Unit. This processing option is required.
- 3. Job Category and Totals** Enter 1 if the report should display totals only. Default of blank will display the summary counts by job category, as well as the totals. Values are listed in UDC table 00/ZO.

## R084422 - (USA) Affirmative Action Exception Report

Run the Affirmative Action Exception Report (R084422) before you run the Hired Applicants by EEO Job Category, Applicant Flow Analysis, or Adverse Impact Analysis reports. The Affirmative Action Exception Report lists applicants with missing values in any of these fields:

- EEO Job Category (from defined code list (06/J)
- Home Business Unit
- Gender
- Ethnic Code (a code other than defined codes 01 through 05 from 06/M)

After reviewing this report, you can correct or enter data in the system for the applicants listed and then run any EEO applicant report. This report helps you increase the accuracy of all the applicant EEO reports.

You can set up a processing option to specify the reporting date ranges. This report is based on information in the Applicant Master table (F08401).

## Processing Options for Affirmative Action Exception Report (R084422)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

## Defaults

Use these processing options to define the defaults that will be applied when you run the report.

- 1. Beginning Effective Date** Enter the beginning date for the report period. If this processing option is left blank, the system uses January 1 of the current year.
- 2. Ending Effective Date** Enter the ending date for the report period. If this processing option is left blank, the system uses the current date.

## R084483 - (USA) Applicant List - EEO Listing

To analyze the number of female, minority, veteran, or disabled applicants who have applied to the organization, print the Applicant List-EEO Listing report. You use this report for Affirmative Action reporting purposes to show that the organization provides equal opportunities for all of the applicants who apply to the organization. Managers can also use these reports to analyze hiring and promotion practices within the organization.

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

## Processing Options for Applicant List - EEO Listing (R084483)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Date of Birth

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

- Enter '1' to hide Date of Birth** Use this processing option to specify whether to display the Date of Birth. Values are:
- Blank: Display Date of Birth (Default)
  - 1: Hide Date of Birth

## R086415 - OSHA 301 Injury and Illness Report

You generate the OSHA 101 Occupation Illness/Injury report (R086415) to satisfy OSHA record keeping requirements. When you generate this report, the system retrieves the information that you entered in the Injury/Illness Case Information program (P08601). The report includes only those cases that have been defined as government reportable; that is, cases for which the Government Reportable option on the Injury/Illness Case form is turned on.

Depending on the company procedures, you can generate this report:

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

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

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

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

### Process

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

- |   |   |
|---|---|
| <b>1. Supplemental Database Code for Injury/Illness Cases</b> | Use this processing option to specify the Supplemental Database code for injury/illness cases. All supplemental database records associated with injury or illness cases will be stored with this value to distinguish them from the supplemental database records for other items, such as employees, applicants, or dependents.<br><br>The system stores the values in UDC 00/SD. |
| <b>2. Action When Injured Data Type</b>                       | Use this processing option to designate the data type used for supplemental data stored under the Action When Injured heading within the injury/illness case supplemental database records.   |
| <b>3. How Accident Occurred Data Type</b>                     | Use this processing option to designate the data type used for supplemental data stored under the How Accident Occurred heading within the injury/illness case supplemental database records.   |



- |  |  |
|--|--|
| <b>4. Physician Data Type</b>          | Use this processing option to designate the data type used for supplemental data stored under the Physician heading within the injury/illness case supplemental database records.                |
| <b>5. Hazardous Material Data Type</b> | Use this processing option to designate the data type used for supplemental data stored under the Hazardous Material heading within the injury/illness case supplemental database records.       |
| <b>6. Object Involved Data Type</b>    | Use this processing option to designate the data type used for supplemental data stored under the Physical Object Involved heading within the injury/illness case supplemental database records. |
| <b>7. Hospital Data Type</b>           | Use this processing option to designate the data type used for supplemental data stored under the Hospital heading within the injury/illness case supplemental database records.                 |
| <b>8. Accident Location Type</b>       | Use this processing option to designate the data type used for supplemental data stored under the Accident Location heading within the injury/illness case supplemental database records.        |

## R086420 - Occupational Illness/Injury

To analyze health safety management statistics for the 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.

### Processing Options for Occupational Illness/Injury Report (R086420)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

#### Display

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

- |  |  |
|--|--|
| <b>1. Display Totals</b>                       | 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. |
| <b>2. Display Percentages For Level Breaks</b> | 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 of the cases that are examined. These percentages appear at the end of the report. The percentages do not appear with the default of blank.

You can use data selection to determine whether to include injuries or illnesses on the report.

**R086421 - Government Reportable Illness/Injury**

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

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

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify JD Edwards EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

**Display**

These processing options are used to select the data that appears 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 of the cases that are examined. These percentages appear at the end of the report. The percentages do not appear with the default of blank.

You can use data selection to determine whether to include injuries or illnesses on the report.

**4. Display and Group Totals by**

Use this processing option to specify whether to display the total count of records by the establishment number, supervisor number, or job type. The totals are displayed as a footer after each level break. Blank or zero are not values for this processing option. Values are:

*1*: Establishment Number

2: Supervisor Number

3: Job Type



# Glossary of JD Edwards EnterpriseOne Terms

<b>activity</b>	A scheduling entity in JD Edwards EnterpriseOne tools that represents a designated amount of time on a calendar.
<b>activity rule</b>	The criteria by which an object progresses from one given point to the next in a flow.
<b>add mode</b>	A condition of a form that enables users to input data.
<b>Advanced Planning Agent (APAg)</b>	A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of relational databases, flat file format, and other data or message encoding, such as XML.
<b>application server</b>	A server in a local area network that contains applications shared by network clients.
<b>as if processing</b>	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
<b>alternate currency</b>	<p>A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.</p> <p>In JD Edwards EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.</p>
<b>as of processing</b>	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
<b>back-to-back process</b>	A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.
<b>batch processing</b>	<p>A process of transferring records from a third-party system to JD Edwards EnterpriseOne.</p> <p>In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.</p>
<b>batch server</b>	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
<b>batch-of-one immediate</b>	<p>A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.</p> <p>See also direct connect and store-and-forward.</p>
<b>business function</b>	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules,

and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.

<b>business function event rule</b>	See named event rule (NER).
<b>business view</b>	A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
<b>central objects merge</b>	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
<b>central server</b>	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
<b>charts</b>	Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.
<b>connector</b>	Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.
<b>contra/clearing account</b>	A general ledger account in JD Edwards EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in JD Edwards EnterpriseOne Financial Management.
<b>Control Table Workbench</b>	An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
<b>control tables merge</b>	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
<b>cost assignment</b>	The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
<b>cost component</b>	In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).
<b>cross segment edit</b>	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
<b>currency restatement</b>	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
<b>database server</b>	A server in a local area network that maintains a database and performs searches for client computers.
<b>Data Source Workbench</b>	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the system-release number data source. It also updates the Data Source Plan detail record to reflect completion.

<b>date pattern</b>	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
<b>denominated-in currency</b>	The company currency in which financial reports are based.
<b>deployment server</b>	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
<b>detail information</b>	Information that relates to individual lines in JD Edwards EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
<b>direct connect</b>	A transaction method in which a client application communicates interactively and directly with a server application.  See also batch-of-one immediate and store-and-forward.
<b>Do Not Translate (DNT)</b>	A type of data source that must exist on the iSeries because of BLOB restrictions.
<b>dual pricing</b>	The process of providing prices for goods and services in two currencies.
<b>edit code</b>	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
<b>edit mode</b>	A condition of a form that enables users to change data.
<b>edit rule</b>	A method used for formatting and validating user entries against a predefined rule or set of rules.
<b>Electronic Data Interchange (EDI)</b>	An interoperability model that enables paperless computer-to-computer exchange of business transactions between JD Edwards EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
<b>embedded event rule</b>	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
<b>Employee Work Center</b>	A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
<b>enterprise server</b>	A server that contains the database and the logic for JD Edwards EnterpriseOne.
<b>EnterpriseOne object</b>	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.
<b>EnterpriseOne process</b>	A software process that enables JD Edwards EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. JD Edwards EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
<b>Environment Workbench</b>	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the system-release number data source. It also updates the Environment Plan detail record to reflect completion.
<b>escalation monitor</b>	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

<b>event rule</b>	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
<b>facility</b>	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a “business unit.”
<b>fast path</b>	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
<b>file server</b>	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network users request files and make changes to these files.
<b>final mode</b>	The report processing mode of a processing mode of a program that updates or creates data records.
<b>FTP server</b>	A server that responds to requests for files via file transfer protocol.
<b>header information</b>	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
<b>interface table</b>	See Z table.
<b>integration server</b>	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
<b>integrity test</b>	A process used to supplement a company’s internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
<b>interoperability model</b>	A method for third-party systems to connect to or access JD Edwards EnterpriseOne.
<b>in-your-face-error</b>	In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
<b>IServer service</b>	This internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
<b>jargon</b>	An alternative data dictionary item description that JD Edwards EnterpriseOne appears based on the product code of the current object.
<b>Java application server</b>	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
<b>JDBNET</b>	A database driver that enables heterogeneous servers to access each other’s data.
<b>JDEBASE Database Middleware</b>	A JD Edwards EnterpriseOne proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
<b>JDECallObject</b>	An API used by business functions to invoke other business functions.
<b>jde.ini</b>	A JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards EnterpriseOne. This includes workstations and servers.
<b>JDEIPC</b>	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.



<b>jde.log</b>	The main diagnostic log file of JD Edwards EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of JD Edwards EnterpriseOne.
<b>JDENET</b>	A JD Edwards EnterpriseOne proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all JD Edwards EnterpriseOne supported platforms.
<b>Location Workbench</b>	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the system data source.
<b>logic server</b>	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when JD Edwards EnterpriseOne software runs.
<b>MailMerge Workbench</b>	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
<b>master business function (MBF)</b>	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
<b>master table</b>	See published table.
<b>matching document</b>	A document associated with an original document to complete or change a transaction. For example, in JD Edwards EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
<b>media storage object</b>	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
<b>message center</b>	A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user.
<b>messaging adapter</b>	An interoperability model that enables third-party systems to connect to JD Edwards EnterpriseOne to exchange information through the use of messaging queues.
<b>messaging server</b>	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
<b>named event rule (NER)</b>	Encapsulated, reusable business logic created using event rules, rather than C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
<b><i>nota fiscal</i></b>	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
<b><i>nota fiscal factura</i></b>	In Brazil, a <i>nota fiscal</i> with invoice information. See also <i>nota fiscal</i> .

<b>Object Configuration Manager (OCM)</b>	In JD Edwards EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
<b>Object Librarian</b>	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
<b>Object Librarian merge</b>	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
<b>Open Data Access (ODA)</b>	An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.
<b>Output Stream Access (OSA)</b>	An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
<b>package</b>	JD Edwards EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snapshot of the central objects on the deployment server.
<b>package build</b>	<p>A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in JD Edwards EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.</p> <p>Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”</p>
<b>package location</b>	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
<b>Package Workbench</b>	An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the system-release number data source. It also updates the Package Plan detail record to reflect completion.
<b>planning family</b>	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
<b>preference profile</b>	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
<b>print server</b>	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
<b>pristine environment</b>	A JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

<b>processing option</b>	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
<b>production environment</b>	A JD Edwards EnterpriseOne environment in which users operate EnterpriseOne software.
<b>production-grade file server</b>	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
<b>program temporary fix (PTF)</b>	A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.
<b>project</b>	In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
<b>promotion path</b>	<p>The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):</p> <p>11&gt;21&gt;26&gt;28&gt;38&gt;01</p> <p>In this path, <i>11</i> equals new project pending review, <i>21</i> equals programming, <i>26</i> equals QA test/review, <i>28</i> equals QA test/review complete, <i>38</i> equals in production, <i>01</i> equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.</p>
<b>proxy server</b>	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
<b>published table</b>	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
<b>publisher</b>	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
<b>pull replication</b>	One of the JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.
<b>QBE</b>	An abbreviation for query by example. In JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
<b>real-time event</b>	A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when certain transactions occur.
<b>refresh</b>	A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
<b>replication server</b>	A server that is responsible for replicating central objects to client machines.
<b>quote order</b>	In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
<b>selection</b>	Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
<b>Server Workbench</b>	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the system-release number data source. It also updates the Server Plan detail record to reflect completion.
<b>spot rate</b>	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
<b>Specification merge</b>	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
<b>specification</b>	A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
<b>Specification Table Merge Workbench</b>	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
<b>store-and-forward</b>	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
<b>subscriber table</b>	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
<b>supplemental data</b>	<p>Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.</p> <p>For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across JD Edwards EnterpriseOne systems.</p>
<b>table access management (TAM)</b>	The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
<b>Table Conversion Workbench</b>	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
<b>table conversion</b>	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
<b>table event rules</b>	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
<b>terminal server</b>	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

<b>three-tier processing</b>	The task of entering, reviewing and approving, and posting batches of transactions in JD Edwards EnterpriseOne.
<b>three-way voucher match</b>	In JD Edwards Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
<b>transaction processing (TP) monitor</b>	A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.
<b>transaction set</b>	An electronic business transaction (electronic data interchange standard document) made up of segments.
<b>trigger</b>	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
<b>triggering event</b>	A specific workflow event that requires special action or has defined consequences or resulting actions.
<b>two-way voucher match</b>	In JD Edwards Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
<b>User Overrides merge</b>	Adds new user override records into a customer's user override table.
<b>variance</b>	<p>In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.</p> <p>In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.</p>
<b>Version List merge</b>	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.
<b>visual assist</b>	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
<b>vocabulary override</b>	An alternate description for a data dictionary item that appears on a specific JD Edwards EnterpriseOne form or report.
<b>wchar_t</b>	An internal type of a wide character. It is used for writing portable programs for international markets.
<b>web application server</b>	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
<b>web server</b>	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
<b>Windows terminal server</b>	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows

terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

<b>workbench</b>	A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.
<b>work day calendar</b>	In JD Edwards EnterpriseOne Manufacturing, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
<b>workflow</b>	The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.
<b>workgroup server</b>	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
<b>XAPI events</b>	A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when the specified transactions occur to return a response.
<b>XML CallObject</b>	An interoperability capability that enables you to call business functions.
<b>XML Dispatch</b>	An interoperability capability that provides a single point of entry for all XML documents coming into JD Edwards EnterpriseOne for responses.
<b>XML List</b>	An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.
<b>XML Service</b>	An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.
<b>XML Transaction</b>	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.
<b>XML Transaction Service (XTS)</b>	Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.
<b>Z event</b>	A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.
<b>Z table</b>	A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.
<b>Z transaction</b>	Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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