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PeopleSoft HCM 9.2: Absence Management

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PeopleSoft HCM 9.2: Absence Management
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. 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 help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Bold	Highlights 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.
Italics	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italics also highlight references to words or letters, as in the following example: Enter the letter *O*.
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`	Highlights a PeopleCode program or other code example.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

Typographical Convention	*Description*
{ } (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.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

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

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What’s new in the PeopleSoft Online Help.
- PeopleSoft Online Help acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft HCM Related Links

PeopleSoft Information Portal on Oracle.com

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

HCM Abbreviations

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Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with Absence Management

Absence Management Overview

Absence Management handles absence processing and enables you to fine-tune the design of your system. Using a browser environment, PeopleTools, and a rules-based system, you can configure your absence system online without writing or changing the source code, thus reducing installation and maintenance time and costs.

Absence Management contains no application-specific rules or code. Using items, called *elements,* you build rules that determine what absence components are calculated, on a payee-by-payee basis, during batch processing.

Related Links

Absence Management Features

Absence Management Business Processes

Absence Management provides these business processes:

- Absence entitlement processing.
- Absence take processing.
- Transfer of converted absence data to payroll.

Absence Management Integrations

Absence Management integrates with these applications:

- PeopleSoft Human Resources (HR)
- PeopleSoft Payroll for North America (directly or through PeopleSoft Time and Labor).
- PeopleSoft Payroll Interface.

Related Links

Understanding How Absence Management Integrates with the Payroll System

Understanding Payee Data

Absence Management and Global Payroll

Absence Management and Global Payroll share many of the same components. In addition, some of the fields and pages in the shared components apply only to Global Payroll. These situations are noted throughout this documentation.

Important! This documentation is written for the Absence Management application. If you are using Global Payroll, refer to *PeopleSoft HCM 9.2: Global Payroll*.

Absence Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See the product documentation for *PeopleSoft HCM: Application Fundamentals*, *PeopleTools: PeopleSoft Setup Manager*, and *PeopleTools: PeopleSoft Component Interfaces*.

Chapter 2

Understanding Absence Management

Common Elements, Absence Features, and Integration

This topic contains a review of terms used in this documentation, presents important absence management concepts and features, and discusses the integration to your payroll system.

Common Elements Used in This Documentation

Absence Event

The period of time that a payee is absent for the same reason. For example, if a payee is out sick Monday through Wednesday, the three-day absence is referred to as an *absence event*.

Absence Take

The element that represents the reason for the absence event.

Note: The self service term for Absence Take is *Absence Name*.

Adjustment

An increase or decrease that is made to the entitlement balance.

Entitlement

The amount of paid time-off that a payee is entitled to take for each category of absence or each absence event, depending on your method of accrual. For example, payees in your organization may be entitled to receive 20 vacation days per year.

Entitlement Balance

The amount of unused entitlement.

Generation Control

A type of data filtering that provides more control over whether an element for a payee is processed during batch processing. This increased control is accomplished through generation control elements, which enable you to tell the system whether to process an element, based on criteria that you define.

Payee

Payees are the people in your organization that you want to pay. From an Absence Management perspective, payees are employees whose absence events are managed by the system.

Units

The period of time in which entitlement, take, adjustments, balances, and other absence-related time periods are measured. Typically, units represent either hours or days. You choose the unit of measurement to use.

Absence Management Features

Absence Management enables organizations to automate the processes for planning and compensating paid time off for a multinational workforce. It combines employee and manager capabilities and tracks all absences in a single application. Absence Management contains built in integration to PeopleSoft Payroll for North America, either directly or through PeopleSoft Time and Labor, and to third-party payroll solutions using PeopleSoft Payroll Interface.

This overview of Absence Management features includes the following topics:

- Schedules.
- Entitlements.
- Absence types and reasons.
- Takes.
- Absence entry, approvals, and self service features.
- Integrations.

Schedules

Tracking the time that payees are absent from work is critical to producing an accurate payroll. You need to know when payees are out sick, on vacation, or absent for any other reason and whether to pay them for this time. Schedules define workplace attendance expectations for groups of employees, and include definition of the workdays, scheduling units, and holidays. This information is important to the absence process because it tells the system whether a reported absence occurred during a scheduled work time. Absences during scheduled work periods may be paid if they meet your organization's absence rules.

Absence Entitlements

Absence entitlement elements define how much paid time off your organization gives payees for various kinds of absences. They also specify the entitlement period, the calculation frequency, and any automatic adjustments to make to entitlement balances. For example, you might set up a vacation entitlement element that gives payees 15 days of paid vacation each year. Also, you might specify that payees are compensated for half of any vacation days that are unused by April 1 of the following year. Entitlement can be granted for each absence or at the frequency that you specify.

For each absence entitlement element that you create, you indicate whether entitlement should accrue for each absence (for example, 40 days for each illness) or at the frequency that you specify (for example, 2 sick days per month). Absence-based entitlement is resolved when you run the Take process after an absence occurs; frequency-based entitlement is resolved when you run the Entitlement process. With frequency-based entitlement, you can use generation control to limit the conditions under which entitlement is resolved. For example, you can limit resolution to active payees only. Using automatic adjustments, you can specify what happens to a payee's frequency-based entitlement balance when certain conditions are met; for example, when a payee is terminated or when a certain date is reached. Payees can be compensated for all or part of the unused entitlement, or they can lose all or part of the unused entitlement. You use a generation control element to define the conditions under which the adjustment is made.

Absence Takes

Absence take elements define your rules for allowing paid time off. They define which kinds of absences are valid and the requirements that must be met before entitlement can be used. For example, a vacation take rule may require that payees be employed three months before using vacation entitlement. You can link each take element to one or more entitlement elements so that the system can calculate the number of paid and unpaid units and update the entitlement balances. If you link to more than one entitlement element, you specify the order in which the elements are to be used. When an absence occurs, the system takes from the first entitlement (until it is depleted) before taking from the next entitlement.

Absence Types and Reasons

Absence types define the broad categories of absences you want to track, such as illness, vacation, or maternity leave. Within each absence type, you can create a set of absence reasons that further classify absences. For example, if you create an absence type called illness, you may want to set up reasons such as cold, flu, stress, and so on.

You create absence types to describe the categories of absences that are relevant to your organization such as illness, vacation, personal, or work injury. Within each type, you can define codes that further describe the reason for the absence; for example, flu or back problems. The type and reason that are associated with an absence event populate system elements that you can use in absence formulas.

Absence Entry, Approval, and Self Service Features

Depending on how you set up the approvals framework, self service features may be available to employees and managers to enter, review, and, in the case of managers, approve absence transactions. Additionally, payroll or absence administrators can enter, modify, review and approve absence transactions through Absence Management pages.

- Absence entry.

  To record actual absences into the system, users select the take element that identifies the absence and enter the dates of the absence. An absence reason can also be entered to further identify the cause of the absence (if you have defined absence reasons codes). Depending on your take rules, you can require online approval of absence entries before processing. If online forecasting is required for a take element, the system issues a warning when users try to save absence entries without first running the online forecasting process. Payees and managers can enter requests for absences through a web browser and view requests.

  Users can enter full or partial day absences so that when a payee is out for the same number of hours during each day of an absence event, the user enters the hours only once or selects the Half Day check box, if appropriate.

  Self service users can enter information in as many as 4 configurable fields when they enter absence events. This information updates the daily data when you run the Take process and can be available to your absence formulas. If you use this feature, we recommend that you provide users with guidelines for the types of data that they can enter.

  Note: If you define rules for self-service absence transactions, employees, managers, or both can use the self service pages to enter requests for absences. You can also define rules for approving self-service absence requests. Requests entered through the self service pages are treated as actual absences once they are approved.

- Absence entitlement balance forecasting.

  You can require the use of online absence entitlement balance forecasting during absence entry, or make its use optional. Managers can approve requests for absences and forecast absence entitlement balances as of a particular date. With forecasting, a user enters actual or planned absence events and launches an online process that processes future periods of time, starting with the last finalized calendar. It can return values for balances and other items that you define. You might use this feature, for example, to determine whether a payee has or will have enough entitlement to cover an absence.

- Balance inquiry.

  Use this feature to display a payee's current entitlement balance. The online process displays the current entitlement balance and can be used to project entitlement for a take element as of the date that you specify.

- Delegate absence self service transactions.

  Delegation is when a person authorizes another to serve as his or her representative for a particular task of responsibility. Users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Integration

Absence Management has functionality that enables you to enter and track absence information. However, that information must be available to your payroll system in order to process earnings and deductions related to absences. To accomplish this, Absence Management integrates with the following PeopleSoft applications:

- Payroll for North America, either directly or through Time and Labor.
- Payroll Interface, for customers that use a third-party payroll system.

Integration to Payroll for North America

To enable direct integration between Absence Management and Payroll for North America, Absence Management delivers the ability to export computed absence results (by employee and pay period) for actual payment. Only a minimum amount of setup is required to map absence payment concepts to an existing Payroll for North America system.

For customers who use both Payroll for North America and Time and Labor, the functionality in Absence Management includes the ability to enter absences or view absence balances in Time and Labor on the Timesheet page Time and Labor converts this data into payable time and adds sequence and reference numbers for eventual cost distribution. This integration eliminates double entry and custom interfaces.

Integration to Payroll Interface

To enable the integration between Absence Management and third-party payrolls, Absence Management enables you to export computed absence results (by employee and pay period) for actual payment. Only a minimum amount of setup is required to map absence payment concepts to an existing payroll interface process.

Chapter 3

Introducing the Core Application Architecture

Understanding the Core Application Architecture

Absence Management is built on a core application that organizations in all countries can use to create absence management systems. Understanding the core application architecture will enable you to better understand the complex details of Absence Management.

Understanding Elements

When you create your absence management system using Absence Management, you want to be sure that it meets all the requirements of your organization. One of the ways that PeopleSoft ensures this is by building the absence management system through the use of components called *elements*.

This topic discusses:

- What is an element?
- Combining elements into rules.
- Why the core application uses element name number (PIN) processing.

What Is an Element?

An element is the smallest component of Absence Management. Elements are building blocks that relate to other building blocks to define your absence management system.

You define each element only once and use it repeatedly anywhere in the system.

This table lists the element categories:

Type of Element	***Description***
Data retrieval	Retrieves data. Some are predefined elements (called *system elements*) that are delivered by PeopleSoft. Others you define when creating your absence management system.
Calculation	Performs a calculation.
Organizational	Defines the structure and framework for the system.

This table lists alternative element categories:

Type of Element	*Description*
Primary	Represents primary rules for absence takes and entitlements.
Supporting	Usually not used alone, but used to create other, more complex elements.
Miscellaneous	Represents such things as eligibility criteria, accumulators, and certain types of rules.

You can combine these elements in an unlimited number of ways to produce the results that you need for your absence management processing.

Related Links

Understanding Elements

Combining Elements Into Rules

In Absence Management, you create and store rules by entering data through the online pages.

These rules drive the core application and define the absence management process. Think of a *rule* as what defines how an element is calculated. Rules define the absence management process itself.

Each country using Absence Management defines its own rules. Absence Management enables you to define rules that address your specific absence management processing needs.

Image: Elements are manipulated by rules to create the absence management process

This diagram shows how elements and rules define your absence management process.

Important! There is usually no need to modify the Absence Management COBOL programs. Using the online pages, you can configure the system to meet your absence management processing needs. PeopleSoft strongly discourages the modification of the delivered COBOL programs—with the possible exception of modifying array size—because modifications can affect the integrity of the entire system.

Related Links

Defining Array Elements

Why the Core Application Uses Element Name Number (PIN) Processing

An element name number (PIN) is a numeric identifier for an element. Every element in Absence Management has a unique element name number, including the elements that you create and the elements the PeopleSoft system delivers. Absence Management programs access and process an element by referring to its element name number, rather than its name.

A PIN is referred to as an *element* in Absence Management. A PIN and an element are identical, and a PIN number is the same as an element number. We explain the term PIN here because it is referenced throughout the programs and table structure of the application. Think of PIN as the technical name that is used in the programming and table structure and *element* as the functional name that is used on all pages and discussions.

This is necessary because Absence Management is designed for use by any organization in any country. Each organization will likely give the elements that form the basis for its absence management system different names, depending on its requirements. And organizations in different countries are going to name their elements using different languages. Also, the system elements delivered by PeopleSoft are often translated into many languages. If the name were the only way to identify an element, there could be problems.

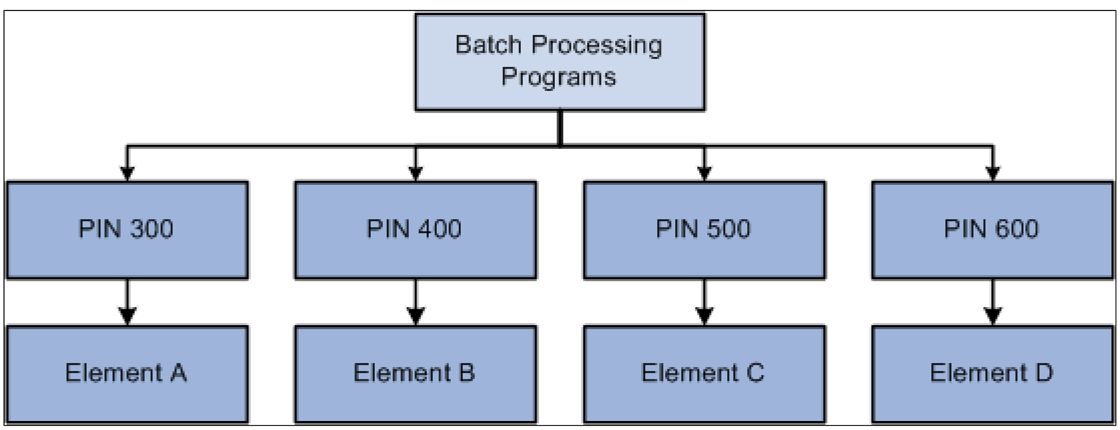
PIN numbers also improve performance within batch processes. It is more efficient for the system to use numeric values than to use character values. This performance improvement is a result of being able to easily read the numeric values into the processing arrays and create a pointer to the correct place in the array.

PINs are numbered sequentially.

Note: The system assigns a PIN number to each element that you create. The first number the system assigns is 100,001. PIN numbers prior to 100,001 are reserved for the elements that are delivered with Absence Management.

Image: Elements are accessed by pin number rather than element name

This graphic shows how elements are accessed by PIN number rather than by element name.



Understanding the Processing Framework

The Absence Management core application is a common foundation and structure that organizations use to build their own calculation rules. The core application determines the basic framework for your absence processing. This framework supplies the normal processing sequence, organizational structure, and processing structure for calculating absences.

This topic discusses:

- The processing sequence.

- The organizational structure.
- The processing structure.
- Calendars.

The Processing Sequence

An absence process consists of several processing phases, some of which you can run together. The typical processing sequence (the order in which Absence Management executes phases of a batch process) for an absence run consists of these phases:

- Identification (payee selection).
- Calculation.
- Finalization.

You can also run Cancel, Freeze, Unfreeze, and Suspend phases as needed and modify processing instructions by payee.

When you first launch the batch process, Absence Management determines which payees are to be selected and calculated for the absence run, based on the selection criteria that you have specified. This identification phase is executed only once for each calendar group ID.

During the calculation phase, absence calculations are performed. Each payee is processed sequentially. As the system encounters each payee, it processes each element that is identified in the process list. Various criteria such as eligibility and generation control are considered in selecting which elements to process.

The calculation process can be repeated any number of times; only the absences that are appropriate to calculate are processed. When a calculation is first executed, all absences are processed. During subsequent calculations, only the following absences are processed:

- Absences resulting from iterative triggers.
- Absences for which you have entered recalculate instructions.
- Absences that encountered errors during the previous run.

An iterative trigger can be produced when data changes for a payee. For example, a change to a payee’s job record might create an iterative trigger. Or the addition of a new hire to the calendar group ID can produce iterative triggers.

Finalizing an absence run closes and completes the process.

Related Links

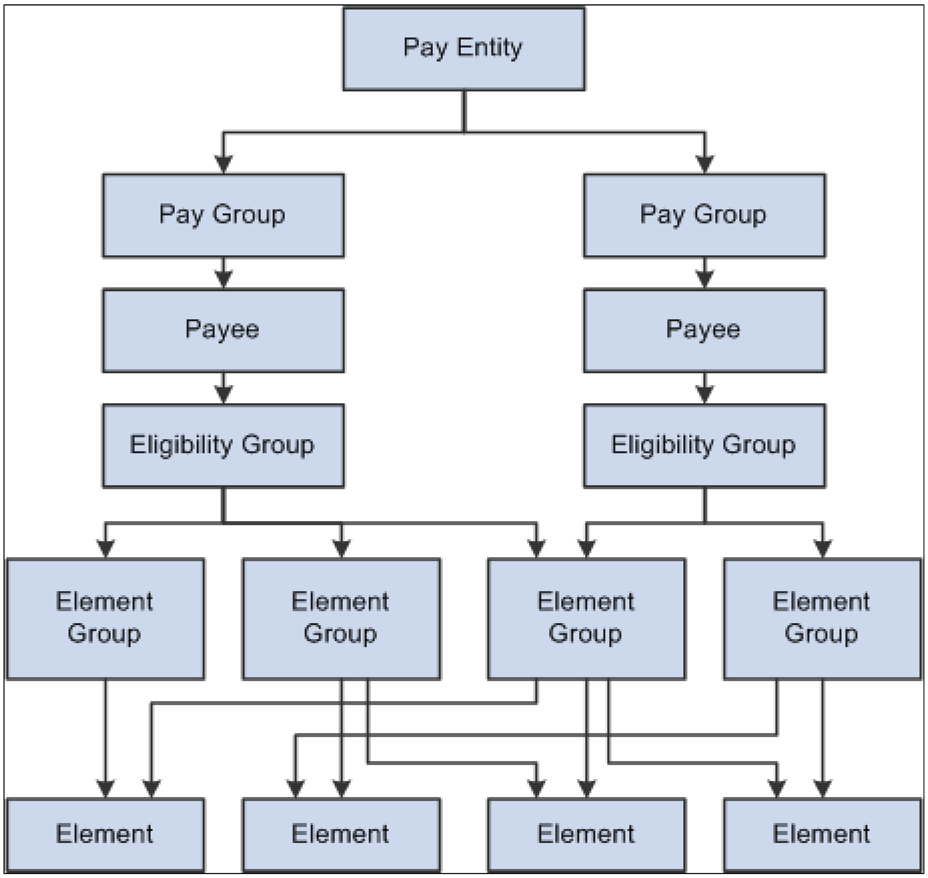
Understanding Absence Processing
Trigger Table Data
Understanding Process Lists

The Organizational Structure

The Absence Management core application determines the organizational structure for absence processing.

Image: Organizational structure of Absence Management

This diagram shows the hierarchy of components in the organizational structure.



Pay Entity

Pay entity defines the organization managing absences for payees.

A pay entity can be linked to one or more pay groups. However, each pay group is linked with only one pay entity.

You associate a specific country with each pay entity. This country designation is important for many features in Absence Management such as the groups of calendars with a single calendar group ID, retroactive methods, and trigger definitions.

Pay group

Absence Management uses a logical grouping, called pay group, to qualify individuals for absence management. Typically, all individuals in a pay group have something in common that causes them to be processed at the same time in the absence management system.

Common examples of pay groups are salaried and hourly payees. You can assign a payee’s default absence elements based on pay group if you select this option at installation time. A pay group can be associated only with a single pay entity.

Each pay group has a default eligibility group associated with it. This includes the default absence elements for the pay group population. The default eligibility group that is associated with a pay group is used as the payee level default. You can override these defaults.

pay groups are ultimately associated with pay calendars to process absences. It is important to group payees whose absences are calculated with the same frequency—weekly, monthly, and so on.

Payee

Payees are the people in your organization for which you want to calculate absence results.

Payees who are included in a pay group definition can be members of different eligibility groups. The only link between pay groups and eligibility groups is from a default perspective. The eligibility group that is defined on the Pay Group page is used as an initial default for the payee. You can override the default.

Eligibility Group

An eligibility group is a grouping of element groups. Eligibility groups indicate the specific elements for which a certain payee population is eligible. The default eligibility group is defined at the pay group level. A payee is assigned to an eligibility group through the default that is defined at the pay group level. You can override the default value.

For example, let's say that you have a pay group for all payees whose absences are calculated monthly. Of those payees, 99 percent are regular, salaried payees. who are eligible for regular absence entitlements and takes. However, you also have 10 executives whom you want to include in that same pay group. These executives are eligible for slightly different absence rules. You can override their eligibility group and assign them to the EXEC ABSENCES eligibility group. You can have only one default eligibility group for each pay group.

Element Group

Element groups provide a method of assigning a large number of elements to many eligibility groups without repeating the elements in each and every eligibility group. Element groups provide a means for grouping these elements. You can assign any number of element groups to an eligibility group.

Elements

Elements are the basic building blocks of Absence Management. The organizational structure of the system begins with the definition of these basic absence management components.

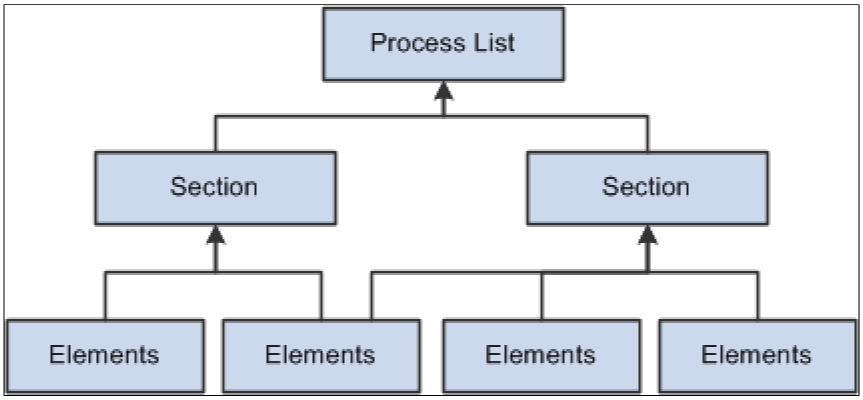
Related Links

Understanding Payee Data
Understanding the Organizational Structure

The Processing Structure

Image: Processing structure of Absence Management

This diagram shows the components of the processing structure.



Process List

A process list specifies the order in which absence elements are processed and resolved. You add these elements to the process list by using sections. If you add sections to your process list, the sections are processed in the order in which you insert them into the list. You can also execute sections conditionally.

The Process List - Definition page indicates that the type of calculation is absence.

Section

A section is a grouping of elements and controls the order that those elements are processed on the process list. You can use the following types of sections for absence processing:

- Standard sections for regular processing.
- Payee sections for specifying, at the payee level, elements for processing.
- Absence take sections for processing absences in date sequence.

Once you have defined a section, you can reuse it in multiple process lists.

Elements

Elements are the basic building blocks in Absence Management. Some stand alone while others use several simple elements (called *supporting elements*) that are combined to form more complex elements.

During an absence processing run, the system resolves each element in the process list for each payee. The elements that are resolved depend on a payee, so the resolved value of an element depends on which payee is under consideration.

Related Links

Understanding Processing Elements
Understanding Elements

Calendars

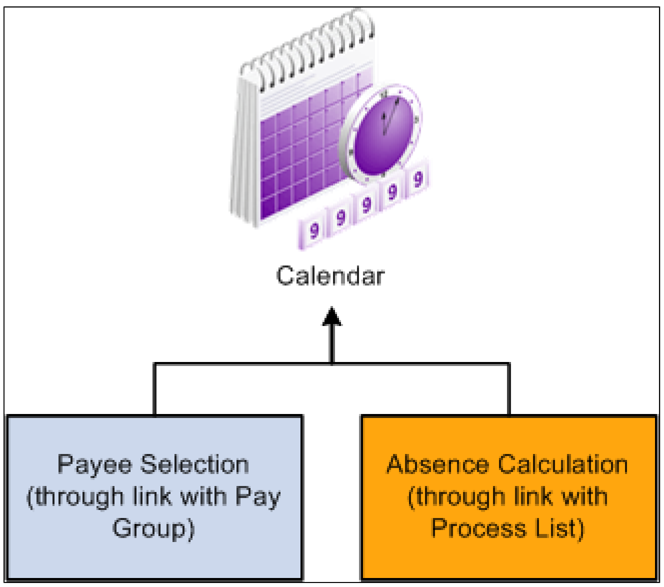
To run an absence process, the relevant components of the system are tied together through the use of calendars. A calendar controls whose absence results will be calculated, and the period of time for which the absences are processed.

Only one pay group can be associated with a calendar. Through the use of various selection criteria, you can define who is going to be paid:

- Calendar run types define the type of absence run; for example, a regular absence run or an off-cycle absence run.
- Calendar period IDs define the period of time for which the absences are processed.
- Calendar group ID groups the calendars that you want to process at the same time.

Image: Calendar ties the entire process together

This diagram shows how calendars ties together the components of an absence run.



Related Links

Understanding Calendars

Understanding the Batch Architecture Process Flow

This topic discusses:

- Absence Management modes.
- Payee selection.
- Calculation (technical).
- Arrays used in batch processing (technical).

- Batch processing output tables.

Absence Management Modes

Absence Management processes payees and elements by utilizing a very specific processing order. All the components of the system that you define, such as payees, elements, and rules, come together at the time an absence run is executed.

Think of Absence Management as having two primary modes:

- Setup mode

  During the setup mode, you define the various elements, rules, and other system configurations that make up your absence management system.

- Processing mode

  During the processing mode, Absence Management looks at all the setup information that you've defined, along with any data that you've entered, and processes it according to your specifications.

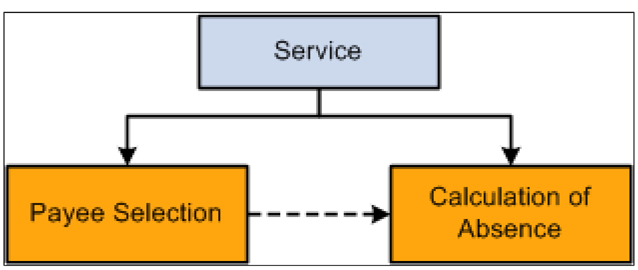
Note: The discussion in this topic about the batch architecture process flow is a very high-level overview of the process. Each phase of the process is discussed in greater detail later in this documentation.

Payee Selection

When you run an absence batch process, the first program that the system calls is the Service program. The Service program acts as the coordinator between the selection of payees to be processed and the calculation process. The Service program initiates the payee selection process. Once the payees are selected, the Service program passes control of the data that was created during the payee selection phase to the Calculation program.

Image: The Service program is the batch processing starting point

This diagram shows how the Service program coordinates the payee selection and calculation phases.



Before you can process absences, you must identify the payees that are to be processed. In Absence Management, this is called *payee selection* or *payee identification.* Payee selection is required in absence processing.

The payee selection process is separate from the calculation process. No rules are defined for payee selection that is associated with an absence calculation. The payee selection phase of the process only identifies the payees and creates the data that is later passed on to the calculation phase.

The pay calendar acts as the controlling function that coordinates and defines the payee selection and calculation processes. The Payroll/Absence Run Control also controls payee selection.

On the calendar definition page, you indicate whether you want active payees or listed payees selected. If you select active payees, you are offered a number of other defining choices. If you select listed payees, you insert the employee ID numbers for the payees that you want to select.

The payee selection process also uses retroactive and period segmentation triggers. Retroactive triggers can cause other periods besides the current absence period to be processed for a particular payee. Period segmentation triggers can cause the absence period to be split into segments, thus producing multiple calculations.

The result of the payee selection process is the creation of Process Status (GP_PYE_PRC_STAT) and Segment Status (GP_PYE_SEG_STAT) records. A Process Stat record is created for each payee for each calendar (including retroactive processes). A Segment Stat record is created for each payee for each segment in each calendar. The Process Stat and Segment Stat records are the storage places for the payee data that is related to the calendar that is being run. Essentially, the Process Stat and Segment Stat records list the payees and all the absence periods that are to be processed, including the current absence period and possible retroactive periods.

Related Links

Understanding Absence Processing

Understanding Calendars

Calculation (Technical)

Once payees have been selected, the Service program passes control to the calculation phase of the process. The calculation phase uses the data that is stored in the Process Stat and Segment Stat records as the beginning set of payee data.

The first step in calculating absences is to load process-level data into arrays, including data from sources such as pay entity, pay group, eligibility group, calendar, and the process list. This system data is more static than the payee-specific data.

The calculation programs process each payee, using the Payee Process Stat and Payee Segment Stat Records that were created during the payee selection phase. The program loads all the payee-level data into payee arrays, including data from table sources such as Job, Person, Compensation, and Overrides.

The process that loads the payee-level data into the arrays also refreshes its data or reset pointers to data between every absence run so that:

- The correct effective-dated information is always used.
- The correct year-to-date balances are always reflected.

At this stage, all the process-level and payee-level data is loaded into arrays, ready for processing.

Next, the calculation phase checks element eligibility.

The calculation program calls the Process List Manager program, which looks to the process list to determine which elements will be processed and in what order.

When the Process List Manager encounters an element to be processed, it calls the PIN Manager (a program that manages individual elements) to process each element that passed the element eligibility check earlier in the process. The PIN Manager references the PINV array during this process. The PINV array stores the results of all element resolutions during absence batch processing. If the data stored in

PINV indicates that an element has not already been resolved, the PIN Manager calls an PIN resolution program (a program that processes specific types of elements).

A separate array, called *PINW,* stores the accumulator data that is resolved during batch processing.

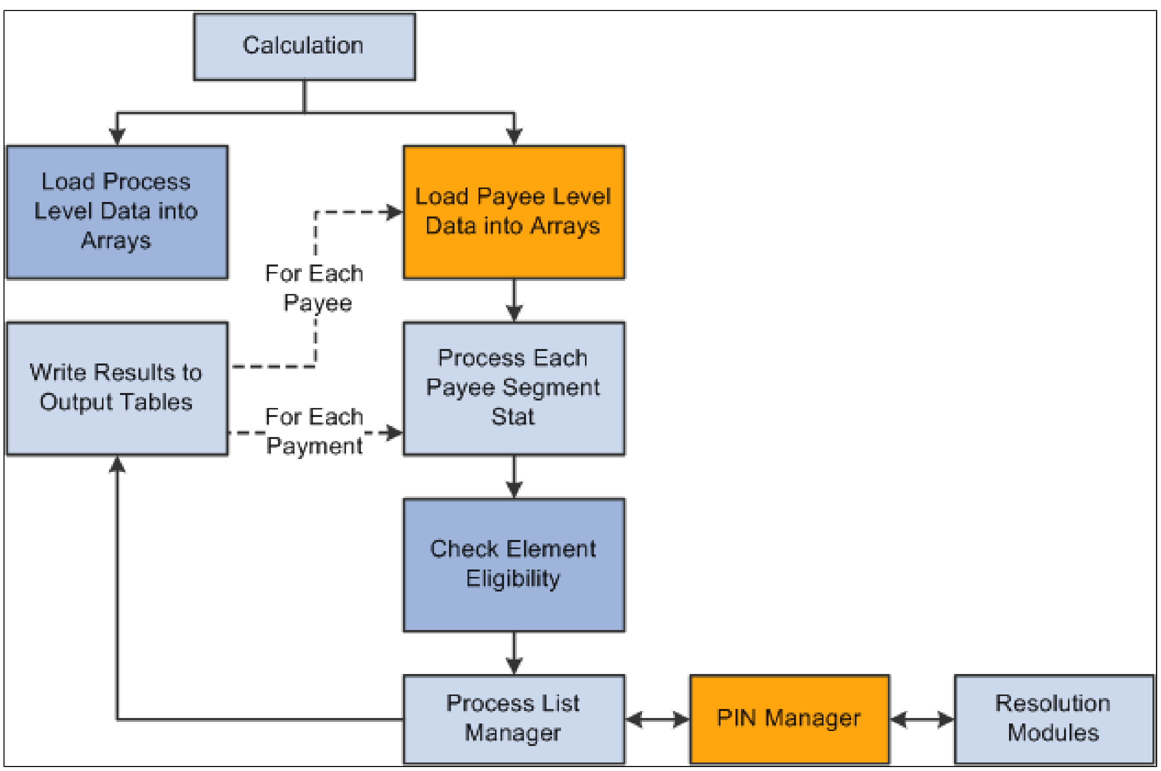
Each PIN resolution program resolves a specific type of element. For example, one PIN resolution program might resolve absence elements while another might resolve formula elements. The PIN resolution program loads the element definition into memory. Then the program overrides the definition that is stored in memory with any payee overrides or positive input that is designated for that payee. If any elements are referenced in the element and overrides definitions that are now in memory, the program calls the PIN Manager to resolve them. Remember, an element can comprise other elements. During processing, this means that to resolve a single element, the system might need to resolve any number of other elements from which the primary element is created. The results of this process are used to calculate the values of other elements, and pass the values back to the PIN Manager, which writes them to the main value array (PINV).

Each element is resolved in a cyclical (or *recursive*) manner; that is, each element is resolved, and the data is stored (in PINV or PINW). Then the Process List Manager again looks to the process list to see what element is to be processed next, and the process is repeated.

When all calculations are complete for the absence run, the program writes the results to the appropriate output tables. First, the program references the PINV and PINW arrays and writes the results to the database. Then it references all positive input and writes the data to the positive input history records. Finally, the program generates deltas for any future retroactive processing.

Image: The calculation process

This diagram shows the calculation phase of the batch process.



Related Links

Element Eligibility

Understanding Overrides

Arrays Used in Batch Processing (Technical)

In Absence Management batch processing, arrays are used to store data. Arrays are temporary tables that COBOL programs use to store data during processing. Once processing is complete, the programs write the data from the temporary arrays to the appropriate output tables.

Occasionally you might need to modify the COBOL programs to accommodate a larger maximum array size than is defined in the programs that are delivered by PeopleSoft. If an array is too small (the data overflows the array), you get an error message, and the batch process fails. The error message (MSGID-ARRAY-OFLOW) identifies the array and the COBOL file where the array is defined. This guides you to the location in the designated file that might need modification.

Increasing the Occurs Count in Arrays

The table access programs allocate a specified, limited amount of memory space to store in a table array all the details of the absence management process tables that are typical for an absence run.

You can increase the maximum size of an array by increasing the occurs count in the appropriate table access program.

Note: This is the only COBOL modification that we detail because COBOL modifications to the delivered Absence Management programs are *strongly* discouraged.

For example, let’s look at a piece of unmodified code in GPCDPDM.CBL.

Below is an array and its related COUNT control field that prevents the program from aborting. When you make a modification, both *highlighted* numbers must be changed and kept in sync.

```
05  L-PMT-COUNT           PIC 9999    VALUE 0   COMP.
         88  L-PMT-COUNT-MAX               VALUE 20.

05  L-PMT-DATA                        OCCURS 20
                                           INDEXED BY PMT-IDX.
```

The assumption here is that there will never be more than 20 absences processed for a payee during any calendar run. If more than 20 absences were processed, the program would issue an error message (MSGID-ARRAY-OFLOW), and the absence management process would terminate.

While the system loads and refreshes this array once for each payee, the system refreshes other arrays for each absence, and loads and increments others throughout the entire process.

This type of modification is not difficult to deal with when you upgrade to a new Absence Management release, when PeopleSoft delivers a whole new set of source code. Simply move your array size modifications to the new code line. Whenever you change the size of an array, be sure to recompile the entire Global Payroll COBOL code line (GPP*).

Related Links

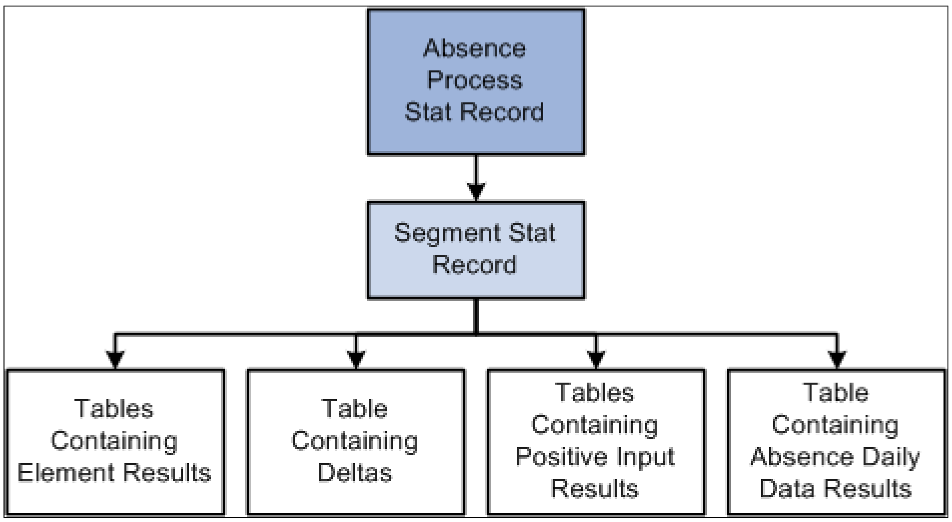
Understanding the Absence Management Utilities

Batch Processing Output Tables

The goal of an absence batch processing run is to produce a set of output tables, where your important batch processing data results reside. Once you know the type of information that resides in the output tables that are generated by Absence Management, you can use those tables to produce reports and other data manipulations that are relevant to your organization's needs.

Image: Relationships between batch processing output tables

This diagram shows the relationships between the batch processing output tables.



Tables Generated by Payee Selection Process

The payee selection process generates the following tables:

- Process Stat (status) record (GP_PYE_PRC_STAT).

  There is one Process Stat record for every EMPLID/EMPL_RCD combination per calendar.

  There is a one-to-one/many relationship between the Process Stat record and the Segment Stat record.

- Segment Stat record (GP_PYE_SEG_STAT).

  The Segment Stat record is a child of the Process Stat record. There is one Segment Stat record for each gross to net within the calendar.

Tables Containing Element Results

The following tables contain element results:

- Generated Positive Input (GP_GEN_PI_DATA).

  Contains the results of earnings and deductions after batch processing.

- Other Elements (GP_RSLT_PIN).

  Contains the results of miscellaneous element resolutions after batch processing.

Table Containing Accumulator Results

The Accumulators table (GP_RSLT_ACUM) contains the results of accumulators after batch processing.

Table Containing Deltas

The Deltas table (GP_RSLT_DELTA) contains deltas, which are the differences between two element results. This data is often important for processing retroactivity. This table is a child table to the Segment Stat (segment status) table (GP_PYE_SEG_STAT), which is a child of the Process Stat table (GP_PYE_PRC_STAT).

Tables Containing Absence Daily Data Results

The following table contains the absence daily data results.

Absence Daily Data (GP_RSLT_ABS)

Defining Installation Settings

To define installation settings, use the Installation Table (INSTALLATION_TBL), Installation Settings (GP_INSTALLATION), and Countries (GP_COUNTRY) components.

When you install Absence Management, you select various settings and default values that are specific to your implementation.

This topic discusses how to:

- Indicate an Absence Management installation.
- Define the default country.
- Define Absence Management installation settings.
- Define schedule settings and load dates.
- Define country-level setup.

Pages Used to Define Installation Settings

Page Name	***Definition Name***	***Navigation***	***Usage***
Products	INSTALLATION_TBL1	Set Up HCM, Install, Installation Table, Products	Define the PeopleSoft applications installed.
Country Specific	INSTALLATION_TBL3	Set Up HCM, Install, Installation Table, Country Specific	Define country-specific information.
Installation Settings	GP_INSTALLATION	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Settings, Installation Settings	Define installation settings that are unique to Absence Management.

Page Name	***Definition Name***	***Navigation***	***Usage***
Schedule Settings	TL_INSTL_PUNCH	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Settings, Schedule Settings	Define default settings for work schedules.
Dates Table Load	TL_DATE_LOAD	Click the Load Dates link on the Schedule Settings page.	Load dates for use in resolving schedules.
Countries	GP_COUNTRY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Countries, Countries	Define country-level setup parameters.

Products Page

Use the Products page (INSTALLATION_TBL1) to define the PeopleSoft applications installed.

Navigation

Set Up HCM, Install, Installation Table, Products

If your organization also uses PeopleSoft Payroll for North America or PeopleSoft Payroll Interface, select the appropriate check box as well.

Note: To use the Absence Management application, the Global Payroll Core check box might be cleared.

Related Links

"Products Page *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Defining the Default Country

Use the Country Specific page (INSTALLATION_TBL3) to define country-specific information.

Navigation

Set Up HCM, Install, Installation Table, Country Specific

Use the Country field to define the primary country in which your organization does business. This should be the country with the majority of your payees.

Related Links

"Country Specific Page *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Installation Settings Page

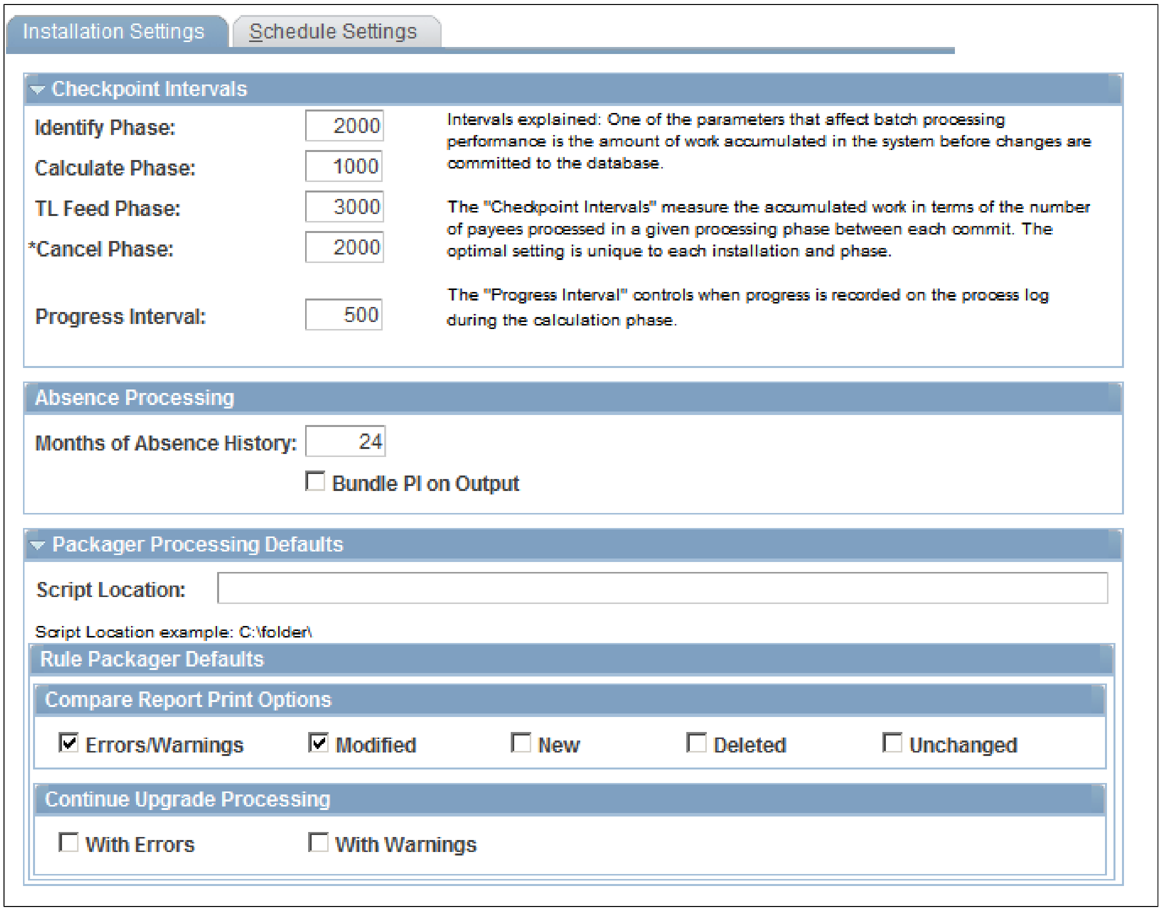
Use the Installation Settings page (GP_INSTALLATION) to define installation settings that are unique to Absence Management.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Settings, Installation Settings

Image: Installation Setting page

This example illustrates the fields and controls on the Installation Setting page.



Checkpoint Intervals

Checkpoint intervals control how many employees are processed between database commits. You can select a different interval for the identify and calculate processing phases. Employees that are *committed* do not need to be recalculated if the run has to be restarted because of a technical error.

Progress Interval	Controls how often the process writes a line to the process log stating how many employees have been processed.

Absence Processing

Months of Absence History	Controls how many months of absence daily history to load into the batch process for use with the absence take element processing and duration element. The absence daily history is loaded from the result table, GP_RSLT_ABS.

Bundle PI on Output (bundle positive input on output)

Selecting this check box causes the system to consolidate positive input during the absence process, when possible, so that you can send a single row of positive input to payroll. Positive input entries for the same absence event that share the same percent and rate are combined; the unit, amount, and base values are summed

In other words, the bundled generated positive input rows will be output from the absence process instead of daily rows. This is a consideration when considering the size of data storage for the generated positive input result table. Keep in mind, the daily earning/deduction element details will not be stored. This does not effect the actual earning/deduction calculation during the pay calculation if you are using PeopleSoft Global Payroll. If this check box is off, daily rows would be inserted into the generated positive input result table from the absence process, and the daily rows would be bundled as part of the input process for the pay calculation.

See Entering, Updating, and Voiding Absence Events.

Packager Processing Defaults

Script Location

Enter the location where DMS scripts are created. The default will be blank. An example displays below the field to let you know how to enter the script location.

Note: The value will default for the rule and non-rule packages. This script location should match the location setup for the PSNT process scheduler in which you are using. This is set up in the psconfig.cfg file.

Compare Report Print Options

This group box controls the sections of the Compare Report that will be printed. Select the sections of the report to print . The options on the Packager Processing page will default the values selected each time you run a Compare Report. The check boxes can be overridden on the processing pages.

Values for the report sections include:

- *Errors/Warnings* – Select to print the warning or errors that have occurred during the compare.
- *Modified* – Select to print the elements that are different from the ones in the target database.

The above two options reflect the delivered defaults.

- *New* – Select to print the new elements.
- *Deleted* – Select to print the elements that will be deleted.

- *Unchanged* – Select to print the elements that have not changed.

Continue Upgrade Processing

This group box controls the ability to upgrade when there are errors or warnings. The default for each value is cleared.

Valid values include:

- *With Errors* – Select to upgrade the package even if there are errors after the compare.
- *With Warnings* – Select to upgrade the package even if there are warnings after the compare.

Schedule Settings Page

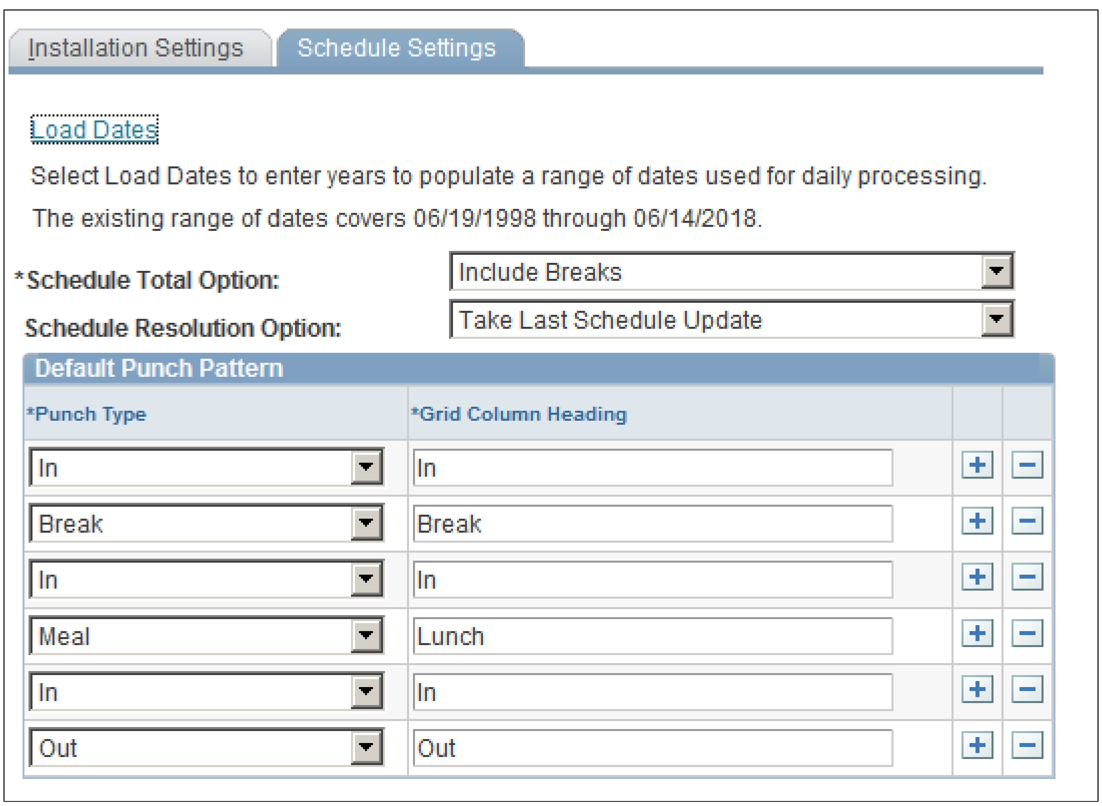
Use the Schedule Settings page (TL_INSTL_PUNCH) to define default settings for work schedules.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Settings, Schedule Settings

Image: Schedule Settings page

This example illustrates the fields and controls on the Schedule Settings page.



Load Dates

Click to access the Dates Table Load page where you can load the range of dates to be used in schedules. Dates from 1994 to

	2014 are preloaded. You need only use this feature to load dates before or after this date range.
Schedule Total Options	This field applies only if People Soft Time and Labor is installed. Specify whether to include or exclude meal times, breaks, or both in the scheduled hours totals on schedule definitions, shift definitions, and the Manage Schedules page. Options are *Exclude Meals and Breaks, Include Meals and Breaks, Include Meals,* and *Include Breaks.* The default is *Include Breaks*.
Schedule Resolution Options	Specify how to resolve schedule changes. Select *Take Last Schedule Update* to have the system use the last update to resolve an employee's schedule, whether the update comes from a third-party, workforce scheduling system or an online override. Select *Take Online Override* to have the system look for an online schedule override to resolve the schedule for the day. The system does not look for changes from a third-party workforce scheduling system.

Default Punch Pattern

Specify the default sequence for displaying punch types on the scheduling pages. You can also use the Grid Column Heading fields to modify the punch type labels that are to appear as column headings on the schedule pages.

Related Links

Entering, Updating, and Voiding Absence Events

Countries page

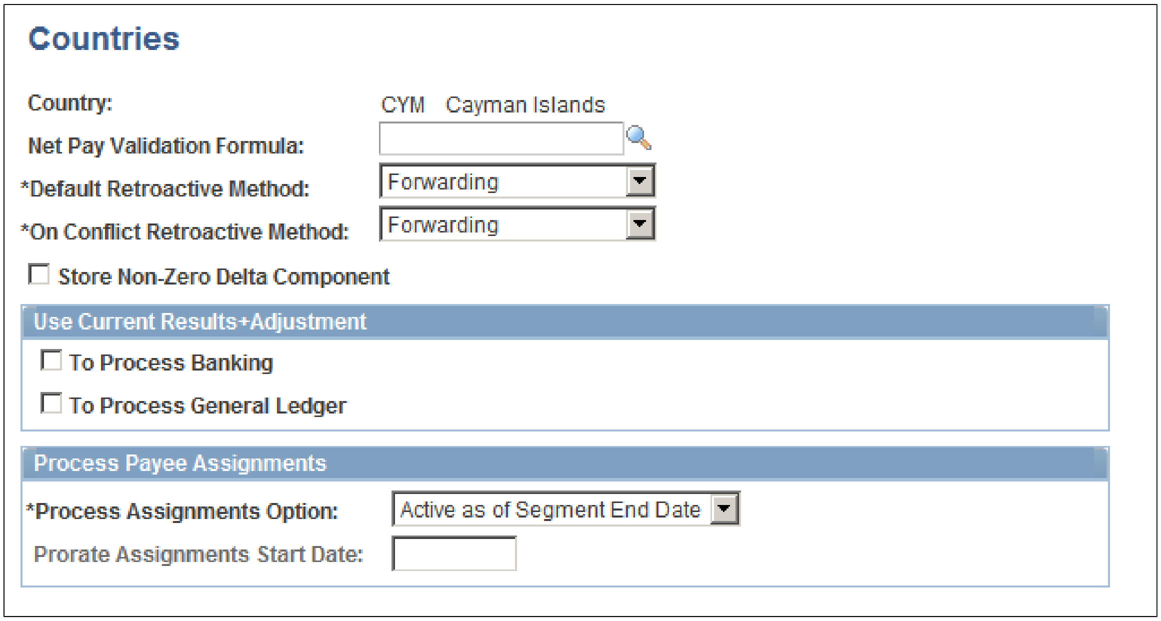
Use the Countries page (GP_COUNTRY) to define country-level setup parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Countries, Countries

Image: Countries page

This example illustrates the fields and controls on the Countries page.



Note: Although the fields on the Countries page are not directly applicable to Absence Management, you must use the Countries component to define a country record for each country that uses the Absence Management application. Creating country records is a prerequisite to defining self-service absence entry rules and for using some other features.

Net Pay Validation Formula

This field is not applicable to Absence Management.

Default Retroactive Method

Values are *Corrective* and *Forwarding*. The only valid value for Absence Management is *Corrective*.

On Conflict Retroactive Method

Select which retroactive method, *Corrective* or *Forwarding*. The only valid value for Absence Management is *Corrective*.

Process Payee Assignments

The Process Assignments Option field determines when to process payee assignments. The options are:

- *Active as of the Segment End Date* – Select to have an element entered on the payee assignment page processed if the assignment is active as of the segment end date.
- *Active Anytime within Segment* – This option is not used with Absence Management.

Prorate Assignments Start Date	This field is used when the Process Assignment Option is *Active Anytime within Segment*. It is not used with Absence Management.

Store Non-Zero Delta Component

Select this check box in order for the system to store any delta amount or delta component that has a nonzero value, regardless of the setting on the Element Name (GP_PIN) page, Results group box for the element. Clear this check box in order for deltas to inherit the element's store option.

The following table provides an overview of how the system interprets the check box settings at different levels:

Element Store Option	*Country Delta Option*	*Element is Stored*	*Country is Stored*
ON	ON	YES	YES
ON	OFF	YES	YES
OFF	ON	NO	YES
OFF	OFF	NO	NO

Note: For additional information regarding retroactivity, see Understanding Retroactive Processing.

Use Current Results + Adjustment

The check boxes in this group box are not applicable to Absence Management.

Chapter 4

Working with Payee Data

Understanding Payee Data

Absence Management uses payee data that is defined in HR, including job and personal data, and schedules.

Absence Management recognizes the following payee types:

- Employees
- Contingent workers

Absence Management can track absence information for these payee types.

When you add a payee into HR through the Job Data component, you indicate that Absence Management is the absence system for the payee and then you assign the payee to a pay group. The pay group defines the default processing instructions for the payee, which you can override.

Using elements defined in Absence Management, you can retrieve payee-specific data from HR during processing.

Several areas of HR are country-specific, such as those that deal with job and personal data. For more information about these topics, see the corresponding country-specific documentation for HR.

Note: Absence Management provides payee-level security that restricts the payees that a user can view.

Related Links

Payee Security

Understanding Data Retrieval from HR

This topic discusses how data in HR is retrieved and used in Absence Management using these elements:

- Database system elements
- Arrays
- Rate codes
- Frequency
- Triggers

Database System Elements

Database system elements contain payee-related data that is retrieved from HR and commonly used in absence calculations. You don't have to set up these elements or do anything special to resolve them. They are resolved when they're used in a calculation.

These HR tables populate database system elements:

- PERSON.
- PERS_DATA_EFFDT (personal data effective date).
- PER_ORG_ASGN_VW.
- JOB (including fields from country-specific sub records).
- PER_ORG_ASGN (person organizational assignment).
- PER_ORG_INST (person organizational instance).
- ADDRESSES.
- CONTRACT_DATA.
- WKF_CNT_TYPE (workforce contract type).

See Working with System Elements.

Arrays

An array is an element that retrieves data from any table or view that database system elements do not retrieve. For example, you can use an array to retrieve data from the Benefit table or the Company table in HR for further processing in Absence Management.

See Defining Array Elements.

Rate Codes

You use rate codes to retrieve multiple components of pay data from HR and bring into Absence Management. The system calculates the values in Absence Management, rather than transferring the data directly from HR, so that currency conversions can be calculated for every absence run. In Absence Management, you define a rate code element and link it to the corresponding rate code defined in a HR table.

See Defining Rate Code Elements.

Frequency

HR has an effective-dated Frequency table, where you enter the annualization factor for each frequency. Defining the annualization factor is important for absence processing in Absence Management.

Absence Management accesses the same Frequency table as HR and uses it throughout Absence Management for annualization and deannualization. When you set up a frequency in HR, you associate a factor with it. For example, an annual factor can be equal to one, a monthly factor can be equal to 12, and a weekly factor can be equal to 52.

The frequency formulas used for annualization and deannualization are the same for both HR and Absence Management:

- (Annualized Amount) = (Amount) × (Frequency Factor).
- (Deannualized Amount) = (Annualized Amount) / (Frequency Factor).

Important! If you change the effective status, frequency type, or annualization factor of an existing frequency on the Frequency Table page in HR, you get a warning message saying that previous calculations using this frequency are out of sync with the new values of the frequency.

When defining absence elements in Absence Management, the system obtains the frequency factor from HR. The system annualizes the absence element, according to the specified frequency factor, and denationalize the absence element, according to the specified calendar period frequency. The only exception to this rule is when you've specified a generation control frequency. Then, the system annualizes the absence value according to the specified frequency factor, but denationalize it according to the generation control frequency.

In Absence Management, frequency is used with:

- Element definition.
- Generation control.
- Calendar periods (when defining the frequency that's being processed).
- Rate code elements.
- System elements.

See Earnings and Deductions.

See "Understanding Frequency IDs *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Triggers

You can create triggers in Absence Management to detect changes made to data in HR. This enables Absence Management to identify payees automatically who need to be recalculated during an absence run. You can set up retro, segmentation, or iterative triggers. For example, you might want to create a retro trigger that detects changes to job data, thus telling the system that retroactivity should occur for this event.

Triggers can respond to field-level and record-level data changes.

With Absence Management, you can also create mass triggers. Mass triggers enable you to generate payee triggers based on changes to setup tables. Mass triggers can be established for specific records on specific components.

See Understanding Triggers.

See .

Assigning an Absence System and Pay Group to a Payee

This topic provides an overview of absence assignment in HR and discusses how to assign pay groups and override pay group defaults.

Page Used to Assign an Absence System and Pay Group to a Payee

Page Name	***Definition Name***	***Navigation***	***Usage***
Payroll page	JOB_DATA2	Workforce Administration, Job Information, Job Data, Payroll	Select Absence Management as the absence system and assign pay group parameters for each payee whose absences are tracked through Absence Management.

Understanding Absence System Assignment in HR

You use the Installation Table - Products page in HR to indicate that Absence Management is installed.

There are two actions for which you can select an absence system for a payee:

- Hire
- Rehire

During the hire or rehire process you select an absence system for a payee on the Job Data - Payroll page. This becomes part of the payee's Job record.

For example, suppose that you initially implemented HR, but used a third-party absence management system. On January 1, 2005, your organization decided to convert to Absence Management. You insert a new effective-dated row into the Job record with *Absence Management* selected in the Absence System list box. The payee's absence data will be calculated in Absence Management for absence periods that are in effect as of January 1, 2005.

See "Setting Up Implementation Defaults *(PeopleSoft HCM 9.2: Application Fundamentals)*".

See "Understanding Job Data *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

Points to Remember

Here are some points to remember about assigning Absence Management as the absence system:

- In order for a payee to be processed in Absence Management, the payee must have a Job record, because information about the Absence System flag and the pay group are stored on the payee's Job record. This applies to all types of payees - employees and contingent workers.
- Absence Management processes only the payees for whom the Absence System indicator is set to *Absence Management* for the period of time that the payees are associated with that absence system.
- Absence Management does not prevent you from changing the Absence System indicator from *Absence Management* to another absence system going forward.

- Absence Management does not prevent you from changing the Absence System indicator from *Absence Management* to another absence system retroactively.

  Note: It is recommended that you create retro and period segmentation triggers for the Absence System change.

- Absence Management does not support the Payroll System of *Other*.
- Absence Management will automatically default as the Absence System when *Global Payroll* is selected as the Payroll System.
- Absence Management may be used as a stand alone application and must have a Payroll System of *Global Payroll*.
- There is no integration between absence systems.

  For example, if your organization switches from Absence Management to another absence management system, PeopleSoft does not automatically transfer the balances and the data. You must transfer that information yourself.

System Occurrences When a Job Data Record is Added or Modified

Certain things happen in the system when a Job record is created for a payee. For example, a row is inserted into the Schedule Assignment table, indicating that the person should use the default schedules that are assigned at the pay group level for Absence Management and at the work group level for PeopleSoft Time and Labor. This occurs regardless of whether or not the payee's absences are tracked in Absence Management.

Related Links

Trigger Table Data

"Assigning Schedules to a Group *(PeopleSoft HCM 9.2: Time and Labor)*"

"Products Page *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Payroll Page

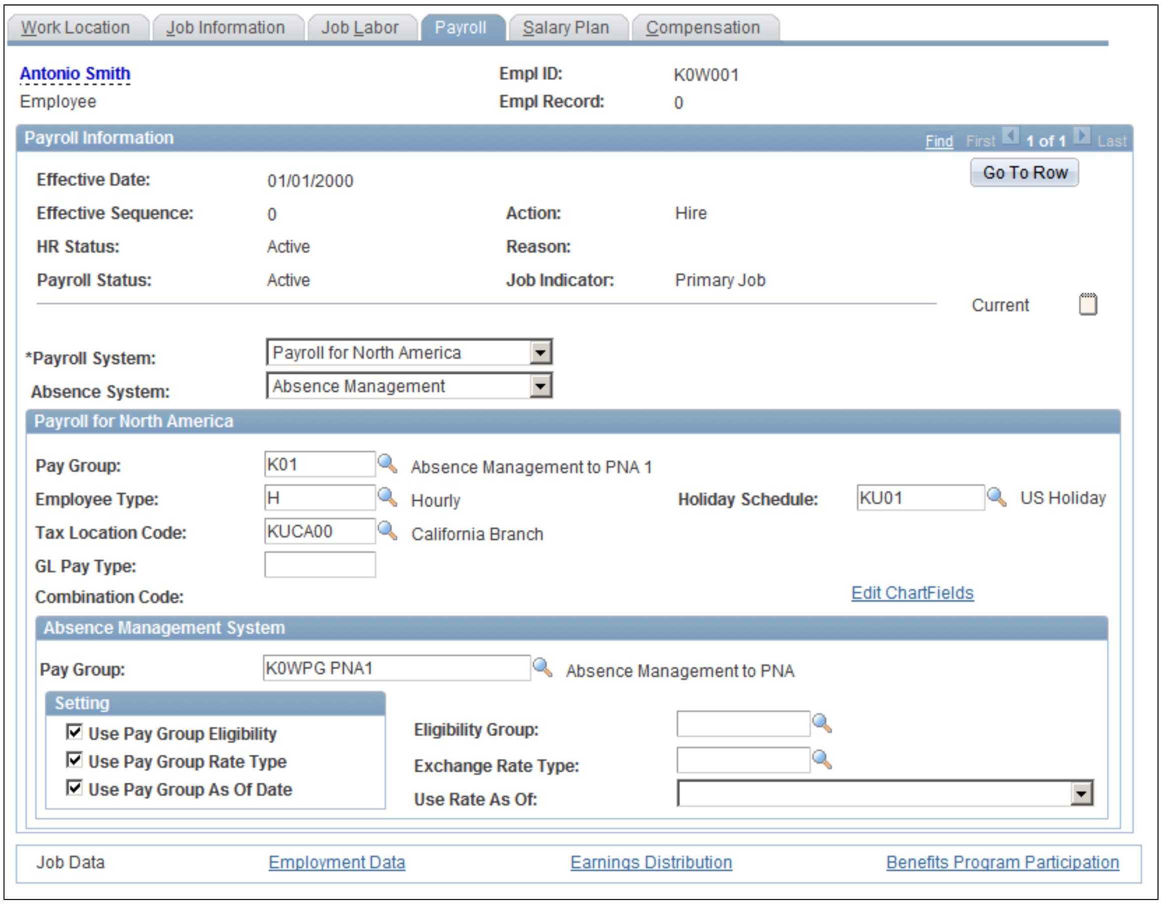
Use the Payroll page (JOB_DATA2) to select Absence Management as the absence system and assign pay group parameters for each payee whose absences are tracked through Absence Management.

Navigation

Workforce Administration, Job Information, Job Data, Payroll

Image: Job Data - Payroll page

This example illustrates the fields and controls on the Job Data - Payroll page.



Assigning Pay Groups and Overriding Pay Group Defaults

For each payee whose absences you will track in Absence Management, you must do the following:

1. Select *Absence Management* on the Installation Table - Products page.
2. Assign the payee to a pay group on the Job Data - Payroll page in HR.

The pay group assignment determines the default values for the payee’s eligibility group. You can override these values for an individual payee on the Job Data - Payroll page.

Note: As part of the general setup for Absence Management, you must define payee job data defaults on the Pay Group Name page prior to selecting a pay group for a payee on the Job Data - Payroll page.

Note: If you do not select a holiday schedule for the payee on the Job Data - Payroll page, the system uses the holiday schedule assigned to the payee's pay group during absence processing .

Note: The Job Data - Payroll page is discussed in HR documentation. The Pay Group Name page is discussed elsewhere in this documentation.

See "Understanding Job Data *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

See Understanding the Organizational Structure.

Viewing Payee Data

This topic provides an overview of payee data pages in Absence Management and discusses how to view job information.

Page Used to View Job Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Job Information	GP_PYE_DATA	Global Payroll & Absence Mgmt, Payee Data, Review Job Information	View Absence Management-specific information that is stored for a payee on the Job record in HR, as well as the pay entity that is associated with the pay group on the Job record.

Understanding Payee Data Pages in Absence Management

Absence Management contains two payee data-related pages: Job Information and Retro Limits Assignment. This topic discusses how to view job data for a payee on the Job Information page. The Retro Limits Assignment page is discussed elsewhere in this documentation.

Related Links

Setting Backward and Forward Retro Limits

Review Job Information Page

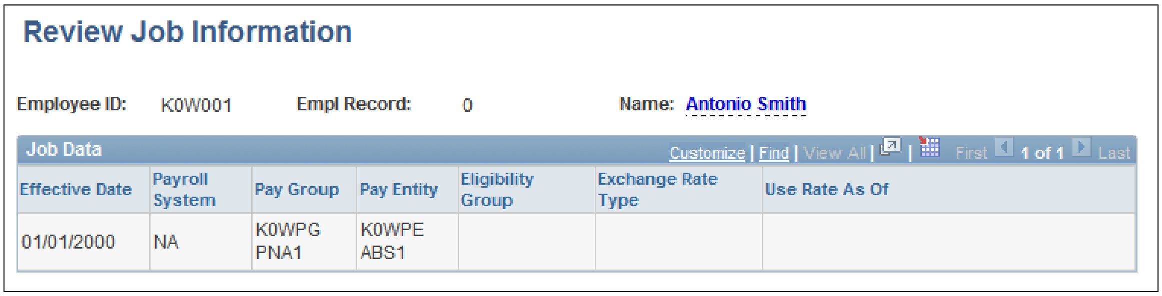
Use the Review Job Information page (GP_PYE_DATA) to view Absence Management-specific information that is stored for a payee on the Job record in HR, as well as the pay entity that is associated with the pay group on the Job record.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Review Job Information, Review Job Information

Image: Review Job Information page

This example illustrates the fields and controls on the Review Job Information page.



To change data that appears on this page, you must update the Job record in HR using the Job Data - Payroll page or one of the other Job Data components.

Payroll System Displays the payroll system for the payee. Values are:

GP (Global Payroll)

NA (Payroll for North America)

OT (Other) This pay system flag is not supported in Absence Management.

PI (Payroll Interface)

Pay Group Displays the pay group for the payee.

Pay Entity Displays the pay entity for the payee.

Eligibility Group Displays the eligibility group for the payee.

Note: The Eligibility Group field appears only if it is overridden at the payee level. The field is blank if the default value from the pay group is used.

Related Links

"Viewing Information About Current Exchange Rate Calculations *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Setting Backward and Forward Retro Limits

Updating Payee Data

When you need to change job or personal data for a payee, add a new effective-dated row. Making changes to an existing row in Job Data or Personal Data can lead to data corruption. To correct this, change the Job row back to the way it was and insert a new row with a different effective date sequence.

Sharing Schedule Data

This topic discusses how to:

- Share the holiday schedule with HR.
- Share schedule assignments with Time and Labor.

Sharing the Holiday Schedule with HR

Absence Management uses the holiday schedule that is created in HR. Holiday schedule information is stored on a payee's Job record. Absence Management uses the holiday schedule during absence processing to create daily data and update leave balances. It also uses the holiday schedule to resolve count elements during absence processing.

If a holiday schedule is not defined for a payee at the job level in HR, Absence Management uses the holiday schedule defined for the payee's pay group. (The holiday schedule defined for the pay group does not appear, by default, on the Job record.)

Related Links

"Setting Up Holiday Schedules *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Understanding the Organizational Structure

Sharing Schedule Assignments with Time and Labor

Absence Management and Time and Labor use many of the same pages and records for setting up and assigning work schedules. If you're using both applications, you may need to create and assign schedules only once.

Absence Management handles batch processing for schedule assignments differently than Time and Labor. When processing in Absence Management, if a payee is using the default work schedule, the system retrieves the default work schedule from the pay group definition. In Time and Labor, if the payee is using the default work schedule, that system retrieves the default work schedule from the workgroup definition.

In Absence Management, you can also assign a schedule to a payee other than the pay group default. You can assign schedules and alternate schedules individually to payees on the Assign Work Schedule page (Primary Details tab and Alternate Details tab).

Points to Remember

Here are some points to remember about work schedules:

- A payee's default work schedule and alternate work schedule are not stored on the Job record.

  This information is stored on the PS_SCH_ASSIGN table that is shared by Time and Labor and Absence Management. When a payee is hired, the system creates a new row and applies the default work schedule to the payee.

- You can override a payee's default work schedule and alternate work schedule information at the payee level on the Assign Work Schedule page (Primary Details tab and the Alternate Details tab).

Related Links

Assigning Work Schedules

Understanding the Organizational Structure

Chapter 5

Defining General Element Information

Understanding Elements

There are many types of elements in Absence Management; each has a unique purpose. Elements can be grouped into different categories, depending on how each one is used. An element can be used to retrieve data, calculate a formula, or organize the framework for a system. Some elements stand on their own, while others, called *supporting elements,* are building blocks for other elements.

Before defining elements, you perform some basic, one time setup tasks—such as, defining element types and entry types—to help classify your elements so that they make the most sense for your organization.

Although each element type is unique, all element types share a common set of attributes that are defined and stored the same way. Once you've defined an element name, you can add information (such as rules) to the element through its component.

Understanding Categorization of Elements

Elements can fall into different categories, depending on how they're used. This table categorizes elements by function:

Data Retrieval Elements	***Calculation Elements***	***Organizational Elements***
System Elements	Variables	Element Groups
Arrays	Dates	Sections
Writable Arrays	Duration	Process Lists
Brackets	Formulas	
Rate Codes	Rounding Rules	
Historical Rules	Counts	
	Proration Rules	
	Earnings	
	Deductions	
	Absence Entitlements	
	Absence Takes	

Data Retrieval Elements	***Calculation Elements***	***Organizational Elements***
	Accumulators	
	Generation Control	

Elements can also be categorized by element type: primary element, supporting element, or other type. A primary element can stand alone. A supporting element is used to create other, more complex elements. Other elements are used to define things like eligibility criteria, accumulators, and certain types of rules.

This table categorizes elements by element type:

Primary Elements	***Supporting Elements***	***Other Elements***
Earnings	System Elements	Rounding Rules
Deductions	Arrays	Proration Rules
Absence Entitlements	Brackets	Accumulators
Absence Takes	Rate Codes	Element Group
	Variables	Sections
	Dates	Process List
	Durations	Generation Control
	Formulas	Historical Rules
	Counts	
	Writable Arrays	

Understanding Data Retrieval Elements

PeopleSoft delivers some data retrieval elements; you can define others. This topic discusses:

- System elements
- Arrays
- Writable arrays
- Brackets
- Rate codes
- Historical rules

System Elements

System elements are delivered and maintained by PeopleSoft. You never have to change system elements or do anything special to define them. You cannot add system elements; however, you can rename them.

There are two types of system elements:

- Database system elements

  Think of database system elements as payee-related elements. They contain data that can be used frequently in a calculation, such as department ID, location, and personal data. Database system elements are resolved only when they are used in a calculation.

- System-computed elements

  System-computed elements are populated by the absence process, but are not physical database fields. If, when, and how often a system-computed element is resolved depends on its purpose and type.

  For example, Period End Date and Period Type are resolved at the beginning of every segment calculation; daily data, which is used in absence calculations, is calculated daily. Other system-computed elements, such as those that are used with rate codes, are resolved only when a rate code element is encountered in a calculation.

Related Links

Working with System Elements

Arrays

An array is a link between a field and an element. An array retrieves data that's stored in the database tables that Absence Management does not provide in system elements. You can use arrays to retrieve complex data that's stored in any table outside Absence Management. For example, you can create an array to retrieve birthday data for a payee's dependents from the DEPENDENT_BENEF table in PeopleSoft HR.

Arrays are temporary tables that the COBOL programs use to store data during processing. Once processing is complete, the programs write the data from the temporary arrays to the output tables.

Using an array is a two-step process:

1. Retrieve data from the database.

2. Use that data for further processing.

When defining an array, you must provide enough information to the system so that it can perform both steps.

Related Links

Defining Array Elements

Arrays Used in Batch Processing (Technical)

Writable Arrays

A writable array writes the values of user-defined elements into a row in a table. Writable arrays are in many ways the opposite of standard arrays.

You can use writable arrays to populate your own result tables. You use PeopleSoft Application Designer to create the result table, and then you use the writable array pages in Absence Management to define the element that populates the table during batch processing.

Related Links

Defining Array Elements

Brackets

Use brackets to look up and retrieve values in a lookup table based on other values.

For example, say that your organization provides absence entitlements based on seniority. You build a bracket that lets you look up the correct entitlement amount based on a payee's years of service.

Note: It is important that you define all of the building blocks that are associated with your lookup rules before you define your bracket.

Related Links

Defining Bracket Elements

Rate Codes

You use rate codes to resolve multiple components of data. Rate codes retrieve multiple components of data from HR and bring that data into Absence Management.

HR rate codes (HR rate codes) are not automatically resolved in Absence Management. To use the rate code, you set up an absence element in Absence Management and use the rate code element within the definition of that element.

Note: When you define a rate code element in Absence Management, you associate it with a predefined HR rate code. The Absence Management rate code element is automatically created only if the HR rate codes are defined when Absence Management is installed.

Related Links

Defining Rate Code Elements

Historical Rules

You use historical rule elements to set up rules that retrieve data from prior periods. You can use historical rules in formulas.

A historical rule can be attached to any element that's stored in the Absence Management Accumulator results table, or the Absence Management Element results table.

Related Links

Defining Historical Rule Elements

Understanding Calculation Elements

You use calculation elements to calculate such elements as formulas, takes, and entitlements.

This topic discusses:

- Variables
- Dates
- Duration
- Formulas
- Rounding rules
- Counts
- Proration rules
- Absence entitlements
- Absence takes
- Accumulators
- Generation control

Variables

You use a variable element to define and store a value such as a character, date, or number. For example, assume that on January 1, you have three formulas and two elements that use a factor of 20 in their calculations, and that this factor is scheduled to change on April 1 to a factor of 25. Without a variable element, you would have to make five effective-dated changes. However, if you define this factor as a variable element, you make just one effective-dated change to the variable itself. You can then use the new factor of 25 anywhere that the variable is used.

Variables are the only items that are used with arrays. When you create an array, you retrieve the values into variables.

Related Links

Defining Variable Elements

Dates

Using the date element, you can calculate a date by starting with an existing date and adding to or subtracting from it to come up with a new date. For example, to determine the date for a payee's five years of service, start with the payee's hire date and add five years to it.

You can also parse parts of a date. For example, if you want only the year of a date to be returned, use a date element to parse out the years, months, or days of the date.

Related Links

Defining Date Elements

Duration

Use a duration element to calculate the period of time between two dates. A duration is the result of subtracting one date from another. You define duration in years, months, or days.

For example, to determine a payee’s age, calculate the duration between the payee's birth date and the calendar period end date.

Related Links

Defining Duration Elements

Formulas

Use formulas to create your own unique elements. You can define sophisticated rules, mathematical formulas, and iterative calculations as formula elements.

For example, you can define a formula to calculate an employee’s vacation entitlement.

Related Links

Defining Formula Elements

Rounding Rules

Use rounding rules to round other elements such as formulas or absence elements that resolve to a numerical value. A rounding rule resolves to 1, if rounding is successful, or 0, if rounding is not successful.

For example, let’s say that you define a rounding rule that truncates resolved values to two decimal places. During a calculation, you get a resolved value of 2.833333. The rounding rule truncates the value to 2.83.

You specify whether you want to round based on such factors as the number of digits or decimals, or round to an incremental value. You also select the type of rounding: Nearest, Round Up, Round Down, or Round Up if Greater Than or Equal To, Else Down.

Related Links

Defining Rounding Rule Elements

Counts

Counts are a way to calculate and summarize something on a daily basis. For example, you might track the number of hours that a payee worked. A count element provides a day-by-day check of the hours worked and keeps adding to the work hours for a defined period of time.

Once you define the calculation rules for a count, you can associate it with a proration rule. When segmentation occurs, the count elements used in the proration rule determine the numerator and denominator to use for prorating amounts.

Related Links

Defining Count Elements

Proration Rules

You can use a proration rule to prorate a value when segmentation occurs. A proration rule generally works in conjunction with segmentation.

A proration rule defines a numerator and a denominator to apply to an amount during segmentation. A proration rule defines the *from* and *to* dates for a count.

As an example, for a calculation period of June 1–30, with one segment from June 1 to June 10, you define the *numerator* as the time of the segmentation (June 1 to June 10) and the *denominator* as the time of the entire calculation period (June 1 to June 30). Therefore, you set up your formula as 10/30, and the proration rule resolves to .333 (10/30).

Related Links

Defining Proration Rules

Absence Entitlements

You use absence entitlement elements to track absences such as vacations or leaves of absence. There are two types of absence entitlements:

- Per frequency

  The entitlement amount is calculated, regardless of whether there is an absence.

  As an example, say that payees receive 12 days of vacation per year and that this entitlement is accumulated at 10 hours per month. This entitlement is a fixed, predetermined amount that is calculated and updated monthly, regardless of whether it is used.

- Per absence

  The entitlement amount is calculated only if there is an absence.

Related Links

Defining Absence Entitlement Elements

Absence Takes

You use an absence-take element to define the conditions that must be met for an absence to be paid. An absence take involves defining rules for minimum and maximum absence takes. You set up absence takes to accumulate in hours, days, or other units.

For example, if your organization gives payees 12 days of vacation each year, and a payee goes on vacation for five days, the absence take for the payee is five days.

Once you've defined your absence take rules on the Absence Take pages, you can track absences by entering them on the Absence Event Entry page.

Related Links

Defining Absence Take Elements

Accumulators

You use accumulator elements to store and track balances. You can store an accumulator for a designated period of time. For example, you can store absence entitlement balance data for one year. The system can create accumulators automatically *(automatically generated accumulators)* or you can create them manually *(additional accumulators)*.

You can add or subtract elements with accumulator members and define begin and end dates.

There are two types of accumulators:

- Segment accumulators, which accumulate values through segment calculation.
- Balance accumulators, which accumulate values over a period of time, such as a month or a year.

You can also define the level at which you want to track a balance. For example, you can track a balance by payee record number, payee ID, department, or organization. You set up the tracking levels that work best for your organization.

Related Links

Understanding Accumulators

Automatically Generated Accumulators

Generation Control

You use a generation control element to determine whether an element should be resolved. To define a generation control element, you must specify the criteria that have to be met before the element is processed, based on such factors as HR Status, Action, Frequency, Segment Status, and Formula.

Related Links

Defining Generation Control Elements

Understanding Organizational Elements

You use organizational elements to define the structure and framework for the system, such as the processing framework (process lists and sections) and organizational structure (element groups).

In the overall-processing framework, the calendar ties the element group (on the payee side) to the section and ties the process list to the process.

This topic discusses:

- Element and eligibility groups.

- Sections.
- Process lists.

Element and Eligibility Groups

Use element groups to create groupings of elements to associate with eligibility groups. You associate eligibility groups with pay groups and list sets.

You define element groups based on your organizational needs. For example, if your organization has a simple absence management system, you might group all entitlement elements into one element group and all take elements into another element group and use the two element group names to specify all entitlements and takes.

Related Links

Defining Element Groups

Sections

Sections are groups of elements that you add to a process list. Sections tell the system what elements to resolve when processing an absence run and the sequence for resolving them. The order of sections is important because it determines the order in which your elements and calculations are processed.

There are five types of sections:

- Standard, which is used for regular processing.
- Generate Positive Input which is used with Global Payroll.
- Payee, which is used to specify which elements should be processed and in what sequence, at the payee level.
- Sub-Process, which is used for segment calculations and other iterative processes.
- Absence Take, which is used to process absences according to date order.

Related Links

Setting Up Sections

Process Lists

You use process lists to control the order in which sections are processed during an absence run.

You can create a general or specific process list, based on your organization’s needs.

Related Links

Functions of Process Lists

Understanding Process List Setup

Defining Element Types

This topic provides an overview of element types and codes and discusses how to define element types.

Page Used to Define Element Types

Page Name	**Definition Name**	**Navigation**	**Usage**
Element Types	GP_PIN_TYPE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Element Types, Element Types	Define element types, such as arrays, brackets, and earnings. You can also define the program ID that's used to resolve each element.

Understanding Element Types and Codes

PeopleSoft delivers the data for the Element Types page, which is used in batch processing to resolve the valid element types with the utility program. This table lists the two-character codes and corresponding element types that PeopleSoft delivers:

Element Type Code	**Element Type**
AA	Auto Assigned
AC	Accumulator
AE	Absence Entitlement
AR	Array
AT	Absence Take
BR	Bracket
CT	Count
DD	Deduction
DR	Duration
DT	Date
EG	Element Group
EM	Error Message
ER	Earnings
FM	Formula
GC	Generation Control

Element Type Code	***Element Type***
HR	Manage Historical Data Rule
PO	Proration Rule
PR	Process
RC	Rate Code
RR	Rounding Rule
SE	Section
SY	System Element
VR	Variable
WA	Writable Array

You can modify the utility program, but it is recommended that you do not. Instead, create a new element type and utility program to resolve the new element type. Add the new element type and associated programs on the Elements Type page.

Note: If you know an element name, but you don't know what type of element it is, you can find this information on the Element Name inquiry page (Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, View Element Names). There is no security on the inquiry page, so users can view all elements on this page.

Element Types Page

Use the Element Types page (GP_PIN_TYPE) to define element types, such as arrays, brackets, and earnings.

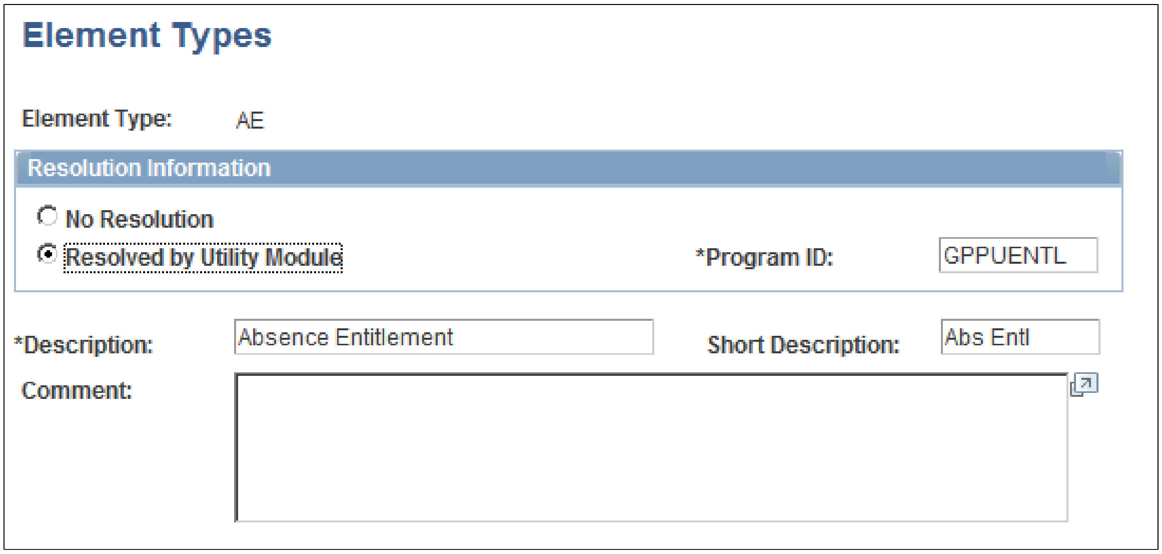
You can also define the program ID that's used to resolve each element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Element Types, Element Types

Image: Element Types page

This example illustrates the fields and controls on the Element Types page.



Element Type

Displays the element type value that you selected in the entry dialog box.

Resolution Information

No Resolution

Select if you don't want the element resolved. In this case, the element that is associated with the element type is just a point of reference. For example, a pay group is a collection of elements and never resolves to a value. This option is used in batch processing. The PIN manager checks the element type to determine whether any resolution is needed.

Resolved by Utility Module

Select if you want the element that is associated with the element type to be resolved by a utility program that is delivered by PeopleSoft or created by you.

Program ID

Select the utility program that is used to resolve each element. Program ID data is delivered by PeopleSoft.

When a batch that is running encounters an array element, the process first looks to see which program should be called to resolve the element. This field provides a link for batch processing between an element type and the utility program that is to be used to resolve that element type.

Note: If you selected *No Resolution* in the Resolution Information group box, this field is unavailable for entry.

Defining Entry Types

This topic provides an overview of entry types and discusses how to define entry types and element groupings.

Page Used to Define Entry Types

Page Name	***Definition Name***	***Navigation***	***Usage***
Entry Types	GP_ENTRY_TYPE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Entry Types, Entry Types	Enter entry types and define unique groupings of elements.

Understanding Entry Types

Elements can use other elements. Sometimes there are restrictions on the types of elements that you can use in certain places. To restrict the entry types that are entered into an element definition, you use the Entry Types page.

Entry types can be elements, but they don't have to be. For example, an entry type can be an element name, an amount, or a date. You use entry types to determine what you're going to enter initially. The information from the Entry Types page is stored for every element.

For example, let's say that you have an entitlement (ENTITLEMENT1) with a calculation rule that is defined as ENTITLEMENT1 = Amount. Because it's defined as an amount, entry types for ENTITLEMENT1 can include numeric variables, numeric formulas, and numeric values, but you cannot enter a date in the amount field.

You use the Entry Types page mainly to associate a corresponding prompt view to use if the entry type is selected online. For each entry type that's defined, you associate a prompt view with it. For some entry types, you also associate additional, special prompts to be used for security and override areas (related to the Override fields on the Element Name page). Entry type prompts are closely related to entry types. Use an entry type prompt to indicate the entry types for a field in the application. The entry type prompts are then used and attached through Absence Management so that only those entry types are available. Based on the entry type that you selected, you go to the prompt views that are indicated for that entry type to get a list of elements to select from.

Entry Types Page

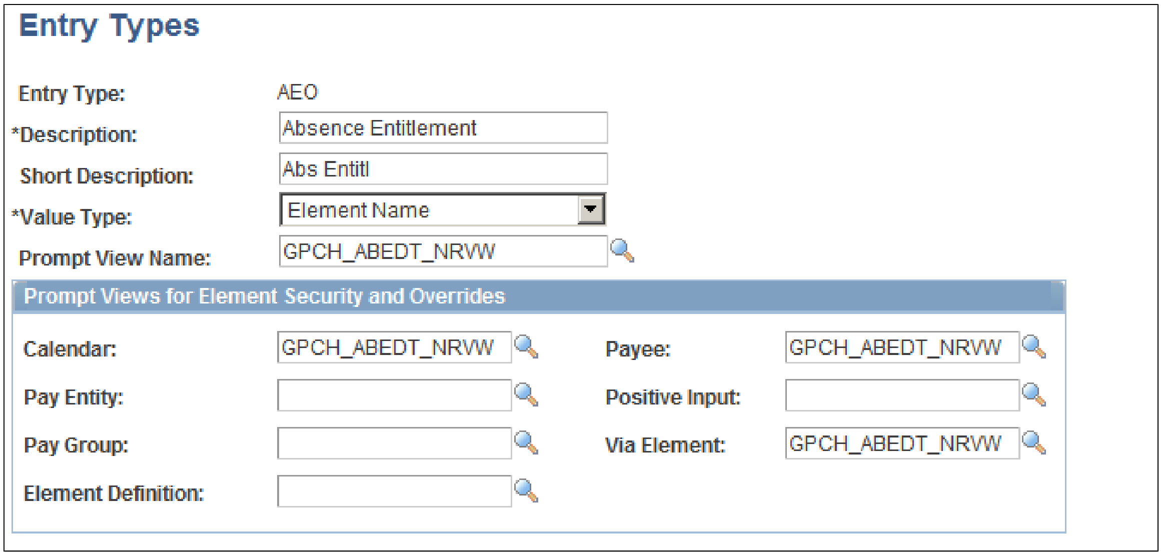
Use the Entry Types page (GP_ENTRY_TYPE) to enter entry types and define unique groupings of elements.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Entry Types, Entry Types

Image: Entry Types page

This example illustrates the fields and controls on the Entry Types page.



Value Type

Select the type of field that appears on a page when an entry construct is used. Values are: *Character, Date, Element Name, Integer, Not Applicable,* and *Numeric.* If you select *Element Name,* you can enter information into the Prompt Views for Element Security and Overrides group box. For all other values, this group box is unavailable for entry.

Prompt View Name

Displays the value that appears in the Valid Entry Type field on the Entry Type Prompts page. Instead of hard-coding the values in the view text, the system controls the prompt by defining the values on the Entry Types page.

Prompt Views for Element Security and Overrides

Calendar, Payee, Pay Entity, Positive Input, Pay Group, Via Element, and Element Definition

These fields are related to the Override Levels check boxes on the Element Name page. You can enter overrides at various levels and control additional security in prompt views. For example, if you are on the Pay Entity page, the system looks for the Pay Entity prompt view first (instead of the prompt view name). All eight prompt views (including the prompt view name and the seven prompt views in this group box) have the same purpose, but are coded differently. The prompt views in this group box also look at the security check boxes on the Element Name page.

Selecting Entry Types and Displaying Record.Field Combinations

This topic provides an overview of prompt views and discusses how to:

- Define entry types for prompt views.
- Display record.field combinations.

Pages Used to Select Entry Types and Display Record.Field Combinations

Page Name	***Definition Name***	***Navigation***	***Usage***
Entry Type Prompts	GP_ENTRY_PROMPT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Entry Type Prompts	Define which entry types are valid for a specific prompt view. View a list of all entry types for an entry prompt ID. Complete the Entry Types page prior to using this page.
Record.Fields using Prompt ID	GP_ENTRY_PROMPT_VW	Click the Record. Fields Using Prompt ID link on the Entry Type Prompts page.	Displays the record.field combinations for the entry prompt ID. This page references the Entry Type Prompts page, providing an easy way to view the database fields that use this prompt. To change an entry type, check this page first to see which record.field combinations will be affected.

Understanding Prompt Views

Prompt views are associated with an entry type to determine the list of valid values available in a field. Usually, before you select an actual element, you are prompted to select the entry type itself. This entry type is used to define what type of element is going to be used or whether a character, numeric, date, and so on is to be used. Based on the entry type that you select, you can prompt correctly on the next field.

For example, when you select a calculation rule on the Earning - Calculation page, the corresponding entry type fields appear on the page. If the calculation rule is Amount, you see two fields next to the Amount label: the first is the entry type and the second is the actual selection. The Entry Type field might display values of *Numeric, Accumulator, Bracket, Deduction, Earning, Formula, Payee Level, Rate Code,* and *Variable,* all of which are entry types. For example, if you select *Variable,* when you press the tab key to move out of the field and you prompt against the second field, only the variables appear as valid values. (If you had selected *Bracket,* only brackets would appear as valid values.)

For the example of an earning definition, if the calculation rule is Amount, an entry prompt ID, *GP_ENT_AMT_VW,* is defined. For this entry prompt ID, you have indicated (by selecting the Valid Entry Type check boxes) that the following entry types are valid: *Numeric, Accumulator, Bracket, Deduction, Earning, Formula, Payee Level, Rate Code,* and *Variable.* These are the valid entry types that appear when you prompt on the Earning - Calculation page for the Amount Entry Type field.

Entry Type Prompts Page

Use the Entry Type Prompts page (GP_ENTRY_PROMPT) to define which entry types are valid for a specific prompt view.

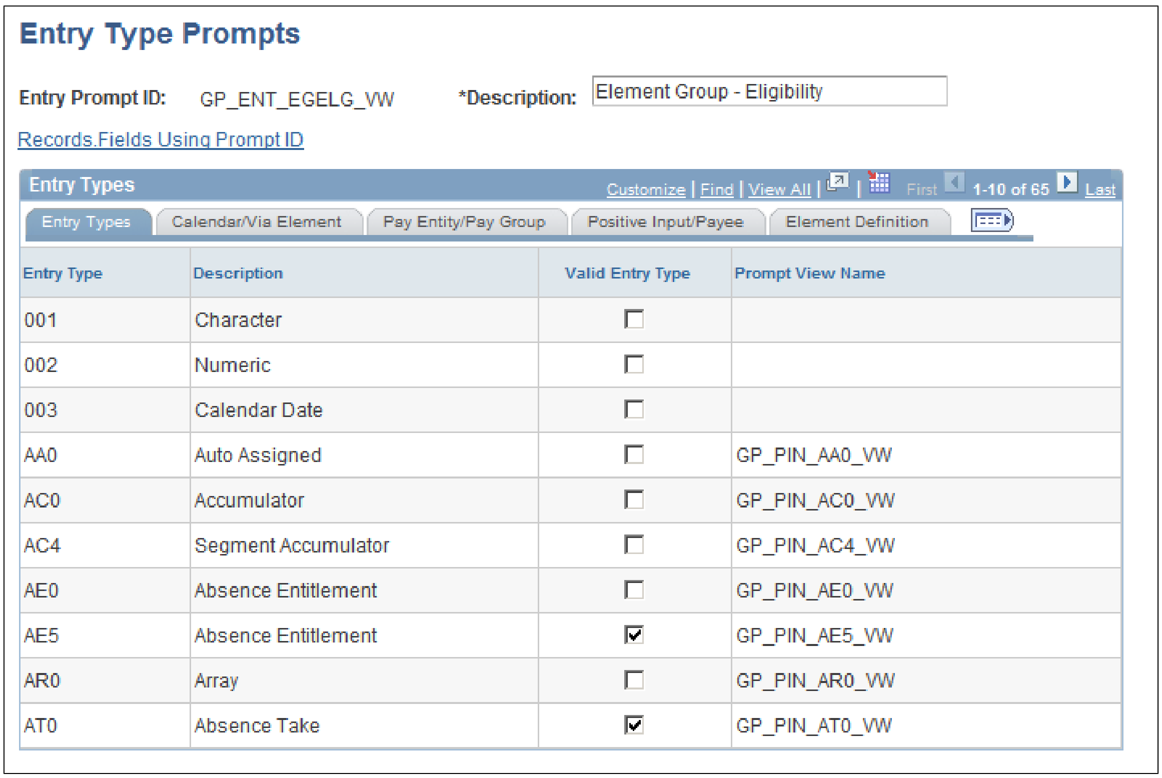
View a list of all entry types for an entry prompt ID.Complete the Entry Types page prior to using this page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Entry Type Prompts

Image: Entry Type Prompts page

This example illustrates the fields and controls on the Entry Type Prompts page.



You use the Entry Type Prompts page to define which entry types are valid for a specific prompt view. You select which Entry Types are valid and entered wherever this entry prompt ID is used.

Calendar, Payee, Pay Entity, Positive Input, Pay Group, Via Element, and Element Definition are related to the Override Levels check boxes on the Element Name page. You enter overrides at various levels to control additional security within prompt views. For example, if you are on the Pay Entity page, the system looks for the Pay Entity prompt view first instead of the prompt view name. So, all eight prompt views (including Prompt View Name and the seven prompt views found in the Prompt Views for Element Security/Override group box) have the same purpose, but they are coded a little differently. The prompt views in the Prompt Views for Element Security/Override group box also look at the security check boxes on the Element Name page. You select entry types for the entry prompt ID that you want to look at on the Entry Type Prompts page. You use entry type prompt IDs to create and maintain valid entry type prompt views. Entry types are not hard-coded in the prompt views.

Common Page Information

Record.Fields Using Prompt ID

Click to access the Record.Fields Using Prompt ID page.

Entry Type

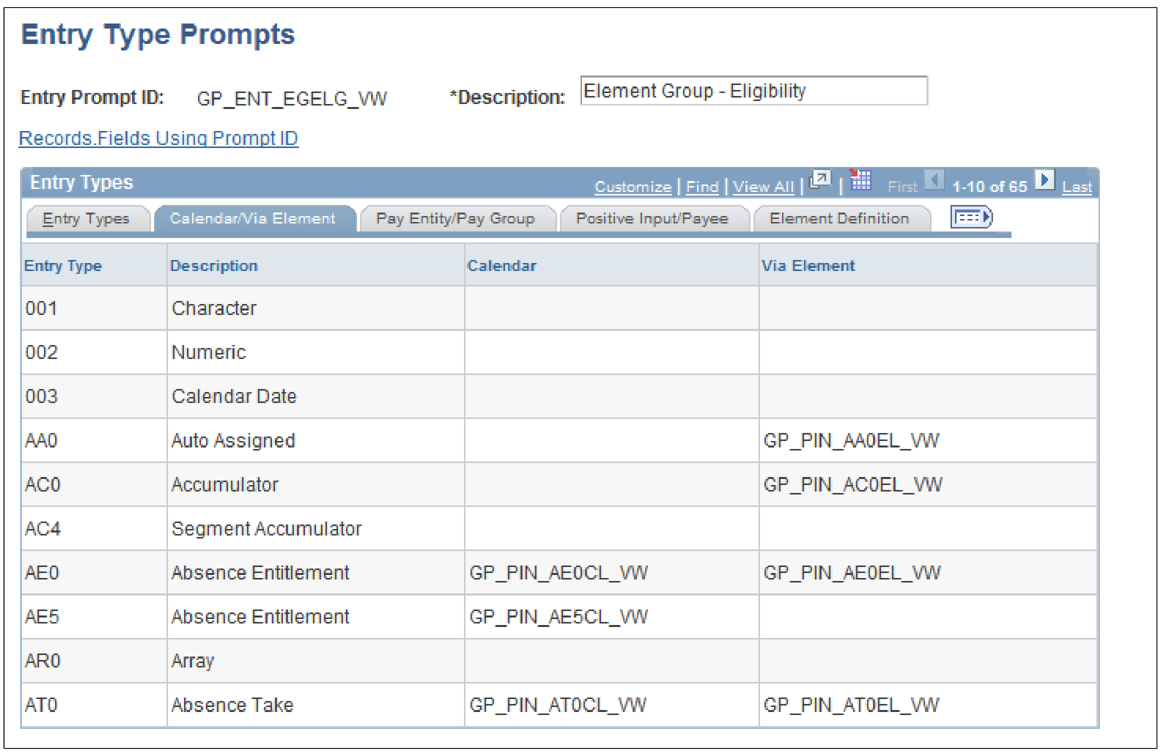
Displays information from the Entry Types page. You can select entry type for each entry prompt ID. For example, let's say that you have an entitlement element (ENTITLEMENT1). Valid entry types for the element can include *Numeric* and *Accumulator.* Select the check box associated with any of the valid entry types. If the Valid Entry Type check box is selected, the entry type appears as a valid value on the prompt. Based on the entry type that you select, the system returns to the corresponding entry type definition in the Prompt View Name field on the Entry Types page.

Calendar/Via Element Tab

Select the Calendar/Via Element tab.

Image: Entry Type Prompts - Calendar/Via Elements

This example illustrates the fields and controls on the Entry Type Prompts page: Calendar/Via Elements tab.



Entry Type Prompts

Entry Prompt ID: GP_ENT_EGELG_VW *Description: Element Group - Eligibility

Records.Fields Using Prompt ID

Entry Types Customize | Find | View All | First 1-10 of 65 Last

Entry Types | Calendar/Via Element | Pay Entity/Pay Group | Positive Input/Payee | Element Definition

Entry Type	Description	Calendar	Via Element
001	Character		
002	Numeric		
003	Calendar Date		
AA0	Auto Assigned		GP_PIN_AA0EL_VW
AC0	Accumulator		GP_PIN_AC0EL_VW
AC4	Segment Accumulator		
AE0	Absence Entitlement	GP_PIN_AE0CL_VW	GP_PIN_AE0EL_VW
AE5	Absence Entitlement	GP_PIN_AE5CL_VW	
AR0	Array		
AT0	Absence Take	GP_PIN_AT0CL_VW	GP_PIN_AT0EL_VW

This tab pertains to calendar and via element overrides.

The prompt view name and the prompt views that appear on the Calendar/Via Element, Pay Entity/Pay Group, Positive Input/Payee, and Element Definition tabs are related displays, based on information that you entered on the Entry Types page (for each defined entry type). When you use these online, you are first prompted to select an entry type, and then (based on the entry type that you selected) you enter the second field.

For example, if you select an entry type of *Variable* for the Earnings Amount field, when you press tab to move out of that field and prompt on the next field, the system locates the prompt view name. The system uses that as the prompt for the next field; therefore, only variables appear.

The functionality of the prompts that are defined on these tabs is similar to the prompt view names. The difference is that the Override check boxes on the Element Name page (Pay Calendar, Pay Entity, Pay Group, Payee, Positive Input, Element Definition, and Via Element) are used to control where in the system you can override the element. You notice that on these tabs, you can define separate prompt views for each entry type. These views are defined just to take the Override check boxes on the Element Name page into consideration.

So, based on where you are in the system, you use either the prompt view name or the correct override prompt view name to prompt for valid values in the second field.

Pay Entity/Pay Group Tab

Select the Pay Entity/Pay Group tab.

This tab pertains to pay entity and pay group overrides.

Positive Input/Payee Tab

Select the Positive Input/Payee tab.

This tab pertains to positive input and payee overrides.

Element Definition Tab

Select the Element Definition tab.

This tab pertains to element definition overrides.

Defining Industries and Categories

This topic provides an overview of industries and categories and lists the pages used to define industries and categories.

Pages Used to Define Industries and Categories

Page Name	***Definition Name***	***Navigation***	***Usage***
Industry/Region Types	GP_PIN_INDUSTRY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Industries/Regions, Industry/Region Types	Define industry and region codes that help classify elements and supporting elements.
Category Types	GP_PIN_CATEGORY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Categories, Category Types	Define category codes that help classify elements and supporting elements.

Related Links

Defining Element Names

Restricting User Access

Understanding Industries and Categories

Industries and categories are ways to further classify elements. You create codes for the industries and categories that are applicable to your organization. For each code, you specify if it is applicable to all countries or a specific country.

You can view all industry and category codes through the Industry/Region Types and Category Types pages. Your security level, as defined on the User Rules Profile page, determines the countries for which you can add industries and categories.

You associate an industry and category with an element by selecting from prompt tables on the Element Name page. The country for which an element is defined determines the available industry and category codes.

Note: You cannot change or delete existing industry codes or categories because they are also entered in the GP_PIN table. Updating the Industry/Region Types or the Category Types page does not update the GP_PIN table.

Defining Element Names

This topic provides overviews of element names, PIN codes and PINs, and the process of selecting definition as of dates, and discusses how to:

- Define element names.
- Add user-defined fields to element definitions.
- Enter and view element comments.
- Select forecasting options.

Pages Used to Define Element Names

Page Name	***Definition Name***	***Navigation***	***Usage***
Element Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Earnings	Name an element and define its basic parameters.
Custom Fields for Element <name>	GP_PIN_CUSTOM_SEC	Click the Custom Fields link on the Element Name page.	Add user-defined fields to an element definition.

Page Name	***Definition Name***	***Navigation***	***Usage***
Comments for Element <name>	GP_PIN_SEC	Click the Comments link on the Element Name page.	Enter or review detailed comments for an element. The comments that you enter are for informational purposes only and do not affect absence processing.
Forecasting for Element <name>	GP_FORECAST_SEC	Click the Forecasting link on the Element Name page. Available for absence take and absence entitlement elements only.	Select forecasting options for an element.

Understanding Element Names

Although each element type has a unique purpose, all element types share a common set of attributes that are defined and stored on the first page of each element component. The object name of this page is always GP_PIN and it appears as the first page for all element definitions. the Element Name page is often labeled to identify the element type that is being created—for example, *Earnings Name.* Once you define an element name, you can enter additional information that is specific to the element type.

Understanding PIN Codes and Element Name Numbers

When you create an element name, the system assigns the element a PIN code and a Element Name number. The PIN code and the element name must be unique. As you create new elements, the system checks to see whether this unique set of identifiers already exists. You can rename an element name, but the PIN code is a constant.

Element Name numbers:

- Enable the system to track the element and its name wherever it's used, regardless of its name.

  You can change an element name without affecting the system.

- Point to the data and the element name on the Element Name page.
- Are significant only within a database and can be different for the same element names across databases.
- Act as keys to the GP_PIN table and the value that is stored in other tables to represent an element.
- Are assigned sequentially.
- Are used only for batch-processing.

Related Links

Understanding the Absence Management Utilities

Understanding the Process of Selecting Definition As Of Dates

Elements can have many effective-dated rows. The definition as of date that you assign to an element on the Element Name page tells the system which effective-dated definition to retrieve for the element during processing.

You can select one of these dates: Calendar Period Begin Date, Calendar Period End Date, Payment Date, Process Begin Date, and Process End Date.

Note: You can override the process begin date and process end date for a payee and calendar group by using the Payee Calendar Groups page.

Example 1

Assume that an element has the following effective-dated rows (definitions) and values:

January 1, 1990 = 100

January 1, 2000 = 125

January 31, 2000 = 150

February 1, 2000 = 175

The January and February calendars have the following dates:

Calendar Date	***January Calendar***	***February Calendar***
Begin Date	January 1, 2000	February 1, 2000
End Date	January 31, 2000	February 28, 2000

When you process the January calendar, the system retrieves the definition of the element based on the element's definition as of date:

Definition As Of Date	***Effective-Dated Row Used***	***Value***
Calendar Begin Date	January 1, 2000	125
Calendar End Date	January 31, 2000	150

Example 2

Process Begin Date and Process End Date can be especially useful for issuing advance payments. They refer to the begin date and end date of the calendar period in which the element is actually processed.

For example, suppose that in January you want to issue an advance payment to a payee who will be on vacation in February. To make the advance payment, you process the February calendar in January; however, you want the system to use the definition of the element as of January—the actual processing period.

This table shows which definition of the element the system retrieves, based on your choice of definition as of date:

Definition As Of Date	***Effective-Dated Row Used***	***Value***
Process Begin Date	January 1, 2000	125
Process End Date	January 31, 2000	150
Calendar Begin Date	February 1, 2000	175
Calendar End Date	February 28, 2000	175

Related Links

Entering Calendar Override Instructions for a Payee

Element Name Page

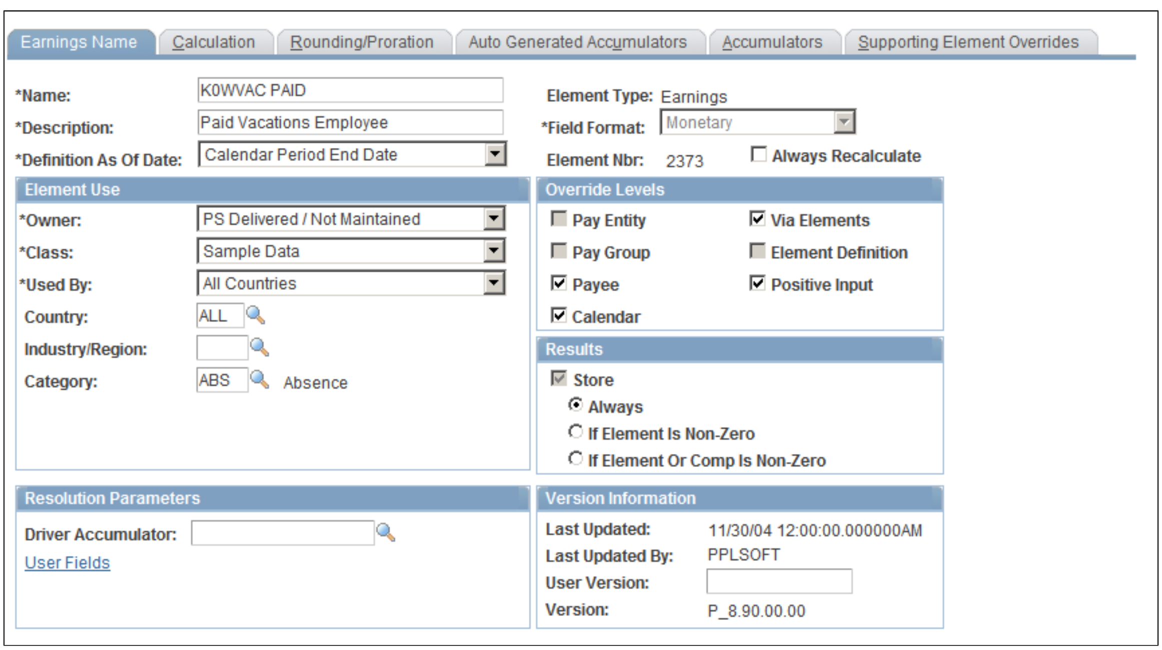
Use the Element Name page (GP_PIN) to name an element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Earnings

Image: Element Name page

This example illustrates the fields and controls on the Element Name page.



Note: The preceding example is a generic representation of the page that you use to create all element types. After you create an element on the Element Name page, you continue the process of defining each element in its appropriate component, as described elsewhere in this documentation.

Field Format

Defines the format for the resolved value. Available values are based on the element type and can include *Date, Decimal, Character, Monetary,* or *Pointer* (for calculating generic formulas for a variable).

For some element types you cannot change the displayed field format.

Note: The difference between *Decimal* and *Monetary* is that *Monetary* is currency-controlled and requires the entry of a currency code.

Definition As Of Date

Select the date on which the system is to retrieve the element definition during a process run. Options are:

Calendar Period Begin Date: The begin date of the calendar period to which the element is linked.

Calendar Period End Date: End date of the calendar period to which the element is linked.

Payment Date: Payment date of the calendar period to which the element is linked.

Process Begin Date: Begin date of the calendar period in which the element is processed.

Process End Date: End date of the calendar period in which the element is processed.

Selections are limited for some elements. For example, *Calendar Period End Date* is the only valid option for section and process list elements.

Retroactivity is also a consideration for this field. During recalculation, the system always respects this day and uses the appropriate date based on individual recalculation period calendars.

Element Nbr (element number)

The Element Name number.

Always Recalculate

Applies only to the period of time that is being resolved and is selected by default. If selected, the system recalculates the element every time that it encounters it in the calculation process. If this check box is clear, the system uses the previous resolved value of the element.

Clear the check box when:

- You update an element through an element-like formula.

Otherwise, each time that the system encounters the element, it initializes it according to the element's definition.

- You think that the old value will be different from the value that you'll get if the system resolves this element again—for example, when a variable has been set up with a Via Element override on the Element Name page.

Select this check box if you think that the previous value is incorrect and needs to be updated—for example, in formulas that need to be applied within a loop, an array, or a count.

Note: If this check box is clear, and the Recalculate check box on the Section - Definition page is selected, the system resolves the element each time that it encounters it (when that section is processed). If the same element is encountered in a different section, where the check box is clear, the element is resolved only once.

When the PIN Manager encounters an element, it runs an eligibility check. If it determines that the element must be resolved, it looks at the recalculation logic. You can indicate an element's recalculation at the process list level, the section level, and the element level. If you indicate recalculation at any of these levels, the element is recalculated.

For example, if the Always Recalculate check box is selected, the system recalculates the element. If the Always Recalculate check box is clear, the system looks at the table of resolved elements for a match between the same element and the same calculation dates. If there is a match, the system uses that value; otherwise, the system resolves the element.

See Understanding the Process of Selecting Definition As Of Dates.

Element Use

In this group box, you define several security-related options.

Owner

Identifies who controls and maintains the definition of the element. Values are:

Customer Maintained: Identifies the elements that you created. All fields are available for entry.

PS Delivered/Maintained: The element is delivered and maintained by PeopleSoft. To edit any fields, you can take control of the element by selecting the Customer Control Indicator check box. This changes the owner to *PS Delivered/ Customer Modified.* If PeopleSoft later releases an updated version of the element, you can accept the updated definition or retain your changes. Either way, element ownership does not change.

If you change the name, description, override levels, class, industry, or category for an earning, deduction, or absence element, the system makes the same changes to all related components and auto generated accumulators and changes the owner for those items.

Important! Taking control of an element is irreversible.

PS Delivered/Not Maintained: The element is delivered, but not maintained by PeopleSoft (for example, sample data or statutory data). You can update any editable fields.

PS Delivered/Customer Modified: Indicates that you have taken control of a PeopleSoft-delivered or maintained element.

PS Delivered/Maintained/Secure: The element is delivered and maintained by PeopleSoft. You can edit the name, description, override levels, results, custom fields, and comments (and for system elements, Use as Chartfield and prompt view). Any changes that you make can be overwritten by future PeopleSoft updates.

Class

Indicates the type of rule for the element. Values are:

Customary: Sample rules that are created by PeopleSoft. They are not statutory requirements, but are commonly followed rules. An example of when a customary rule is used is with tariffs. Customary rules are often used in a production environment.

Not Classified.

Sample Data: Rules that are created by PeopleSoft for sample data purposes. They are not used in a production environment.

Statutory: Rules that are created by PeopleSoft for calculating rules that are required by law.

System Data: Rules that are created by PeopleSoft. They are either system elements or system data that are delivered with the application—for example, common constants and dates.

The Class field works with the Owner field to determine the level of support and security.

Note: Not all statutory rules are set to *PS Delivered/Maintained.* For some statutory rules, the owner is set to *PS Delivered/Not Maintained.* Typically these rules are statutory, but might need to be modified for organization-specific information.

Used By

Select whether the element is used by *All Countries* or a *Specific Country.* This field is also used in User Rules Profile security to determine which elements a user can access.

Country

If you selected *Specific Country* in the Used By field, the Country field appears. Select the country for which the security-related options apply.

Note: Element usage security is a way to limit the number of elements that you see on a prompt so that you see only the element information that's useful to you. You can check element usage security with the Used By and Country fields.

Industry/Region

To classify your element further, select an industry code or region code. You define industry codes on the Industry/Region Types page. If an element is created for a specific industry, select an industry code here. Typical industry codes include Banking, Insurance, and Metallurgy.

Category

To classify your element further, select a category code. Category codes are defined on the Category Types page.

Customer Control Indicator

Appears only if you have authority to take control of the element according to the user profile rules. See the Owner field.

See Restricting User Access.

Override Levels

In this group box, you enable security-related override levels for the selected element. That is, you define when users can override the element's value, or, in some cases, exclude the element from processing. For example, if you select Pay Calendar, you can use the Calendar - Excluded Elements page to tell the system not to process this element for any payee associated with a particular calendar. If you select Pay Calendar for a bracket, date, duration, formula, or variable element, you can use the Calendar - Overrides page to have the system use an override value for the element when the system processes a particular calendar.

Pay Entity, Pay Group, Payee, Calendar, Via Elements, Element Definition and Positive Input

Select each type of override that you want to enable. Options vary by element type.

See Understanding Overrides.

Results

In this group box, you specify when to store the resolved value of the element in the result tables. The options vary by element type.

Select these options with caution to avoid creating large tables that are difficult to manage. Consider storing only the values that you need for reporting and auditing purposes or for retroactivity or other situations where you need to refer to the prior value of an element.

Store

Select to store the resolved value of the element in the result table during processing. For certain element types, you can specify the conditions under which the value is stored by selecting an option below the check box.

	When Store is clear, the resolved value is never stored.
Always	This option (the default) appears only for earning and deduction elements. Select it to store the calculated result of the element, even when the value is 0.
If Element Is Non-Zero	Appears only for earning and deduction elements. Select it to store the resolved value of the element when it is not 0.
If Element or Comp is Non-Zero (if element or component is nonzero)	Appears only for earning and deduction elements. Select the option if you want to store the resolved value of the element if it or one of its components (percent, base, rate, or unit) is nonzero. With this option, the element or component values are always stored if the arrears balance, the amount being paid back, the amount not taken, the adjustment value, or the retroactive adjustment value is nonzero.
Store if Zero	Appears for all element types except earnings and deductions. You cannot select this check box without first selecting Store. The Store if Zero check box is a way to further define what is sent to the results tables. Select Store if Zero to store a resolved value even when the value is 0. If you select Store but not Store if Zero, the element is written to the result tables only if the resolved value is not equal to zero, blank, or null. If you select both check boxes, the resolved value is written to the result tables, even if it is zero, blank, or null. If you select neither check box, the system never stores the resolved value.

Resolution Parameters

The fields in this group box apply only to earning and deduction elements.

See Earnings Name Page.

Version Information

User Version	You can enter up to 14 alphanumeric characters in this field to identify changes you make to the element definition. When you save the definition, the system adds a prefix of *INT_* to indicate that this is a user-defined value. You can use the Absence Management utilities to stamp and package elements by version. The value that you enter here appears in the Version field of the pages that you update.
Version	Displays the version of the element. The prefix *P_* identifies versions released by PeopleSoft. The prefix *C_* identifies versions created by customers.

The system clears the version from this page when any of the following conditions occur:

- You save the page after making changes.

  (The version is cleared only on the page that you make corrections to.)

- You enter a value in the User Version field and save the page.

  (The version is cleared only on the page to which you make corrections.)

- You run the Stamping process for the element.

  In this case, the element is stamped with the new version.

Additional Elements

Custom Fields	Click this link to access the Element Name - Custom Fields page.
Comments	Click this link to access the Element Name - Comments page.
Forecasting	This link appears for absence take and absence entitlement elements only. Click this link to access the Element Name - Forecasting page.

Related Links

Stamping and Packaging Elements by Version

Adding User-Defined Fields to Element Definitions

Access the Element Name - Custom Fields page (click the Custom Fields link on the Element Name page).

Use the fields on this page in any way that you want. For example, you can use the fields to classify elements or to indicate a sorting order for reports. The data that you enter is stored by system elements.

Comments for Element <Name> Page

Use the Comments for Element <name> page (GP_PIN_SEC) to enter or review detailed comments for an element.

The comments that you enter are for informational purposes only and do not affect absence processing.

Navigation

Click the Comments link on the Element Name page.

For each system-computed system element that is delivered by PeopleSoft, you can view detailed comments including a general description, when the system element is available, and where it is used. This is useful information when you want to learn about what a specific system element does.

For elements that you define, you can use the Comments page to view or enter your own notes or details about an element.

Forecasting for Element <Name> Page

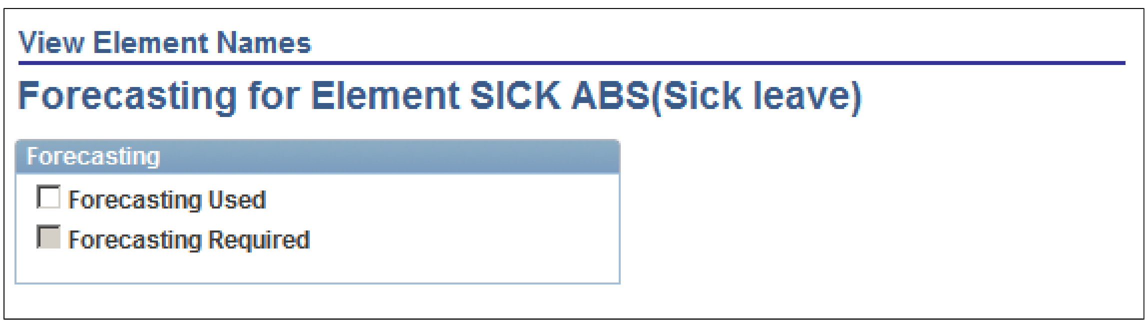
Use the Forecasting for Element <name> page (GP_FORECAST_SEC) to select forecasting options for an element.

Navigation

Click the Forecasting link on the Element Name page. Available for absence take and absence entitlement elements only.

Image: Element Name – Forecasting for Element <name> page

This example illustrates the fields and controls on the Element Name – Forecasting for Element <name> page.



Forecasting Used

Select to enable the absence forecasting or balance inquiry feature for this element. This field also enables forecasting configuration under the take definition element as well as under Absence Management forecasting rules. It does not enable forecasting in Absence self service applications nor in Timesheets.

See Defining Forecasting Rules for Self Service Absence Requests.

Forecasting Required

This field appears for absence take elements only. Select to have the system generate a warning if a user tries to save absence entries on the Absence Event Entry page without first running the Forecasting process.

Note: This field only applies to the Absence Event Entry page. To set up forecasting required for absence self service and Time and Labor Timesheets use the Forecasting page.

See Defining Forecasting Rules for Self Service Absence Requests.

Updating Component Element Information

This topic discusses how to update component element information.

Page Used to Update Component Element Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Components	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Components, Components	Update information about component elements (such as rate, unit, base, and percent) that are generated when an earning, deduction, or absence entitlement element is created.

Updating Component Element Information

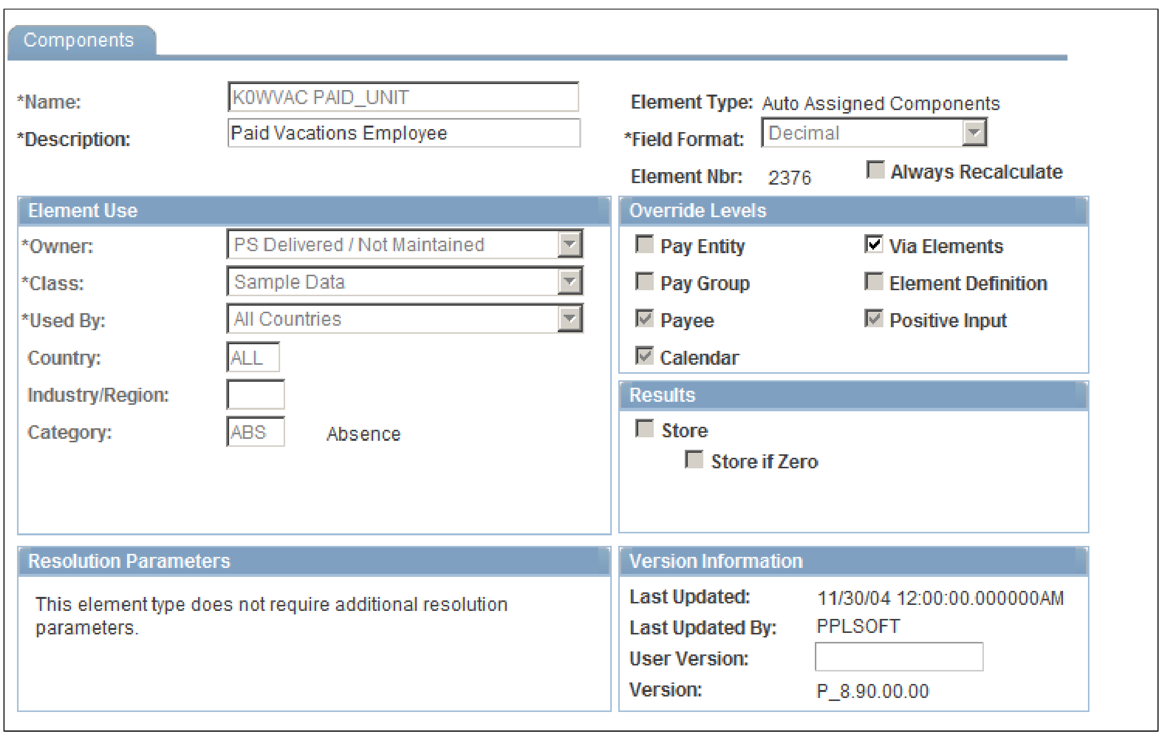
Use the Components page (GP_PIN) to update information about component elements (such as rate, unit, base, and percent) that are generated when an earning, deduction, or absence entitlement element is created.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Components, Components

Image: Components page

This example illustrates the fields and controls on the Components page.



On this page, only the Description field, the Via Elements check box, the Custom Fields link, and the Comments link are available for entry or selection.

All other fields are updated when the parent element value changes. (A *parent element* is an earning element, a deduction element, or an absence entitlement element.) These fields display the values that were entered for the parent element when it was created.

Override Levels

Via Elements	Select to indicate the override level for the component, if there is one.

Related Links

Adding User-Defined Fields to Element Definitions

Understanding Overrides

Defining Suffixes

This topic provides an overview of suffixes and discusses how to define suffixes for absence entitlements:

Page Used to Define Suffixes

Page Name	*Definition Name*	*Navigation*	*Usage*
Absence Entitlements	GP_SUFFIX2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Element Suffixes, Absence Entitlements	Define suffixes for absence elements in the base language that you've selected.

Understanding Suffixes

Absence Management uses suffixes to identify the components and auto-generated accumulators created for earning, deduction, and absence elements. For example, when you define an earning, deduction, or absence element, you must specify the components that make up the element, such as base, rate, unit, and percentage. The system *names* these components and auto-generated accumulators by appending a suffix to the element's name. For example, suppose that you define an earning element named EARN1 with this calculation rule: EARN1 = Rate × Unit The system automatically creates two additional elements for the components in the calculation rule:

- Rate element: EARN1_RATE
- Unit element: EARN1_UNIT

In this example, the suffixes used to name the components of the element are *_RATE* and *_UNIT*.

PeopleSoft delivers suffixes, but you can also create your own suffixes. Suffixes are defined by country, so you can define element components in your native language.

The system determines the suffix names to use, based on the country that is identified in the Used By/ Country fields on the Element Name page. If an element is defined as All Countries in the Used By/ Country fields, the system determines the correct suffix by identifying the entry on the Suffix page that has the Default Country check box selected.

Note: When you create an element, the system creates only the suffixes and components that are needed. For example, if you create an earning element and define it as EARNINGS1 = Unit x Rate, the system creates suffixes only for the unit and the rate.

Note: You can only add, modify, and delete suffixes on the Element Suffixes (GP_SUFFIX) component that apply to elements defined for your own country or *All* countries.

Absence Entitlements Page

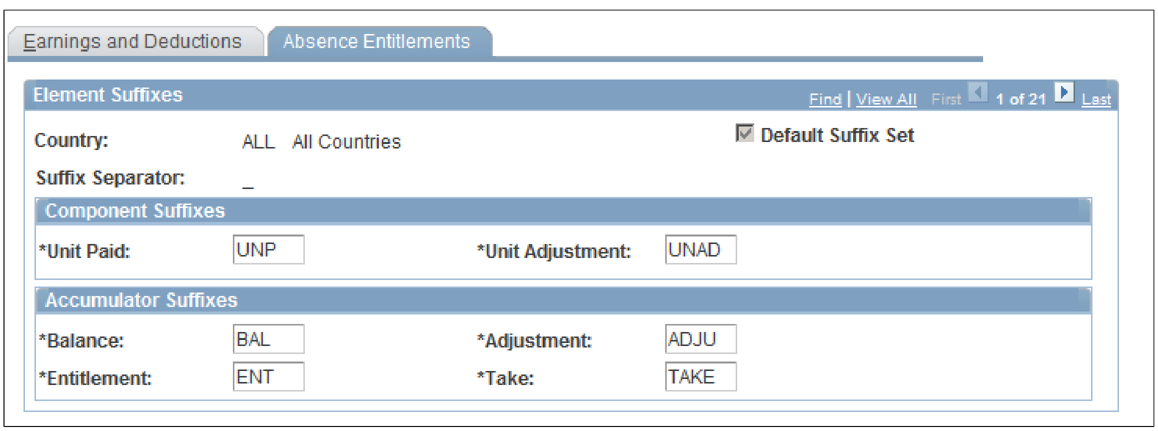
Use the Absence Entitlements page (GP_SUFFIX2) to define suffixes for absence elements in the base language that you've selected.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Element Suffixes, Absence Entitlements

Image: Absence Entitlements page

This example illustrates the fields and controls on the Absence Entitlements page.



Component Suffixes and Accumulator Suffixes

Unit Paid and Unit Adjustment	Define the suffixes to be appended to the components and accumulators that the system generates for absence entitlement elements.

Related Links

Absence Entitlements - Auto Generated Accumulators Page

Chapter 6

Defining Data Retrieval Elements

Understanding Data Retrieval Elements

In Absence Management, you use data retrieval elements to retrieve data from the system.

There are five data retrieval elements included in the system:

- System elements
- Arrays
- Brackets
- Rate codes
- Historical rules

PeopleSoft defines and delivers system elements; you name and define the basic parameters of other elements, such as arrays and brackets.

Batch Processing

During processing, the system truncates data that is retrieved by system elements and arrays when the data exceeds these lengths:

Character fields: 30

Numeric fields: 12.6

Related Links

Defining Element Names

Working with System Elements

This topic provides overviews of system elements and batch processing of system elements, and discusses how to:

- Name and define system elements.
- View system element details.
- View system element comments.

Pages Used to Modify and View System Elements

Page Name	Definition Name	Navigation	Usage
System Element Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, System Elements, System Element Name	Name the element and define its basic parameters.
Source And Use	GP_SYSTEM_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, System Elements, Source and Use	Displays whether a system element is a system-computed element or a database system element. For a database system element, it also displays the record and field that populates it and indicates whether the field is SetID controlled.
System Elements by Source	GP_SYSTEM_PIN_INQ	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, View System Elements by Source, System Elements by Source	View system elements by source.
Comments for Element <name>	GP_PIN_SEC	Click the Comments link on the System Element Name page.	View detailed comments about system-computed system elements that Absence Management delivers.

Understanding System Elements

System elements are delivered and maintained by PeopleSoft and usually contain payee-related data for use in calculations. Although you cannot add system elements, you have the ability to define and alter various parameters that control their use.

There are two types of system elements:

- Database system elements, which come from a predefined list of database records and fields.
- System-computed elements, which come from internally stored data.

  System-computed elements are resolved at different times, for example, at the beginning of calculations, daily, or when a rate code element is encountered, depending on the element's purpose.

Note: To store the value of a database system element for reporting purposes, include the element in your process.

Understanding Batch Processing of System Elements

All system elements, whether they are database or system-computed elements, have several important considerations. A system element that is frequency controlled is annualized by the Frequency field and then deannualized, based on the calendar frequency. Thus, any absence element that uses the Frequency field should be defined as having a frequency equal to the use calendar period frequency. This approach ensures correct results, avoiding additional annualization or deannualization.

Database System Elements

For database elements from effective-dated records, the row selected is based on context. Typically the value is as of the segment end date. If referenced during resolution of a sliced element, the value is as of the slice end date. When retrieving values from job records, for example, the system matches on employee ID, employee record, and the segment and slice end date.

System element definitions for the country being processed and those used by all countries are loaded at the beginning of an absence run. System elements are resolved when used in the absence process.

Note: Only database system elements that are used and have been defined as Store = Yes are stored in the result tables.

PeopleSoft HR Database System Element Records

The following table lists the database tables that populate database system elements:

Table Name	*Description*
PERSON	Not effective-dated. Select based on employee ID.
PERS_DATA_EFFDT (personal data effective date)	Max Effdt (maximum effective-dated) row is less than or equal to the segment end date. If referenced in a slice, looks at Max Effdt rows that are less than or equal to the slice end date.
JOB	The Max Effdt row is less than or equal to the segment end date. If referenced in a slice, looks at Max Effdt rows that are less than or equal to the slice end date.
PER_ORG_ASGN (person organization assignment)	Not effective-dated. Select based from the employee's organizational instance number
PER_ORG_INST (person organization instance)	Not effective-dated.
CONTRACT_DATA	Not effective-dated. Select based on CONTRACT_NUM (contract number) from the selected job record.
WKF_CNT_TYPE (workforce contract type)	The Max Effdt row is less than or equal to the segment end date where the contract number on this row matches the contract number on job. You can use CONTRACT_NUM from JOB or from CONTRACT_DATA, because the system synchronizes them. If the contract number is referenced in a slice, use the slice end date.
COMPENSATION	Includes all comp_effseq rows for each rate code (comp_ ratecd) where Effdt and Effseq (effective sequence) match Effdt and Effseq from the Job table.

Note: These HR tables are discussed in detail in the HR documentation.

See "Understanding Job Data *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

System-Computed Elements

System-computed elements appear on the output results table only if they are used, provided that the appropriate output options on the Source And Use page are selected.

During batch processing, all database system elements are retrieved and stored in arrays, whereas system-computed element values are retrieved and set by the appropriate processing module. For example, when you process absences, the system populates only those system elements that are specific to absences.

With system-element processing:

- The system populates the first active segment, based on all the active segments that are created for a specific process stat record.
- The system also populates the last active segment, based on all the active segments that are created for a specific process stat record.

System Element Name Page

Use the System Element Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, System Elements, System Element Name

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Note: You name every element and define its basic parameters on an element name page with the object name of GP_PIN. The page title and general appearance of this page change based on the type of Absence Management element that you name and define.

For each system-computed system element that is delivered by PeopleSoft, you can view detailed comments including a general description, when the system element is available, and where the element is used by clicking the Comments link. This is useful information when you want to learn more about how the system uses a specific system element.

Related Links

Defining Element Names

Source And Use Page

Use the Source And Use page (GP_SYSTEM_PIN) to displays whether a system element is a system-computed element or a database system element.

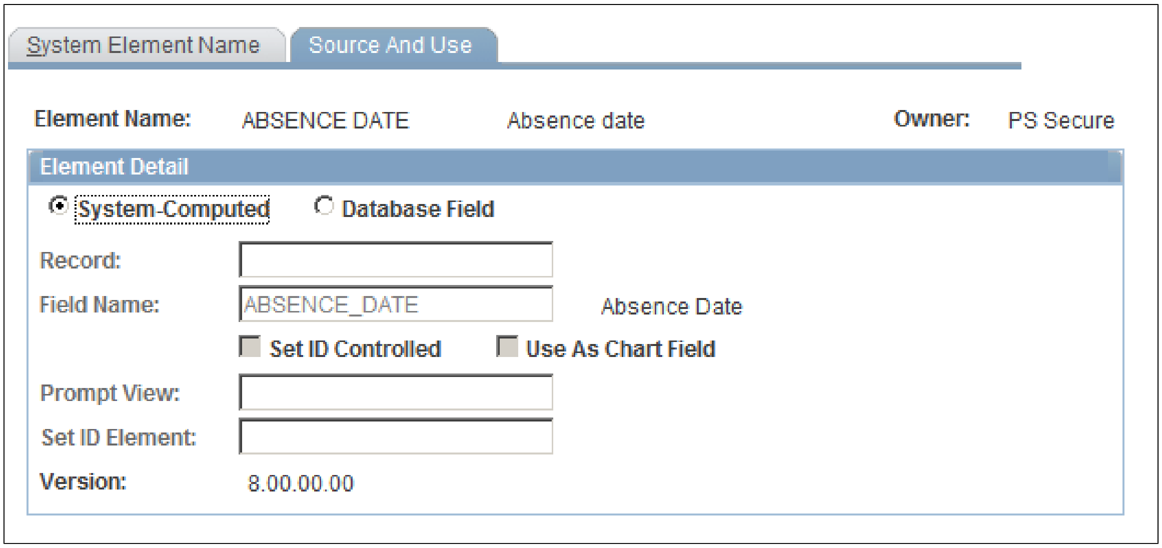
For a database system element, it also displays the record and field that populates it and indicates whether the field is SetID controlled.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, System Elements, Source and Use

Image: Source And Use Page

This example illustrates the fields and controls on the Source And Use Page.



Record Displays the record that the system element populates.

Field Name Displays the field from which the system element obtains its information.

SetID Controlled Selected if the field is controlled by SetID. Elements that are controlled by SetID have field name and prompt view values.

Use As Chart Field This check box is not applicable to Absence Management.

Prompt View Elements that are controlled by SetID have a prompt view specified. If a SetID-controlled system element is used as a supporting element override for positive input, it also requires a prompt view.

SetID Element Displays the SetID field name for the system element.

Related Links

"Business Units, Tablesets and Set IDs *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Comments for Element <Name> Page

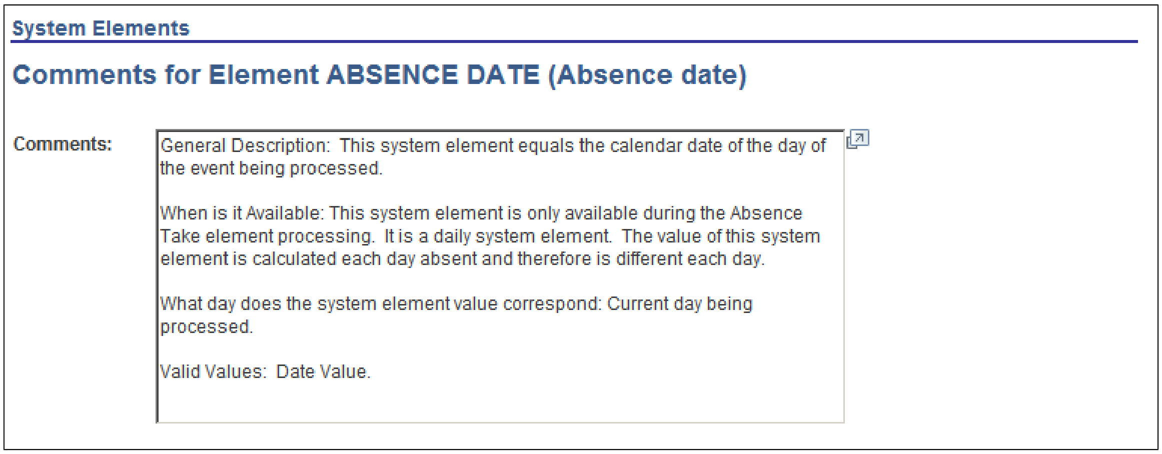
Use the Comments for Element <name> page (GP_PIN_SEC) to view detailed comments about system-computed system elements that Absence Management delivers.

Navigation

Click the Comments link on the System Element Name page.

Image: Comments for Element <name> page

This example illustrates the fields and controls on the Comments for Element <name> page.



For each system-computed system element that is delivered by the PeopleSoft system, you can view detailed comments including a general description, when the system element is available, and where it is used by clicking the Comments link on the System Element Name page. This is useful information when you want to learn about what a specific system element does.

Defining Array Elements

This topic provides an overview of arrays and batch processing of arrays, and discusses how to:

- Name an array.
- Select and define information about the SQL statement.
- Define fields retrieved by an array.
- Define formula processing for an array.

Pages Used to Define Array Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Array Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Arrays, Array Name	Name the element and define its basic parameters.

Page Name	*Definition Name*	*Navigation*	*Usage*
Field Map and Keys	GP_ARRAY_KEYS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Arrays, Field Map and Keys	• Select the database table for the FROM clause of the SQL statement and define the values for the WHERE clause of the SQL statement the system uses when retrieving data for an array. • Define the fields within an array. This provides the data for the SELECT clause of the SQL statement and determines the elements to resolve from this array call. You also use this page to define the sort order for retrieving rows from a database.
Processing Formulas	GP_ARRAY_PROCESS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Arrays, Processing Formulas	Define all required formula processing.

Understanding Array Elements

Arrays enable you to retrieve data from external sources such as HR tables—data that you need to use, evaluate, or process in your absence rules.

To build an array, you assemble a Structured Query Language (SQL) statement out of FROM, SELECT, and WHERE clauses using the Array Definition component.

- To define the FROM clause, you identify the table containing the required data in the Record (Table) Name field on the Field Map and Keys page.
- To build the SELECT clause, you identify the table columns (fields) containing the data in the Fields Retrieved group box on the Field Map and Keys page.
- To build the WHERE clause, you define the array keys and the conditions under which rows of data are to be pulled from the database table based on the values of the array keys.

  To do this, you use the fields in the Retrieval Criteria group box on the Field Map and Keys page.
- After defining the SQL statement, you must map the database column values in the array to Absence Management variables.

  These variables hold the column values and make them available for use in Absence Management rules.

  To do this, use the Variable Element Name field on the Field Map and Keys page.

Note: After you construct your SQL statement, you can also define any formulas; you need to evaluate the data retrieved by the array.
Do this on the Array Processing Formulas page.

Note: Arrays are not effective-dated. Any changes are likely to affect retroactive processing.

Understanding Batch Processing of Arrays

Arrays can be used to access data in database tables or views that are not delivered by system elements. They do not resolve to a value but instead invoke processing.

You can create either payee-based arrays or non-payee-based arrays on the Field Map and Keys page. Payee-based arrays are resolved as of the slice or segment that is currently being resolved.

Arrays must be resolved for every segment and slice. If any element set by an array is used by another element that's being sliced, the array itself should be added to the event list to ensure that the array and all return column elements are also sliced. You must enter the array into the event list.

Payee-Based Array Processing

The system performs these steps when processing payee-based arrays:

1. Arrays call the database the first time that they are encountered in a calendar run.

   All of the rows of data that fit the WHERE criteria (based on keys entered) are pulled into memory. The cursors are sorted by employee ID in ascending order, by employee record number in ascending order, and by effective date in descending order.

2. For each payee, a cursor is set to access the appropriate rows of data (the Payee and Effective Date fields based on field use on the Field Map and Keys page).

   Payee-based arrays are aligned per absence based on the period end date. If segmentation occurs and the array is on the event list or is being used in an absence element that is being sliced or segmented, the array must be aligned by slice or segment end date.

3. The array process formulas are applied against the data that is stored in memory (for the payee cursor set above), based on the process code.

4. The database field is resolved to the last row of data against which the process formulas were applied.

Whenever the array is accessed, steps 2 through 4 are performed again. Step 1 is performed only if the payee has changed or if a new slice or segment is being resolved.

Non-Payee-Based Array Processing

When processing non-payee-based arrays, the system performs the following steps:

1. Arrays call the database the first time they are encountered in a calendar run.

   All rows of data that fit the WHERE criteria (based on keys entered) are pulled into memory, so most effective-dated logic should be within the process formula logic.

2. If the table is effective-dated, the lookup formula references the system element that refers to the correct date (segment, slice, period).

If segmentation occurs and the array is on the event list or is being used in an absence element that's being sliced or segmented, the array must be aligned by slice or segment end date. Arrays can return multiple rows from the database. The process formulas are applied against the rows.

3. The array process formula is run.

4. The database field is resolved to the last row of data against which the process formula was applied.

Whenever the array is accessed, steps 2 through 4 are performed again. Step 1 is performed only if the *Reload for Each Resolution* or *Reload for Each Segment* value is selected on the Field Map and Keys page.

Related Links

Arrays Used in Batch Processing (Technical)

Array Name Page

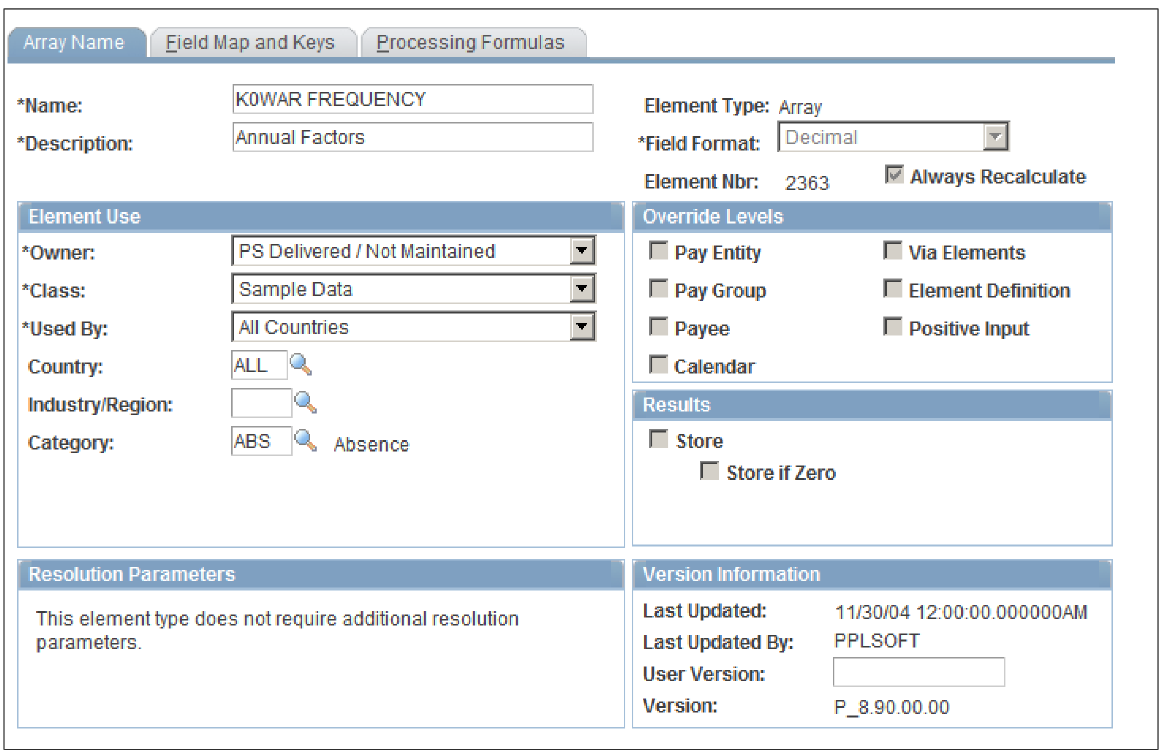
Use the Array Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Arrays, Array Name

Image: Array Name page

This example illustrates the fields and controls on the Array Name page.



Because arrays are temporary tables that store results only during processing, storing the results after processing isn't necessary. The system clears the Store and Store if Zero check boxes and makes them unavailable for entry.

In addition, arrays are not effective-dated, so this page has no definition as of date. To change an array definition, create a new array and new effective-dated elements that reference it. If a database table or view is renamed, create a new array.

Note: You name every element and define its basic parameters on an element name page with the object name of GP_PIN. The page title and general appearance of this page change based on the type of Absence Management element you are naming and defining.

Related Links

Defining Element Names

Arrays Used in Batch Processing (Technical)

Field Map and Keys Page

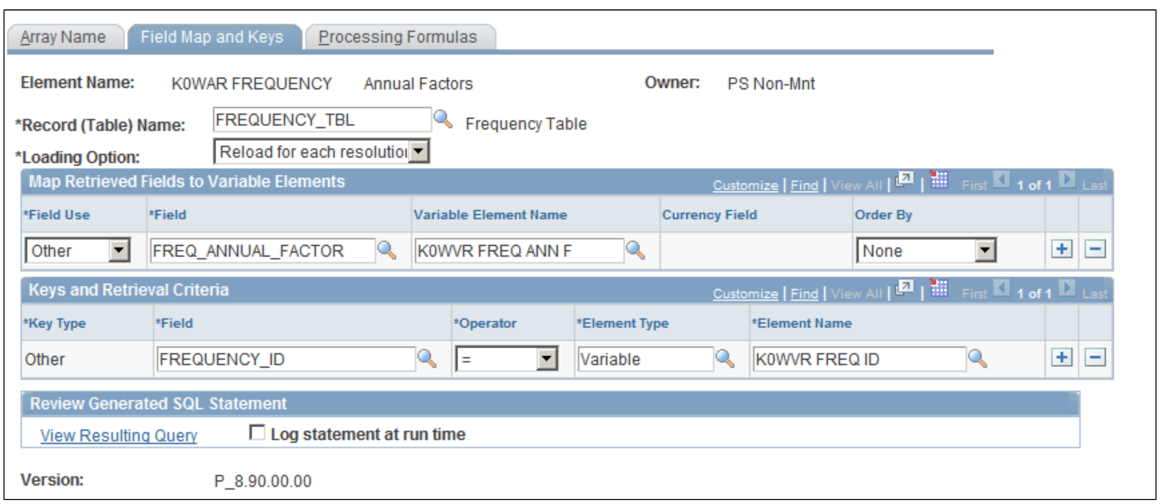
Use the Field Map and Keys page (GP_ARRAY_KEYS) to .

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Arrays, Field Map and Keys

Image: Field Map and Keys page

This example illustrates the fields and controls on the Field Map and Keys page.



Record (Table) Name	Select the table for the SQL statement to use from the list of PeopleSoft defined tables. In the FROM clause of the SQL statement, the system appends the prefix *PS_* to the selected table name. You can also select views. The prompt list displays all SQL tables and views in the database.

Loading Option

Select a value to control how often the array data are refreshed from the database.

Values are:

Employee-based look-up: Select to create a payee-based array.

Data is retrieved once for each payee. When that person is processed, the array storage becomes available for the next payee.

*Load once (small table):*Select to create a non payee-based array. Data is retrieved only once the very first time the array is referenced within the process. Compared to the two "Reload" alternatives, this option can significantly improve performance because the process only accesses the database once to load data. As indicated, this should be used only with smaller tables. The buffer for all arrays with this option combined can only hold 5000 rows. If the data in the table is changed by the process itself (and it is desirable to reflect these updates in the process, *Load once* is not a good option.

Reload for each resolution: Select to create a non payee-based array.

Data is retrieved from the database every time the array is resolved.

Reload for each segment: Select to create a non payee-based array.

Data is retrieved from the database once per segment being processed, regardless of the number of times the array may be resolved within each segment.

Note: The loading option that you select controls the key types that you can enter in the Key Type field.

See the product documentation for *PeopleTools: Data Management*.

Map Retrieved Fields to Variable Elements

Specify the columns to be retrieved from selected rows in the Array - Fields Retrieved group box (this is the SELECT part of the SQL statement). Also specify the variable elements to populate with the selected columns' values. The system orders the *Keyed by Employee* arrays by employee ID (and employee record number and effective date, if specified), with employee ID and employee record number in ascending order and effective date in descending order.

Field Use

Select from these options:

Monetary: When monetary conversion is required.

Pointer: To specify that a column contains a PIN.

Other: (default) For all other cases.

Field

Select a field from the list of columns in the database table. The system displays all columns in the database table that can be used in the SELECT AND/OR ORDER BY clause.

Variable Element Name

Define the host variable to populate with the value of the selected field. The Variable Element Name field is not required. If this field is blank, only the database field name column value is used in the ORDER BY clause.

Note: You cannot use the same variable name for two or more different field names.

Currency Field

If the field being retrieved from the database stores a monetary amount, enter a currency field name, indicating the column name of the field in the database that stores the corresponding currency code. If the currency code doesn't equal the processing currency, the system converts the monetary amount in the database to the processing currency. This field is available for entry only if you select *Monetary* in Field Use.

Order By

Define the sort order—ascending, descending, or none—for retrieving rows from the database. This is crucial because, depending on the defined lookup formula, you may want only the first row retrieved or use special formula logic dependent on the order.

Note: The same field can be assigned to more than one Absence Management variable, but it cannot be ordered in more than one way (for example, both ascending and descending).

Keys and Retrieval Criteria

Key Type

Select a key type.

If the Loading Option is *Employee-based look-up,* the key types are *Effdt* (effective date), *EmplRcd*(employee record number), *EmplID* (employee ID), and *Other.* Select *Other* if you want to use any other database field in the table that you are querying as a key.

If the Loading Option is *Load once (small table), Reload for each resolution,* or *Reload for each segment,* all key fields are defined as *Other.*

When specifying keys for a user-defined array, you generally define at least one key, but the system enables you to save this page without specifying keys. (In this case, the system loads the entire table.)

Warning! Changing the array keys clears the data in the Keys and Retrieved fields and the Processing Formulas pages.

Field

Enter the exact name of the record (table) column as defined in the database. This is the first half of the equation in the WHERE clause. For example, suppose that you have the equation WHERE EmplID equals System Element Payee ID1, EmplID is what you enter underField.

The field name must be the exact name of the column in the table in the database—not the field label or description

Operator

Indicates the user in the WHERE clause. You can enter an operator only if the key type is *Other.* Valid operators are: *<, <=, <>, =, >=, >,* and *N.A.*

Element Type

Select *Bracket, Formula, System Element,* or *Variable.* You can enter an entry type only if the key type is *Other.*

Element Name

Select the element for the second half of the WHERE clause. For example, in the equation WHERE EmplID equals System Element Payee ID1, Payee ID1 is the element name. You can enter an element name only if the key type is *Other.*

Review Generated SQL Statement

Log statement at run time

Select this check box to view the text of the SQL statement dynamically generated by the array module during batch processing. You can direct the output display into a file by selecting the Redirect Output option in PeopleTools Configuration Manager.

View Resulting Query

Click to view the SQL statement in real time. The system displays what SQL is to be created to pull data into the array, and lists how many rows are in the table defined in the Record (Table) Name field.

Using System Elements as Key Values

Depending on your loading option, you can use *EmplID, EmplRcd#,* and *Effdt* as key fields.

If you select *EmplID* or *EmplRcd* as array keys, the system hides the Operator and Element Name fields and assumes an operator of equal to (=) current *EmplID* and *EmplRcd#.* For *Effdt,* the system assumes an operator of less than or equal to (<=) the date specified in the Compare Effdt (effective date) against field.

For example, if you select *Employee-based look-up* and enter a key type of *EmplID* (using field name *EmplID),* and a key type of *EmplRcd#* (using field name, *EmplRcd#),* the system builds a SQL statement that retrieves data for the current payee only.

Using Other as a Key Type in Payee-Based and Non-Payee-Based Arrays

If you are not using one or more of the three provided array key elements—or you want entries beyond those—specify a key field name, an operator, an entry type, and the correct element name.

1. Select the correct operator for the key field (record column) in the WHERE clause.

2. Select an entry type.

3. Enter an element name corresponding to the entry type—this must be a defined element of the type that you selected.

This is the data that the system uses to build the WHERE clause of the SQL statement that it needs for retrieving data for the array. You can enter multiple key fields for your definition.

Note: If you enter multiple rows on the page, the multiple conditions are processed as AND conditions.

Example: User-Defined Key Structure

Say that you're searching the database for a row of data with a matching department ID.

You enter Other DEPTID = System Element DEPTID. The system looks for a row in the Department table (DEPT_TBL) with a DEPTID (department ID) that equals the value in the system element DEPTID for the payee currently being processed when it encounters this array.

Processing Formulas Page

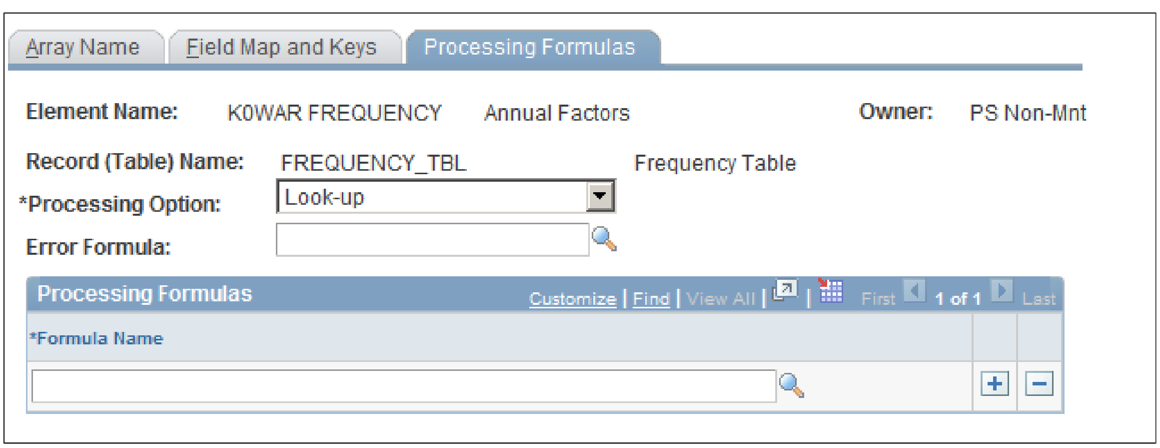
Use the Processing Formulas page (GP_ARRAY_PROCESS) to define all required formula processing.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Arrays, Processing Formulas

Image: Processing Formulas page

This example illustrates the fields and controls on the Processing Formulas page.



Processing Option Select one of these values to determine when and how the system applies a formula. Values are:

By Formula, Apply all Rows: The system selects all the rows required for the array, applies the first formula to all rows, applies the second formula to all rows, and continues for all formulas.

By Row, Apply all Formulas: The system selects a row of data from the database and applies each formula on this page to that row. It then selects the next row and applies each formula to that row, continuing for all rows.

Look-up: The system selects a row of data from the database, applies each formula on this page to that row, selects the next row, and applies each formula to that row. The first formula that resolves to a value of 1 stops the loop. So if you are searching data for a particular value, the system stops looking when it finds that value.

Note: With regards to arrays with look-up processing, if you select a value of *Look-up,* but do not specify a formula value in the Formula Name field, the system uses the first row of data returned by the array.

Error Formula

Select an Error Formula Name for the system to use during error processing, if no rows are found.

Formula Name

Select the formula that the system applies to each row of data to resolve the array.

If you selected *Look-up* as the array processing option, select a Boolean formula here.

Note: Instead of using a formula, consider defining the array so that the desired row of data is always ordered first. Also, if the array will never return more than one row of data, and this row will always contain the desired data, no Formula Name field value is necessary with the processing option of *Look-up.*

Note: The system automatically assigns a sequence number to each formula. The sequence is unchangeable. If you make a mistake, delete all the items back to the mistake and add the formulas again in the correct order.

Related Links

Defining Formula Elements

Defining Writable Array Elements

This topic provides overviews of writable arrays, storage considerations for writable arrays, and batch processing of writable arrays, and discusses how to:

- Name a writable array.
- Define writable array records and fields.

Pages Used to Define Writable Array Elements

Page Name	*Definition Name*	*Navigation*	*Usage*
Writable Array Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Writable Arrays, Writable Array Name	Name the element and define its basic parameters.
Definition and Fields	GP_WRITABLE_ARRAY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Writable Arrays, Definition and Fields	Identifies the table into which the writable array process inserts data. Also identifies the element that populates each column (field name) in the table.

Understanding Writable Array Elements

Writable arrays are elements that you can use to populate user-defined result tables. You use PeopleSoft Application Designer to create the result table, then you use the writable array pages that are described in this topic to define the element that populates the table during batch processing. Writable arrays are in many ways the opposite of standard arrays. Instead of reading values from a row in a table to user-defined variables, a writable array writes the values of user-defined elements into a row in a table.

Writable arrays make it easy for you to design reports that exactly meet your needs—each row in your table can produce a corresponding line of information in your report. You can also combine multiple tables to create a report, for example, use one table for a report header, one for the body of the report, and another for the footer.

Finally, writable arrays can also conserve valuable storage space by consolidating many vertical rows of information into a single horizontal row.

To define a writable array:

1. Use PeopleSoft Application Designer to create the table that the writable array element populates.

   The first seven fields in the table must be the same as the keys in the basic result tables. You can also use some of the optional result table keys, such as INSTANCE or SLICE_BGN_DT, and include keys that are not used in the basic result tables, such as DEPTID.

   The seven fields are:

   - EMPLID
   - CAL_RUN_ID
   - EMPL_RCD
   - GP_PAYGROUP

- CAL_ID
- ORIG_CAL_RUN_ID
- RSLT_SEG_NUM

2. On the Writable Array Name page, define the naming information for the writable array.
3. On the Definition and Fields page, identify the table that the writable array is to populate, and map the elements that are to populate the table to the corresponding fields (columns) within the table.

Note: When you create a result table using a writable array, the table must include the basic segment status keys shared by all the standard result tables. You can include additional keys as well.

Understanding Storage Considerations for Writable Array Elements

While custom result tables can conserve storage space, they can also increase the need for space if they duplicate data from the standard result tables. Consider using writable arrays to consolidate or temporarily store the following types of results:

- Miscellaneous personal data required for audit purposes.

  You might want to store these values in a single row instead of in the standard result tables and keep the records as long as you need them for auditing purposes.

- Period summary data.

  If you need to summarize data by period on year-to-date reports, you can save summary data for each period for as far back as needed.

- Temporary data used in reports.

  For reporting purposes, you may want to duplicate data found in the standard result tables but present it in a different form. You can then delete the data once you complete the reporting period.

Because you may want to delete temporary data at different times, we leave the management of the data in your result tables up to you.

Understanding Batch Processing of Writable Array Elements

Typically, each call to a writable array element creates one row of data. To produce multiple rows of output, you can use loops within a subprocess section and arrays to call the writable array multiple times. Using pointers and variables, you can populate the same field in a writable array with values from different elements, as long as you do not map character and numeric elements to the same field.

Writable Array Name Page

Use the Writable Array Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Writable Arrays, Writable Array Name

When a writable array resolves successfully, the element itself is set to one. Most likely, you will not want to store this value, so the Store and Store if Zero options on the Element Name page are not selected, by default. You can select them if you choose.

In addition, writable arrays are not effective-dated, so there is no definition as of date on the Writable Array Name page. If you need to change the element's definition, create a new writable array instead, and then create new effective-dated elements that reference the new writable array. If you rename a database table or view, create a new writable array.

Note: You name every element and define its basic parameters on an element name page with the object name of GP_PIN. The page title and general appearance of this page change based on the type of Absence Management element that you are naming and defining.

Related Links

Defining Element Names

Definition and Fields Page

Use the Definition and Fields page (GP_WRITABLE_ARRAY) to identifies the table into which the writable array process inserts data.

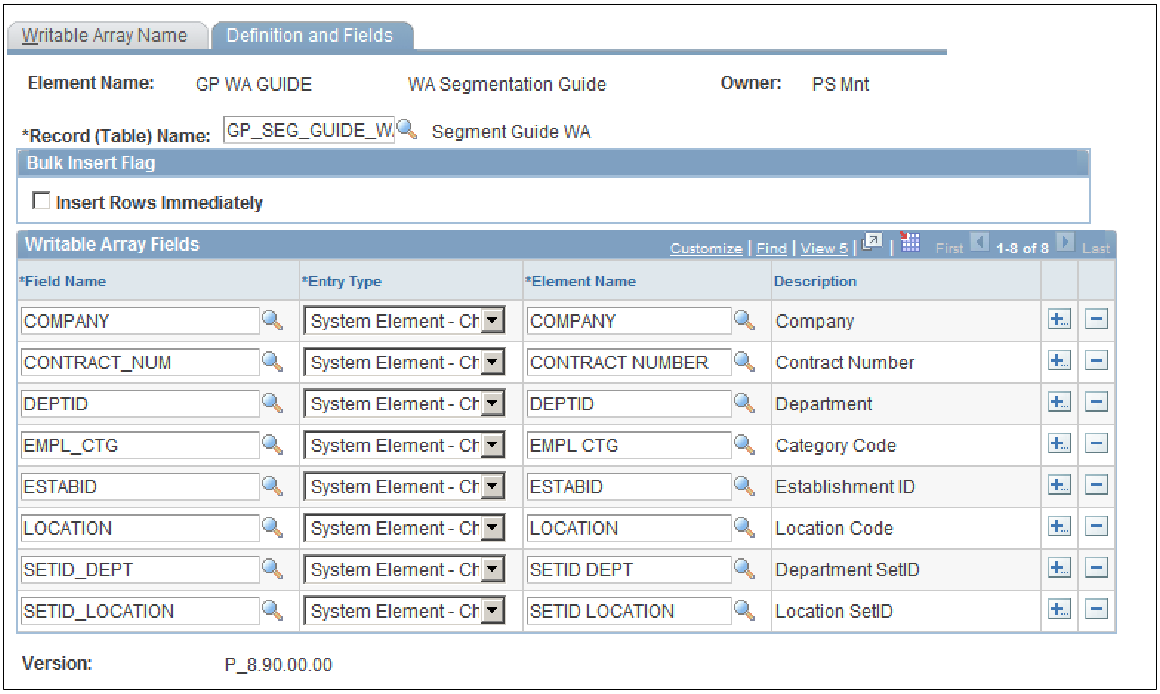
Also identifies the element that populates each column (field name) in the table.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Writable Arrays, Definition and Fields

Image: Definition and Fields page

This example illustrates the fields and controls on the Definition and Fields page.



Note: The writable array must have a record name and at least one field name in order to save.

Record (Table) Name

Enter the name of the table that the writable array is to populate. The only tables available for selection are those containing the seven required key fields of a writable array.

The system appends the prefix *PS_* to the table name and uses the new name in the INSERT clause of a SQL statement.

Insert Rows Immediately

Select if you are defining a writable array to generate data for immediate use by a standard array in the same process. This ensures that the data is present in the database when the standard array element is processed.

If this check box is not selected, the system does not immediately write data to the database table that the array is populating. It inserts the data at a later time using a bulk insert process.

Note: Not all relational database management systems provide bulk insert. For these, the rows will always be inserted one-by-one as they are processed.

Field Name	Enter the name of the writable array field that you want to populate. The list of available options includes only those fields that are included in the table that you selected in the Record (Table) Name field. The order in which you add field name is not important.
Entry Type	Select the type of element that will populate the field.
Element Name	Select the element whose value the system uses to populate the writable array key field that you are defining. **Note:** During processing, the system populates the array with the current value of the selected element. (Linking an element to a writable array field does not, in itself, cause the element to resolve.)

Defining Bracket Elements

This topic provides overviews of brackets, interpolation methods, and batch processing of brackets, and discusses how to:

- Define the lookup rules for a bracket.
- Identify the search keys and return columns.
- Enter lookup values.

Pages Used to Define Bracket Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Bracket Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Brackets, Bracket Name	Name the element and define its basic parameters.
Lookup Rules	GP_BRACKET1	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Brackets, Lookup Rules	Define the lookup rules for a bracket.
Search Keys/Return Columns	GP_BRACKET2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Brackets, Search Keys/Return Columns	Identify the search keys and the return columns for the bracket.

Page Name	***Definition Name***	***Navigation***	***Usage***
Data	GP_BRACKET3	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Brackets, Data	Enter lookup values. The search key values and the return column values that you selected in the Brackets - Search Keys/ Return Columns page appear here.

Related Links

Defining Element Names

Understanding Bracket Elements

Brackets enable you to create simple lookup tables. Based on a table that you define in a bracket, a bracket is used to look up data and assign certain values based on the lookup data. Brackets are also called *bands* and *lookup tables.*

Brackets can use one or more lookup values (search columns). Using a lookup value, bracket processing returns one or more columns that are available for use in other elements such as formulas.

Before defining a bracket, create any elements that you need to use in the bracket definition. For example, before building a bracket that lets you look up, for example, additional absence entitlements based on years of service, create the duration element that returns the years of service.

To define a bracket:

1. Define the naming information for a bracket on the Bracket Name page.
2. Define the lookup rules for the bracket on the Lookup Rules page.
3. Select the search key values and the return column values that you'll use in the lookup table on the Search Keys/Return Columns page.
4. Enter the lookup values on the Brackets - Data page.

Understanding Interpolation Methods

When a search key doesn't exactly match the lookup values defined for the bracket (on the Bracket Data page), the interpolation method defines how the system calculates the values that the bracket returns.

You can select one of the following three interpolation methods on the Lookup Rules page:

- *Linear:*

  Uses a mathematical formula to create a prorated value based on the next-higher and next-lower keys (works only with brackets that have one or two numeric keys and with numeric result columns). With the linear interpolation method, you can use a rounding rule to specify the type of rounding for the returned value.

- *Use Nearest:*

Uses the value from the row that has the nearest key (works only with brackets that have numeric or date keys).

- *Use Next Higher:*

  Uses the value from the row that has the next-higher key (works with any bracket).

- *Use Next Lower:*

  Uses the value from the row that has the next-lower key (works with any bracket).

Use Lowest and Highest Option

For the linear interpolation method, the system looks for the next-lower and next-higher rows to calculate the return value. When there isn't a lower or higher row, you can use the Use Lowest/Highest Option check box on the Lookup Rules page to indicate whether the system should take the lowest or highest matching option.

Understanding Batch Processing of Bracket Elements

In bracket processing, the system looks up a row based on the key values and returns a bracket value.

Brackets always resolve to the value of the first column returned. They are resolved as they're encountered in the process. If an element in the return column of a bracket is encountered during processing, it doesn't automatically invoke resolution of the bracket, because the system doesn't know whether the element is associated with this bracket.

Brackets and all return columns are populated as of applicable slice and segment end dates that are used when encountered during processing, with these criteria:

- If a bracket is used by another element that's being sliced, the bracket and all return column elements are also sliced.
- If the bracket is encountered on the process list, it is resolved for the segment that's currently being processed.
- If a bracket return column needs to be re-resolved during segmentation, the bracket should be used in the calculation or the bracket should be on the event list.

How Brackets Use Interpolation Methods

Three factors need to be considered:

- Interpolation Method (corresponding Use Lowest/Highest Option check box if *Use Next Higher, Use Next Lower,* or *Linear* is selected).
- Outside Table Limits (only if there's no match on the first key).
- Error Processing Options (when there's no match using appropriate interpolation methods and selections).

  Two options are available. If Generate Error is selected, the system does not resolve the bracket (or any of the return columns) and puts the calculation in error. If Continue Process is selected, the system resolves the bracket and all the other return columns to be either 0 or blank (depending on the field format).

This table clarifies how batch processing treats each interpolation method:

Interpolation Method	***Batch Process***
Use Nearest	If mismatch key is nonnumeric, go to Error Processing Options. If mismatch key is numeric determine whether next-lower and next-higher values exist: • If only next-lower value exists, use that row. • If only next-higher value exists, use that row. • If both next-lower and next-higher values exist, determine which value is nearer and return that row (if exactly halfway between, return the higher row).
Use Next Lower	Determine whether next-lower row exists: • If next-lower row exists, use that row. • If next-lower row doesn't exist, look at the Use Lowest/Highest Option check box (if lower value doesn't exist). • If Use Lowest/Highest Option check box is selected, use the lowest row where keys match. • If Use Lowest/Highest Option check box is not selected, go to Error Processing Options.
Use Next Higher	Determine whether next-higher row exists: • If next-higher row exists, use that row. • If next-higher row doesn't exist, look at the Use Lowest/Highest Option check box (if higher value doesn't exist). • If Use Lowest/Highest Option check box is selected, use the lowest row where keys match. • If Use Lowest/Highest Option check box is not selected, go to Error Processing Options.

Interpolation Method	***Batch Process***

Linear	If mismatch key is nonnumeric, go to Error Processing Options.
	
	If mismatch key is numeric determine whether next-lower and next-higher values exist:
	
	• If only next-lower value or next-higher row exists, look at Use Lowest/Highest Option check box.
	
	• If Use Lowest/Highest Option check box is selected, use that row (no linear interpolation required).
	
	• If Use Lowest/Highest Option check box is not selected, go to Error Processing Options.
	
	If both next-lower and next-higher values exist:
	
	• In relation to the keys:
	
	    • Determine the difference between the next-lower and next-higher rows (Key Difference 1).
	
	    • Determine the difference between your value and the next-lower value (Key Difference 2).
	
	    • Determine ratio by dividing Key Difference 2 by Key Difference 1 (Key Ratio).
	
	• For each return column:
	
	    • Determine the difference between the values for the next-lower and next-higher rows (Return Column Difference 1).
	
	    • Apply Key Ratio to the Return Column Difference (Return Column Difference 2).
	
	    • Add Return Column Difference 2 to the value from the next-lower row. This is the value that should be returned for the return column.

Additional Notes About Batch Processing for Bracket Elements

Search keys are considered in the order in which they are entered on the bracket definition. Values are in ascending order (based on key order).

For all interpolation methods, if all keys match, use that row. For all interpolation methods, try to match on keys sequentially (first key, second key, and so on).

What to Do When Keys Are Mismatched

If there's a mismatch on the first key:

- Determine whether the mismatch is specified in Outside of the Table Limits.

  If the first key value is under the key 1 value defined on the first row:

  - If *Use First Row if Under* is selected, use the first row.
  - If *Use First Row if Under* isn't selected, go to Error Processing Options.

- If the first key value is over the key 1 value defined on the first row:

  - If *Use Last Row if Over* is selected, use the last row.
  - If *Use Last Row if Over* isn't selected, go to Error Processing Options.

- If the mismatch isn't specified in Outside of the Table Limits and no interpolation method is selected, go to Error Processing Options.
- If an interpolation method is selected and the field format of the first key is nonnumeric, go to Error Processing Options.
- If an interpolation method is selected and the field format is numeric, go to the appropriate logic, based on the interpolation method process. See details of each interpolation method in the preceding table.
- If there's a mismatch on a subsequent key and no interpolation method is selected, go to Error Processing Options.
- If there's a mismatch on a subsequent key and an interpolation method is selected, consider only the rows where all keys have been matched.

  Go to the appropriate logic based on the interpolation method process. Refer to the details of each interpolation method in the preceding table.

Bracket Name Page

Use the Bracket Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Brackets, Bracket Name

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Note: You name every element and define its basic parameters on an element name page with the object name of GP_PIN. The page title and general appearance of this page change based on the type of Absence Management element that you are naming and defining.

Related Links

Defining Element Names

Lookup Rules Page

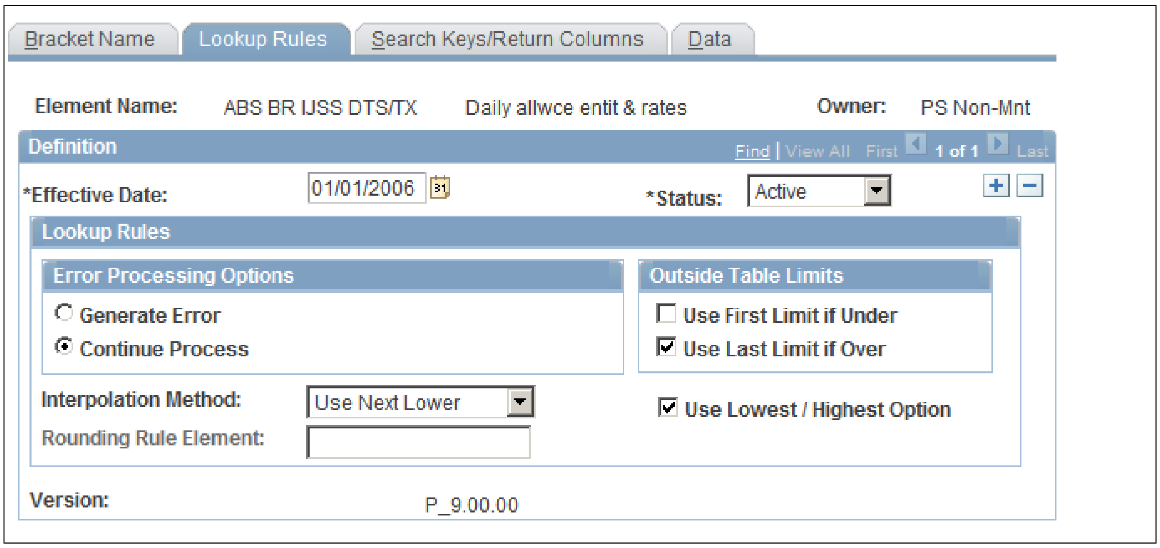
Use the Lookup Rules page (GP_BRACKET1) to define the lookup rules for a bracket.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Brackets, Lookup Rules

Image: Lookup Rules page

This example illustrates the fields and controls on the Lookup Rules page.



Error Processing Options

Select from the following values:

Generate Error: Stops processing and generates an error.

Continue Process: Continues processing without returning any value.

Outside Table Limits

Defines what happens if the key values are over or under those that are defined in the table:

Use First Limit if Under: Select if key values are under those that are defined in the table.

Use Last Limit if Over: Select if key values are over those that are defined in the table.

Interpolation Method

Select an interpolation method that defines the values to return if the system doesn't find an exact match; for example, if the key values are between two rows on the table. All interpolation methods use only one search key, the first mismatched one. Select from the following values:

Linear: Uses a mathematical formula to create a prorated value based on the next-higher and next-lower keys (works only with brackets that have one or two numeric keys and with numeric result columns).

	Use Nearest: Uses the value from the row that has the nearest key (works only with brackets that have numeric or date keys). *Use Next Higher:* Uses the value from the row that has the next-higher key (works with any bracket). *Use Next Lower:* Uses the value from the row that has the next-lower key (works with any bracket). See Understanding Interpolation Methods.
Use Lowest/Highest Option	When using linear interpolation, the system matches on all search columns that have already been matched. Then it looks for the next-lower and next-higher rows where the search columns match. When there isn't a lower or higher row where search columns match, you can use the Use Lowest/Highest Option check box to indicate whether the system should take the lowest or highest matching option. See Understanding Interpolation Methods.
Rounding Rule Element	With linear interpolation, you can use a rounding rule to specify the type of rounding for the returned value. The system applies this rounding rule to all return columns whose field format is numeric (decimal or monetary), because linear interpolation takes the ratio of the next-lower return column value and the next-higher value and returns the prorated value based on the ratio that is above the next-lower value. The result might be an excess of decimal places. See Understanding Interpolation Methods.

Search Keys/Return Columns Page

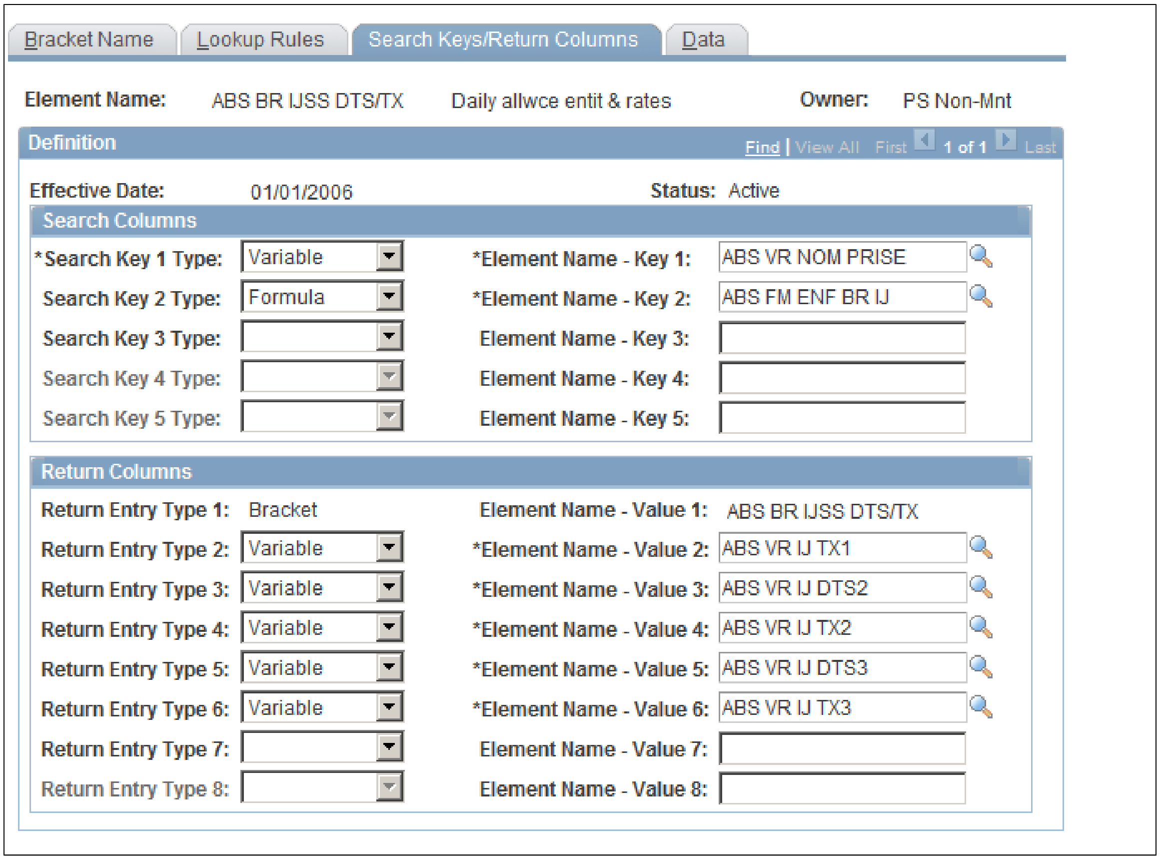
Use the Search Keys/Return Columns page (GP_BRACKET2) to identify the search keys and the return columns for the bracket.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Brackets, Search Keys/Return Columns

Image: Search Keys/Return Columns page

This example illustrates the fields and controls on the Search Keys/Return Columns page.



Search Columns

In the Search Columns group box, select the keys that the system uses to search the bracket data. For each key, select the Search Key Type (element type) that you're entering. Then select the corresponding Element Name. You can enter up to five search keys.

Return Columns

In the Return Columns group box, select the columns that tell the system where to store the values returned by the lookup. For each column, select the Return Entry Type(element type) that you're entering. Then select the corresponding Element Name. The bracket itself is the first returned column. You can enter up to eight return columns.

Data Page

Use the Data page (GP_BRACKET3) to enter lookup values.

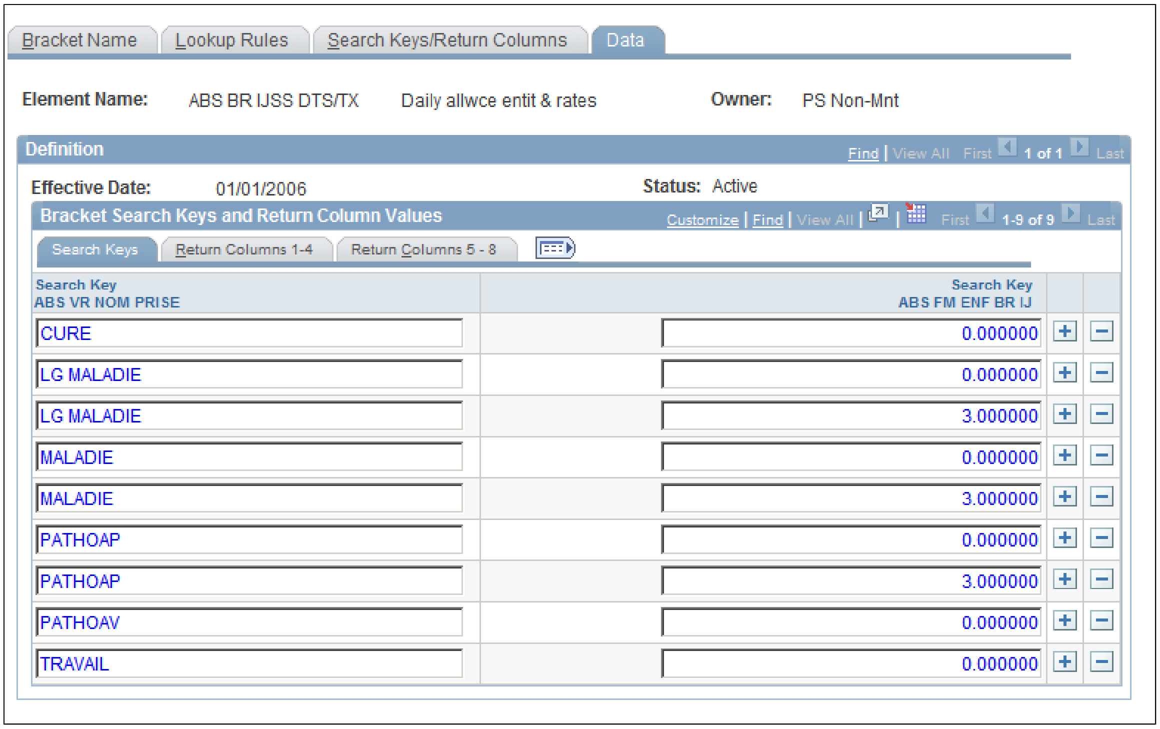
The search key values and the return column values that you selected in the Brackets - Search Keys/ Return Columns page appear here.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Brackets, Data

Image: Data page

This example illustrates the fields and controls on the Data page.



Bracket Search Keys and Return Column Values - Search Keys Tab

Enter the values of the search keys.

Bracket Search Keys and Return Column Values - Return Columns Tab

Enter the values to be returned for each search key value, based on your entries on the Search Keys/ Return Columns page. You can enter multiple return values.

Defining Rate Code Elements

This topic provides overviews of rate code mapping, the use of rate codes and batch processing of rate codes, and discusses how to:

- Name rate code elements.
- Create a rate code element.

Pages Used to Create Rate Code Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Rate Code Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Rate Codes, Rate Code Name	Name the element and define its basic parameters.
Definition	GP_RATE_CODE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Rate Codes, Definition	Create a rate code element and map it to a rate code defined in HR. You can also use the page to view rate code elements and change the mapping.

Understanding Rate Code Mapping

You can use rate code elements to retrieve multiple components of pay that have been defined in HR—including base pay and non base-pay components.

To have the system retrieve the rate codes set up in HR, matching rate code elements must be defined in Absence Management and mapped to the corresponding HR rate codes. A HR rate code can be associated with only one Absence Management rate code element.

Rate code elements can be defined and mapped to HR rate codes in two ways:

1. If you install Absence Management after creating rate codes in HR, use the Rate Codes - Definition page to create rate code elements and map them to the corresponding rate codes in HR.

   Mapping an element to a HR rate code makes the element take on the values of the HR rate code.

2. If Absence Management is installed when you create rate codes in HR, the creation of the rate code element is dependant on if a row exists on the User Rules Profile page for the rate code creators user ID.

   a. If there is an entry on the User Rules Profile page for the User ID of the person who is creating the Rate Code in HR a matching rate code element is created automatically in Absence Management. This rate code will have the same Used By and Country values on the Rate Code Name page that are defined for the User ID of the person creating the rate code. If a different one is desired, a user will a user ID of All Countries will have to modify the rate code with the applicable change to the Used By and Country fields.

   b. If there is no entry on the User Rules Profile page for the User ID of the person creating the Rate Code in HR, the system does not create a rate code in Global Payroll. It handles it just as in the same manner as described in #1 above. A user with the appropriate User ID set up on the User Rules Profile page will have to go into the Rate Code element in Global Payroll to create the rate code element.

See Restricting User Access.

You can display the rate code elements via the Rate Codes - Definition page in Absence Management. You can also use the page to map the element to a different rate code.

This table lists the values that appear on the Rate Codes - Definition page:

Field	***Value***
Name	Same as HR Rate Code Name
Element Type	Rate Code (RC)
Description	HR Rate Code description
Field Format	Decimal
Use Defn As Of	Calendar Period End Date
Always Recalculate	Off (No)
Owner	Customer Maintained
Class	Not Classified
Used By	Same as the Used By value defined on the User Rules Profile page for the person creating the Rate Code in HR.
Country	Same as the Country value defined on the User Rules Profile page for the person creating the Rate Code in HR.
Industry/Region	Blank
Category	Blank
Override Levels	All options set to Off (No)
Store	On (Yes)
Store if Zero	On (Yes)
Customer Fields	Blank
Comments	Blank

Understanding the Use of Rate Code Elements

Rate code elements return the values of rate codes defined in HR. To use a rate code to calculate a payee's absence information, use the rate code in the absence element definition—either directly, as part of the absence calculation rule, or within a formula or other element used by the absence calculation rule.

Related Links

Ordering Elements and Sections in a Process List

Understanding Batch Processing of Rate Code Elements

When the system encounters a rate code element during the absence process, it calls the Rate Code PIN Resolution program, which first determines whether the element, effective on the calendar period end date, represents a base pay rate code or a non base-pay rate code. It then follows the hierarchy for base pay or non base-pay rate code elements, as appropriate, to resolve the rate code.

Criteria for Selecting the Job Row

Absence Management uses the RATE AS OF DATE system element to determine to which maximum effective-dated job row it refers for the rate code.

- If RATE AS OF DATE is unpopulated, the system uses the end date of the current slice or segment to select the job row.
- If RATE AS OF DATE is greater than the calendar period end date, the system uses the calendar period end date to select the job row.
- If RATE AS OF DATE is before the first effective date on job, the rate code resolves to 0 and the payment is put in error.
- In all other cases, RATE AS OF DATE is used.

The FTE factor that applies to some rate codes is retrieved from the maximum effective-dated job row that is less than or equal to the RATE AS OF DATE or slice end date where the payment keys match.

Currency Conversion

When the currency code for a flat amount, hourly, or hourly plus flat amount rate code, as defined in HR, doesn't match the processing currency, Absence Management performs its standard currency conversion during processing. That is, it uses the payee's effective-dated exchange rate type to perform the conversion.

Note: Currency conversion is not required on percent or point rate codes, because returned values are non monetary.

Frequency Conversion

Absence Management also performs frequency conversion on any flat amount or hourly plus flat amount rate code, where the corresponding frequency code in HR doesn't match the calendar period frequency. The system annualizes the rate code using the corresponding frequency factor from HR. It then deannualizes for the calendar period frequency (using the applicable frequency factor). Define all earning elements that use rate codes as Use Calendar Period Frequency.

Note: Frequency conversion is not required on percent or point rate codes, because returned values are non monetary.

Resolving Multiple Instances of the Same Rate Code Element

If the PS_COMPENSATION record contains multiple instances for the same rate code (base pay or non base-pay), the system evaluates each instance separately, sums the instances, and returns one value to the rate code element. Absence Management references two system elements, RATE CODE GROUP and FTE INDICATOR, and applies the following rules:

- If the Rate Code Group differs between the instances, the system element RATE CODE GROUP is resolved according to the last instance and an error message is generated.

- If the FTE indicator differs between instances, the system resolves the system element named FTE INDICATOR according to the last instance and issues a warning message. The payee is not put into an error status. (Absence Management uses the FTE INDICATOR only for rate codes types of flat amount and hourly plus flat amount.)

For example, if a flat amount rate code has one instance in which FTE applies, Absence Management uses the FTE_COMPRATE for this instance. If a second instance indicates that FTE doesn't apply, the system uses the COMPRATE field value for the second instance and sums the two instances.

Hierarchy for Resolving Base Pay Rate Code Elements

When the system encounters a rate code element that's mapped to a HR base pay rate code, it finds the appropriate rows on the PS_COMPENSATION record, where the element matches the rate code. It then identifies the value to be returned, based on the rate code type, as shown in this table:

Rate Code Type	***Fields Evaluated on PS_ COMPENSATION***	***Value Returned for Rate Code***
Percent	COMP_PCT	Percent
Points	COMP_RATE_POINTS	Points
Flat Amount	COMPRATE and FTE_INDICATOR	If FTE_INDICATOR = Yes, return COMPRATE * FTE factor (stored on JOB) If FTE_INDICATOR = No, return COMPRATE
Hourly	COMPRATE	Hourly rate

Hierarchy for Resolving Non Base-Pay Rate Code Elements

When the system encounters a rate code element that's mapped to a HR non base-pay rate code, it derives the rate from the following hierarchy, stopping when it finds the rate:

- Compensation table (PS_COMPENSATION).
- Job Code table (PS_JOBCD_COMP_RATE).

  The system looks for the row where the SetID and Job code fields match the SETID_JOBCODE and JOBCODE system elements.
- HR Comp Rate table (PS_COMP_RATECD_TBL).

The system identifies the value to be returned, based on the rate code type and FTE_INDICATOR, as shown in this table:

Rate Code Type	***Fields Evaluated on PS_ COMPENSATION***	***Value Returned for Rate Code***
Percent	COMP_PCT	Percent
Points	COMP_RATE_POINTS	Points

Rate Code Type	***Fields Evaluated on PS_ COMPENSATION***	***Value Returned for Rate Code***
Flat Amount, or Hourly + Flat Amount	COMP_RATE FTE_INDICATOR	If FTE_INDICATOR = Yes, return COMPRATE * FTE factor (stored on JOB) If FTE_INDICATOR = No, return COMPRATE
Hourly	COMPRATE	Hourly rate

Common Elements Used in This Section

Base pay components — Components that contribute to a payee's base pay are called base pay components. All base pay components are stored in the PS_ COMPENSATION record in HR.

Multiple components of pay — This functionality enables your organization to compensate a payee at more than one *rate* of pay, such as regular pay and merit pay. Components can represent a flat amount, hourly rate, hourly rate plus flat amount, percentage of the worker's compensation package, or salary points.

Non-base-pay components — Components that do not contribute to base pay are called non base-pay components and may or may not be stored in the PS_ COMPENSATION record. When you run the absence process, the system follows a hierarchy to determine the applicable rate.

Naming Rate Code Elements

Use the Rate Code Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Rate Codes, Rate Code Name

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Note: You name every element and define its basic parameters on an element name page with the object name of GP_PIN. The page title and general appearance of this page change based on the type of Absence Management element that you are naming and defining.

Related Links

Defining Element Names

Definition Page

Use the Definition page (GP_RATE_CODE) to create a rate code element and map it to a rate code defined in HR.

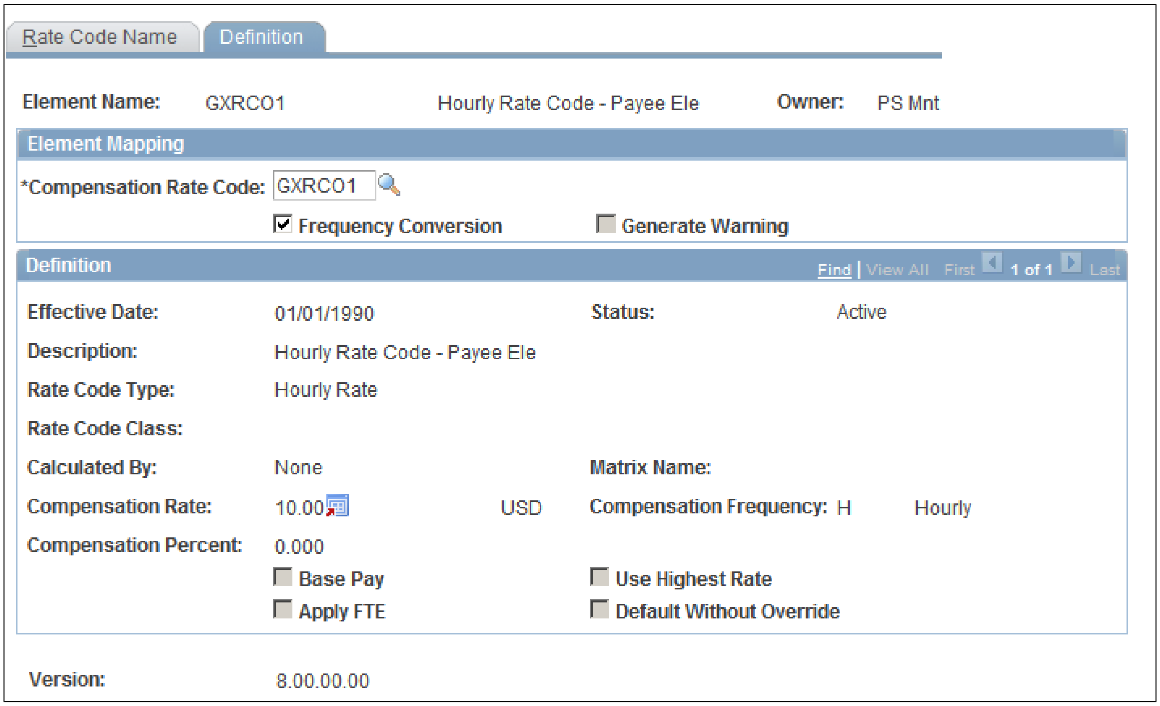
You can also use the page to view rate code elements and change the mapping.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Rate Codes, Definition

Image: Rate Codes - Definition page

This example illustrates the fields and controls on the Rate Codes - Definition page.



Compensation Rate Code

Enter the HR rate code to which you want to map this element. When you select the rate code, the lower half of the page displays information that is defined for the rate code in HR. You cannot change this information in Absence Management.

Frequency Conversion

This check box is selected by default to indicate that the system is to perform frequency conversion (annualization and deannualization) on the value returned by the rate code.

Clear this check box if you want the system to return the value from the rate code definition without performing frequency conversion.

Generate Warning

This check box applies only to rate codes that represent a base pay component. It is selected automatically to indicate that the system generates a warning message during batch processing if it does not find the rate code on the payee's compensation record.

Clear the check box if you do not want the system to generate a warning message in these situations.

Related Links

Understanding Data Retrieval from HR

Defining Historical Rule Elements

To define historical rule elements, use the Historical Rules (GP_HIST_RULE) component.

This topic provides overviews of historical rules and batch processing of historical rules, and discusses how to:

- Define the rule type and periods to be processed.
- Define the formula for a historical rule.

Pages Used to Define Historical Rule Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Historical Calculation Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Historical Rules, Historical Calculation Name	Name the element and define its basic parameters.
Processing Period	GP_HIST_RULE1	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Historical Rules, Processing Period	Define the details of the processing period for the historical rule. Depending on what you select as the rule type, some fields may not be available for entry.
Parameters and Mapping	GP_HIST_RULE2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Historical Rules, Parameters and Mapping	Define the formula for a historical rule.

Understanding Historical Rule Elements

You can use historical rule elements to set up rules that retrieve data from prior periods. Historical rules can be used in formulas.

A historical rule can be associated with any element that's stored in the Earnings/Deductions results table, Accumulators results table, or Other Elements results table.

To define a historical rule:

1. Define the naming information for the historical rule on the Historical Rules Name page.
2. Define the rule type and the periods to be processed on the Processing Period page.

3. Define the formula for a historical rule on the Parameters and Mapping page.

Understanding Batch Processing of Historical Rule Elements

You can attach a historical rule to an earning or deduction element on the Formula Definition page or to any element that's stored in the Earnings/Deductions results table (GP_RSLT_ERN_DED), Accumulators results table (GP_RSLT_ACUM), or Other Elements results table (GP_RSLT_PIN).

A historical rule resolves to one if it's successful and to zero if it's not successful. This works the same way as an array element. A historical rule can then be used in a formula such as:

IF HIST_RULE_TEST =1, THEN

Use variable elements populated by historical rule

ELSE

Generate an error

END-IF

A historical rule is set to one when either the end-of-process formula resolves without errors, or if that formula is not used in the processes, the stop-process-if-true variable is set to TRUE.

In all other situations, a historical rule is set to zero and SQL returns no data.

How the System Processes Historical Rule Elements

Here's how the system processes historical rules:

1. The system dynamically creates SQL to load elements requested from the Absence Management result tables.

   It can get data from multiple result tables at one time by using a SQL UNION, meaning direct access to the database each time the historical rule is called. A SELECT and a series of FETCHES are performed each time. The use of this element type affects performance.

2. The system maps columns to variables.

   The variables are available for use in a formula.

3. The first fetch establishes the keys for the first retrieved segment.

   The program continues fetching records until there is a break in the segment keys. It then populates the input and output interface copybook (PINL) with the values for the retrieved elements or with the null values for the elements in the element mapping that were not found. Then the program requests the resolution of Formula to Execute By Segment.

4. The system performs formula resolution per segment.

5. The system resolves an end of process formula for additional calculations such as averaging.

This table lists how calendars and segments are processed in the reverse order in which they were initially run:

Original Processing Sequence	***Processing Sequence for Historical Rules***
January absence calendar	February absence calendar
February absence calendar	January absence calendar

Historical Calculation Name Page

Use the Historical Calculation Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Historical Rules, Historical Calculation Name

Note: You name every element and define its basic parameters on an element name page with the object name of GP_PIN. The page title and general appearance of this page change based on the type of Absence Management element that you are naming and defining.

Related Links

Defining Element Names

Processing Period page

Use the Processing Period page (GP_HIST_RULE1) to define the details of the processing period for the historical rule.

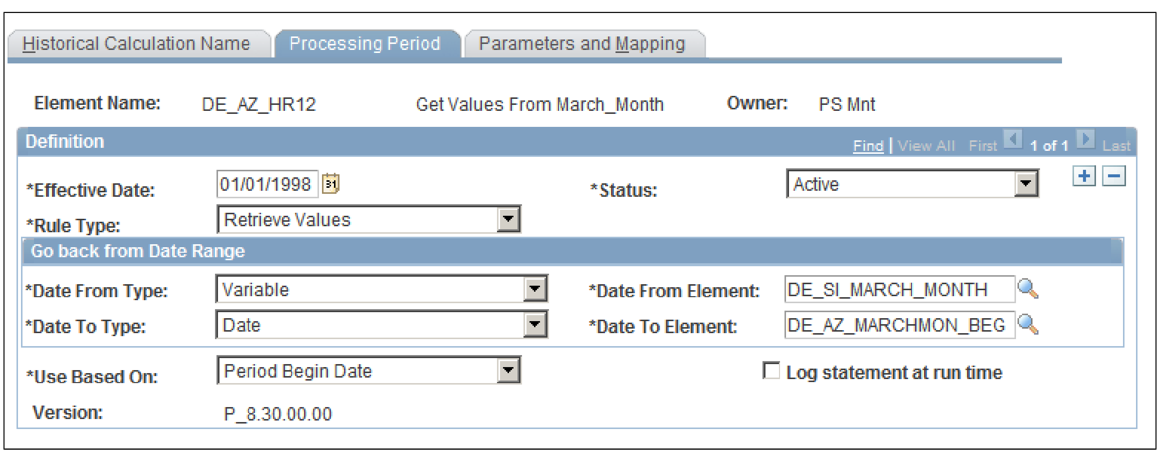
Depending on what you select as the rule type, some fields may not be available for entry.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Historical Rules, Processing Period

Image: Processing Period page

This example illustrates the fields and controls on the Processing Period page.



Note: On the Processing Period page, you create the periods from the *date from* to the *date to* date. You then map the selected result data to the processing periods. If no data exists for an element in a period, it is set to spaces for character and date elements and to zeros for numeric and monetary elements.

Rule Type

Select the type of historical rule from these options:

Use in Fictitious Calculation: This is not used with Absence Management.

Retrieve Values: Select when you want to use a historical rule element in a formula to retrieve previously calculated values.

Go back from Date Range

Define the date from, date to type, date from element, and date to element to establish the rule's date range. If you select a *Retrieve Values* rule type, this field appears as Go Back From Date Range.

Select from the following values in the Date From Type and Date To Type fields:

Bracket

Cal Date (calendar date) Enter a date instead of an element that resolves to a date. In the next field, specify the date to start going back from.

Date

Formula

SystemElem (system element)

Variable

Use Based On

Select a date that tells the system which data values from the GP_RSLT tables are processed by a historical rule. Select from these values: *Period End Date, Period Begin Date* or *Payment Date.*

Log statement at run time

Select this check box to see the text of the SQL statement dynamically generated by the array module during batch processing. You can direct the output display into a file by selecting the Redirect Output option in PeopleTools Configuration Manager.

Example

You want to determine three months of salary (element SALARY) for the period between March 28 and June 27. This table lists the GP_RSLT table values:

Period Payment Date	***Result***	***Period Begin***	***Period End Date***	***Payment Date***
January 2003	100	January 1, 2003	January 31, 2003	February 2, 2003
February 2003	100	February 1, 2003	February 28, 2003	March 2, 2003
March 2003	100	March 1, 2003	March 31, 2003	April 2, 2003
April 2003	100	April 1, 2003	April 30, 2003	May 2, 2003
May 2003	100	May 1, 2003	May 31, 2003	June 2, 2003
June 2003	100	June 1, 2003	June 30, 2003	July 2, 2003
July 2003	100	July 1, 2003	July 31, 2003	August 2, 2003

If you select *Period Begin Date,* the historical rule processes only June, May, and April. It does not process July, because July 1, 2003 (the period begin date) is later than the date from date of the historical period (June 27, 2003). It also does not process March, because March 1, 2003 (the period begin date) is before the date to date of the historical period (March 28, 2003).

Note: Historical rules start from the date from date and look at periods and segments in the reverse order in which they were originally processed and go back to the date to date.

If you select *Period End Date,* the rule processes May, April, and March. It does not process June, because June 30, 2003 (the period end date) is later than the date from date of the historical period (June 27, 2003). It also does not process February, because February 28, 2003 (the period end date) is before the date to date of the historical period (March 28, 2003).

If you select *Payment Date,* the rule processes May, April, and March. It does not process June, because July 2, 2003 (the payment date) is later than the date from date of the historical period (June 27, 2003). It also does not process February, because March 2, 2003 (the payment date) is before the date to date of the historical period (March 28, 2003).

See the product documentation for *PeopleTools: Data Management*

Related Links

Understanding Segmentation Setup

Defining the Formula for a Historical Rule Element

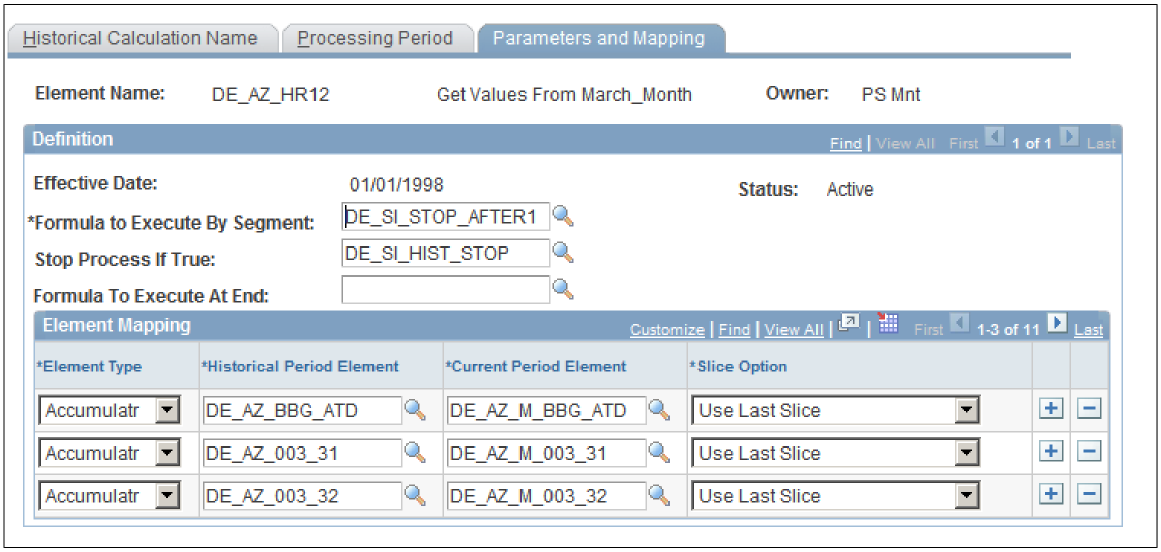
Use the Parameters and Mapping page (GP_HIST_RULE2) to define the formula for a historical rule.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Historical Rules, Parameters and Mapping

Image: Parameters and Mapping page

This example illustrates the fields and controls on the Parameters and Mapping page.



When you run an absence run, the system resolves the Formula to Execute by Segment field per historical period until the Stop Process If True variable is not equal to zero or the last historical period is processed. The system then resolves the formula specified in the Formula To Execute at End field.

Formula to Execute By Segment

Enter the formula to be resolved for each segment or period.

Stop Process If True

Enter a variable. The process keeps looping through periods, resolving the formula for each period, until this variable doesn't equal zero, the date to date is reached, or no more data is found.

Formula To Execute At End

Select the formula to resolve when period processing is completed.

Use Period If True

This field appears for *Use in Fictitious Calculation* rule types only. This is not used with Absence Management.

Element Mapping

The grid in the Element Mapping group box lists the elements for retrieval from the Absence Management result tables for a historical rule.

Element Type

Select the type of element—such as the earning, deduction, or variable—to retrieve.

Historical Period Element

Enter the element that you want to retrieve.

Current Period Element

Enter the variable in which the retrieved value is to be stored. This variable becomes available for use in the Formula to Execute By Segment field.

Slice Option

Specify how the system resolves multiple instances of an element in the historical period. Values are:

- *Sum Slices:* The system sums all slices.
- *Use Last Slice:* The system uses the value of only the last slice.
- *Sum Slices - Current Empl Rcd:* The system sums all slices, but only for rows of data where the EMPL_RCD equals the current EMPL_RCD.
- *Use Last Slice - Cur. Empl Rcd:* The system uses the value of only the last slice, but only for rows of data where the EMPL_RCD equals the current EMPL_RCD.

Chapter 7

Defining Calculation Elements

Understanding Calculation Elements

Supporting elements are the building blocks of your system. Calculation elements, a subset of supporting elements, assist in the calculation process and are used to further refine the more complex elements.

This topic discusses:

- Calculation element names
- Element pointers

Calculation Element Names

You must name every element and define its basic parameters on an Element Name page. All element page components share the same first Element Name page (GP_PIN).

Related Links

Defining Element Names

Element Pointers

An element pointer is an element that points to another element by its system identifying number (PIN).

Once you define an element, its value may change. This presents a dilemma when you try to use elements to calculate other elements. The problem is especially evident when you are creating formulas. Element pointers help you alleviate this problem.

Advantages of Element Pointers

The following are advantages of using element pointers:

- You can use them in formulas to make formulas generic and reusable.
- Different absence calculations can use the same formula.
- When you define a formula, the values for the various elements that constitute the formula will likely change. Rather than referring to the element's value, you can refer to its system identifying number—its *element number.*
- Because you point to its element number—which remains constant—a formula using the element can remain useful over time because the element values will be valid.

Elements that can Use Element Pointers

Pointers can reference almost all elements that use the Definition page.

Use the following major elements to retrieve, store, and assign element pointers:

- Variables
- Brackets

  When using brackets, element pointers can store values that are returned by the lookup. Select a pointer for storing bracket values on the Search Keys/Return Column page.

- Formulas
- Arrays

  Use a pointer to tell the system that a column to be retrieved contains a PIN number. Use the Fields Retrieved page to enter instructions for retrieving columns for an array

Related Links

Understanding Element Pointers in Formulas

Defining Duration Elements

To define duration elements, use the Durations (GP_DURATION) component.

This topic provides overviews of duration elements and batch processing of duration elements, and discusses how to:

- Name durations.
- Define a duration element.
- Use HR status to include or exclude time.

Pages Used to Define Duration Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Duration Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Durations, Duration Name	Name the element and define its basic parameters.
Definition	GP_DURATION	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Durations, Definition	Define the number of days, months, or years between two dates.

Page Name	Definition Name	Navigation	Usage
Set Daily HR Status Criteria	GP_DUR_STAT_SEC	Click the Set Daily HR Status Criteria link on the Durations - Definition page, which is activated when you select Days.	Specify time periods for duration calculation, excluding or including them according to HR status codes.

Understanding Duration Elements

A duration element calculates the time between two dates, by subtracting one date from another. For example, age at Pay Period End Date is calculated as Pay Period End Date minus Birth Date. The resulting value is a duration.

Duration elements always resolve to a number. You can define durations in years, months, or days. If you define duration in days, you can include or exclude certain periods of time based on PeopleSoft HR status codes. You can also include or exclude absence days that have been entered in Absence Management.

Including or Excluding Absences

The Include Absence Days check box on the Durations - Definition page is typically used to exclude absence days from a duration. For example, say that you are calculating a service duration and want to exclude sick days. The daily absence formula will be resolved for each day between the absence begin date and end date. Have the formula return a 1 for each paid sick day (else return a zero). The duration program will sum up each day's value. If a payee was sick 15 days within this time period and the Include Absence Days check box page is not selected, the system subtracts 15 from the total number of calendar days in the period.

Your formula can call any of the system elements that are designed specifically for absence duration. These elements have the same names as those that are used to generate the absence daily data, but they end with the suffix DU. For example, you can use the system element, ABS END DATE DU, to retrieve an absence end date for a particular absence.

Example 1: Rounding

On the Duration - Definition page, you can define whether the duration is a decimal and how to round the duration. This topic provides an example of how rounding works for decimal durations.

The result (before rounding) is 2 years, 5 months, and 20 days and you want the result in months, without rounding. The result is:

(2 Years * 12) + 5 Months = 29 Months + 20/30 = 29.666667

If the Return Duration With Decimals check box is cleared, the value is 29.

If you select the Return Duration With Decimals check box and Add 1 Month if Days, with a value of 15, the result is:

(2 Years * 12) + 5 Months + 1 Month (because days are > 15) = 30

The small difference in the results can be significant when the duration resolution is used throughout the system.

Example 2: Rounding

In this example, assume that:

The Duration From date is January 1, 1999 and the Duration To date is January 31, 2001.

This table illustrates how various options, used together, affect the value returned by a duration element (the system's standard field size is 12.6, so all values are shown to the full six decimal places):

Return Duration In	***Rounding*** ***Add 1 Year If Months >=***	***Rounding*** ***Add 1 Month If Days >=***	***Return Duration With Decimals***	***Value***
Years	No	No	Yes	2.083333
Years	No	No	No	2.000000
Years	Yes, 1	No	No	2.000000
Months	No	No	Yes	25.000000
Months	No	Yes, 15	No	25.000000
Days			Yes	Impossible. An online error message appears.
Days	No	No	No Inclusive = No	761.000000
Days	No	No	No Inclusive = Yes	762.000000

Note: The Duration program uses the PeopleTools utility PTPDTWRK to get the difference between two dates. When the GP Duration option is to return the value in Years, PTPDTWRK is called with the AGE option, which gives a result in years, months, and days. For example, when the dates are April 1, 2003 to April 1, 2004 PTPDTWRK returns 1 year, 0 months, and 0 days. When the end date is March 31, 2004, PTPDTWRK returns 0 years, 11 months, and 30 days. You might think that the decimal difference between these two dates would be calculated as 364/365 = .99726, but this is not what is happening. PTPDTWRK can return the value between dates in days, but to convert this into years would require calculating the number of leap years involved .

Including/Excluding HR Status Days

Using the Set Daily HR Status Criteria page you can include or exclude time periods from the duration calculation, based on HR status codes.

If status Include or Exclude criteria are defined as part of the duration definition:

- The Date From date cannot be earlier than the first effective-dated PS_JOB row.

  If the Date From date is before the first effective-dated PS_JOB row, the duration calculation uses the earliest effective-dated PS_JOB row for this EmplID/Empl_Rcd combination as the default Date From date. The duration calculation doesn't limit the Date From date based on other fields.

- The Date To date cannot be after the Calendar Period End Date.

  If the Date To date is after the Period End Date, the duration calculation uses the Period End Date as the default Date To date.

- Only the maximum effective sequence PS_JOB row is considered, because any non maximum effective sequence PS_JOB rows mean nothing from a status perspective.

- No warnings or errors are issued if the Date From or Date To dates are modified to be the effective date of the first PS_JOB row or the Period End Date in the above situations.

For example, if the first effective date PS_JOB row is January 7, 1995 but the Date From date is January 1, 1995, the system uses January 7, 1995 because the Date From date cannot be less than the first PS_JOB effective date.

Note: Payment keys are ignored in Status Control Include or Exclude calculations.

Example 1: Including/Excluding HR Status Days

For this example, assume the following:

Date From: January 1, 2000.

Date To: January 31, 2000.

Unit of measure: Days.

Include From and To Date selected.

Payee Status: Leave effective January 22, 2000

Days Active: 21 Days, Inactive: 10, Result of absence formula: 5

This table shows how the system resolves the duration value, based on various Include/Exclude options:

HR Status	Absence Formula	Duration with Inclusive ON	Duration with Inclusive OFF	Reason
Include-Active	Blank	21 days	21 days	Active days only
Include-Inactive	Blank	10 days	9 days	Leave days only
Include-Active	Include	26 days	26 days	Active Days + Formula Days
Include-Inactive	Include	15 days	14 days	Leave Days + Formula Days
Include-Active	Exclude	16 days	16 days	Active Days - Formula Days
Include-Inactive	Exclude	5 days	4 days	Leave Days - Formula Days

HR Status	***Absence Formula***	***Duration with Inclusive ON***	***Duration with Inclusive OFF***	***Reason***
Blank	Include	5 days	5 days	Formula Days only
Blank	Exclude	26 days	25 days	Total Days - Formula Days
Blank	Blank	31 days	30 days	Total Days
Exclude-Active	Blank	10 days	9 days	Leave Days only
Exclude-Inactive	Blank	21 days	21 days	Active Days only
Exclude-Active	Include	15 days	14 days	Leave Days + Formula Days
Exclude-Inactive	Include	26 days	26 days	Active Days + Formula Days
Exclude-Active	Exclude	5 days	4 days	Leave Days - Formula Days
Exclude-Inactive	Exclude	16 days	16 days	Active Days - Formula Days

Example 2: Including/Excluding HR Status Days

Assume that a duration is set up as follows:

- Date From: June 23, 2005.
- Date To: September 23, 2005.

A sub period is defined as follows:

- Include if status is *Active.*
- Sub period > 5 days.

This table lists a payee's PS_JOB rows:

Status	***Effective Date***
Active	June 23, 2005
Suspended	July 1, 2005
Active	August 1, 2005
Terminated	August 10, 2005

The duration resolves to eight days (first Active) plus nine days (second Active), meaning a value of 17 days. Both Active periods are included because they are both greater than five days.

Note: Payment keys and fields besides Employee Status aren't considered during the Status inclusion/exclusion calculations.
Only PS_JOB rows that are less than or equal to the period end date are considered. The Date From or Date To dates can be modified to be the effective date of the first PS_JOB row, or the Period End Date, because of the system rule that the Date From date cannot be before the first PS_JOB effective date.

Related Links

"Understanding Job Data *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*"

The Absence Take Process

Understanding Batch Processing of Duration Elements

The duration module resolves a duration element by:

1. Resolving Date From and Date To, if needed.
2. If there are status entries, validating that the first PS_JOB row isn't less than the Date From and that Date To isn't after the period end date.
3. Calculating the duration period (years, months, or days) between Date From and Date To.
4. If there are Human Resource status entries, processing them.
5. Including or excluding absence days, if applicable.
6. Applying rounding.
7. Truncating decimals if Return Duration With Decimals isn't selected.

If you've indicated on the Duration - Definition page that the value should be returned in years and you've selected both the Add 1 Year if Months >= and Add 1 Month if Days >= options, the system evaluates the Add 1 Month if Days >= option and then evaluates and applies the Add 1 Year if Months >= option.

Duration Name Page

Use the Duration Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Durations, Duration Name

You name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Related Links

Defining Element Names

Definition Page

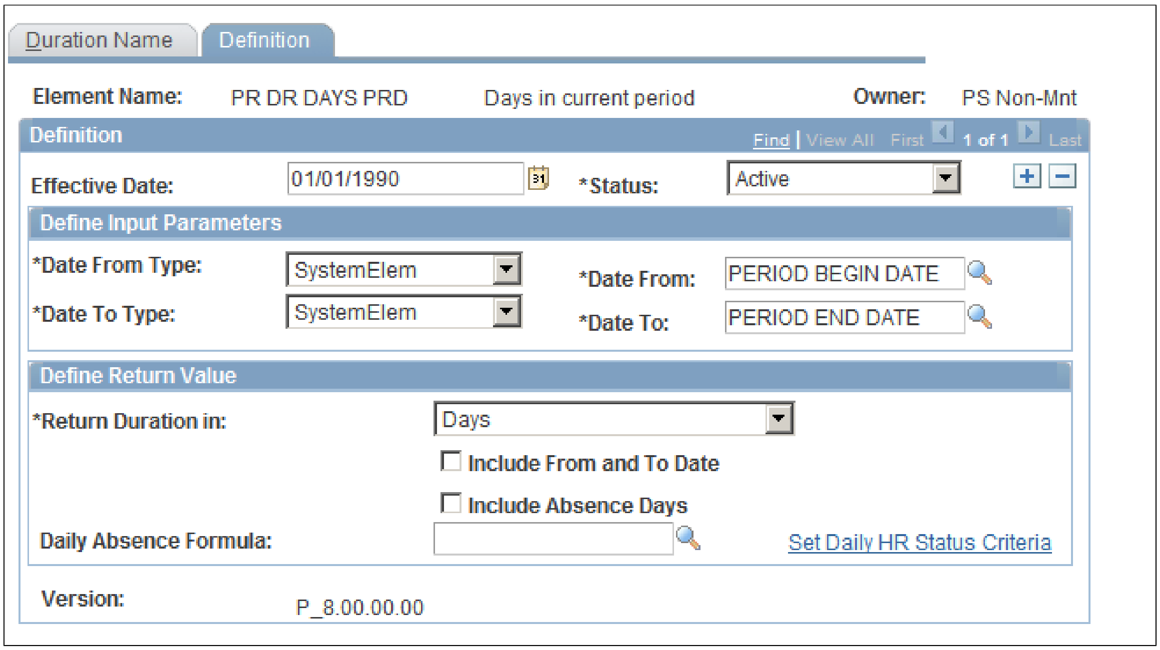
Use the Definition page (GP_DURATION) to define the number of days, months, or years between two dates.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Durations, Definition

Image: Durations - Definition page

This example illustrates the fields and controls on the Durations - Definition page.



Date From Type and Date To Type

Select the type of element that returns the Date From and Date To days. Valid values are: *Bracket, Cal Date* (calendar date), *Date, Formula, System Elem* (system element), and *Variable.*

Date From and Date To

Define the first and last day that the system is to include in the duration calculation.

Select the names of the elements that return the dates.

If the Date From date is the same as or greater than the Date Todate, the duration element resolves to zero.

Return Duration in

Select the unit of measure for the returned duration value. Valid values are:

- *Years* - Select to return the duration in years. This is the default value.
- *Months* - Select to return the duration in months.
- *Days* - Select to return the duration in days.

If you select *Days,* the Include From and To Date and Include Absence Days check boxes become available.

Select the Include From and To Date check box to include the from and to dates in the calculation.

For example, if the date from and date to are February 1, 2006 and February 5, 2006, and you select Include From and To Date, the system counts five days. If you don't select Include From and To Date, the system ignores the last day and returns a count of four. It also ignores the last day when it applies any instructions that you enter for including/excluding absences or including/excluding days based on HR status.

(The system returns a value of zero when the begin date and end date are the same if you select *Days* but don't select Include From and To Date. It returns a value of one if you select Include From and To Date.)

Return Duration in Decimals

Select to receive the duration result in decimal form. .

If you select Return Duration in Decimals, the system converts durations to decimals after applying any rounding rules you may have defined.

The system expresses the results as follows, depending on Return Duration in value:

Years: The system returns years and the remaining number of months and days in decimal form. To calculate the decimal amount, the system divides the number of days by 30 and adds the result to the number of months. It then divides the number of months by 12 and adds the result to the number of years. For example, a duration of two years and one month returns a value of 2.08333.

Months: The system returns the number of months plus any additional days (partial month) in decimal form. Days are divided by 30 for calculation of the decimal value.

Days: Invalid.

Note: A month is defined as the period between the first day of one month and the first day of the next month. For example, January 1, 2006 to January 31, 2006 isn't a month—it's 30 days. To make it a month, select Return Duration in Decimals. The system returns 30 days, which equals one month. If you don't select Return Duration in Decimals and you're counting months, the result is zero.

Round months up from N days Select and enter the number of days to which the system rounds the month.

Round years up from N months Select and enter the number of the months to which the system rounds the year.

These fields are used to apply rounding rules to the result of your duration calculation. If you do not select a check box, no rounding occurs.

If you select either of these check boxes, and the months or days value is greater than the value that you enter, the calculation adds one year or one month, respectively.

For example, if Return Duration in is *Years,* and you select Round years up from N monthsand enter *6,* the system returns a duration of 3 years and 6 months as a value of 4 years.

Note: The system applies the selected rounding rule before converting durations to decimals. If you select the Return Duration in Decimals check box and a rounding option, the system rounds up the months or years, as applicable, leaving no decimal value.

Include From and To Date This check box becomes available when the Return Date In value is *Days.*

Select to include the from and to dates in the calculation.

Include Absence Days Leave this check box cleared to exclude days. For example, if you leave this check box cleared, you can calculate a duration of time minus sick days.

Select the Include Absence Days check box to include absence days in the duration calculation.

This check box becomes available when the Return Date In value is *Days.*

Note: The system automatically excludes absences if you do not select Include Absence Days and specify a daily absence formula.

Daily Absence Formula This field becomes available when the Return Date In value is *Days.*

To include or exclude the days that a payee is absent, select the formula that returns the number of absent days. To include the days that a payee is absent, you select the Include Absence Days check box. To exclude the days that a payee is absent, clear the Include Absence Days check box; now the number of absent days will be subtracted from the total duration count.

The formula is resolved for every day of absence daily history between the from and to dates (including those dates), and should return a 1 for each absence day it wants to count. The duration program cumulates the formula for each row of absence daily data (GP_RSLT_ABS, which is the output of the Absence Take process) and totals the results of the formula for all of the rows where the absence dates fall within the From and the To dates. (Keep in mind that the first and last day is considered only if the Include From and To Date check box is selected.)

Your formula must specify the take elements that you want to count. For example, you can use the absence type in an IF statement to count only sick time.

Your formula can call any of the system elements that are designed specifically for absence duration. These elements have the same names as those that are used to generate the absence daily data, but they end with the suffix DU. For example, you can use the system element, ABS END DATE DU to retrieve an absence end date for a particular absence.

Set Daily HR Status Criteria

This field becomes available when the Return Date In value is *Days.*

Click this link to access the Set Daily HR Status Criteria page, where you can include or exclude time periods in the calculation based on HR status codes.

If you enter instructions to include daily absence data *and* include or exclude days based on status codes, the system performs two separate counts and combines the results. For example, if you include active days (based on HR status) and exclude absence days, the system counts the number of days the payee was active and subtracts the number of days the payee was absent.

Warning! Double counting can occur, depending on the instructions that you enter in the two group boxes. For example, if you include active days *and* days a payee is out sick, the days on which a payee is both active and sick are counted twice.

Set Daily HR Status Criteria Page

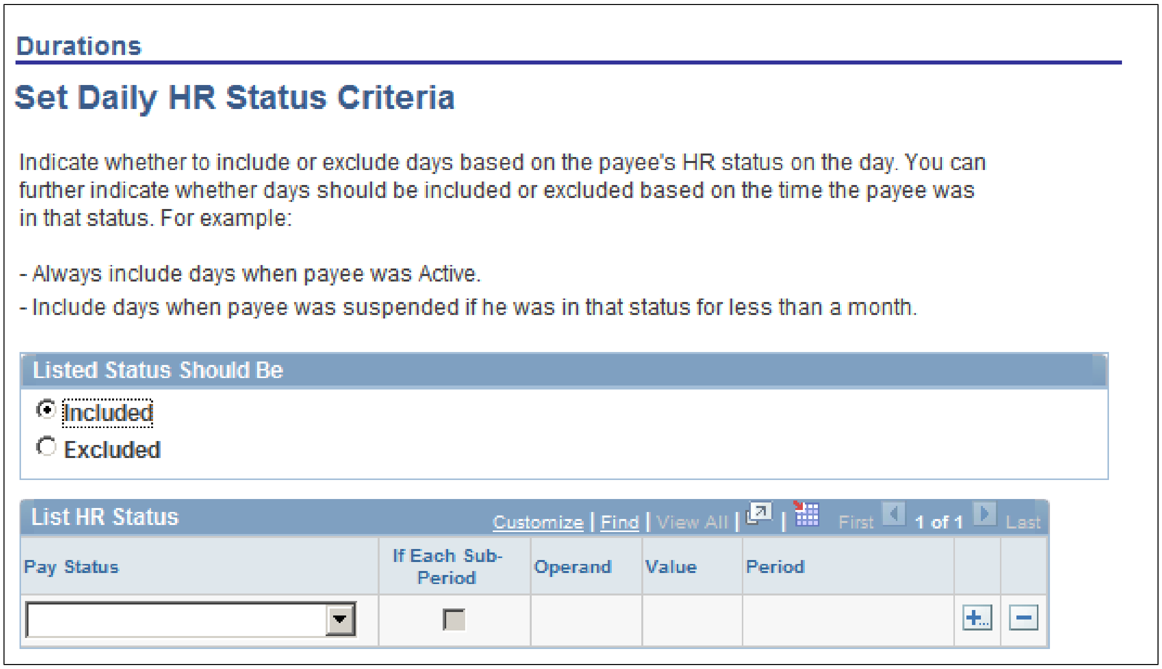
Use the Set Daily HR Status Criteria page (GP_DUR_STAT_SEC) to specify time periods for duration calculation, excluding or including them according to HR status codes.

Navigation

Click the Set Daily HR Status Criteria link on the Durations - Definition page, which is activated when you select Days.

Image: Set Daily HR Status Criteria page

This example illustrates the fields and controls on the Set Daily HR Status Criteria page.



If the unit of measure on the Durations - Definition page is set to *Days,* you can include or exclude time periods from the duration based on HR status codes. You can also specify minimum and maximum periods to check against.

Listed Status Should Be

Select Included or Excluded to include or exclude the status combinations that you specify in the List HR Status group box. Including or excluding status combinations has the following implications at processing time:

Include directs the system to include the period with that status combination in the duration.

Exclude directs the system to exclude the period with that status combination in the duration.

The code combinations that you enter are, as a group, either included or excluded, meaning that when you include specific status codes, those that you omit are automatically excluded. If you exclude certain codes, those that you don't exclude are automatically included.

The time period indicated includes the PS_JOB Effective Date.

Additional Period Definitions

Use the following fields to further define the periods that you want to include or exclude from the duration.

If Each Sub-Period	Select to include or exclude sub periods of a specified length from the duration. A sub period is a consecutive number of days that a payee's status remains unchanged. Whether you can add sub periods together depends on whether the sub periods are in the same period. Sub periods are added together if they individually fulfill the criteria. The system calculates period by period; for each period, it checks the criteria that is defined on this page. If the criteria are met, the system considers the period for inclusion or exclusion. If the criteria are not met, the system ignores the period.
Operand	Select from <, <=, >, and >= to determine whether the time period is included in or excluded from the duration calculation. The operand is used with the Value and Period fields.
Value	The number of years, months, or days to include or exclude from the duration. This value is used with the operand to determine whether the length of time in the selected status is included in or excluded from the calculation.
Period	The period of time defined in the previous field: *Days, Months,* or *Years.*

Defining Variable Elements

To define variable elements, use the Variables (GP_VARIABLE) and Variables by Category (GP_VARIABLE_BY_CAT) components.

This topic provides overviews of variable elements, field formats, and batch processing of variables, and discusses how to:

- Name variables
- Define a variable

Pages Used to Define Variable Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Variable Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Variables, Variable Name	Name the element and define its basic parameters.
Definition	GP_VARIABLE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Variables, Definition	Define the value of a variable according to the format specified on the Variable Name page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Variables By Category	GP_VARIABLE_BY_CAT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Variables by Category, Variables by Category	View or update the values of one or more variables within the same category. (Variables are assigned to categories on the Variable Name page.) One or two Values tabs can appear on this page: • The Numeric Values tab displays variables defined with decimal values or monetary values (along with the currency code). • The Character Values tab displays variables defined with character values or date values. You can't create or delete variables using this page.

Understanding Variable Elements

Variables are a means of storing a value and using it later. In situations requiring you to input a value —whether in a formula, in a calculation component, or elsewhere—the system enables you to identify the input as a variable and use the same value repeatedly. Using variables, you can define this value and invoke it anywhere in your formulas and calculations.

Example

On January 1 , the batch process resolves three formulas and two earnings using a numeric factor of 20 in their calculations. This factor changes to 25 on April 1. If you assign this factor a format type of *numeric,* you have to make five effective-dated changes, but if you define this factor as a variable element, you have to make only one effective-dated change for the new factor, 25, to be used anywhere the variable is referenced.

Understanding Field Formats

Variables can be defined with any one of the following field formats:

- Character

  The field length for variables with a character field format is 30 spaces.

- Date
- Decimal

  The field length for variables with a decimal field format is 12.6.

- Monetary

The field length for variables with a monetary field format can be up to 12.6, depending on the currency code you are using.

- Pointer

  Variables can be defined with the *Element Pointer* field format, which enables you to link a variable element to another element. This concept is useful when you use variable elements as components of a formula element to make the formula more generic and applicable to changing situations.

  An element pointer is a means of storing the element number of another element, not the element's actual value. When you use the element pointer variable, the process uses the value of the element pointed to by the element pointer.

Note: When you assign a value to a variable either directly or by means of another element (for example, an array), consider whether the variable can support the assigned value in terms of field length and field format. For example, 50 characters should not be assigned to a character variable with a field length of 30. Similarly, a monetary value should not be assigned to a variable with a character format.

Related Links

Understanding Element Pointers in Formulas

Understanding Batch Processing of Variables

Being data input elements, variables are resolved as they are encountered during batch processing. The resolution of the value equals the value you put in the definition.

If you selected the Store check box on the Variable Name page, all resolutions of the variable are stored.

Variable Name Page

Use the Variable Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Variables, Variable Name

You name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Related Links

Defining Element Names

Definition Page

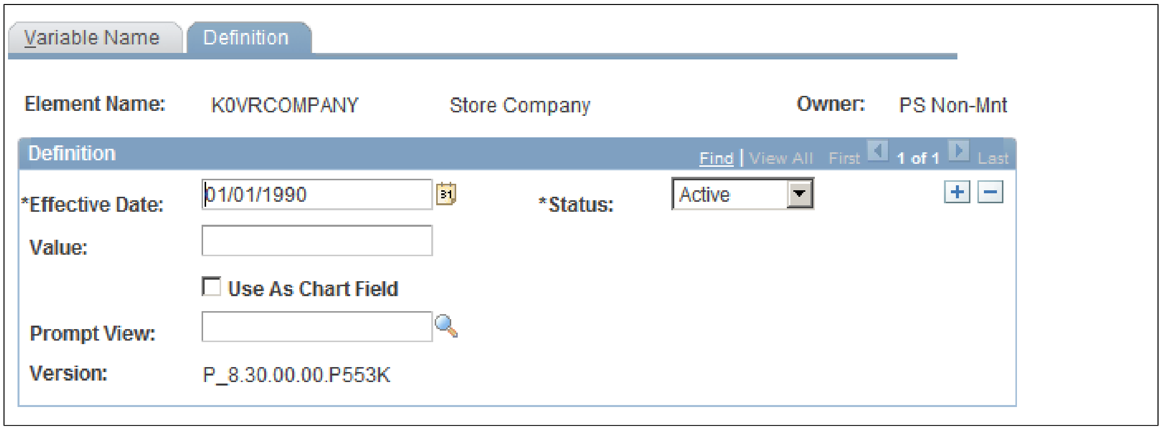
Use the Definition page (GP_VARIABLE) to define the value of a variable according to the format specified on the Variable Name page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Variables, Definition

Image: Variables - Definition page

This example illustrates the fields and controls on the Variables - Definition page.



Value Enter the value to assign to this variable.

The type of value that you assign depends on the format type that you designated on the Variable Name page.

Use As Chart Field and Prompt View These fields apply only when using PeopleSoft Global Payroll.

Defining Date Elements

To define date elements, use the Dates (GP_DATE) component.

Use a date element to include a date in a calculation or determine a new date by taking a starting date and adding or subtracting a period of time to get another date.

Note: Date elements are used for defining specific dates. If you need to subtract one date from another and determine the intervening duration, use a duration element, not a date element.

This topic discusses how to:

- Name dates.
- Define a date or calculate a new date based on an existing date.
- Assign unique element identifiers.

Pages Used to Define Date Elements

Page Name	Definition Name	Navigation	Usage
Date Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Dates, Date Name	Name the element and define its basic parameters.
Definition	GP_DATE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Dates, Definition	Define a date or calculate a new date based on an existing date.
Extract	GP_DATE_EXTRACT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Dates, Extract	Assign a unique identifier to each element that you enter on the Dates Definition page, allowing reuse of the Year, Month, and Day fields, individually or together.

Related Links

Defining Duration Elements

Date Name Page

Use the Date Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Dates, Date Name

You name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Related Links

Defining Element Names

Definition Page

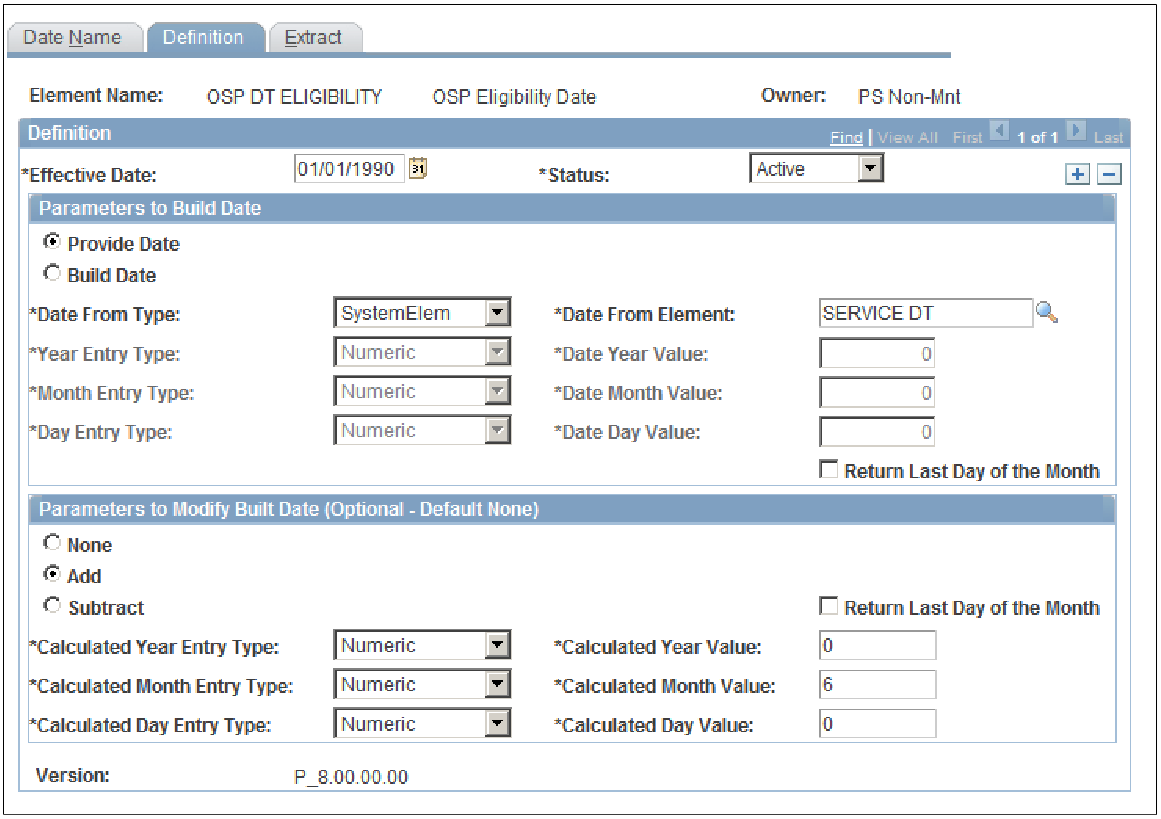
Use the Definition page (GP_DATE) to define a date or calculate a new date based on an existing date.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Dates, Definition

Image: Dates - Definition page

This example illustrates the fields and controls on the Dates - Definition page.



Provide Date

Select to provide the date, and specify the entry type of the element containing the date in the Date From Type field. Define the date or date element in the Date From or Date From Element field. (The Date From field appears when you select *Cal Date* in the Date From Type field.

Build Date

Select to have the system build the date, based on elements that you select.

When you select Build Date, the Year Entry Type, Month Entry Type, and Day Entry Type fields become available. Use these fields to define the entry type of the elements containing the month, day, or year. Identify the date element or date value in the fields to the right.

Return Last Day of the Month

Select to have the system return the last day of the month as a value.

You can use this with the Provide Date or Build Date option. Select to have the system override the provided or build date by moving the last day of the month into the day portion of the date.

Parameters to Modify Built Date (Optional - Default None)

None

Select if you don't want any calculations performed using this date—the date value remains as defined in the group box above.

Add

Select to add to the value defined in the Parameters to Build Date group box. The Calculated Year Entry Type, Calculated Month Entry Type, and Calculated Day Entry Type fields become available, offering a list of entry types. Enter the elements corresponding to these entry types in the fields on the right.

The value that you select is added to the date value in the Definition group box.

Subtract

Select to subtract from the value defined in the Parameters to Build Date group box. The Calculated Year Entry Type, Calculated Month Entry Type, and Calculated Day Entry Type fields become available, offering a list of entry types. Enter the elements corresponding to these entry types in the fields on the right.

The value that you select is subtracted from the date value in the Parameters to Build Date group box, to arrive at the resolved date value.

Return Last Day of the Month

Select to have the system return the last day of the month as a value. This result occurs only after the Add or Subtract calculation is complete, and it's independent of the Return Last Day of the Month field in the group box titled Parameters to Build Date.

Examples

This table illustrates what date values result from various page selections:

Provide Date/ Build Date	***Entry Type, Value***	***Return Last Day of the Month***	***Calculate Option***	***Entry Type, Value***	***Return Last Day of the Month***	***Resolved Value***
Provide Date	Date, November 22, 2004	No	Add	Month: Numeric, 2	No	January 22, 2005
Provide Date	Date, November 22, 2004	No	Add	Month: Numeric, 2 Day: Numeric, 3	No	January 25, 2005

Extract Page

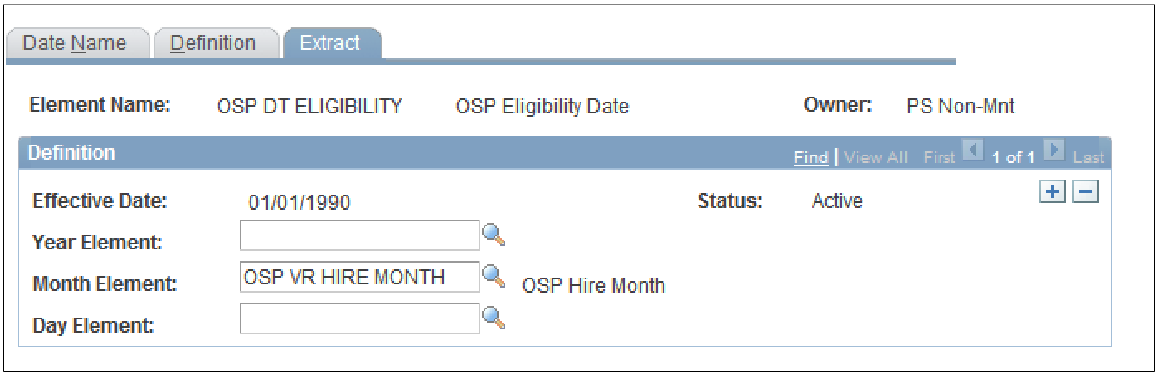
Use the Extract page (GP_DATE_EXTRACT) to assign a unique identifier to each element that you enter on the Dates Definition page, allowing reuse of the Year, Month, and Day fields, individually or together.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Dates, Extract

Image: Extract page

This example illustrates the fields and controls on the Extract page.



Year Element, Month Element, and Day Element

Select the variable to extract the year, month, and day, as applicable.

For example, say that you want to capture the year that your date element resolves to. You create a variable called YEAR and select it in the Year Element field. Now, say that the date element resolves to January 10, 2008. The system stores the value, 2008, in the YEAR variable.

The YEAR variable can then be used is another date formula to build a new date.

Defining Formula Elements

To define formula elements, use the Formulas (GP_FORMULA) component.

This topic provides an overview of element pointers in formulas and discusses how to:

- Name formulas.
- Define formulas for use in calculations.
- Assign a rounding rule and element pointer selections.
- View formulas.

Pages Used to Define Formula Elements

Page Name	*Definition Name*	*Navigation*	*Usage*
Formula Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Formulas, Formula Name	Name the element and define its basic parameters.
Field-by-Field Definition	GP_FORMULA2_V2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Formulas, Field-by-Field Definition	Define formulas for use in calculations. View formula definitions.
Element Attributes	GP_FORMULA_F1_SEC	Click the button on the Formulas - Field-by-Field Definition page.	Assign a rounding rule and element pointer selection to the field in your formula.
Text Definition	GP_FORMULA2_V2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Formulas, Text Definition	View your formula and confirm that it's correct.

Understanding Element Pointers in Formulas

When you define a formula, the values of the elements that comprise it are likely to change. If you refer to an element's specific value at a given time, you have to change the formula every time a component element value changes. Rather than referring to the element's value, you can use an *element pointer* to refer to its system identifying number—its element number. When you do this, you are telling the system that during processing, it should return whatever value is stored in the element's array. Because the element number remains constant, a formula using the element remains useful indefinitely, because the element values are valid.

During batch processing, any variable defined with a *Pointer* field format has a value stored in the Element Pointer field in the PINV array. That is, only the element number is stored and the variable element isn't resolved to an actual character, numeric, or date value.

If the field format for the variable element used in a formula isn't equal to *Pointer* and you select the Use Element Value option on the Element Attributes page, the formula uses the element's value.

If the field format for the variable element used in a formula isn't equal to *Pointer* and you select the Use Element Number option on the Element Attributes page, the formula uses the element's number.

If the field format for the variable element used in a formula is equal to *Pointer* and you select the Use Element Value option on the Element Attributes page, the formula uses the value of the element to which the pointer element is pointing.

If the field format for the variable element in a formula equals *Pointer* and you select the Use Element Number option on the Element Attributes page, the formula uses the value of the pointer element. In other words, it uses the element number, because that's what elements with a field format equal to *Pointer* store.

This table summarizes which values are used with different configurations:

Field Format	***Use Element Value Option Selected***	***Use Element Number Option Selected***
Field Format <> Pointer	Element Value	Element Number
Field Format = Pointer	Value of the element pointed to by Pointer Value	Pointer Value (an element number)

Example

Say that before a certain formula is used, the values for the elements are as follows:

Element Number	***Element Name***	***Element Type***	***Field Format***	***Decimal Value***	***Character Value***	***Pointer Value***
1000	V1	Variable	Decimal	150		
2000	V2	Variable	Character		ABC	
3000	V3	Variable	Decimal	250		
4000	V4	Variable	Pointer			1000

You've selected the Use Element Value option on the Element Attributes page.

If an element's field format isn't *Pointer,* the formula uses the value of the element. So, if you're using the following statement in your formula:

V1 Assign to V3

then, after the resolution of the formula, V3 equals 150.

If an element's field format is *Pointer,* the formula uses the value of the element pointed to by the pointer. So, if you're using the following statement in your formula:

V4 Assign to V3

then, after the resolution of the formula, V3 equals 150.

If you want to use V4 in your formula, the formula checks whether the Use Element Value or Use Element Number option is selected. In this example, it's Use Element Value. The formula then checks whether the field format is *Pointer* In this example, it's *Pointer.* The pointer value is 1000. Because 1000 is an element number and this element number represents V1, the formula uses the value of V1 (150).

Assume also that you've selected the Use Element Number option on the Element Attributes page.

If the field formats for Element Name 1 and Element Name 2 aren't *Pointer,* the formula uses the element number. So, if you're using the following statement in your formula:

V2 Assign to V4

and you're using pointers, then, after resolution of the formula, V4 contains 2000 in the pointer value.

If the field formats for Element Name 1 and Element Name 2 are *Pointer,* the formula uses the pointer value. So, if you're using the following statement in your formula:

If V4 = 2000

then the condition is true, because the pointer value of V4 equals 2000.

If you want to use V2 in your formula, the formula checks whether the Use Element Value or the Use Element Number option is selected. In this example, it's Use Element Number. The formula then checks whether the field format is a *Pointer.* In this example, it isn't. This directs the formula to use the element number of V2, whose element number is 2000. So, 2000 will be assigned to the pointer value of V4.

Note: If you're using the element number V2, the Assign To element must be in Pointer field format and the Use Element Number option must be selected on the Element Attributes page for Element 1, Element 2, and Assign To Element.

Related Links

Understanding Field Formats

Defining Variable Elements

Formula Name Page

Use the Formula Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Formulas, Formula Name

You name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Related Links

Defining Element Names

Field-by-Field Definition Page

Use the Field-by-Field Definition page (GP_FORMULA2_V2) to define formulas for use in calculations.

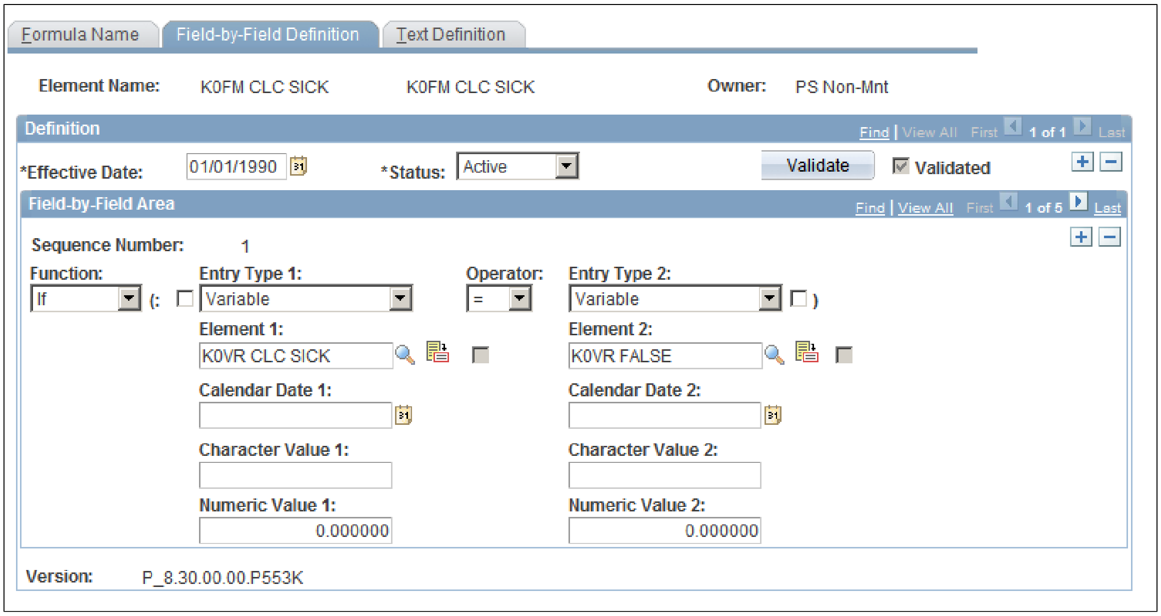
View formula definitions.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Formulas, Field-by-Field Definition

Image: Field-by-Field Definition page

This example illustrates the fields and controls on the Field-by-Field Definition page.



Building Your Formula

Build your formula in the Field-by-Field Area group box, specifying one operation or result in each row.

Function	Select the type of function or qualifier for the formula. Options include *And, Average, Comment, Else, Endif, Exit, If, In, Maximum, Minimum, Or, Sum,* and *Then.*
((left parenthesis)	Select to group your formula calculations. Selecting this check box requires that you must select the) check box. How you group your formula calculations with parentheses can affect the calculation sequence.
Entry Type 1 or 2, Element 1 or 2, Calendar Date 1 or 2, Character Value 1 or 2, and Numeric Value 1 or 2	Select the entry type for the operation. If you select the *Character, Cal Date, Date,* or *Numeric* entry type, enter a value in the corresponding Date Value, Numeric Value, or Character Value field. If you select any other entry type, the system prompts for the correct element in the corresponding Element Name field.
	Click to access the Element Name Attributes page and assign a rounding rule, previous period rule, or element pointer selection to a field that you're using in your formula. The check box to the right of the entry type list is selected if additional information has been entered on the Formula - Field Details page.

Operator

Select the operator to perform on the operands that you entered. The following standard operators are available: *(none), -, *, /, +, <, <=, <>, =, >,* and *>=.*

) (right parenthesis)

Select to group your formula calculations. If you select this check box, you must select the (check box. How you group your formula calculations with parentheses can affect the calculation sequence.

Assign To Type and Assign To Element

To assign a value to an element, first select the entry type and then select the element.

For example, you are defining a formula named SICK LEAVE to calculate entitlement for absences due to sickness. To have the system assign the resolved value of the formula element to the SICK LEAVE formula, enter SICK LEAVE in Assign To Element field.

Before you can select the formula in this field, you must save the formula definition with an effective date.

Note: Under either parenthesis, you can enter multiple sets of parentheses. To do so, use multiple lines. You can enter only one (or) per row.

Validating Your Formula

After you define your formula, save it, then validate and edit the formula. Whenever you alter the formula, re-validate it.

Validate

Click this button to validate your formula. (Validating a formula automatically saves the formula.)

Validated

This check box is selected if you clicked the Validate button and the formula passed validation.

Note: If you try to run a process using a formula that you've changed without validating, you get an error. Save the page before clicking the Validate button. You can save the page anytime, but no validation against the database occurs until you click the Validate button.

Example: Setting Up a Formula

Using the formula element, you can create elements using mathematical and logical operands, rules, and mathematical formulas.

In this example, you need a simple formula to forecast whether there is sufficient entitlement to cover an absence event. The requirements are as follows:

- If the system element, DAY COUNT UNP (day count unpaid) is greater than zero, return a value of NOT ELIGIBLE.
- Otherwise, return a value of ELIGIBLE.

Start by turning the calculation into a mathematical formula. In this example, K0FM PTO ELIGIBLE is the name of the formula that you are defining.

```
If DAY COUNT UNP > 0, then
  'NOT ELIGIBLE'   >>  K0FM PTO ELIGIBLE
else
  'ELIGIBLE'       >>  K0FM PTO ELIGIBLE
Endif
```

Formulas can often be expressed in multiple ways. To streamline processing, use the simplest version that requires the least processing.

After turning the calculation into a mathematical formula, you enter the formula into the system. If you haven't defined the element and entered the basic descriptions, do so on the Formula Name page. Then, on the Field-by-Field Definition page, define the formula, line by line.

This table shows how you enter your forecasting formula:

Sequence Number	***Function***	***(***	***Entry Type 1 / Element 1 or value***	***Operator***	***Entry Type 2 / Element 1 or value***	***)***	***Assign To Type/ Assign To Element***
1	If		SystemElem / DAY COUNT UNP	>	Numeric / 0		
2	Then				Character / NOT ELIGIBLE		Formula / K0FM PTO ELIGIBLE
3	Else				Character / ELIGIBLE		Formula / K0FM PTO ELIGIBLE
4	Endif						

Note: Every If statement must end with an Endif.

Each element name must be associated with an appropriate entry type. For example, on the first line, Element Name 1 (DAY COUNT UNP) is associated with the entry type *System Element.*

You can view your formula by accessing the Text Definition page. When you have defined the formula, validate it by clicking the Validate button on the Field-by-Field Definition page.

Related Links

Understanding Element Pointers in Formulas

Element Attributes Page

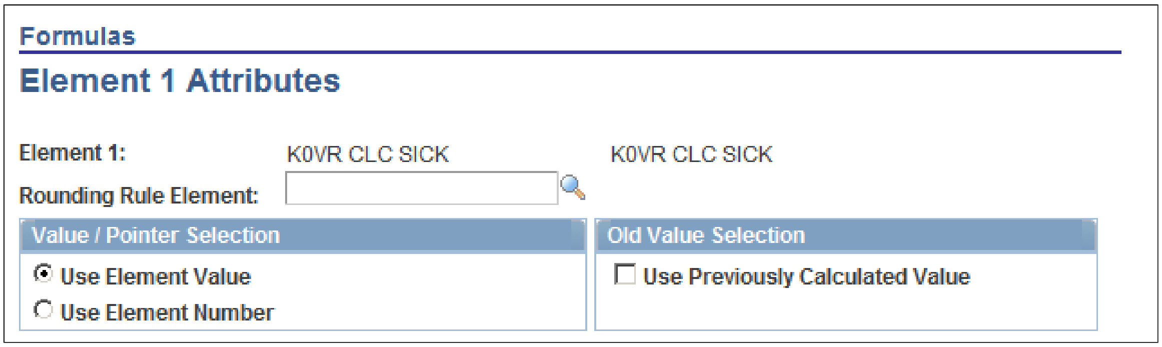
Use the Element Attributes page (GP_FORMULA_F1_SEC) to assign a rounding rule and element pointer selection to the field in your formula.

Navigation

Click the button on the Formulas - Field-by-Field Definition page.

Image: Element Attributes page

This example illustrates the fields and controls on the Element Attributes page.



Rounding Rule Element

If the field format of the element that you selected on the Formula Name page is *Decimal, Monetary,* or *Pointer,* select a rounding rule from the list. This field is only visible for elements with these field formats.

The rounding rule applies only to the operand for which you've entered it. The element itself isn't updated; only the calculation is affected.

Value/Pointer Selection

Use these fields to define element pointers in your formula.

Use Element Value

Select to use an element's value in the calculation.

Use Element Number

The default value is *Use Element Value* in formulas. You can also build formulas that use elements by their element number.

Select to reference an element by using its system identifying number (element number), not its current value.

For example, you have written a formula to calculate garnishments, but different payees have different garnishments. If you use element pointers in your formula expression to point to an element using its identifying element number, then you won't have to rewrite the formula every time the number and type of garnishment changes for different payees. The formula will adapt its calculations because it is retrieving current values for the elements referenced by the element pointer.

Old Value Selection

Use Previously Calculated Value

Select to use the previously calculated value.

Text Definition Page

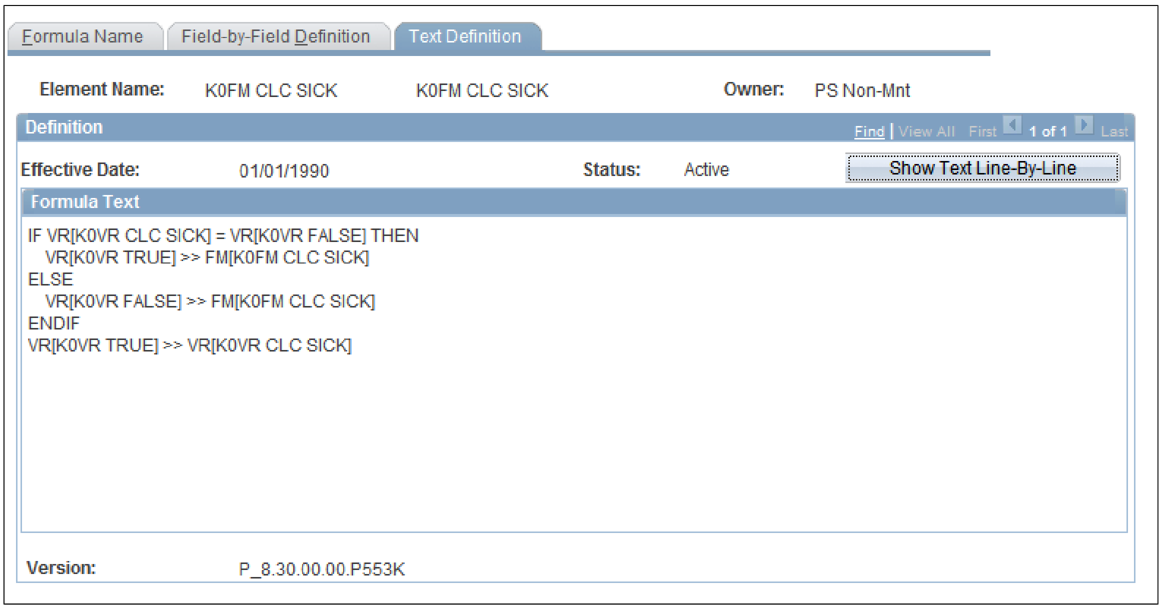
Use the Text Definition page (GP_FORMULA2_V2) to view your formula and confirm that it's correct.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Formulas, Text Definition

Image: Text Definition page

This example illustrates the fields and controls on the Text Definition page.



Use the Text Definition page to view the formula that you created on the Formula - Field-by-Field Definition page. If something isn't correct, return to the Field-by-Field Definition page and adjust the formula.

Show Text Line-By-Line

Click to view the text of the formula that you created on the Formula - Field-by-Field Definition page, as it was entered, line-by line.

This view can be useful when troubleshooting a formula with errors. Any errors created by SaveEdit will be noted within the text as well as by an error message at the bottom of the page.

Note: In the line-by-line view each line is prefixed by its row/line number and the error location is updated to reflect the number of the line displayed in the formula text.

Defining Message Elements

Message elements are closely related to formula elements. To fully understand message elements, read the section on formulas before reading this topic.

In this topic, we discuss how to define message elements.

Note: No online pages specifically define message elements, because they are provided in system data.

By referencing the message element in a formula, you can manage the error messages that are created during batch processing. A message element calls a program that writes an error message into the error message table (PS_GP_MESSAGES) and then, optionally, puts the payment in error.

Many of the fields in the PS_GP_MESSAGES table are system-populated. Others are populated during batch processing. By using these field values as components of a formula, you can create your own message and error conditions during batch processing.

To populate fields that aren't system-populated, these components and processes are provided:

- Five system elements (MSG_BIND1_PTR … MSG_BIND5_PTR), with the *Pointer* field format.

  These pointers point to the parameters that you're using in your error messages.

- Five numeric system elements (MSG_BIND1_NM_IND … MSG_BIND5_NM_IND).

  If the value of MSG_BINDx_NM_IND equals zero, the system displays on the Payee Messages page the element name to which the MSG_BINDx_PTR element points. Otherwise it displays the value of the element that is pointed to by MSG_BINDx_PTR.

- Numeric system elements for the message number (MSG_NBR) and MSG_SET_NBR.
- A numeric system element (MSG_PAYMENT_ERR) that can put the calculation in error.

  If the value of this system element doesn't equal 0, the calculation is in error.

- An error message element type.

  This element type has only one element in the GP_PIN_NM table (MESSAGE). The field format is *Decimal.* The Re-calc (recalculation) check box must be cleared. This entry type is available only on the Field-by-Field Definition page and for Element 1 and Element 2. When the batch process encounters this message (formula) element, it inserts a row in the PS_GP_MESSAGES table for the message ID and parameters specified. If there's no error, the MESSAGE element equals zero. If there's an error, the MESSAGE element equals one. The primary purpose of this element type is to enable the batch process to recognize that a user error needs invoking. The batch process doesn't look at its value.

Every system element that is related to an error message is reset to blank or zero.

Note: You can create your own error messages only by using formula elements.

Example

This table gives an example of a formula element setup (a portion of an entire formula expression):

Sequence Number	***Function***	***Element 1***	***Operator***	***Element 2***	***Assign To Element***
1	If	XXXXX	=	YYYYY	

Sequence Number	*Function*	*Element 1*	*Operator*	*Element 2*	*Assign To Element*
2	Then (error)			17005	MSG_SET_NBR
				1015	MSG_NBR
3				ELEMENT_A (Use Element Number)	MSG_BIND1_ PTR (Use Element Number)
4				ELEMENT_B (Use Element Number)	MSG_BIND2_ PTR (Use Element Number)
5				1	MSG_BIND1_NM _IND
6				1	MSG_PAYMENT _ERR
7	If	MESS_AGE	=	0	
8	. . .				

This table provides explanations of the formula described in the previous table:

Sequence Number	*Explanation*
1	This is a regular expression in the formula.
2, 3	Assign the error message number to the system element MSG_ NBR and MSG_SET_NBR.
3	Assign the element number ELEMENT_A (represents the element in error) to MSG_BIND1_PTR pointer value.
4	Assign the element number ELEMENT_B (represents the element in error) to MSG_BIND2_PTR pointer value.
5	Assign the value 1 to MSG_BIND1_NM_IND to indicate that ELEMENT_A contains an element number. Because no value has been assigned to MSG_BIND2_NM_IND, it appears as an element value.
6	Assign the value 1 to element MSG_PAYment_ERR, which puts the calculation status in error.
7	Use the message element, which calls the resolution program for this element type.

Note: An indicator tells the system whether a number value is an element number so that the formula message program knows whether to leave that value alone or retrieve that element's value. Leaving that value alone means that the element name is displayed on the online message page.

Related Links

Understanding Element Pointers in Formulas

Defining Rounding Rule Elements

To define rounding rule elements, use the Rounding Rules (GP_ROUNDING) component.

This topic provides an overview of rounding rule elements and discusses how to:

- Name rounding rule elements.
- Define how numeric values are rounded.

Pages Used to Define Rounding Rule Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Rounding Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Rounding Rules, Rounding Name	Name the element and define its basic parameters.
Definition	GP_ROUND_RULE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Rounding Rules, Definition	Define how numeric values are rounded.

Understanding Rounding Rule Elements

When performing calculations that resolve to a numeric value, the value may need rounding. The rounded value is what gets stored or used in further calculations. Rounding is a tool that enables you to systematically change values according to predefined rules.

Once you've defined your rounding rule elements, you can apply them to other elements throughout the system to determine how rounding will occur.

Note: Many rounding rules apply to specific features of the system. They are explained in the section of this documentation that discusses those features. The text here describes only the generic functionality of the rounding rules element.

Examples of Size Rounding

This table provides examples of how the rounding rules work if you select Rounding on the Rounding - Definition page:

Size	***Option***	***Amount Before Rounding***	***Rounded Value***
2 Decimal Places	Truncate/Down	123.454999	123.450000
	Truncate/Down	123.455000	123.450000
	Truncate/Down	123.450001	123.450000
	Truncate/Down	123.450000	123.450000
	Up	123.454999	123.460000
	Up	123.455000	123.460000
	Up	123.450001	123.460000
	Up	123.450000	123.450000
	Round Up If >= 4 Else Down	123.454999	123.460000
	Round Up If >= 4 Else Down	123.455000	123.460000
	Round Up If >= 4 Else Down	123.450001	123.450000
	Round Up If >= 4 Else Down	123.450000	123.450000
0 Decimal Places	Truncate/Down	123.499999	123.000000
	Truncate/Down	123.500000	123.000000
	Truncate/Down	123.000001	123.000000
	Truncate/Down	123.000000	123.000000
	Up	123.499999	124.000000
	Up	123.500000	124.000000
	Up	123.000001	124.000000
	Up	123.000000	123.000000
	Round Up If >= 4 Else Down	123.499999	124.000000
	Round Up If >= 4 Else Down	123.500000	124.000000

Size	*Option*	*Amount Before Rounding*	*Rounded Value*
	Round Up If >= 4 Else Down	123.000001	123.000000
	Round Up If >= 4 Else Down	123.000000	123.000000
1 Digit - 10's	Truncate/Down	124.999999	120.000000
	Truncate/Down	125.000000	120.000000
	Truncate/Down	120.000001	120.000000
	Truncate/Down	120.000000	120.000000
	Up	124.999999	130.000000
	Up	125.000000	130.000000
	Up	120.000001	130.000000
	Up	120.000000	120.000000
	Round Up If >= 4 Else Down	124.999999	130.000000
	Round Up If >= 4 Else Down	125.000000	130.000000
	Round Up If >= 4 Else Down	120.000001	120.000000
	Round Up If >= 4 Else Down	120.000000	120.000000

Examples of Incremental Rounding

This table provides examples of how the rounding rules work if you select the Increment on the Rounding - Definition page:

Increment	*Option*	*Amount Before Rounding*	*Rounded Value*
25	Truncate/Down	137.499999	125.000000
	Truncate/Down	137.500000	125.000000
	Truncate/Down	150.000001	150.000000
	Truncate/Down	150.000000	150.000000
	Up	137.499999	150.000000
	Up	137.500000	150.000000
	Up	150.000001	175.000000

Increment	***Option***	***Amount Before Rounding***	***Rounded Value***
	Up	150.000000	150.000000
	Round Up If >= 12.4 Else Down	137.499999	150.000000
	Round Up If >= 12.4 Else Down	137.500000	150.000000
	Round Up If >= 12.4 Else Down	150.000001	150.000000
	Round Up If >= 12.4n Else Down	150.000000	150.000000
2.5	Truncate/Down	137.499999	135.000000
	Truncate/Down	137.500000	137.500000
	Truncate/Down	150.000001	150.000000
	Truncate/Down	150.000000	150.000000
	Up	137.499999	137.500000
	Up	137.500000	137.500000
	Up	150.000001	152.500000
	Up	150.000000	150.000000
	Round Up If >= 1.25 Else Down	137.499999	137.500000
	Round Up If >= 1.25 Else Down	137.500000	137.500000
	Round Up If >= 1.25 Else Down	150.000001	150.000000
	Round Up If >= 1.25 Else Down	150.000000	150.000000

Rounding Name Page

Use the Rounding Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Rounding Rules, Rounding Name

You name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Related Links

Defining Element Names

Definition Page

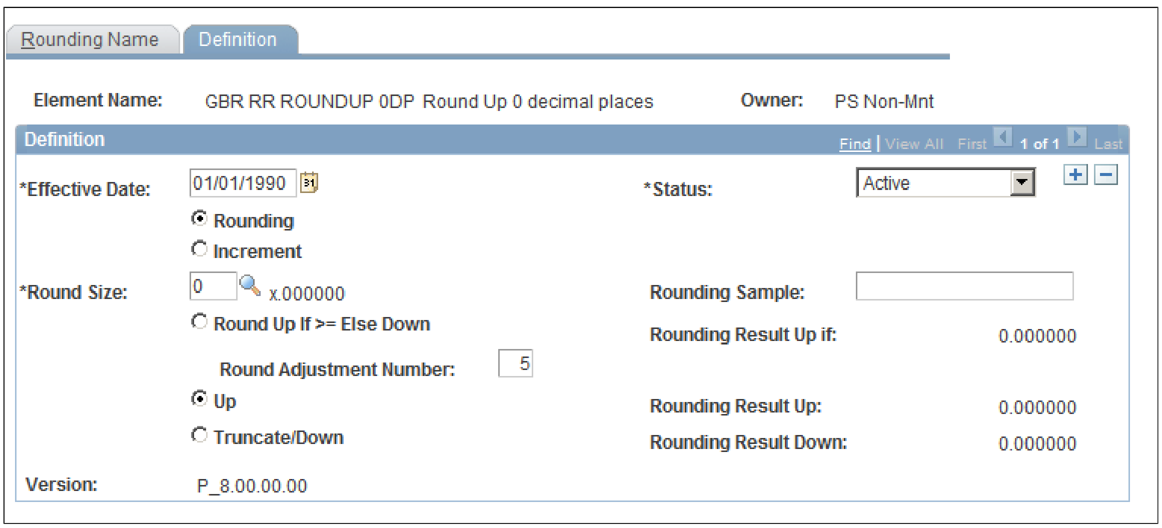
Use the Definition page (GP_ROUND_RULE) to define how numeric values are rounded.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Rounding Rules, Definition

Image: Rounding - Definition page

This example illustrates the fields and controls on the Rounding - Definition page.



Rounding

Select to use traditional rounding rules.

Increment

Select to set rounding increments.

When you select this option, the Increment field appears, where you define the incremental value.

Round Size

This field appears when you select the Rounding option. Specify a round size from the list. Values are *01* through *11,* or 0 to 5 decimal places.

The example fields on the bottom right half of the page enable you to view examples of each type of rounding.

Round Up if >= Else Down	Select to round up if the result is greater than or equal to the value you enter in the Round Adjustment field, based on the number of digits or decimal places entered. If the result doesn't exceed or equal the value, the result is rounded down. The default value is *5* for rounding. If you select the Rounding check box, you can enter only one digit in the Round Adjustment field. If you select the Increment option, you can enter a value of up to eight digits. This digit looks at the decimal place to the right of what is being rounded. For example, if you're rounding to the tens (one decimal place), it looks to the hundreds field.
Up	Select to round up, based on the number of digits or decimal places entered. It rounds up if the value to the right of the digits or decimal places specified is greater than zero. The system looks at all the remaining digits or decimal places, not just the next digit.
Truncate/Down	Select to truncate (round down), based on the number of digits or decimal places entered. All digits or decimal places to the right of the number specified are changed to zero, and the rest are truncated.
Rounding Sample	Enter a value to see how the system would round the amount based on your page selections.

Defining Count Elements

To define count elements, use the Counts (GP_COUNT) component.

This topic provides an overview of count elements and discusses how to define count elements.

Pages Used to Define Count Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Count Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Counts, Count Name	Name the element and define its basic parameters.
Definition	GP_COUNT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Counts, Definition	Define a count element. Use this page to select an existing counting formula.

Understanding Count Elements

You might need a process for counting the number of scheduled work days or hours from a specific period of time. For this purpose, you use count elements, which are primarily for proration calculations but can be used in other situations.

When you define a count element, you reference a formula that you've defined as the counting formula. That is, you define a formula that counts the number of scheduled work days or hours; then you reference that formula on the Counts - Definition page so that the system knows that it should process the referenced formula as a counting formula.

The count element refers to the work schedule that is associated with each payee to count the correct workdays. When the system finishes checking each day's work schedule, it counts the number of days or hours for the sub periods, either segments or slices.

The formula is resolved for each day in the work schedule within a date range. Set up the formula to return the number of units for each day. The count program will cumulate the formula results. If the count element is called from the proration element, the counting period is set by the proration element. If the count formula is not called from a proration element, the counting period is the segment.

An example of a simple count formula (GP COUNT WRK DAYS) follows.

```
IF SCHED_HRS > 0 THEN
GP TRUE => GP COUNT WRK DAYS
ELSE
GP FALSE => GP COUNT WRK DAYS
Endif
```

Related Links

Understanding Work Schedules

Defining Proration Rules

Defining Formula Elements

Understanding Segmentation Setup

Count Name Page

Use the Count Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Counts, Count Name

You name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Related Links

Defining Element Names

Definition Page

Use the Definition page (GP_COUNT) to define a count element.

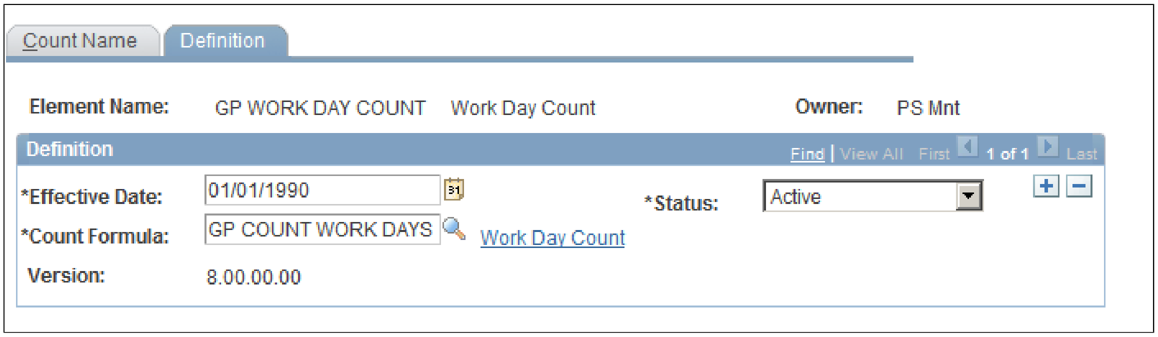
Use this page to select an existing counting formula.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Counts, Definition

Image: Counts - Definition page

This example illustrates the fields and controls on the Counts - Definition page.



Count Formula — Enter the name of the formula that performs the count.

<Formula Name> — Click the link next to the Count Formula field to view the formula definition pages.

Defining Proration Rules

To define proration rules, use the Proration Rules (GP_PRORATION) component.

This topic provides an overview of proration rules and discusses how to define numerators and denominators.

Pages Used to Define Proration Rules

Page Name	***Definition Name***	***Navigation***	***Usage***
Proration Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Proration Rules, Proration Name	Name the element and define its basic parameters.
Definition	GP_PRORATION	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Proration Rules, Definition	Define numerators and denominators that comprise proration factors.

Understanding Proration Rules

A proration rule can be triggered by segmentation or with the system element, PRORATE. You define what values to use as the numerator and denominator of a proration rule. When the system applies a proration rule, it multiples the amount by the numerator, and divides the result by the denominator.

You can use a proration rule in the definition of an absence entitlement element (frequency-based). Proration applies to the entitlement units. You can assign a default proration rule on the Pay Group - Defaults page.

When defining a frequency-based absence entitlement element, you have three choices for proration:

- Use no proration, regardless of segmentation.
- Use the pay group proration rule.
- Specify a unique proration rule.

Denominator Schedule Example

The Denominator Schedule group box on the Proration - Definition page enables you to select which work schedules to include in the denominator calculation. Assume that a payee has two work schedules:

- Work Schedule A, 5 days a week.
- Work Schedule B, 3 days a week.

Also assume that February has exactly 4 weeks and that the proration rule is defined to use the number of workdays, then:

- If the payee has only Work Schedule A, the denominator is 20 (5 days × 4 weeks).
- If the payee has only Work Schedule B, the denominator is 12 (3 days × 4 weeks).
- If the payee has Work Schedule A for the first 2 weeks and Work Schedule B for the second 2 weeks, you can tell the system to use a denominator of:
    - 12 (3 × 4), if you're using the work schedule as of the end of the period.
    - 16 ((5 × 2) + (3 × 2)), if you're using both (all) work schedules.

Note: When you define a proration element, the Always Recalculate check box on the Proration Name page is automatically selected. This is to ensure that the system correctly calculates the proration factor when there is element segmentation.

Proration Name Page

Use the Proration Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Proration Rules, Proration Name

You name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Related Links

Defining Element Names

Definition Page

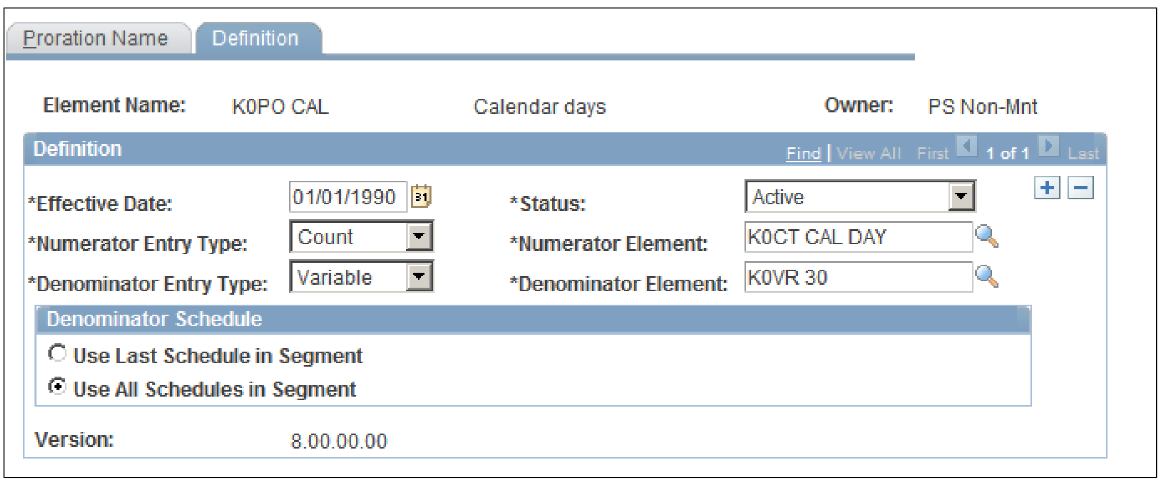
Use the Definition page (GP_PRORATION) to define numerators and denominators that comprise proration factors.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Proration Rules, Definition

Image: Proration - Definition page

This example illustrates the fields and controls on the Proration - Definition page.



Numerator Entry Type, Denominator Entry Type, Numerator Element, and Denominator Element

Select the types of elements that define the numerator (slice period) and the denominator (the full pay period). Values are *Accumulatr* (accumulator), *Count, Formula, Duration,* and *Variable.*

Enter the element name in the Numerator Element or Denominator Element field to the right.

Counts are perhaps the most common element type used to define proration rules. For example, you can define count elements to count the number of scheduled work days or hours in a pay period. When a payee has segmentation, the system resolves the count element for the numerator for the slice period (or segment if no slices exist). The count element for the denominator resolves for the entire period.

To count calendar days, a duration element provides better performance than a count element. For the numerator, calculate the calendar duration between the slice begin and slice end date.

For the denominator, use a duration element that calculates the calendar days between the period begin and period end dates.

You might use a variable if you aren't concerned with the number of days in a calendar period and prefer a static value. For example, in a monthly calculation cycle, the number of calendar days in the period fluctuates every month but you may want to ignore this fluctuation. You can create a variable with a value of 30.00 and use it as the denominator.

Denominator Schedule

Use these fields to specify which work schedules to include in the denominator calculation.

Use Last Schedules in Segment Select to use the last schedule in the segment.

Use All Schedule in Segment Select to use all schedules in the segment.

Defining Generation Control Elements

To define generation control elements, use the Generation Control (GP_GCTL_CONDITION) component.

This topic provides an overview of generation control elements and discusses how to:

- Define the criteria for certain element conditions in batch processing.
- Include or exclude employee status conditions.
- Include or exclude action/reason code combinations.
- Include or exclude frequency codes.
- Include or exclude segment status conditions.
- Include or exclude formula elements.
- Include or exclude run types.

Pages Used to Define Generation Control Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Generation Control Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Generation Control, Generation Control Name	Name the element and define its basic parameters.

Page Name	***Definition Name***	***Navigation***	***Usage***
Conditions	GP_GCTL_CONDITION	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Generation Control, Conditions	Define the criteria for use in directing the system to include or exclude certain element conditions during batch processing.
HR Status for Element <name> (human resources status)	GP_GCTL_ST_SEC	Click the HR Status link on the Conditions page.	Exclude or include employee status conditions during batch processing.
H/R Action/Reason for Element <name> (human resources action/reason)	GP_GCTL_AR_SEC	Click the Action/Reason link on the Conditions page.	Exclude or include action/reason code combinations.
Frequency for Element <name>	GP_GCTL_FQ_SEC	Click the Frequency link on the Conditions page.	Exclude or include frequency codes.
Segment Status for Element <name>	GP_GCTL_SS_SEC	Click the Segment Status link on the Conditions page.	Exclude or include segment status conditions.
Formula for Element <name>	GP_GCTL_FM_SEC	Click the Formula link on the Conditions page.	Exclude or include formula elements.
Run Type for Element <name>	GP_GCTL_RT_SEC	Click the Run Type link on the Conditions page.	Exclude or include run types.

Understanding Generation Control Elements

In the basic processing of an element, the system assumes that the element is to be processed whenever a payee is processed. But sometimes you don't want an element processed every time for every payee.

Generation control provides a type of filtering that enables you to control whether an element for a payee is processed during batch processing. Using generation control elements, you can tell the system whether to process an element based on predefined criteria.

The following six parameters are used to define generation control elements:

- HR Status
- HR Action/Reason
- Segment Status
- Frequency
- Formula
- Run Types

For each control parameter, you specify whether the entries exclude or include the element during batch processing. If you include the element, only payees that match on the selected values have the element processed. All other values are excluded. If you exclude the element, the element isn't processed for payees that match on the selected value or values. All other values are included.

HR Status Example 1

You want to include for processing all payees whose HR status is *Active,* so you create a generation control element that includes all payees with this status. You then associate this generation control element with the elements that you want to control. So, in batch processing, only payees with an *Active* HR status have these elements processed. All payees with a different HR status, such as *Inactive* or *Terminated,* don't have the element processed.

HR Status Example 2

This table lists the PS_JOB rows for a payee:

Effective Date	***HR Employee Status***
January 1, 1999	Active
January 10, 1999	Leave of Absence
January 20, 1999	Active

This table shows how elements E1 and E2 have the following generation control conditions applied to them with the HR Status page controls:

Element	***Include/ Exclude***	***Employee Status***	***All Job Records in Segment***	***Last Job Record***
E1	Include	Leave of Absence	No	Yes
E2	Include	Leave of Absence	Yes	No

E1 isn't processed, because the last Job row isn't Leave of Absence. E2 is processed, because the Job row with Leave of Absence is in the segment.

Note: Typically, you record leaves of absence through the absence entry pages; however, in some cases, you may want to use the HR status to track long-term leaves of absence.

HR Action/Reason Example (without Segmentation)

This table lists a payee's PS_JOB row:

Effective Date	***Action***	***Reason***
January 1, 1990	Hire	New Position

This table shows how element E1 has the following generation control conditions applied to it with the HR Action/Reason page controls:

Element	***Include/ Exclude***	***Action***	***Reason***
E1	Include	Hire	New Position

If you're processing January 1, 1999 through January 31, 1999, E1 isn't processed, because the PS_JOB row doesn't have an effective date in the segment.

HR Action/Reason Example (with Segmentation)

This table lists a payee's PS_JOB rows:

Effective Date	***Action***	***Reason***
January 1, 1990	Hire	New Position
January 15, 1999	Termination	Dishonesty

This table shows how element E1 has the following generation control conditions applied to it with the HR Action/Reason page controls:

Element	***Include/ Exclude***	***Action***	***Reason***
E1	Include	Termination	Dishonesty

For the January 1999 pay period, this payee has two segments: Segment 1 (January 1, 1999 through January 15, 1999) and Segment 2 (January 16, 1999 through January 31, 1999).

E1 is processed in Segment 1, because the effective date falls within the segment's date parameters. E1 isn't processed in Segment 2, because the effective date doesn't fall within these parameters.

HR Action/Reason Example (with Last Day Worked)

In this example, assume that you want a certain absence balance to a payee upon termination. This table shows how elements E1 and E2 have the following generation control conditions applied to them on the HR Action/Reason page:

Element	***Include/ Exclude***	***Action***	***Last day Worked***
E1	Include	Termination	Yes
E2	Include	Termination	No

Assume the following:

Pay period is January 1, 2001 − January 31, 2001.

Payee's last day of work is January 31, 2001.

Accordingly, a job row is inserted with an effective date of February 1, 2001 (which is the first day the person is terminated, or not active) with an Action of *Termination.*

E1 is processed because the system looks at the Last Day Worked (on the Employment record) to see if the action is within the period.

E2 is *not* processed in January because the effective date is February 1, 2001. If the payee is paid in February for some reason, E2 would be processed.

Note: The Generation Control HR Action/Reason page considers all PS_JOB rows for a given segment. The PS_JOB row must have an effective date in the segment.

Frequency Code Example

You have a weekly calculation period and want a particular type of entitlement to accrue only to the first pay period of the month. But you want to use the same process list for all four weekly absence runs during the month. To avoid having to create a new process list just to accommodate your needs for the first calculation period, you can use the frequency generation control feature to define a frequency with a *First of the Month* value. In this way, you can use the same process list for all four pay periods and confine the particular deduction processing to the first pay period.

Understanding Batch Processing of Generation Control Elements

The Generation Control program is called from the absence entitlement programs. The calling programs pass the Generation Control element to be resolved. The PIN Manager acts as the central program controlling the process.

Generation Control Name Page

Use the Generation Control Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Generation Control, Generation Control Name

You name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Related Links

Defining Element Names

Conditions Page

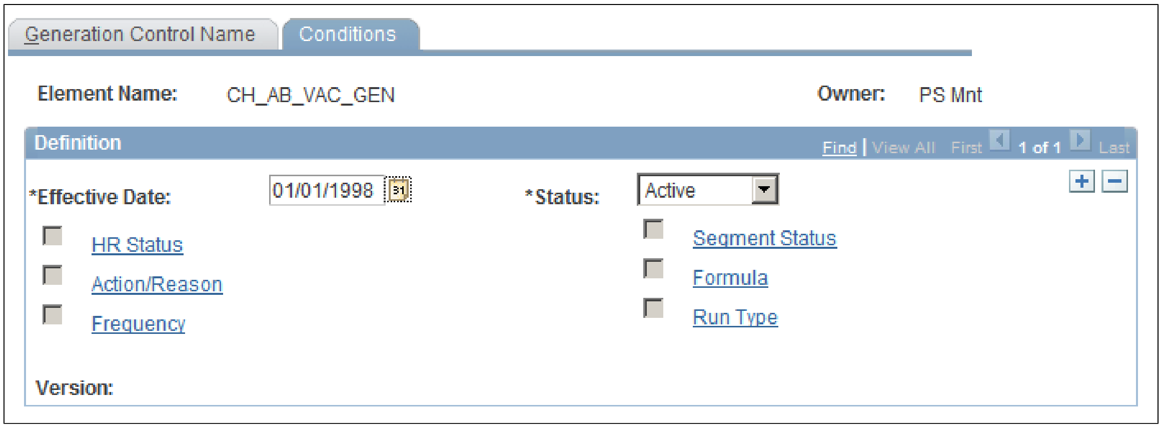
Use the Conditions page (GP_GCTL_CONDITION) to define the criteria for use in directing the system to include or exclude certain element conditions during batch processing.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Generation Control, Conditions

Image: Generation Control - Conditions page

This example illustrates the fields and controls on the Generation Control - Conditions page.



HR Status (human resources status)
Click this link to access the HR Status page. Indicate which employee status conditions to process.

Action/Reason
Click this link to access the HR Action/Reason page. Indicate which Action/Reason code combinations to process.

Frequency
Click this link to access the Generation Control - Frequency page. Indicate which frequencies to process.

Segment Status
Click this link to access the Segment Status page. Indicate which segment status conditions to process.

Formula
Click this link to access the Generation Control - Formula page. Indicate which formulas to process.

Run Type
Click this link to access the Generation Control - Run Type page. Indicate which run types to process.

Important! When more than one generation control parameter type (such as HR status and frequency) is entered, the payee must meet both criteria to pass generation control. When more than one value (such as Actions of *Hire* or *Rehire*) for a particular generation control type is entered, the payee must meet only one of the criteria to pass generation control.

HR Status for Element <Name> (Human Resources Status) page

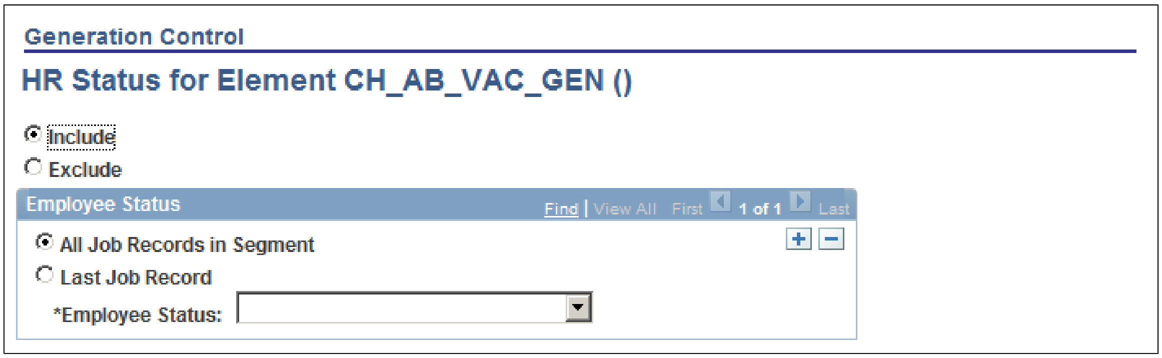
Use the HR Status for Element <name> (human resources status) page (GP_GCTL_ST_SEC) to exclude or include employee status conditions during batch processing.

Navigation

Click the HR Status link on the Conditions page.

Image: HR Status for Element <name> page

This example illustrates the fields and controls on the HR Status for Element <name> page.



Include and Exclude	Select the option to include or exclude the employee status conditions that you enter in the group box below.
All Job Records in Segment	Select to tell the system to look at all job rows in the segment. If any row contains the value indicated in the Employee Status field, it's considered a match.
Last Job Record	Select to tell the system to look only at the maximum effective-dated PS_JOB row for the match, within the period in question.
Employee Status	Select a status code from the list.

H/R Action/Reason for Element <Name> (Human Resources Action/Reason) Page

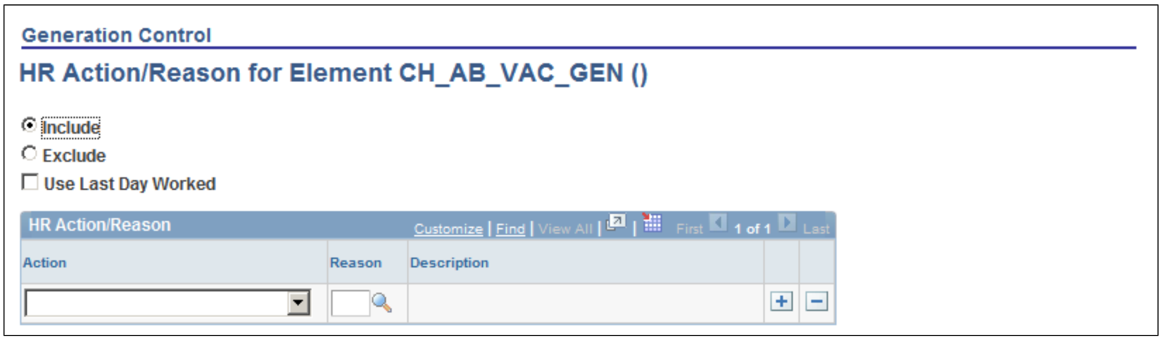
Use the H/R Action/Reason for Element <name> (human resources action/reason) page (GP_GCTL_AR_SEC) to exclude or include action/reason code combinations.

Navigation

Click the Action/Reason link on the Conditions page.

Image: HR Action/Reason for Element <name> page

This example illustrates the fields and controls on the HR Action/Reason for Element <name> page.



Include and Exclude Select the option to include or exclude the action/reason code combinations that you insert in the group box below.

Use Last Day Worked Select to use the last day worked.

Action and Reason Select from the list of HR Action codes.

Note: If an action is entered with no reason, the system assumes that all reasons are valid.

Frequency for Element <Name> Page

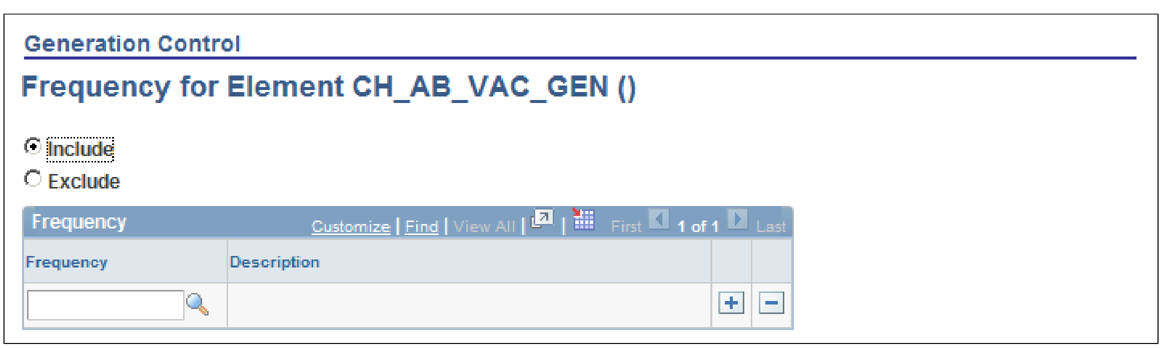
Use the Frequency for Element <name> page (GP_GCTL_FQ_SEC) to exclude or include frequency codes.

Navigation

Click the Frequency link on the Conditions page.

Image: Generation Control - Frequency for Element <name> page

This example illustrates the fields and controls on the Generation Control - Frequency for Element <name> page.



Include and Exclude	Select the option to include or exclude the frequency codes that you insert into the group box below.
Frequency	Select from the list of codes.

Segment Status for Element <Name> Page

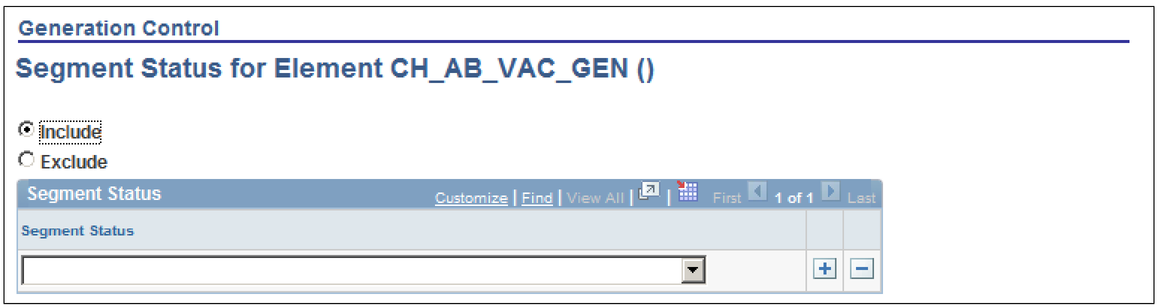
Use the Segment Status for Element <name> page (GP_GCTL_SS_SEC) to exclude or include segment status conditions.

Navigation

Click the Segment Status link on the Conditions page.

Image: Segment Status for Element <name> page

This example illustrates the fields and controls on the Segment Status for Element <name> page.



Include and Exclude	Select the option to include or exclude the segment status conditions that you insert in the group box below.
Segment Status	Select from the list of conditions.

Formula for Element <Name> Page

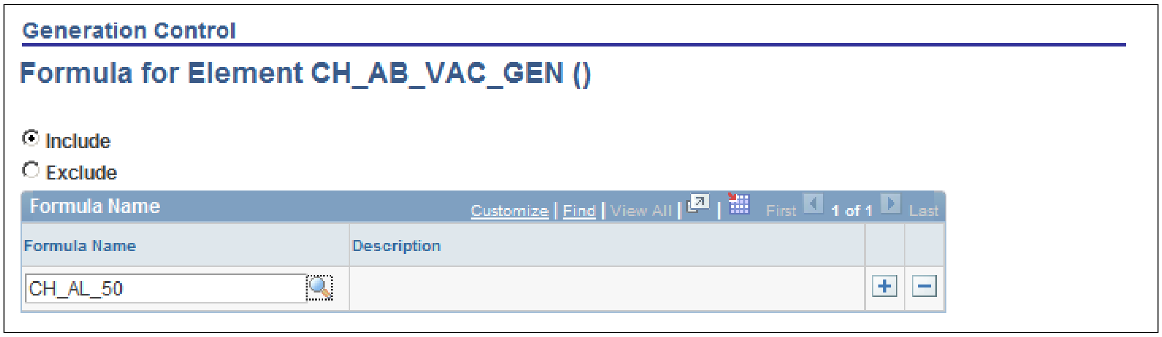
Use the Formula for Element <name> page (GP_GCTL_FM_SEC) to exclude or include formula elements.

Navigation

Click the Formula link on the Conditions page.

Image: Generation Control - Formula for Element <name> page

This example illustrates the fields and controls on the Generation Control - Formula for Element <name> page.



Include and Exclude Select the option to include or exclude the formula elements that you insert into the group box below.

Formula Name Select from the list of elements.

Run Type for Element <Name> Page

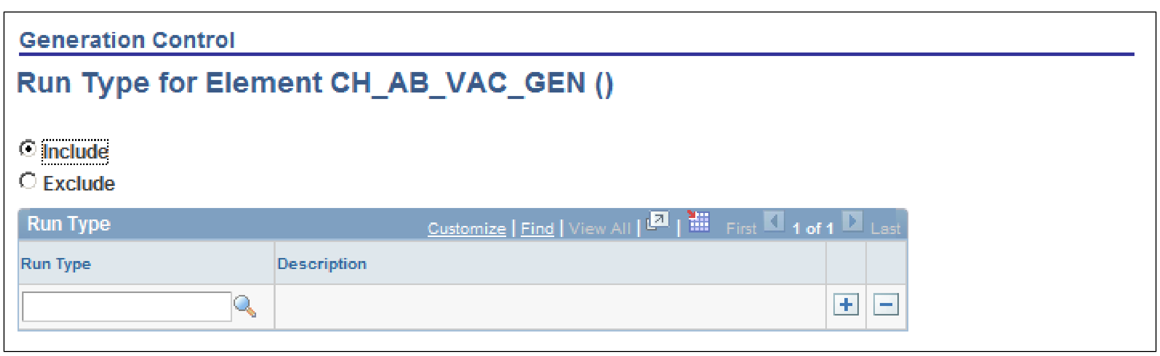
Use the Run Type for Element <name> page (GP_GCTL_RT_SEC) to exclude or include run types.

Navigation

Click the Run Type link on the Conditions page.

Image: Generation Control - Run Type for Element <name> page

This example illustrates the fields and controls on the Generation Control - Run Type for Element <name> page.



Include and Exclude Select the option to include or exclude the run type that you insert in the group box below.

Run Type Select from the list of run types.

Defining Generation Control Frequency

To define generation control frequency, use the Generation Control Frequencies (GP_GCTL_FREQUENCY) component.

This topic provides an overview of generation control frequency and discusses how to define a generation control frequency.

Page Used to Define Generation Control Frequency

Page Name	***Definition Name***	***Navigation***	***Usage***
Generation Control Frequency	GP_GCTL_FREQUENCY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Generation Control Frequencies, Generation Control Frequency	Define a generation control frequency.

Understanding Generation Control Frequency

The frequency tag element is used to define an intermediary table so that the system can associate a HR frequency (residing in the HR Frequency Table, FREQUENCY_TBL) with an Absence Management frequency. There are many frequencies that you use infrequently, and this feature enables you to define them through a table in Absence Management rather than through the HR Frequency Table.

Through use of the frequency tag, generation control is also related to how the system annualizes and deannualizes elements.

When you aren't using generation control, the numerator for annualization is the element's frequency and the denominator is the calendar period frequency. When you are using generation control, the numerator for annualization is still the element's frequency but the denominator is the generation control frequency.

Generation Control Frequency Page

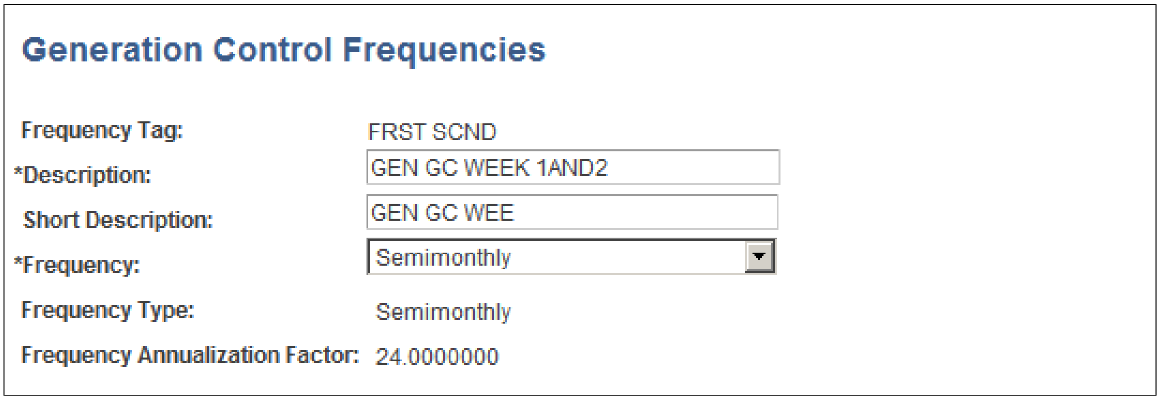
Use the Generation Control Frequency page (GP_GCTL_FREQUENCY) to define a generation control frequency.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Generation Control Frequencies, Generation Control Frequency

Image: Generation Control Frequency page

This example illustrates the fields and controls on the Generation Control Frequency page.



Frequency

Select from the list of available values (*Annual, Biweekly, Contract, Daily,* and so on.)

The values in this field come from FREQUENCY_TBL.

Chapter 8

Defining Earning and Deduction Elements

Understanding Earning and Deduction Elements

This topic discusses:

- Earnings and deductions.
- Calculation rules.
- Components.
- Automatically generated accumulators.

Earnings and Deductions

Earning and deduction elements enable you to send absence-related data to your payroll system so that payees can be appropriately compensated for time off. Think of earnings as adding to a person's pay and deductions as subtracting from a person's pay. There's little difference between defining earning elements and defining deduction elements.

The payroll system with which Absence Management is integrated determines whether you should create earning elements, deduction elements, or both:

- If using PeopleSoft Payroll for North America, create earning elements.
- If using PeopleSoft Payroll Interface with a third-party payroll system, create earning elements, deduction elements, or both as needed.

After you create earning and deduction elements in Absence Management, you map these elements to their counterparts in your payroll system. The rules that you define in Absence Management should be consistent with the corresponding earning and deduction rules in your payroll system.

Related Links

Integration

Calculation Rules

When you define an earning or deduction element, you select from one of four calculation rules:

- Unit × rate.
- Unit × rate × percent.
- Base × percent.

- Amount.

An element's calculation rule determines which values the system can transmit to your payroll system after you process absence events.

In most cases, you'll want to select a calculation rule of unit × rate or unit × rate × percent. This enables you to pass the units of paid and unpaid time calculated by the Absence Take process to your payroll system. Absence Management will pass along the retrieved value for rate, percent, and amount, if these are part of the calculation rule, but its does not calculate values for these components.

Components

Saving an element definition causes the system to automatically generate the following components based on the selected calculation rule: unit, rate, base, percent.

Automatically generated components have the same name as the earning or deduction element plus a suffix. For example, if you create the earning element VACATION = Unit × Rate, the system automatically generates two component elements named VACATION_UNIT and VACATION_RATE. Suffix names are determined by the country that you specify for the earning or deduction element on the Element Name page.

Note: Names of earning and deduction elements are limited to 12 characters because of suffixes. Other element names can have as many as 18 characters.

Components take on the attributes of the earning or deduction element. If you change the attributes of the earning or deduction element, the component attributes also change. To continue with the previous example, if you change the name of the VACATION earning element to PTO, the system changes the component names to PTO_UNIT and PTO_RATE. The only attributes of a component that you can change directly are the description, comments, customer fields, and the Via Element Overrides option. You make these changes on the Components page.

A component is also an element and can therefore be used in another element's definition. As an example, assume that you define the following elements:

- SICK1 = Unit × Rate.
- SICK2 = Unit × Rate.
- SICK2 Rate = SICK1 Rate.

When the system calculates the rate for SICK2, it uses the rate for SICK1. You don't have to redefine the rate for every new element. No matter how the rate for SICK1 is defined (numeric, formula, and so on), the rate for SICK2 always equals the rate for SICK1.

Related Links

Updating Component Element Information

Defining Suffixes

Automatically Generated Accumulators

When you define an earning or deduction element, you can specify which accumulators to create. For example, a year-to-date accumulator for an earning or deduction element. You can base the accumulators on calendar periods, fiscal periods, or both. You can also indicate whether you want to store amounts, units, or both and the periods that you want to store in the accumulator: period-, month-, quarter-, or year-to-date.

Note: Although the system creates automatically generated accumulators for earning and deduction elements, it does not update these accumulators. This is because Absence Management does not resolve earning and deduction elements. The use of these accumulators is applicable to PeopleSoft Global Payroll.

Like components, automatically generated accumulators take on the attributes of the corresponding earning or deduction element and use the suffixes that you define on the Earnings and Deductions page of the Element Suffixes component (GP_SUFFIX).

Note: The only accumulators whose attributes are tied directly to an earning element or deduction element are those that are automatically generated by the Earning component (GP_EARNING) or the Deductions component (GP_DEDUCTION). Attributes of accumulators that you create using the Accumulators component (GP_ACCUMULATOR) are not tied directly to earning or deduction elements.

Related Links

Understanding Accumulators

Defining Earning Elements

To set up earning elements, use the Earning (GP_EARNING) component.

This topic provides an overview of the setup steps for earning elements and discusses how to:

- Name an earning element.
- Define calculation rules for an earning element.
- View generated elements for earnings.

Pages Used to Define Earning Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Earnings Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Earnings, Earnings Name	Name the element and define its basic parameters.

Page Name	***Definition Name***	***Navigation***	***Usage***
Calculation	GP_ERN_DED_CALC	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Earnings, Calculation	Define calculation rules for an earning element.
Generated Elements for Element <name>	GP_AUTOGEN_SEC	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Earnings, Auto Generated Accumulators Click the View Generated Elements link.	Displays the system-generated components and accumulators that have been created for an earning element.

Understanding Setup Steps for Earning Elements

In Absence Management, earnings represent compensation that payees receive for paid absence events. You define earning elements to represent your organization's earning rules. The earning elements that you create in Absence Management should correspond to earning codes that are defined in your payroll system. For example, if your payroll system has an earning code for vacation pay, you should set up an earning element in Absence Management for vacation pay. After you define earning and deduction elements, you map them to payroll earning and deduction codes.

To create an earning element:

1. Define the earning name, security levels, and allowable overrides on the Earnings Name page.
2. Set up the calculation rule on the Earning - Calculation page.

   You select the components that make up the calculation rule: an amount or a combination of a base, percent, rate, and unit.

   Note: You cannot change a calculation rule after you run the Absence Take process.

Earnings Name Page

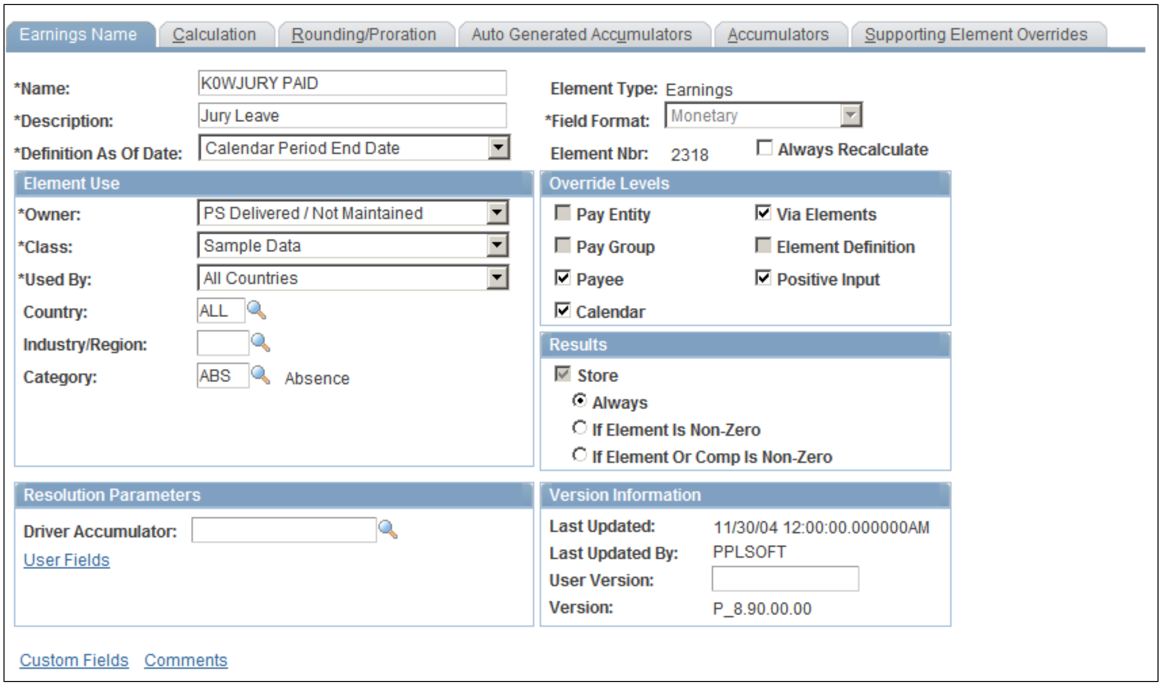
Use the Earnings Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Earnings, Earnings Name

Image: Earnings Name page

This example illustrates the fields and controls on the Earnings Name page.



Note: You name every element and define its basic parameters on an Element Name page. All element components within Absence Management share the same first Element Name page (GP_PIN). However, the Earnings Name page contains the following additional fields that apply only to earnings.

Driver Accumulator	This field applies only to Global Payroll.
User Fields	This link applies only to Global Payroll.

Note: For information on the remaining fields on the Earnings Name page, see Defining Element Names.

Calculation Page

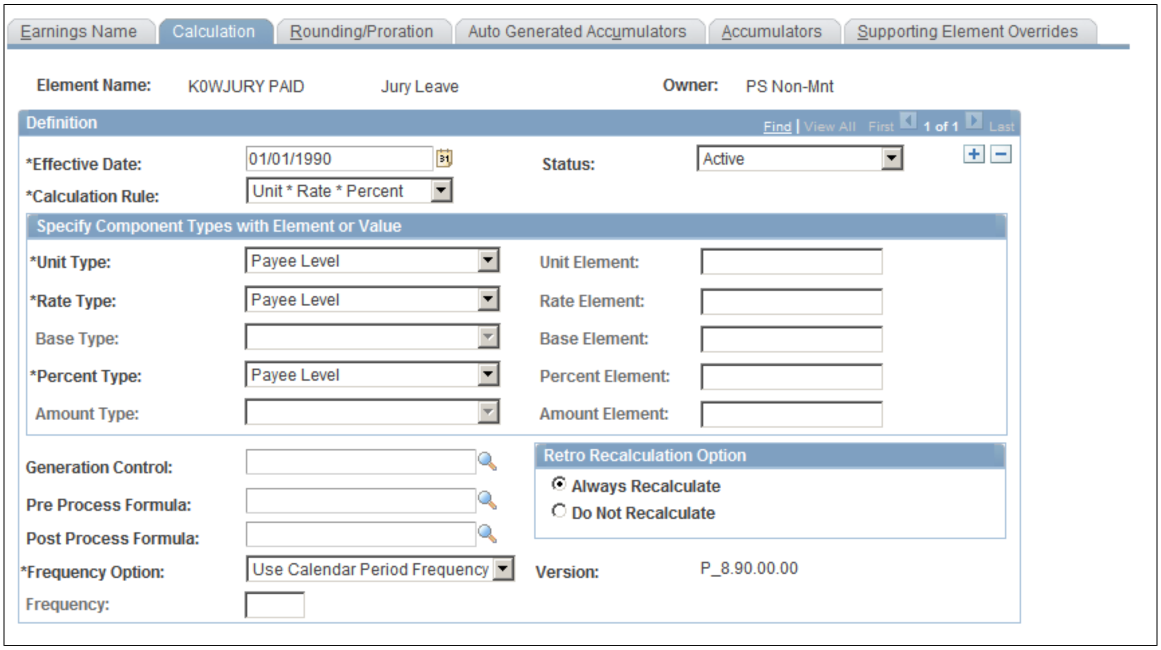
Use the Calculation page (GP_ERN_DED_CALC) to define calculation rules for an earning element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Earnings, Calculation

Image: Earnings - Calculation page

This example illustrates the fields and controls on the Earnings - Calculation page.



Calculation Rule

Define the calculation rule for the element. Valid values are *Amount, Base x Percent, Unit x Rate,* and *Unit x Rate x Percent.* Your selection affects the availability of other fields.

When you process absence events, the system can generate units for the earning elements, which you can transmit to your payroll system. If you integrate Absence Management with Payroll for North America or Payroll Interface, select a calculation rule that includes units. *Unit x Rate x Percent* is recommended because it enables you to send both rate and percent information to your payroll system.

Once you define a calculation rule for an element, you cannot change the rule after output results are generated for the element. If you need to change the element definition, create a new element.

Unit Type, Rate Type, Base Type, Percent Type, and Amount Type

The fields that you can update here depend on the selected calculation rule. Select *Payee Level* for each applicable component.

Note: In Global Payroll, these fields tell the system how to determine the component values or amount. In Absence Management, you use the Absence Take - Day Formula page (when you link the earning element to a take element) to tell the system how to determine the component values or amount.

Unit Element, Rate Element, Base Element, Percent Element, Amount Element, Amount Value and Amount Currency

These fields are not available when you select Payee as the component type.

Generation Control

This field applies only to Global Payroll.

Pre Process Formula and Post Process Formula

These fields apply only to Global Payroll.

Frequency Option and Frequency

These fields apply only to Global Payroll.

Retro Recalculation Option

Specify whether to recalculate an element during retroactive processing. Values are:

Always Recalculate

Do Not Recalculate

If you select *Always Recalculate* here, the element is recalculated during processing the element in a retroactive situation.

Note: You can override this field on the Retro Process Overrides page.

See Understanding Retroactive Processing.

Generated Elements for Element <Name> Page

Use the Generated Elements for Element <name> page (GP_AUTOGEN_SEC) to displays the system-generated components and accumulators that have been created for an earning element.

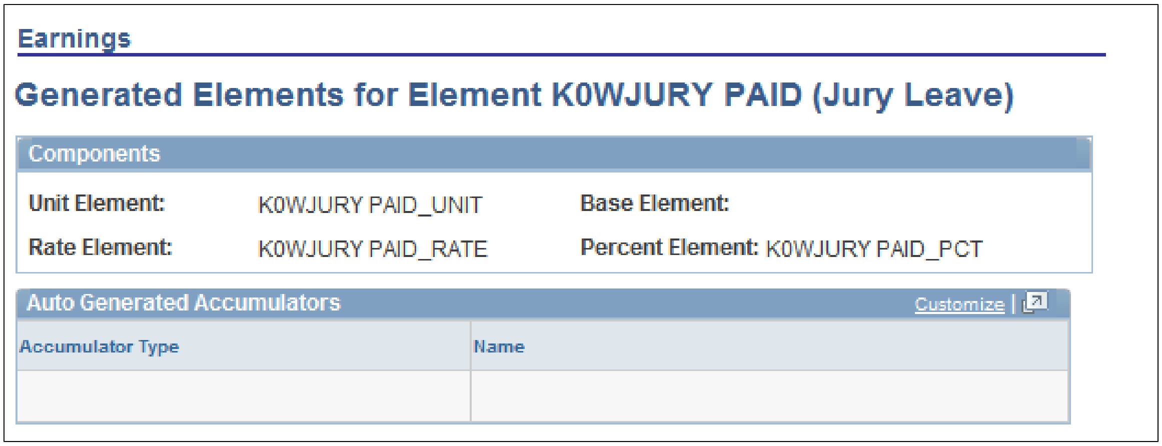
Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Earnings, Auto Generated Accumulators

Click the View Generated Elements link.

Image: Earnings - Generated Elements for Element <name> page

This example illustrates the fields and controls on the Earnings - Generated Elements for Element <name> page.



Components Displays the automatically generated element for each component of the earning element.

Auto Generated Accumulators Displays automatically generated accumulators.

Related Links

Defining Suffixes

Defining Deduction Elements

To set up deduction elements, use the Deductions (GP_DEDUCTION) component.

This topic provides an overview of the setup steps for deduction elements and discusses how to:

- Name a deduction element.
- Define calculation rules for a deduction element.
- View generated elements for a deduction.

Pages Used to Define Deduction Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Deduction Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Deduction Name	Name the element and define its basic parameters.
Calculation	GP_ERN_DED_CALC	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Calculation	Define calculation rules for a deduction element.
Generated Elements for Element <name>	GP_AUTOGEN_SEC	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Auto Generated Accumulators Click the View Generated Elements link on the Deductions - Auto Generated Accumulators page.	Displays the system-generated components and accumulators that have been created for a deduction element.

Understanding Setup Steps for Deduction Elements

A deduction is a payroll element that subtracts from a person's pay. If you are using Absence Management with Payroll Interface, you can create deduction elements in addition to earning elements to compensate payees for time off. Do not create deduction elements if you are using Payroll for North America with Absence Management. Absence Management does not transmit deduction date to Payroll for North America.

To create a deduction element, define the deduction name and calculation rule.

Related Links

Defining Earning Elements

Deduction Name Page

Use the Deduction Name page (GP_PIN) to name the element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Deduction Name

You name every element and define its basic parameters on an Element Name page. All element components within Absence Management share the same first Element Name page (GP_PIN).

The Deduction Name page is similar to the Earnings Name page.

Calculation Page

Use the Calculation page (GP_ERN_DED_CALC) to define calculation rules for a deduction element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Calculation

The Deduction - Calculation page is similar to the Earnings - Calculation page.

Generated Elements for Element <Name> Page

Use the Generated Elements for Element <name> page (GP_AUTOGEN_SEC) to displays the system-generated components and accumulators that have been created for a deduction element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Auto Generated Accumulators

Click the View Generated Elements link on the Deductions - Auto Generated Accumulators page.

The Generated Elements for Element <name> page is similar to the Earnings - Generated Elements for Element <name> page.

Chapter 9

Setting Up Accumulators

Understanding Accumulators

This topic discusses:

- Accumulator elements.
- Balance accumulators in batch processing.
- Retroactive processing and accumulators.

Accumulator Elements

Accumulators are elements that store the cumulative values of defined items as they're processed. For example, they can store accrued entitlement balances and other cumulative values.

Accumulators can be defined:

- Automatically

  When you create an entitlement element, the system can automatically generate a set of accumulators to track the value of the element over time. Automatically generated accumulators typically accumulate values for a single element. You specify the periods of time that the accumulators are to track.

- Manually

  You can create accumulators to track several elements, such as all accrued entitlement. You select the elements that the accumulator is to track and define the period of time that the accumulator is to cover. You can accumulate a single value or multiple values over time.

There are two types of accumulators, some that pertain to a single segment, and others that span several calculation periods:

- Segment accumulators accumulate values during a single segment.
- Balance accumulators accumulate values over a period of time, such as a month or a year.

Related Links

Understanding Auto Generated Accumulators

Balance Accumulators in Batch Processing

This section describes various aspects of how the batch process handles balance accumulators.

Updating Balances

The system loads the value for an accumulator from the end of the previous period. When the accumulator is processed, the value for the current period is added to the historic value to maintain an up-to-date balance. For each period, the batch process pulls forward the accumulator likewise.

Creating New Instances

When defining an accumulator, assign such attributes as level, based-on date, and period to cover—such as calendar year. Level determines whether to keep separate counts per job or across jobs by employee. You can add specifications by adding user keys, such as contract or department. The period and based-on date determine the applicable time period. These attributes determine how and when the batch process creates and keeps separate instances of the same accumulator. The system creates a new instance of balance and segment accumulators anytime that you change the value of a key field. Balance accumulators also spin off a new instance for each new period.

Writing to the Result Tables

How you set up the Accumulator page tells the system whether to write the accumulator to the results tables. The system determines when to drop balance accumulators, using the number of months to maintain after end date and comparing the accumulate through date of each instance with the current pay period begin date.

Related Links

Understanding Processing Elements

Retroactive Processing and Accumulators

Accumulators reflect new retroactive values in the retroactive period by default.

Define all absence balance accumulators as corrective. This makes it possible for the true balance of the accumulator to be reflected in each period.

Related Links

Loading Balance Accumulators

Defining Accumulators

To define accumulators, use the Accumulators (GP_ACCUMULATOR) component.

This topic discusses how to:

- Name an accumulator.
- Define accumulator period and timing information.
- Specify accumulator keys.
- Define the list of elements that contribute to an accumulator.

Pages Used to Define Accumulators

Page Name	***Definition Name***	***Navigation***	***Usage***
Accumulator Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Accumulators, Accumulator Name	Name an accumulator element and define its basic parameters.
Definition	GP_ACCUMULATOR_2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Accumulators, Definition	Define the period information and indicate the timing of the accumulator's resolution.
Level	GP_ACCUMULATOR_1	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Accumulators, Level	Specify keys for accumulators.
Members	GP_ACCUMULATOR_3	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Accumulators, Members	Define the list of elements that contribute to an accumulator.

Accumulator Name Page

Use the Accumulator Name page (GP_PIN) to name an accumulator element and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Accumulators, Accumulator Name

You must name every element that you create and define its basic parameters on an Element Name page. All element page groups share the same first Element Name page (GP_PIN).

Note: When creating an accumulator, you can select a decimal or monetary field format. Select *decimal* for elements that accumulate non-monetary values, such as holiday hours or years of service.

Related Links

Defining Element Names

Definition Page

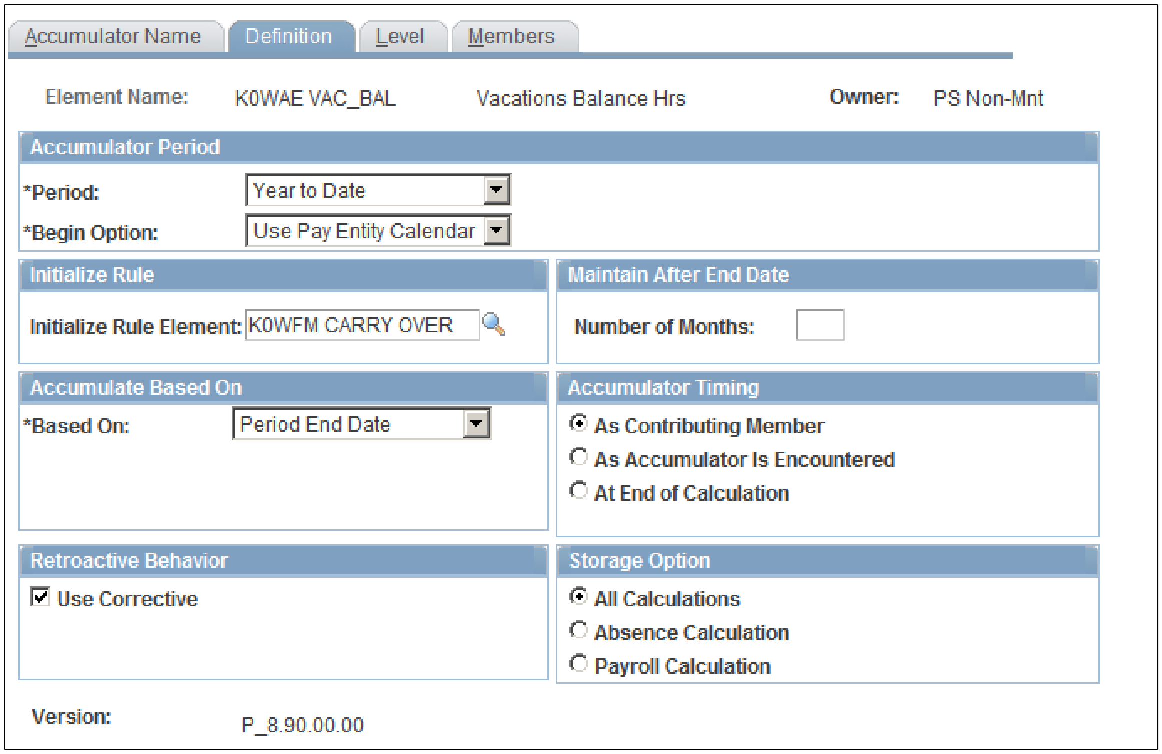
Use the Definition page (GP_ACCUMULATOR_2) to define the period information and indicate the timing of the accumulator's resolution.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Accumulators, Definition

Image: Accumulators - Definition page

This example illustrates the fields and controls on the Accumulators - Definition page.



Accumulator Period

An accumulator period is the period for which an accumulator collects and accumulates amounts.

Period

Select from the following options:

Segment: Represents one segment. If there's no segmentation, a segment period and a absence period are identical.

Calendar Period: The period begin and end dates come from the current calendar period.

Month to Date: The system collects information monthly.

Quarter to Date: The system collects information quarterly.

Year to Date: The system collects information yearly.

Custom Period: A custom period enables you to create an accumulator that's completely open-ended—an end date is not required, as might a custom period to track an employee's lifetime wages. When you select this option, the Date field appears for the begin date. Select the element type from the list in this new field.

Begin Option

Select the accumulator's starting point. This field appears if you select *Month to Date, Quarter to Date,* or *Year to Date* in the Period field. Values are:

Specify Date: The Begin Month and the Begin Day fields appear. Enter the day and month or select variables to return these values.

Use Paying Entity Calendar and *Use Paying Entity Fiscal:* The system uses the defaults set on the Pay Entity Processing Details page.

Initialize Rule

Initialize Rule Element

Enter a formula element to be invoked when a new instance of an accumulator is created for a new period. This formula must also be a member of the accumulator for its results to be added to the accumulator. For example, at the beginning of a calendar year, you might want to have a YTD accumulator that contains accrued vacation time carry over the previous year's value, with certain limits. The formula that you select here can serve this purpose. When the accumulator for the new year is created, the formula is invoked. If you leave this field blank, no special processing occurs.

Maintain After End Date

Number of Months

Specify how long an accumulator remains in the output results table after its stop date. You can use this to access a previous accumulator value for a current calculation.

Note: If you select *Segment* in the Period field, this field becomes unavailable.

Custom Period End Date Options

These fields are only available for custom period accumulators.

Note: The two fields in this group box work independently.

Set End Date If Zero

Select this option to set the accumulator's end date to the segment end date in the period when the accumulator value equals zero. This lets the system display the accumulator's value when it reaches zero and then cease storing this value in the subsequent period.

For example, when tracking entitlement for vacations, you could use this field to display the balance until it reaches zero. If you select this check box, the system populates the Duration in Months field to *999* by default (equivalent to no end date).

Duration in Months

Enter the accumulator's length of duration. The custom period ends after this duration. For example, when tracking maternity leave, you could use this field to display the accumulator for a set entitlement number of months. You should not enter a value in this field if you select the Set End Date if Zero check box. If you select the Set End Date If Zero check box, the system will overwrite any value you enter in the Duration in Months field with a value of *999* (equivalent to no end date).

Accumulate Based On

Based On

Select the calendar period date to use when determining the correct period for recording accumulators. Select from *Period Begin Date, Period End Date* (default), *Payment Date,* or *Specified Date. Specified Date* is commonly used in absence situations. An absence is often linked back to its initial date, even if that was in another period.

Example:

A certain monthly accumulator has one member: E1.

A weekly pay group has these period dates:

Begin Date = January 26, 2005

End Date = February 3, 2005

Payment Date = February 4, 2005

E1 = 10

The Based On field value tells the system whether the 10 of E1 is added to the monthly value for January or February. If you select *Period Begin Date,* the 10 is added to the January balance. If you select *Period End Date,* (or *Payment Date),* the 10 is added to the February balance.

Note: This field is available only if you select *Month to Date, Quarter to Date,* or *Year to Date* in the Period field.

Retroactive Behavior

Use Corrective

Select this check box. (This option has added functionality for PeopleSoft Global Payroll.)

Note: This check box must be selected to correctly process retroactivity in Absence Management.

Accumulator Timing

Select the method for resolving the accumulator. Every accumulator has a list of elements associated with it (defined on the Accumulator Elements page). If you reference the accumulator during processing, the value of the accumulator varies, depending on the time that you specify for the accumulation.

As Contributing

As each contributing element is resolved, the accumulator is updated to reflect the new value. The system adds the value of an element—such as an earning or an entitlement—to the accumulator as the system calculates the element. The accumulator doesn't need to appear on the process list.

As Accumulator is Encountered

The accumulator is resolved whenever it is encountered, for example, within a formula. The accumulator does not need to appear on the process list to be resolved. When a contributing element to an accumulator is resolved, the accumulator itself is not automatically updated with the new value.

At End of Calculation

The accumulator is not updated during the main calculation process, but maintains the value loaded from the end of the last finalized segment. Only after all other elements are resolved does the system update the accumulator to reflect the new, current values of its contributing members. This is done automatically: the accumulator does not need to be on the process list. By default, auto-generated accumulators are defined as *at end of calculation.*

Storage Option

Storage Option

Select the run types during which you can change and store accumulators. Options are:

- *All Calculations:* The accumulator value can be changed during any run type. The value is stored after every run.

  Note: Select this option only if truly necessary. Storing values after every run can consume significant storage space.

- *Payroll Calculation:* This option applies only when using Global Payroll with Absence Management.
- *Absence Calculation:* The accumulator value can be changed during an absence run only. The value is only stored after an absence run.

Note: The system displays an error message if an accumulator is updated during the inappropriate run type. The error message appears, for example, if you attempt to update an absence accumulator in a payroll run.

Warning! You should select the storage option before performing batch processing. This is to ensure that the method the batch system uses to load accumulator balances is consistent with the results already generated.

Level Page

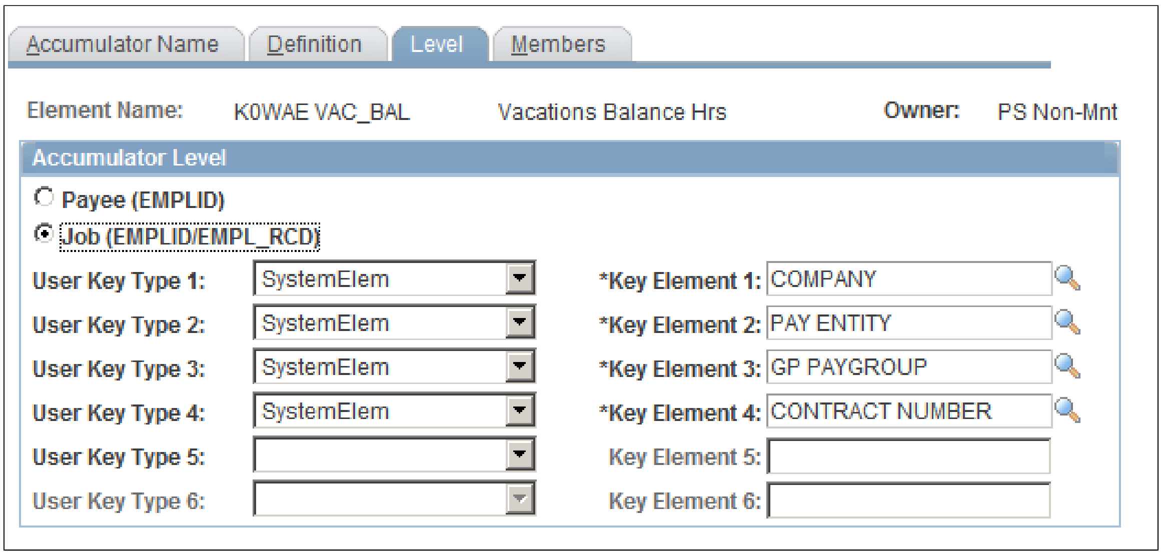
Use the Level page (GP_ACCUMULATOR_1) to specify keys for accumulators.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Accumulators, Level

Image: Accumulators - Level page

This example illustrates the fields and controls on the Accumulators - Level page.



Payee (EMPLID) (payee employee ID)

Select to have the accumulator store the results for all of a payee's jobs together. This is the default option.

Job (EMPLID/EMPL_RCD) (job employee ID/employee record)

Select to have the system store the results for each job that a payee holds in a separate accumulator with EMPLID/Rcd as a key.

User Key Type

You can define up to six user keys for an accumulator. User keys enable you to track a given accumulator at levels below employee record. For example, you can track an employee's year-to-date earnings by contract number or company.

Enter the type of element for the user key. Values are *Variable* and *SystemElem.*

Key Element

Use these fields to select the elements to use as the accumulator keys. For example, to track an accumulator by company, select the system element COMPANY as a user key, which directs the system to maintain different accumulated numbers for each location of the employee.

The following guidelines apply:

- The system doesn't accumulate employee data across pay groups and pay entities in different countries. Thus, COUNTRY is not a meaningful user key.
- Key values are limited to 25 characters and can be characters, dates, or integers. Before selecting user keys, know how their values are stored in the results table.
- You can use decimal and monetary elements as user keys, but the system uses only the whole number and ignores the decimal part. Negative values are converted and stored as positive values.

Related Links

Retroactive Processing and Accumulators

Members Page

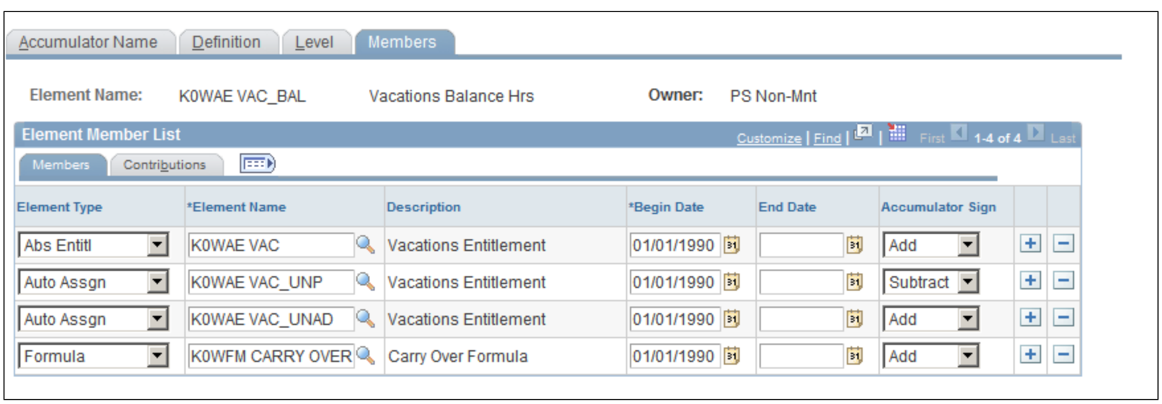
Use the Members page (GP_ACCUMULATOR_3) to define the list of elements that contribute to an accumulator.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Accumulators, Members

Image: Accumulators - Members page: Members tab

This example illustrates the fields and controls on the Accumulators - Members page: Members tab.



Members

Select the Members tab.

Use the fields on this tab to specify which elements contribute to the accumulator's total.

Element Type

Select from the list of element types. Values are *Abs Entitl, Array, Auto Assgn, Bracket, Deduction, Duration, Earnings, Formula, Seg. Accum, System Elem,* and *Variable.*

Element Name

Select elements that contribute to the accumulator's total. An element can accumulate to multiple accumulators; accumulators can contribute to other accumulators.

Begin Date and End Date

Tell the system when a member must start and stop calculating an accumulator.

If this field is blank, the system continues updating the accumulator indefinitely while the elements remain valid.

Accumulator Sign

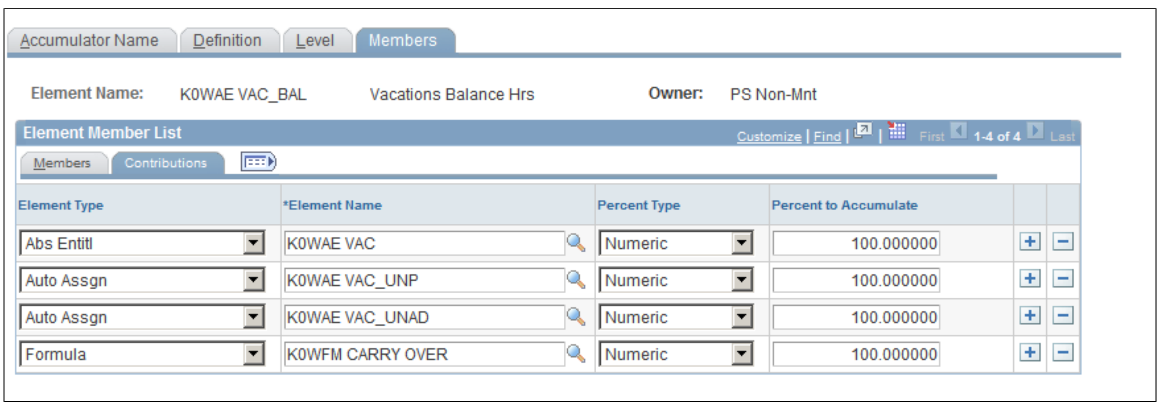
Select *Add* or *Subtract* to indicate if the element adds to or subtracts from the accumulator.

Contributions

Select the Contributions tab.

Image: Accumulator - Members page: Contributions tab

This example illustrates the fields and controls on the Accumulator - Members page: Contributions tab.



The system lists the elements that you selected on the Members tab.

Percent Type and Percent to Accumulate

Specify the portion of the element's value that the system contributes to or subtracts from the accumulator. Values are:

Numeric: Select to specify a percentage of up to 100 percent. Enter the percentage in the Percent to Accumulate field.

Variable or *Formula:* Select to have a variable or formula element return the value to accumulate or subtract. Select the variable or formula name in the Element Name field.

Adjusting Accumulator Balances

This topic provides an overview of accumulator adjustments and discusses how to adjust accumulator amounts.

Page Used to Adjust Accumulators

Page Name	***Definition Name***	***Navigation***	***Usage***
Adjust Balances - Accumulators	GP_ACM_USER_ADJ	Global Payroll & Absence Mgmt, Payee Data, Adjust Balances, Accumulators, Accumulators	Adjust an accumulator balance for a given payee in a finalized calendar group.

Understanding Accumulator Adjustments

For a given payee in a finalized calendar group, you can:

- Adjust an accumulator's results or add a new instance to the results.
- Insert a new accumulator into the results.

When adjusting accumulator results, adjust the accumulator that's loaded as the starting point for a calculation. For example, say that you finalize the March run, and then realize that an adjustment needs to be made to a March year-to-date accumulator. You make the adjustment. When you process the April run, the system reads the March year-to-date balance with the adjustment and uses it as the starting value for the accumulator. In contrast, if you ran April with a retroactive trigger that caused March to be recalculated, the starting balance would come from February and the adjustment would be ignored.

Note: We recommend using the Adjust Absence Balances (GP_PI_MNL_AE) page to adjust absence accumulators.

See Adjusting and Overriding Entitlement Balances.

Adjust Balances - Accumulators Page

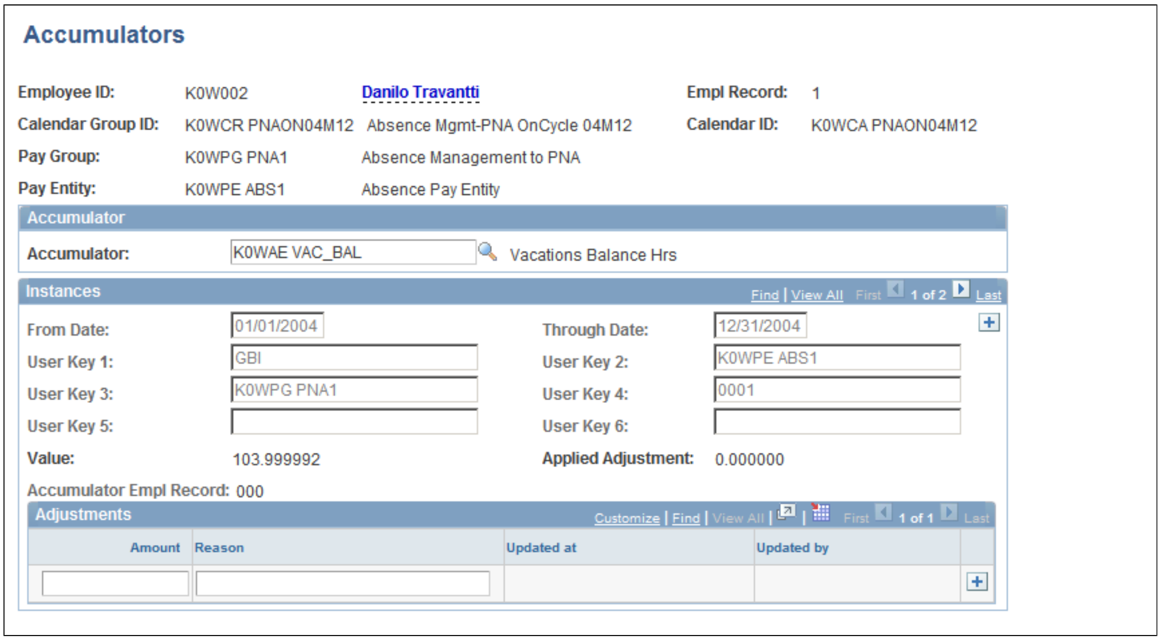
Use the Adjust Balances - Accumulators page (GP_ACM_USER_ADJ) to adjust an accumulator balance for a given payee in a finalized calendar group.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Adjust Balances, Accumulators, Accumulators

Image: Accumulators page

This example illustrates the fields and controls on the Accumulators page.



Note: You cannot adjust accumulators that are in an unfinalized calendar group.

Accumulator

Accumulator

Select the accumulator to adjust. Once selected, the system displays the accumulator's description to the right of this field and populates the Instances group box with information from the result tables. If no results are returned, the accumulator has no recorded balance for the identified employee record and calendar.

Instances

This group box displays the recorded balance, if any, for the selected employee record and calendar. You can enter new instances to add to the result tables at the end of the calendar ID that appears.

From Date and Through Date

The begin and end dates for the accumulator period.

User Key

The user keys that are associated with the accumulator.

Value

The value of the accumulator for the employee (and employee record) at the end of that calendar ID period.

Accumulator Empl record (accumulator employee record)

This field can be helpful when payees have more than one job. It identifies the employee record number to which the accumulator values pertain.

All accumulator data for an employee ID is passed from one segment to another regardless of job. Therefore, when you access a particular Empl Rcd Nbr to view or adjust the accumulator values that resulted from processing that job, you can view and adjust the accumulator values for the payee's other jobs as well.

As an example, assume that a payee has two jobs:

- Empl_rcd = 0 that accrues 10 hours of entitlement each month.
- Empl_rcd = 1 that accrues 11 hours of entitlement each month.

Assume also that Empl_rcd is a key for the year-to-date absence entitlement accumulator. Now, suppose that you process absences for two segments: January/Job 1 and January/Job 2. If you were to access the Adjust Accumulator Balance page for Empl_rcd 0 for the January calendar (and click the Retrieve Data button), the system would display a value of 10 for Accumulator Empl Rcd Nbr 0. (The system provides a snapshot of what it processed for the first segment.) If you were to access this page for Empl_Rcd 1 instead, the system would again display a value of 10 for Accumulator Empl Rcd Nbr 0. In addition, it would display a value of 11 for Accumulator Empl Rcd Nbr 1, when you click the link for the next job.

Note: If you adjust the accumulator balance for Empl_rcd 0, Empl_rcd_acum 0, but the last segment processed for the payee was Empl_rcd 1, the system will ignore the adjustment. You should adjust the balance for Empl_rcd 1, Empl_rcd_acum 0 instead, because this balance becomes the source for the next calendar.

Applied Adjustment

The sum of adjustments that have been made to this accumulator instance. When you click Save, this number is updated to reflect all accumulator adjustments that are currently entered in the Adjustments group box.

Adjustments

Amount

Enter the adjustment amount, either positive or negative.

Reason

Enter the reason for the adjustment

Updated At and Updated by

The system populates these fields when you save the page and displays them when you query adjustments.

Note: You can add new instances and adjust accumulators, but you cannot delete entered data. All adjustments remain in the system for an audit trail. To reverse a prior adjustment, enter a row with an offsetting or negative value.

Chapter 10

Defining Processing Elements

Understanding Processing Elements

Absence Management enables you to define absence take and absence entitlement processes. To set up processing:

1. Create *sections,* which are logical groups of elements that are resolved during an absence run.
2. Add the sections to a *process list* that identifies the sequence and conditions under which each section of elements is resolved.

   You can create any number of process lists.
3. Attach each process list to a calendar, by associating the process list with a run type.
4. Schedule the calendars for processing.

To run an absence process, run the process that you defined. The Process List Manager program starts at the top of the process list and, for each payee, works with the PIN Manager to resolve elements sequentially in each process list section. The system creates a set of files and tables to hold the processing results.

Common Elements Used for Element Processing

Seq Nbr (sequence number)

Enter a sequence number for the element in the section to specify processing order. The processing sequence is extremely important; it can directly affect absence calculations.

Numbers can be up to 5 digits, and each number in the section must be unique. Assign numbers in increments of 10 or some other factor to avoid having to renumber to insert an element.

Recalculate

Select this check box to instruct the PIN Manager to recalculate the element if it encounters it more than once in the process list. Clear the check box to have the PIN Manager adhere to the Always Recalculate check box setting on the Element Name page for the element.

Avoid recalculating elements, which can slow down processing.

Understanding Sections

This topic discusses:

- Section types
- Standard sections
- Payee sections
- Absence take sections

Section Types

Sections control the processing order of individual elements, breaking down large process lists into manageable pieces. Each section can have one or more individual elements. You can't add element groups to a section and generally can't include sections in sections.

Using sections enables reuse of work. For example, if several processes use the same set of take elements, you can create one section for takes and attach it to multiple process lists.

Sections are effective-dated—during processing, the system retrieves sections attached to the process list, based on your calendar period end date.

You can define four section types, which determine:

- How the system processes section elements during absence runs.
- What types of elements—such as absence take elements, and supporting elements—you can add to the section.

This table lists the section types and what each section is used for:

Section Type	***Use***
Standard	For regular processing when defining absence entitlement or absence take processes.
Payee	For specifying, at the payee level, elements for processing and their sequence.
Absence Take	For resolving absence takes in chronological order based on the absence begin date.

Standard Sections

Most sections in your process list are probably standard sections. When the Process List Manager encounters a standard section, it reads and resolves each element in the section in the specified order.

Payee Sections

Payee sections enable you to control which elements are processed for a specific payee and their processing order.

Having created a payee section, use the Section Overrides page to define the elements to be resolved for a particular payee. When encountering a payee section in a process list, the system retrieves the appropriate payee section and processes the elements in the section one by one.

Process lists can have multiple payee sections.

Absence Take Sections

Absence take sections enable you to process take elements based on the order in which absences occurred, rather than the processing sequence defined in a section. These sections are useful when there are dependencies between take elements, and processing in chronological order is necessary to determine correctly which absences to pay.

Absence Take Section Example

Assume that there's a requirement to reduce sickness entitlement by the number of days a payee was absent for sickness or an industrial accident over the past year. In February, a payee is absent 7 days for sickness, 6 days for an industrial accident, and 8 days for sickness, in that order.

You create a section that includes take elements in this processing sequence: SICK, IND ACC. As the following paragraphs illustrate, section type affects the amount of entitlement that's available to cover the takes:

- If the section type is standard, the system processes both SICK takes before it processes the IND ACC take.

  Consequently, it does not consider any days that were taken for the industrial accident when it determines the entitlement balance that is available for the second SICK take.

- If the section type is absence take, the system processes the absences in the order of occurrence.

  As a result, it reduces the entitlement balance for the last SICK take by the number of days that were taken (paid) for the industrial accident and for prior sicknesses over the last year.

Rules for Absence Take Sections

Following are the rules for absence take sections:

- Absence take sections can include take elements only.
- Takes are processed based on absence begin date.

  The system looks at the Absence Event record (GP_ABS_EVENT) to find the absence event with the earliest begin date.

- If more than one absence has the same date, the system refers to the processing sequence defined for the section to determine which take to process first.

  For example, assume that an absence take section includes Takes A and B in that order and that the following absence events are reported: June 2–3 (Take B) and June 3 (Take A). The system will process the absent days in this order:

  - June 2, Take B (the event with the earliest begin date).
  - June 3, Take A.
  - June 3, Take B.

- If a take element (parent element) is mapped to another take element (child element):

- The child element is processed immediately after the parent element for the day being processed.

  List the child element after the parent element on the process list. The system proceeds to the next day, only after processing all generated and manually entered take elements for that day.

- Child elements that are not included in the section where the parent element is being processed are not processed until the system resolves the section that lists the child element.

Note: Mapping refers to linking one take to another by completing the Mapped To Element field on the Absence Take - Day Formula page or the Take with Other Absence field on the Absence Take - Negative Balances page.

See Absence Take - Day Formula Page.

See Absence Take - Negative Balances Page.

Understanding Process Lists

This topic discusses:

- Functions of process lists.
- Batch processing and the Process List Manager.
- Ordering elements and sections in a process list.
- Retroactive processing considerations for process lists.

Functions of Process Lists

Process lists control absence processing at the highest level. They identify the sections, or sets of elements, to resolve during processing and the order in which they resolve.

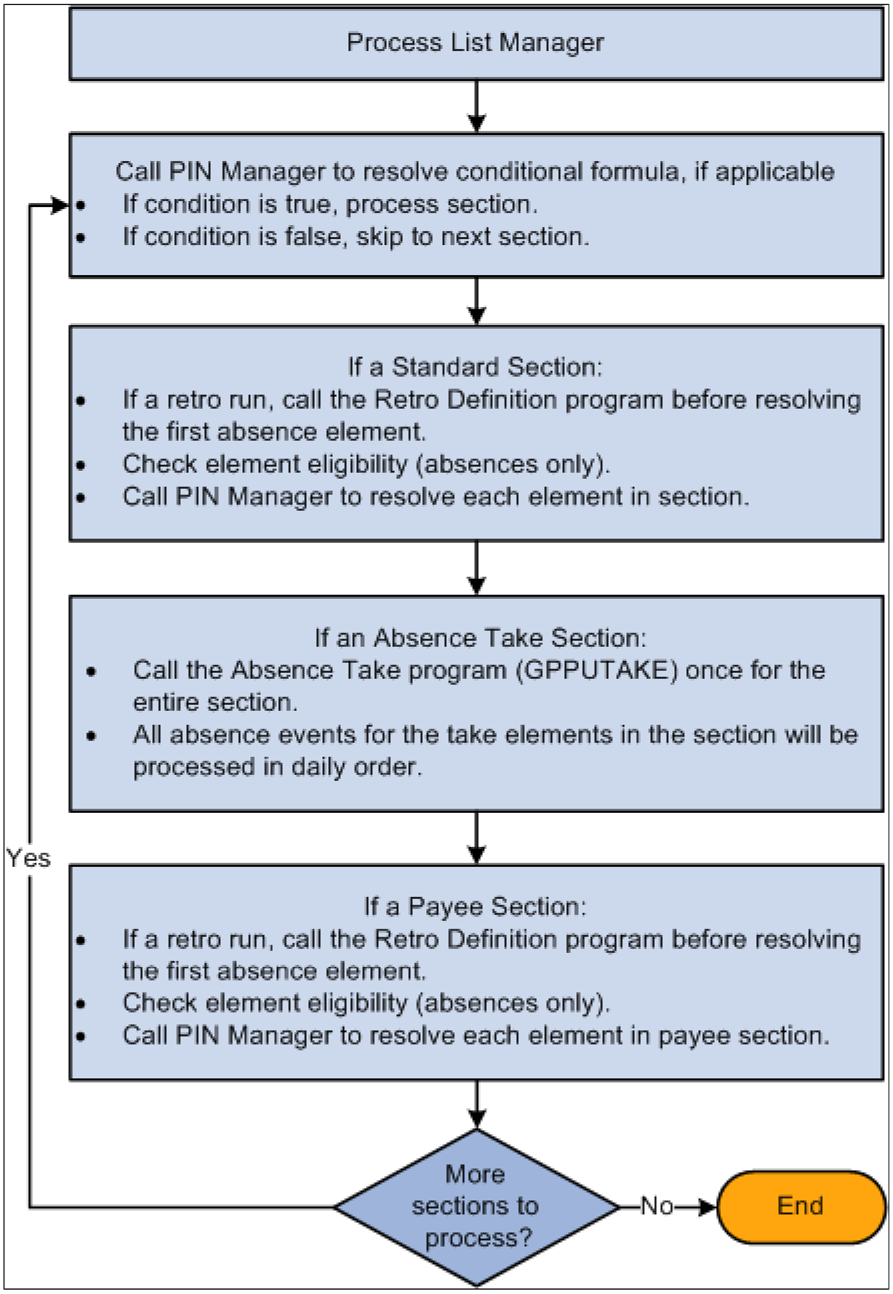
Batch Processing and the Process List Manager

The Process List Manager, a program that calls the PIN Manager during processing to resolve elements on the process list, begins at the top of the process list and reads one section at a time, according to the specified sequence. Whenever the Process List Manager encounters a conditional formula, it calls the

PIN Manager for resolution. If the formula resolves to zero, the section is not processed; if the formula resolves to a nonzero number, the section is processed.

Image: The Process List Manager

This diagram illustrates how the Process List Manager and PIN Manager work together to resolve each section of the process list during an absence run.



Related Links

Understanding the Batch Architecture Process Flow

Ordering Elements and Sections in a Process List

Here are some guidelines for verifying that elements in sections and sections in process lists are ordered logically in the correct sequence:

- Entitlement processing for absences adds to the entitlement balance.

  Take processing takes away from the entitlement balance. If you include absence entitlement and absence take elements on the same process list and put the entitlement elements before the take elements, the additional entitlement balance becomes available for take processing.

- If an array needs to populate data fields before the system can execute a conditional formula, add the section with the array before the conditional section.

- Non-percent rate codes need to be resolved before percent rate codes, so that members of any Comp Rate (compensation rate) code group that need to be used in a percent calculation have been resolved.

- Base pay rate codes need resolving before any non base-pay rate codes, so that the appropriate hourly rate can be calculated and available for any hourly, plus flat amount rate code calculations.

Retroactive Processing Considerations for Process Lists

This topic discusses how changes to a process list can affect retroactive processing.

How Changes to a Process List Can Affect Retroactive Processing

Pay attention to effective dates. If you modify an effective-dated set of data that applies to previously processed periods, when retroactive processing is run, the results will vary. If you want to change the section for future periods only, add a new effective-dated row to the section, then modify the list of elements.

Related Links

Understanding Retroactive Processing

Setting Up Sections

To set up sections, use the Sections component (GP_SECTION).

This topic provides an overview of section set up and discusses how to:

- Name a section.
- Select elements that constitute a section.
- Create a payee section for a process list.

Pages Used to Set Up Sections

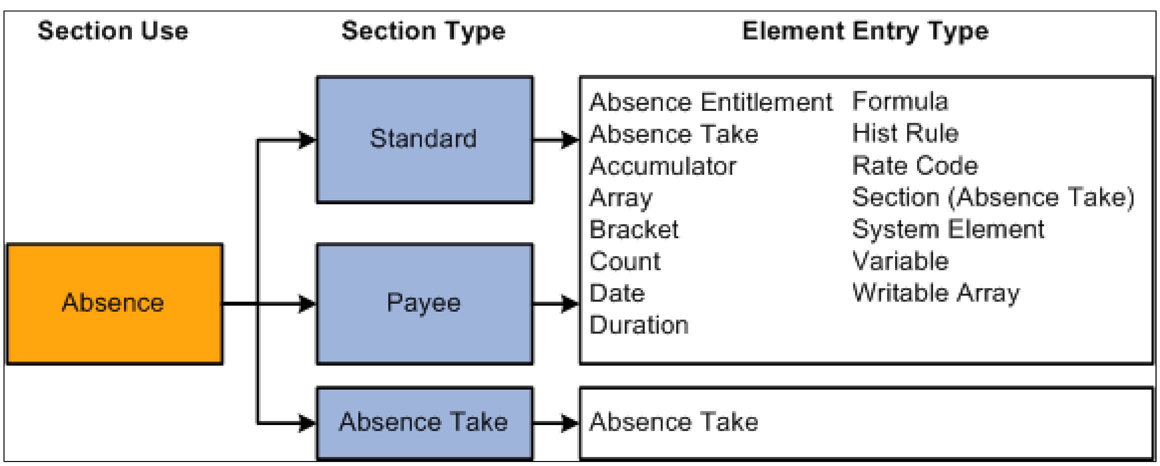
Page Name	***Definition Name***	***Navigation***	***Usage***
Section Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Sections, Section Name	Name a section and define its basic parameters.
Definition	GP_SECTION	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Sections, Definition	Select elements that constitute a section.
Section Overrides	GP_PYE_SECTION	Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Payee Sections, Section Overrides	Create a payee section for a process list.

Understanding Section Set Up

Sections are the building blocks for creating process lists. You create a section by giving it an element name, selecting the section type, and entering elements in processing order. Eligible elements depend on the section type.

Image: Section type determines which elements can be added to a section

This diagram shows the element types that you can include in each section type.



Note: Earnings and deductions are not included in process lists.

Warning! Adding or deleting an element from a section and then trying to process a retroactive run may yield incorrect results. Before changing any element in a section, assess the impact on retroactive processing.

Related Links

Setting Up Sections

Ordering Elements and Sections in a Process List

Section Name Page

Use the Section Name page (GP_PIN) to name a section and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Sections, Section Name

You must enter the basic parameters of each section on the Section Name page. All elements within Absence Management share the same name page (GP_PIN).

Note: On the Section Name page, *Calendar Period End Date* is the only value for the Definition as of Date field. When you run an absence process, the system reads the calendar period end date to determine which effective-dated sections and process list to use.

Related Links

Defining Element Names

Definition Page

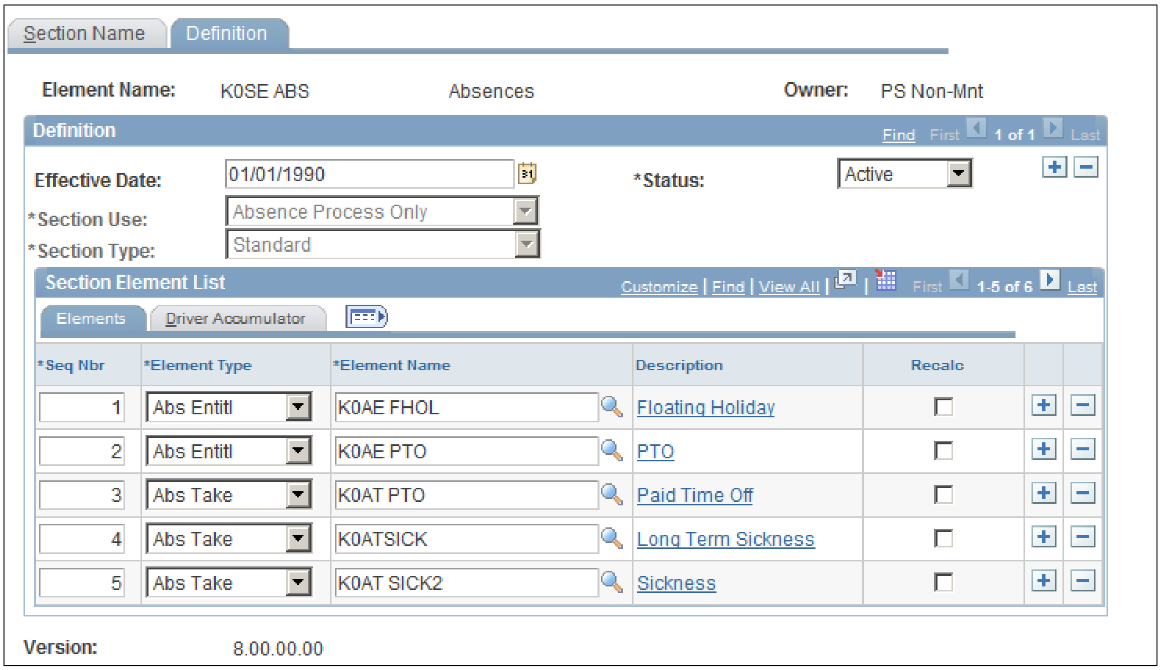
Use the Definition page (GP_SECTION) to select elements that constitute a section.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Sections, Definition

Image: Section - Definition page

This example illustrates the fields and controls on the Section - Definition page.



Section Use

This field displays Absence Process Only. You cannot change this value.

Section Type

Select the section type. This specifies how the Process List Manager processes the elements in this section. Options are *Standard, Absence Take,* and *Payee Section.*

If you select *Payee Section,* all fields become unavailable for entry. After saving this page, you can access the Section Overrides page and select the elements to be resolved for a particular payee.

Element Type

Select the type of element that you're adding to the section. Values depend on your Section Type selection:

Standard sections: Select *Abs Entitl* (frequency-based absence entitlement), *Abs Take* (absence take), *Accumulator, Array, Bracket, Count, Date, Duration, Formula, Hist Rule* (historical rule), *Rate Code, Section, System Element, Variable,* or *Writable Array.*

Absence take section: Select *Abs Take.*

Element Name

Enter the name of the element to include in the section. Selectable names depend on the element type.

Note: The Driver Accumulator tab is used with PeopleSoft Global Payroll only.

Section Overrides Page

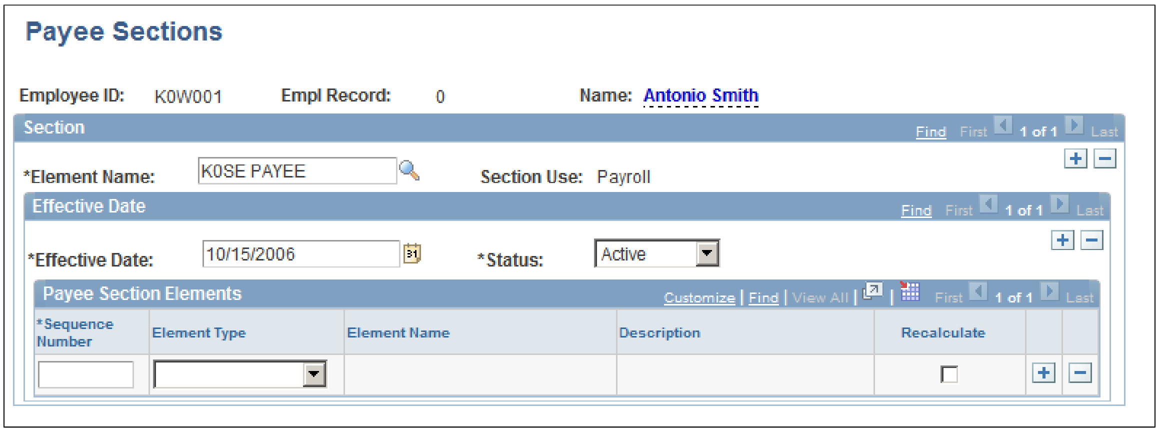
Use the Section Overrides page (GP_PYE_SECTION) to create a payee section for a process list.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Payee Sections, Section Overrides

Image: Section Overrides page

This example illustrates the fields and controls on the Section Overrides page.



Before using this page, create a payee section using the Sections - Section Name and Sections - Definition pages.

Element Name

Enter the name of the payee section, as defined on the Sections - Section Name page.

Section Use

When you select the element name, the system displays *Absence,* to identify the purpose of the section.

Payee Section Elements

Element Type

Select the type of element that you're adding to the section: *Absence Entitlement* (frequency-based entitlement elements), *Absence Take, Accumulator, Array, Bracket, Count, Date, Duration, Formula, Historic Rule, Rate Code, Section - Absence Take, System Element, Variable,* or *Writable Array.*

Element Name

Select the name of the element that you're adding to the section.

Setting Up Process Lists

To set up a process list, use the Process Lists component (GP_PROCESS).

This topic provides an overview of process list setup and discusses how to:

- Name a process list.
- Identify sections comprising the process list.

Pages Used to Set Up Process Lists

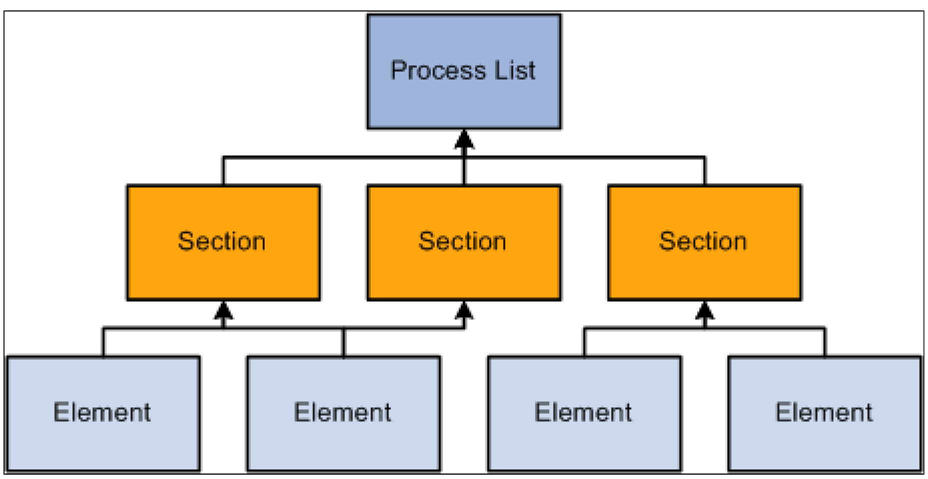
Page Name	***Definition Name***	***Navigation***	***Usage***
Process List Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Process Lists, Process List Name	Name a process list and define its basic parameters.
Definition	GP_PROCESS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Process Lists, Definition	Identify sections comprising the process list and the order of execution.

Understanding Process List Setup

Before creating a process list, you define the sections to include in the process, grouping sets of elements into sections for addition to your process list. In your process list, you can use conditional logic to specify when each section is executed.

Image: Relationship between process list, sections, and elements

This diagram illustrates the relationship between elements, sections, and process lists.



You can create multiple process lists for absence processing. For example, you can create a separate process list for entitlement and take or create one process list that handles both, depending on how you run your processes.

Having created a process list, you attach it to one or more calendars (through a run type). A calendar determines:

- Who's processed.

Specified by the pay group and payee selection criteria on the calendar.

- What's processed.

  Specified by the process list associated with the calendar.

- What period of time and frequency apply.

  Specified by the period ID linked to the calendar.

When running a process, the system reads the pay period end date for the calendar; finds the appropriate effective-dated process list; and processes the selected payees, one by one.

Related Links

Understanding Calendars
Understanding Absence Processing

Process List Name Page

Use the Process List Name page (GP_PIN) to name a process list and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Process Lists, Process List Name

You must enter the basic parameters of the process list on the Process List Name page. All elements within Absence Management share the same name page (GP_PIN).

Note: On the Process List Name page, *Calendar Period End Date* is the only value for the Definition as of Date field. When you run the absence process, the system reads the calendar period end date to determine which effective-dated process list and sections to use.

Related Links

Defining Element Names

Definition Page

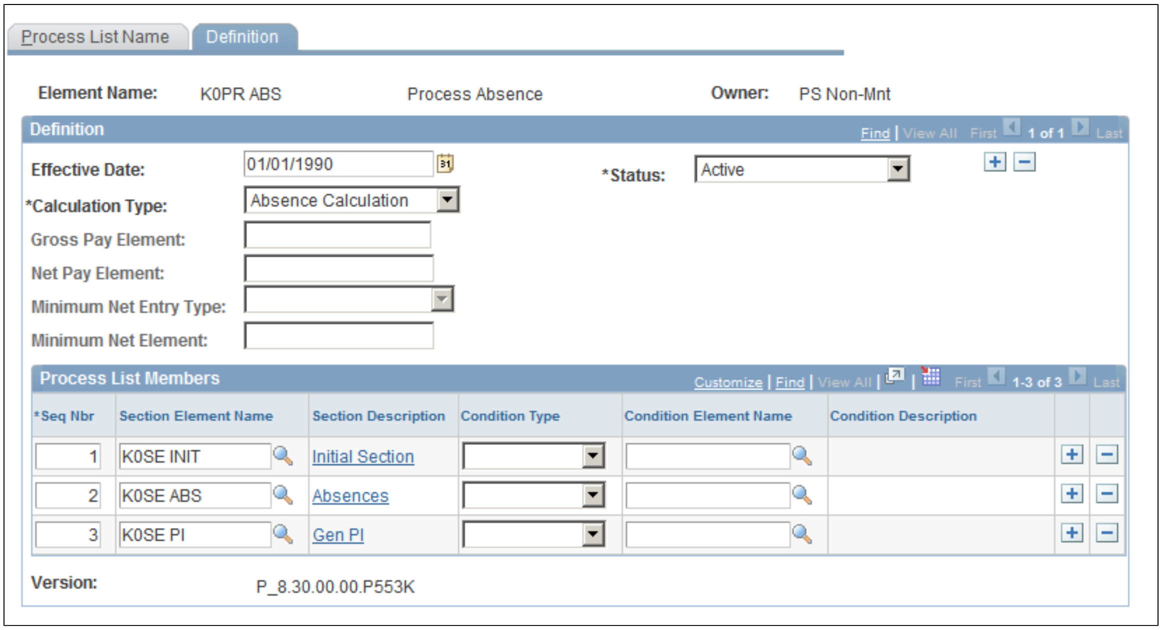
Use the Definition page (GP_PROCESS) to identify sections comprising the process list and the order of execution.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Process Lists, Definition

Image: Definition page

This example illustrates the fields and controls on the Definition page.



Calculation Type

The system displays *Absence Calculation.* You cannot change this value.

Gross Pay Element

This field does not apply. It is used with Global Payroll only.

Net Pay Element

This field does not apply. It is used with Global Payroll only.

Minimum Net Entry Type

This field does not apply. It is used with Global Payroll only.

Minimum Net Element

This field does not apply. It is used with Global Payroll only.

Process List Members

Section Element Name

Select the name of the section that you're adding. You can use a section only once in a process list, but you can add the same section to more than one process list.

Condition Type

Select *Formula* or *Variable* to specify a condition for resolving the section that you're adding to the process list.

Condition Element Name

Required if you selected a condition type. Select the name of the element that defines the condition. If the element resolves to zero, the condition is considered false and the section isn't resolved. If the element resolves to a nonzero value (for example, -2, -1, 1, or 2), the condition is considered true and the system tries resolving the section.

Related Links

Ordering Elements and Sections in a Process List

Chapter 11

Defining Absence Elements

Understanding Absence Element Setup

This topic discusses:

- Prerequisites.
- Setup guidelines and dependencies.
- Absence formulas.

Prerequisites

Before you define any absence elements, review the introductory topic that provides an overview of absence features.

Related Links

Absence Management Features

Setup Guidelines and Dependencies

You define the policies or rules that your organization follows for tracking and compensating payees for absences by creating absence entitlement and take elements. Absence entitlement elements define the conditions under which payees accrue paid time off and the amount of time that they can accrue. Absence take elements specify the rules that the Take process applies to determine whether an absence should be paid.

Consider the following factors before you begin your set up:

- Several absence features require the use of formulas.

  At a minimum, you define a day formula for the take definition. If you're creating entitlement elements that resolve per absence, you also define a per absence formula element. You cannot save the entitlement element until you enter the name of the formula on the Absence Entitlements - Calculation page.

- Entitlement and take elements are linked.

  When you define a take element, you specify which entitlement rules apply. If you define take elements before defining entitlement elements, return to the take pages in correction mode to select the entitlement elements.

- You assign an absence type to each absence take element.

Absence types provide a way to group or categorize absences. You can assign the same absence type to more than one take element.

- Depending on your take rules, take elements can have several interdependencies.

  Mapping out the relationships between these elements can reduce setup time. Take elements are related when:

  - You allow payees to use an entitlement that is associated with another take when they exceed the entitlement balance.
  - You request the system to create a duplicate event for a second take element.
  - You prevent users from entering more than one absence for the same payee for the same day, but you want an error message to give information about the priority of the conflicting events.

- Entitlement, adjustments, balances, and other absence-related values are stated in the same units (hours, days, or some other period of time).

  For example, if you express entitlement in days, make sure that any supporting elements that define adjustments, balances, and other absence-related amounts also resolve to days. The units that you use to define absence elements must match the units that the users enter when they adjust or override an entitlement.

- Although you define most absence entitlement and take elements during implementation, you can create additional absence elements anytime.

  As your business needs change, we recommend creating new absence elements, rather than modifying existing elements. Changing existing elements can affect retroactive processing.

Absence Formulas

Formulas offer a convenient way to implement various absence management features. You can create different formulas for the features that you use or use the same formula in as many situations as you need to.

This table lists the absence-related formulas that you may need:

Formula and Page	***Use***	***Element Populated***	***Value Returned***
Per Absence Formula Element (Absence Entitlements - Calculation page)	Required for *per-absence* entitlement elements. Defines when to resolve entitlement. Resolved each day if the balance is needed during processing.		0 = do not resolve entitlement. Nonzero value = resolve entitlement.

Formula and Page	***Use***	***Element Populated***	***Value Returned***
Day Formula (Absence Take - Day Formula page)	Required for all take elements. Interprets each absent day and returns the units to compare to the entitlement balance. Always resolved per day.	DAY COUNT	Count that represents units for the absent day.
Offset Formula (Absence Take - Day Formula page)	Per-absence entitlements only. Automatically reduces beginning entitlement balance. Resolved immediately after a per-absence entitlement is resolved.		Count that can be added to or subtracted from the entitlement balance.
Conditional Formula (Absence Take - Day Formula page)	Defines conditions for generating an absence event for another take element.		Zero or nonzero value.
(Wait) Count Formula (Absence Take - Period page)	Returns the number of remaining days that a payee must be absent before a wait period is satisfied. Often the formula that is used for the Wait Count is the same as the formula that is used for the Day Formula. For example, *workday* could be counted.	WAIT COUNT	Count
Forecast Element (Absence Take - Forecasting page)	Used during the Forecasting process to evaluate an absence. The result of the formula appears on the Absence Event Entry page. Resolved for each day of an absence event. The system saves only the value that is resolved for the last day of the absence.	ABS EVT FCST VAL	Up to 30 alphanumeric characters.

Many system elements are designed for use within absence formulas and point to columns in the absence daily data table.

For example, assume that you use the system element named SCHED HRS in your Day Formula and that you define the formula, named WRK DAY, as follows:

```
IF SCHED HRS > 0
THEN 1 ->> WRK DAY
ELSE 0 ->> WRK DAY
END IF
```


The formula checks to see if scheduled hours are greater than zero. If they are, the day equals one workday. If they are not, it is not a workday. As long as there is at least one scheduled hour, the absent day is considered a workday.

The formula processes each row of the daily data for the specified period for the absence take element that is being processed. For each row, the system retrieves the value for SCHED HRS from the daily data table.

Note: Absence system elements in the rows of daily data reflect what the current process row contains. You can use other system elements in your formulas; however, the system resolves them only once—not for each row. For example, if you use a system element from the Job row, such as Department, the value for Department does not change for each row.

Related Links

Working with System Elements

Defining Absence Types and Reasons

To set up absence types and reasons, use the Absence Take Types (GP_ABS_TYPE) component.

This topic provides an overview of absence types and reasons and discusses how to define absence types.

Page Used to Define Absence Types

Page Name	*Definition Name*	*Navigation*	*Usage*
Absence Types	GP_ABS_TYPE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Take Types, Absence Types	Define the types of absences that your organization recognizes. You can define reasons in each absence type.

Understanding Absence Types and Reasons

When you define an absence take element, you assign it an absence type that describes the category of the absence; for example, vacation or sick. You can specify whether an absence type applies to all countries or a specific country. For each absence type, you can define an unlimited number of absence reasons.

When reporting absence events, the system displays the absence type associated with the take that you enter. Entering an absence reason is optional. During the batch and online forecasting processes, the absence type and reason code populate system elements (for example, ABSENCE_TYPE, ABSENCE_TYPE_DB (absence type day before), and ABSENCE_REASON) that you can access within your absence formulas.

Absence Types Page

Use the Absence Types page (GP_ABS_TYPE) to define the types of absences that your organization recognizes.

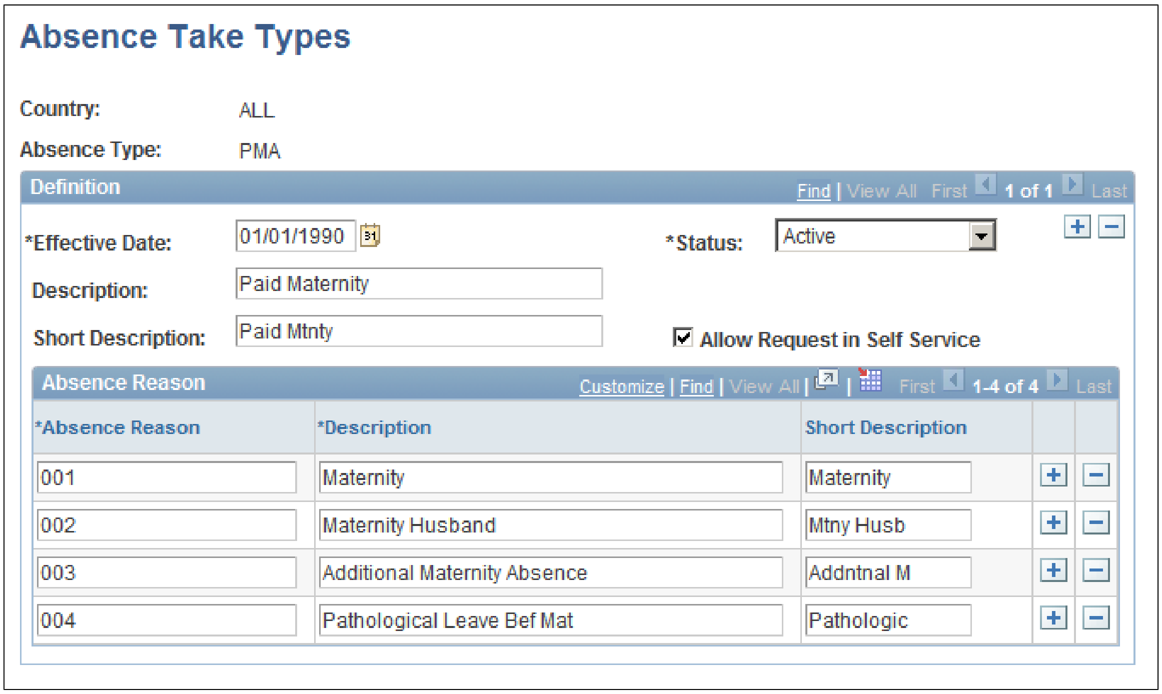
You can define reasons in each absence type.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Take Types, Absence Types

Image: Absence Types page

This example illustrates the fields and controls on the Absence Types page.



Allow Request in Self Service	Selecting this check box enables you to configure all associated take elements for self service absence functionality.
Absence Reason	Enter up to three alphanumeric characters for the Absence Reason code.

Defining Absence Entitlement Elements

Use the Absence Entitlements component (GP_ABS_ENTL) to create an absence entitlement element for each type of entitlement that your organization offers. For example, if you have separate accrual policies for sick time, vacations, maternity leave, and so on, create a separate entitlement element for each.

This topic provides an overview of auto generated accumulators and discusses how to:

- Name entitlement elements and enable forecasting.
- Define an entitlement amount and accrual method.
- Define rounding and proration rules.

- Define accumulator rules for entitlement.
- Define the start date and length of the accumulator period.
- View auto-generated accumulators.
- Define supporting element overrides for entitlement elements.

Pages Used to Define Entitlement Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Absence Entitlement Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Absence Entitlement Name	Name the element and define basic parameters.
Forecasting for Element <name>	GP_FORECAST_SEC	Click the Forecasting link on the Absence Entitlement Name page.	Enable forecasting. for an entitlement element.
Absence Entitlements - Calculation	GP_ABS_ENTL	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Calculation	Define the method of accruing entitlement, the entitlement amount, generation control, and enter instructions for adjusting the entitlement balance under certain conditions.
Absence Entitlements - Rounding/Proration	GP_ABS_RND_PRORTN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Rounding/ Proration	Define rounding and proration rules for an entitlement element.
Absence Entitlements - Auto Generated Accumulators	GP_AUTOGEN_ACUM	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Auto Generated Accumulators	Define user keys for tracking entitlement balances and specify when the accumulation of entitlement occurs.
Absence Entitlements - Accumulator Periods for Element <name>	GP_AUTOGEN_SEC	Click the Accumulator Periods link on the Absence Entitlements - Auto Generated Accumulators page.	Define the start date and length of the entitlement accumulation period (for example, month-to-date or year-to-date) and select auto-generated accumulators to track entitlement, adjustments, and paid units.

Page Name	Definition Name	Navigation	Usage
Absence Entitlements - Generated Elements for Element <name>	GP_ABS_ACM_SEC	Click the View Generated Elements link on the Absence Entitlements - Auto Generated Accumulators page.	View the list of auto-generated accumulators for the entitlement element after saving the element's definition.
Absence Entitlements - Supporting Element Overrides	GP_ELM_DFN_SOVR	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Supporting Element Overrides	Override the value of a supporting element that is used in the definition of the entitlement element.

Understanding Auto Generated Accumulators

When you define and save a new entitlement element, the system generates an accumulator to track the entitlement balance.

After you save the element, you can go to the accumulator definition and enter additional instructions for the balance accumulator:

- For frequency-based entitlements, you can specify an Initialize Rule if you want the system to carry forward all or part of the balance at the end of the accumulation period. If you do not select an Initialize Rule, the system sets the remaining balance to 0 at the beginning of the new accumulation period.
- For absence-based and frequency-based entitlements, you can configure the way the entitlement balance is updated by adding or removing elements that contribute to or deduct from the balance. The system uses the following formula to calculate the entitlement balance:

  Entitlement balance = Entitlement − Units Paid + Units Adjusted

  Units Paid and Units Adjusted are assigned elements that the system creates when it generates the accumulator for the entitlement balance.

Example

If you create an entitlement element called VACATION, the system automatically creates a balance accumulator for the entitlement. This table lists the elements defined on the Members page for the accumulator (suffix names may differ by country) and explains when the elements are resolved:

Element Name	Element Type	Accumulator Sign	When Resolved
VACATION (entitlement)	Absence Entitlement	Add	When entitlement is resolved.
VACATION_TAKE (units paid)	Auto-assign	Subtract	During the Take process the paid units are assigned to this element each day.
VACATION_ADJU (units adjusted)	Auto-assign	Add (positive or negative number)	When entitlement adjustment is resolved.

Absence Entitlement Name Page

Use the Absence Entitlement Name page (GP_PIN) to name the element and define basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Absence Entitlement Name

You must name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same Element Name page (GP_PIN).

Enabling Forecasting

If the entitlement element that you're defining will be linked to a take element for which absence forecasting is allowed, click the Forecasting link at the bottom of the Absence Entitlement Name page to access the Forecasting page. Select the Forecasting Used check box.

To avoid degrading system performance, select the feature only for those takes and entitlements that you're interested in forecasting.

Related Links

Defining Element Names
Absence Entry, Approval, and Self Service Features

Absence Entitlements - Calculation Page

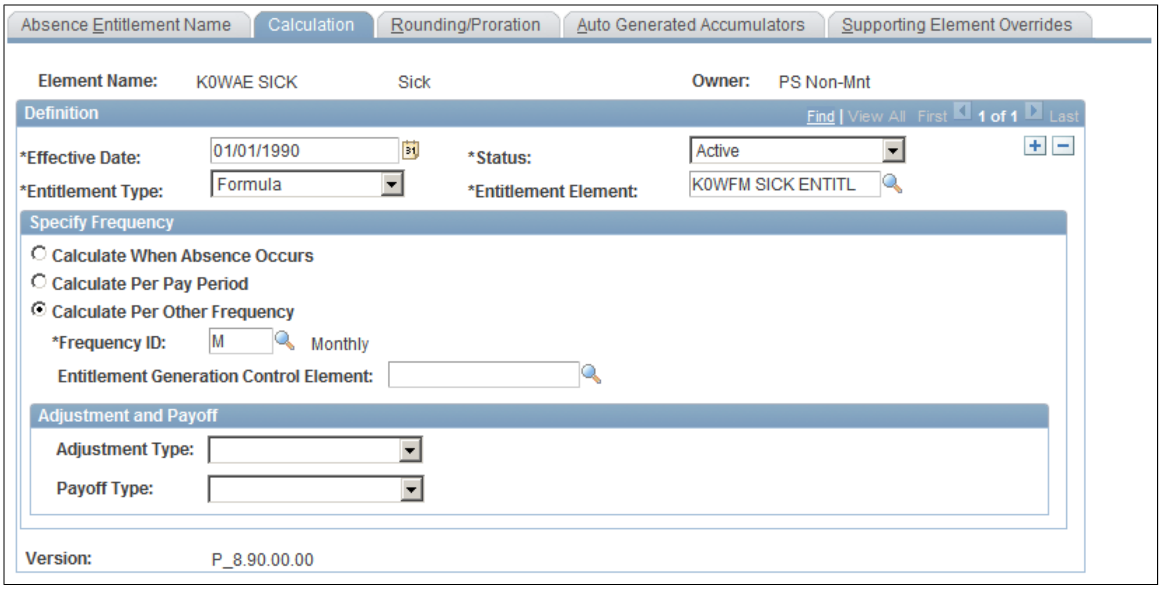
Use the Absence Entitlements - Calculation page (GP_ABS_ENTL) to define the method of accruing entitlement, the entitlement amount, generation control, and enter instructions for adjusting the entitlement balance under certain conditions.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Calculation

Image: Absence Entitlements - Calculation page

This example illustrates the fields and controls on the Absence Entitlements - Calculation page.



Entitlement Type

Select the type of element to use to resolve the entitlement amount. Values are *Accumulator, Bracket, Formula, Numeric, Payee Level, System Element, Variable.*

If you select *Payee Level,* the entitlement element is resolved only if the element is assigned to the payee on the Entitlement/Take Assignment page.

Entitlement Element

If you selected a value other than *Numeric* in the Entitlement Type field, select the name of the element that calculates entitlement.

Entitlement Unit

If you selected *Numeric* in the Entitlement Type field, type the number of units in this field.

Specify Frequency

The fields that appear in this group box vary according to the frequency option that you select.

Calculate When Absence Occurs

Select to grant entitlement only when an absence occurs; for example, you want payees to accrue 42 days of entitlement for each illness. Clear to grant entitlement at a regular frequency such as monthly or annually.

Calculate Per Pay Period

Select if the entitlement is frequency-based, and you want entitlement to accrue each pay period.

Calculate Per Other Frequency and Frequency ID

Select if the entitlement is frequency-based and is to accrue at the frequency that you specify in the Frequency ID field. Frequencies include, but are not limited to *Annual, Daily, Weekly, Monthly, Quarterly,* and *Semimonthly.*

Note: Frequency values are defined in PeopleSoft HR.

The system uses the frequency to determine the entitlement amount to accrue each pay period. For example, if payees accrue one day of entitlement at a *Monthly* frequency, the system annualizes (calculates the annual entitlement) by multiplying 1 (day) by 12 (months). It uses the calendar period for the absence run to deannualize the amount. So, if payees' absences are run weekly, the system calculates the amount to accrue during each absence run by dividing 12 by 52. Therefore, payees accrue 12/52, or .23 days of sick time each pay period.

To deannualize entitlement using a frequency other than the pay period, select a generation control frequency in the Entitlement Generation Control Element field.

Per Absence Formula Element

This field appears only if you selected Calculate When Absence Occurs. Select a formula element. When you run the Take process, the system resolves the day formula (defined for the take element on the Absence Take - Day Formula page) and evaluates the day to determine whether the entitlement balance is needed. If it is, the system resolves the per absence formula element.

If the condition is met (the formula returns a non zero value), the Take process resolves the entitlement. If the condition is not met, the existing entitlement balance is used.

When a take element linked to this entitlement has a minimum pay period, eligibility period, or wait period, the per absence formula is executed only after these periods have been met.

Entitlement Generation Control Element

Select a generation control element to limit the conditions under which the entitlement element is resolved. This field appears when you select Calculate Per Pay Period or Calculate Per Other Frequency.

For example, use generation control to restrict resolution of the element to active payees. If you are defining a frequency-based entitlement and you selected Calculate Per Other Frequency, you can select a generation control frequency element. The system uses the frequency that is defined by the generation control element, rather than the frequency of the pay calendar, to deannualize the entitlement amount and to determine when to resolve the entitlement.

Adjustment and Payoff

For frequency-based entitlements, you can instruct the system to reduce or pay off all or a portion of a payee's entitlement balance when a certain event occurs. Use generation control to define when you want the adjustment to occur.

Adjustment Type	Select the type of supporting element that returns the number of units that you want added to or deducted from the entitlement balance. The system *adds* the returned amount to the entitlement balance; to reduce the balance, be sure that the element returns a negative number. Select from these element types: *Accumulatr, Bracket, Formula, SystemElem,* or *Variable.*
Adjustment Element	Select the name of the supporting element that is to return the adjustment units. For example, let's say that payees can carry up to three months of unused vacation into the new year, at which time any unused entitlement is lost. On March 31, a payee has three unused vacation days carried over from the previous period. The element that you select in this field returns a value of -3.
Adjustment Generation Control Element	This field is required if you completed the Adjustment Type field. Select the generation control element that identifies when the adjustment is to occur.
Payoff Type	Use to compensate payees for all or some of the units that they will lose. Select the supporting element that returns the number of units that are to be paid off. Values are *Accumulatr, Bracket, Formula, SystemElem,* and *Variable.*
Payoff Element	Select the name of the supporting element that is to return the units to be paid off.
Payoff Earning	If you completed the Payoff Element field, select the earning element with which the payoff units are associated. When you run the Take process, the system generates positive input for the target calendar that is specified on the current calendar.

Entitlement Carryover

When the system creates a new accumulator at the start of a new accumulation period, it assigns the value of the old accumulator to the system element named PREV VALUE ACCM. If you want entitlement balances to carry forward to the new accumulation period, you can create an initialization formula (on the Accumulator - Period page) that retrieves the old value from PREV VALUE ACCM and assigns its value to the formula. Add the formula element to the element member list for the accumulator (by selecting *Add* for the Accumulator Sign) via the Members page. When you do this, the value of PREV VALUE ACCM will be assigned to the formula, which will then be added to the balance accumulator. You can add the entire previous balance to the new accumulator, or whatever portion you want.

Related Links

Defining Generation Control Frequency
Defining Generation Control Elements

Definition Page

Absence Entitlements - Rounding/Proration Page

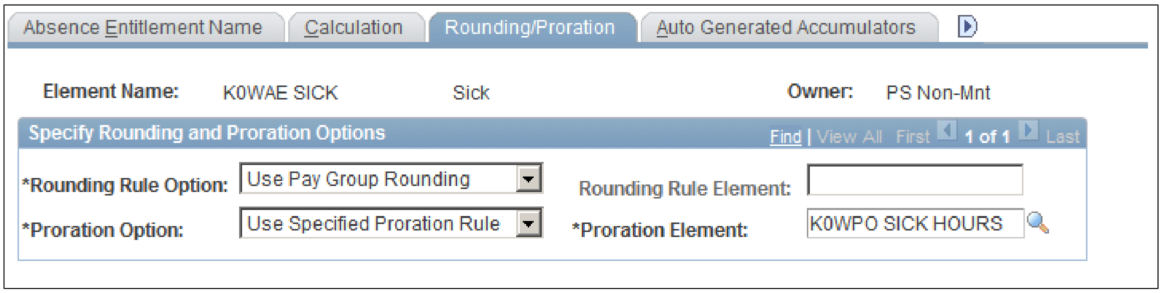
Use the Absence Entitlements - Rounding/Proration page (GP_ABS_RND_PRORTN) to define rounding and proration rules for an entitlement element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Rounding/Proration

Image: Absence Entitlements − Rounding/Proration page

This example illustrates the fields and controls on the Absence Entitlements − Rounding/Proration page.



You can have the system round entitlement units or prorate those units when there is period segmentation. Proration applies to frequency-based entitlement only. If you select both a rounding rule and a proration rule, the system prorates and then rounds the entitlement units. Adjustment and payoff units are never rounded or prorated.

Rounding Rule Option and Rounding Rule Element

To have the system round the entitlement units, specify where you defined the rounding rule by selecting one of the following values in the Rounding Option field.

Use Pay Group Rounding: The system applies the rounding rule that is defined for the payee's pay group.

Use Specified Rounding: The system applies the rounding rule that you select in the Rounding Rule Element field.

Proration Option and Proration Element

These fields applies to frequency-based entitlements only. To prorate entitlement units when the pay period is segmented, specify where the proration rule is defined by selecting a value in the first field:

Use Pay Group Proration Rule: The system applies the proration rule that is defined for the payee's pay group.

Use Specified Proration Rule: The system applies the proration rule that you select in the Proration Rule field.

Note: You can use the PRORATE system element to invoke proration for an entitlement element, even when there's no segmentation. You set the value of PRORATE to Y or N (yes or no) to activate and deactivate proration. For example, you might create a formula that sets PRORATE to Y, prior to processing the entitlement element. After the entitlement element, you reset the system element PRORATE to *N*.

Related Links

Defining Rounding Rule Elements

Defining Proration Rules

Absence Entitlements - Auto Generated Accumulators Page

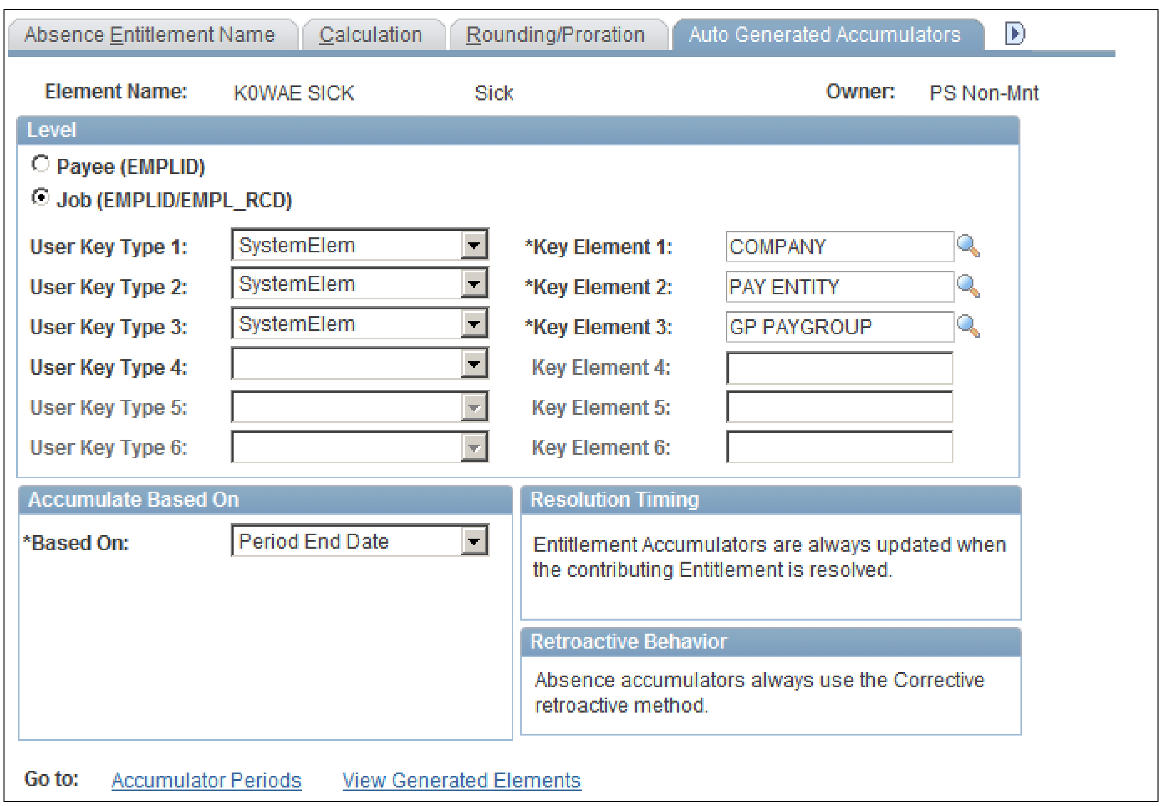
Use the Absence Entitlements - Auto Generated Accumulators page (GP_AUTOGEN_ACUM) to define user keys for tracking entitlement balances and specify when the accumulation of entitlement occurs.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Auto Generated Accumulators

Image: Absence Entitlements - Auto Generated Accumulators page

This example illustrates the fields and controls on the Absence Entitlements - Auto Generated Accumulators page.



The fields on this page are the same as the fields on the Accumulators - Level page and Accumulators - Definition page in the Accumulators component. Only the settings that are specific to absence entitlement elements are described below.

Level

User Key Type 1...6 and Key Element 1...6	To have linked take elements share a per-absence entitlement balance when a user enters absence events with the same original begin date, you can select user keys to set up these instructions. Select *SystemElem* for one of the user keys, and select *ORIG BEGIN DATE* (original begin date) in the corresponding Key Element field. On the Accumulator Periods for Element <name> page, select *Custom Period* in the Period field. In the Date field, select *System Element - Date* and select *ORIG BEGIN DATE* in the Begin Date Element field. Now, when you enter two absence events for the same take element and both events have the same original begin date, the second event uses the entitlement balance of the first event.

Resolution Timing

Accumulator timing identifies when the entitlement balance accumulator is resolved. As the online message indicates, as each element contributing to the accumulator is resolved, the accumulator itself is also updated. The accumulator does not need to appear on the absence process list to be updated.

Retroactive Behavior

Retroactive behavior identifies how the accumulator is updated during retroactive processing. Absence accumulators always use the corrective retroactive method. The accumulator is updated with the newly calculated values of the member elements at the end of a retro recalculation.

Related Links

Level Page

Absence Entitlements - Accumulator Periods for Element <Name> Page

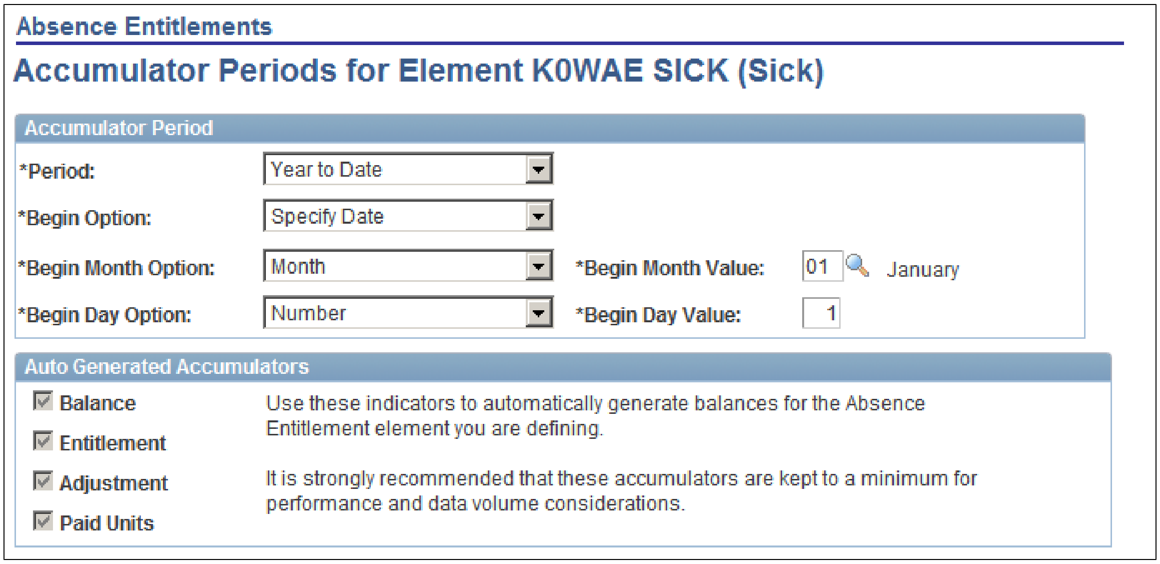
Use the Absence Entitlements - Accumulator Periods for Element <name> page (GP_AUTOGEN_SEC) to define the start date and length of the entitlement accumulation period (for example, month-to-date or year-to-date) and select auto-generated accumulators to track entitlement, adjustments, and paid units.

Navigation

Click the Accumulator Periods link on the Absence Entitlements - Auto Generated Accumulators page.

Image: Absence Entitlements - Accumulator Periods for Element <name> page

This example illustrates the fields and controls on the Absence Entitlements - Accumulator Periods for Element <name> page.



Accumulator Periods

Period	Select the period of time you want the accumulators to track. Depending on the option that you select, other fields may appear. Options are: *Calendar Period* *Custom Period:* If you select this option, complete the Date fields. *Month to Date:* If you select this option, complete the Begin Option and Begin Day fields. *Quarter to Date:* If you select this option, complete the Begin Option, Begin Month, and Begin Day fields. *Segment* *Year to Date:* If you select this option, complete the Begin Option, Begin Month, and Begin Day fields.
Date and Begin Date Value	If you selected *Custom* in the Period field, select the type of supporting element that defines the start date of the accumulation period. Options are: *Bracket - Date, Calendar Date, Date, Formula - Date, System Element - Date,* and *Variable - Date.*

(*Calendar Date* enables you to choose a specific date; *Date* enables you to use a *Date* element.)

In the Begin Date Value field, select the name of the element that defines the date. Or, if you selected *Cal Date* in the first field, select a date in this field.

Begin Option

If you selected *Quarter to Date* or *Year to Date* in the Period field, select the type of supporting element that defines the start date of the accumulation period. Options are:

Specify Date: The accumulation period will begin on the date you specify by completing the Begin Month and Begin Day fields.

Use Pay Entity Calendar: The accumulation period begins on the same day as the calendar that is defined for the pay entity.

Use Pay Entity Fiscal: The accumulation period begins on the same day as the fiscal calendar that is defined for the pay entity.

You define the pay entity calendar and fiscal calendar on the Pay Entity - Processing Details page.

Begin Month Option

This field appears only if you select *Quarter To Date* or *Year To Date.* Select the month in which you want the accumulation period to begin.

Begin Day Option

This field appears only if you select *Month To Date, Quarter To Date,* or *Year To Date.* Select the day of the month on which you want the accumulation period to begin.

Warning! If you change the Begin Month or Begin Day field after you run the Entitlement or Take process, accumulator results may be inaccurate.

Auto Generated Accumulators

When the system generates the accumulators, it automatically adds a suffix to each accumulator's name to identify what the accumulator represents: the balance, entitlement, adjustment, or paid units. For example, an entitlement element named Vacation might have accumulators named VACATION_BAL, VACATION_TAKE, and so forth.

Balance

Selected by default to remind you that the system always creates a balance accumulator to track the unused entitlement units that a payee has accrued. When it creates the balance accumulator, the system also generates two system-assigned elements that contribute to the entitlement balance accumulator: Units Adjusted and Units Paid.

Entitlement

Select to create a separate accumulator that tracks the total number of entitlement units that the payee has accrued during the accumulation period, including those that have been used.

Adjustment

Select to create a separate accumulator for the automatically assigned Units Adjusted element. The accumulator tracks the adjustments that have been made, including manual and automatic adjustments.

Paid Units

Select to create a separate accumulator for the automatically assigned Units Paid element. The accumulator tracks the total number of entitlement units the payee has used during the accumulation period.

Absence Entitlements - Generated Elements for Element <Name> Page

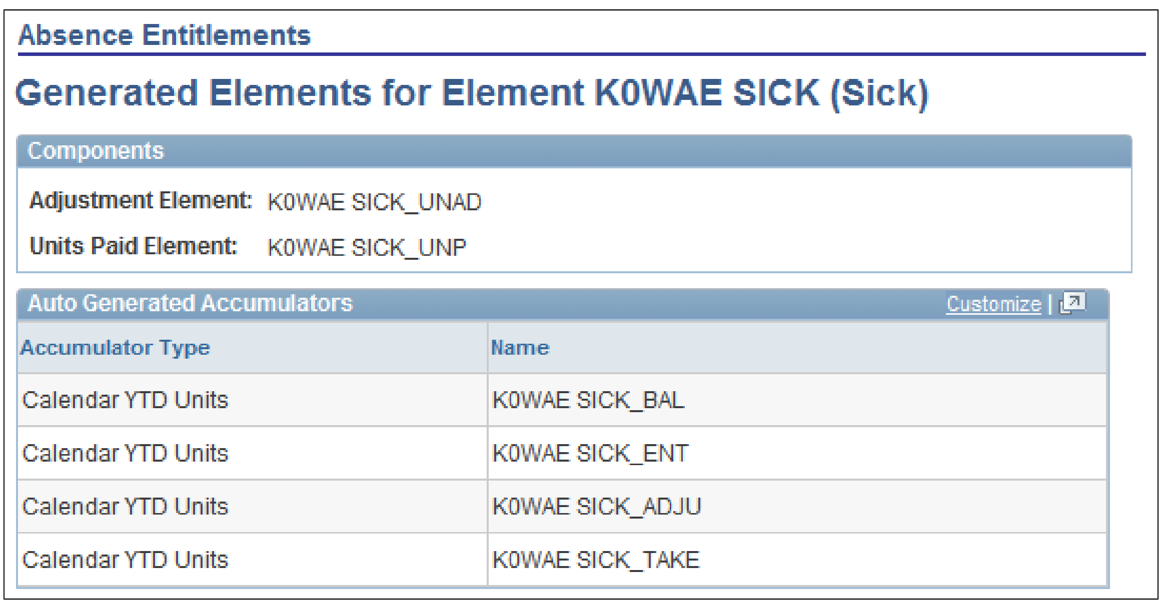
Use the Absence Entitlements - Generated Elements for Element <name> page (GP_ABS_ACM_SEC) to view the list of auto-generated accumulators for the entitlement element after saving the element's definition.

Navigation

Click the View Generated Elements link on the Absence Entitlements - Auto Generated Accumulators page.

Image: Absence Entitlements - Generated Elements for Element <name> page

This example illustrates the fields and controls on the Absence Entitlements - Generated Elements for Element <name> page.



You can see the list of automatically generated accumulators after you save the entitlement element's definition.

Absence Entitlements - Supporting Element Overrides Page

Use the Absence Entitlements - Supporting Element Overrides page (GP_ELM_DFN_SOVR) to override the value of a supporting element that is used in the definition of the entitlement element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Entitlements, Supporting Element Overrides

Defining Absence Take Elements

Use the Absence Take (GP_ABS_TAKE) component to create an absence take element for each type of absence that your organization recognizes. For example, if you have separate rules for compensating sick time, vacation time, leaves of absence, and so on, create a separate take element for each.

This topic provides an overview of absence take elements and discusses how to:

- Name take elements and enable configuration for forecasting.
- Define general calculation rules for take elements.
- Select the day formula, link earnings and deductions, and other take elements.
- Define absence take periods and linked absences.
- Define take rules for negative balances.
- Define absence take priorities.
- Define rules for absence forecasting.
- Define rules for balance inquiry.
- Define user defined result fields.
- Define supporting element overrides for take elements.

Pages Used to Define Absence Take Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Absence Take Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Absence Take Name	Name the element and define basic parameters.
Forecasting for Element <name>	GP_FORECAST_SEC	Click the Forecasting link on the Absence Take Name page.	Enable forecasting rules to be entered on the Absence Take - Forecasting page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Absence Take - Calculation	GP_ABS_TAKE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Calculation	Define general calculation rules for take elements, select the absence type, link entitlement elements, and specify whether absence events require online approval. Also contains user-defined fields.
Absence Take - Day Formula	GP_ABS_TAKE2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Day Formula	Specify the day formula for calculating the day count; linked earning and deduction elements; conditions for reducing the beginning entitlement balance; and mapped take elements.
Absence Take - Period	GP_ABS_TAKE3	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Period	Define eligibility, minimum absence, or wait per absence requirements. Link related absences.
Absence Take - Negative Balances	GP_ABS_TAKE4	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Negative Balances	Define negative balance rules (what happens when the entitlement balance is not sufficient to cover an absence).
Absence Take - Priority	GP_ABS_TAKE5	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Priority	Specify if users can enter more than one absence for a payee for the same day and to assign a priority to absence takes if only one type of absence is allowed each day.
Absence Take - Forecasting	GP_ABS_TAKE6	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Forecasting	Specify the formula to use for absence forecasting and the list of elements that are displayed by the Absence Forecasting process.
Absence Take - Balance Inquiry	GP_ABS_TAKE7	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Balance Inquiry	List the elements that are displayed by the Balance Inquiry process.
Absence Take - User Defined Result Fields	GP_ABS_TAKE8	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, User Defined Result Fields	Select the user-defined fields that can be overwritten by a system element during processing.

Page Name	*Definition Name*	*Navigation*	*Usage*
Absence Take - Supporting Element Override	GP_ELM_DFN_SOVR	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Supporting Element Override	Override the value of a bracket, date, duration, formula, or variable element that is used in the definition of the take element.

Understanding Absence Take Elements

This topic discusses:

- Mapping.
- Eligibility, minimum absence, and wait period criteria.
- Linked absence takes.
- System elements for overwriting daily data from user-defined fields.

Mapping

You can instruct the system to generate a matching absence for another take element (such as TAKE2) when a user enters an absence for this take (for example, TAKE1). When you run the Take process, the system creates additional days in the daily absence results for TAKE2, using the same data that you entered for TAKE1, but applying the take rules that you defined for TAKE2. This feature enables you to evaluate a single absence event using more than one set of entitlement and take rules.

For example, your organization offers a supplemental sick plan in addition to the statutory sick plan. For payees to receive benefits from both plans when you enter sick time, you map the take element for your statutory plan (let's call it SICK) to the take element for the supplemental plan (let's call it SUPP SICK). Now, when a user enters an absence event for SICK, the system creates additional absence days for SUPP SICK. When the Take processing is complete, you can see these additional days in the daily absence results (GP_RSLT_ABS), but not in the absence event record (GP_ABS_EVENT). Define a linked absence take on the Absence Take - Day Formula page.

Eligibility, Minimum Absence, and Wait Period Criteria

When you define an absence take element, you can select up to three time periods that must be met before an absence can qualify for payment:

- Minimum absence

  Define the number of calendar days that an absence must last before it can be paid. If the minimum is not satisfied, the entire absence is unpaid.

- Eligibility period

  Specify the date that must be reached before an absence can be paid.

- Wait per absence

  Define a minimum waiting period per absence. An absence qualifies for payment only after the wait period has been satisfied. Only the days that exceed the wait period qualify. If you link related absences, you can specify that one wait period applies to all linked events or that a separate wait period applies to each event.

When you run the Take process, the system resolves the day formula, evaluates the day, and checks to see whether the period requirements have been met, in the order listed above. If the minimum pay period is not met, no further processing is done for that day, and the day count that is returned by the day formula is considered unpaid. If the minimum period is met, the system checks to see whether the eligibility period is met, and then the wait period. Define the criteria for eligibility, minimum absence, and wait periods on the Absence Take — Period page.

See Absence Take - Period Page.

Linked Absences Takes

You can instruct the system to link related absences that fall in a defined period of time. When occurrences of the same absence are linked, they can share the same per-absence entitlement or the same wait period. Define the criteria for linked absences on the Absence Take - Period page.

When you run the Take process, the system determines whether the new absence falls within the valid linking period. If it does, the system sets the system element named LINK YES-NO, which is associated with the new event, to YES. The per absence formula element (selected on the Absence Entitlements - Calculation page) refers to the value of the LINK YES-NO element to determine whether to resolve entitlement or to use the existing entitlement balance.

The system always compares the start date of the current event to the last matching absence event to determine whether the event falls within the linking period. You define what qualifies as the last matching event. If you specify that the Original Begin Date field on the Absence Event Entry page is used to identify linked absence, absence entries with the same absence type and original begin date are treated as one absence period.

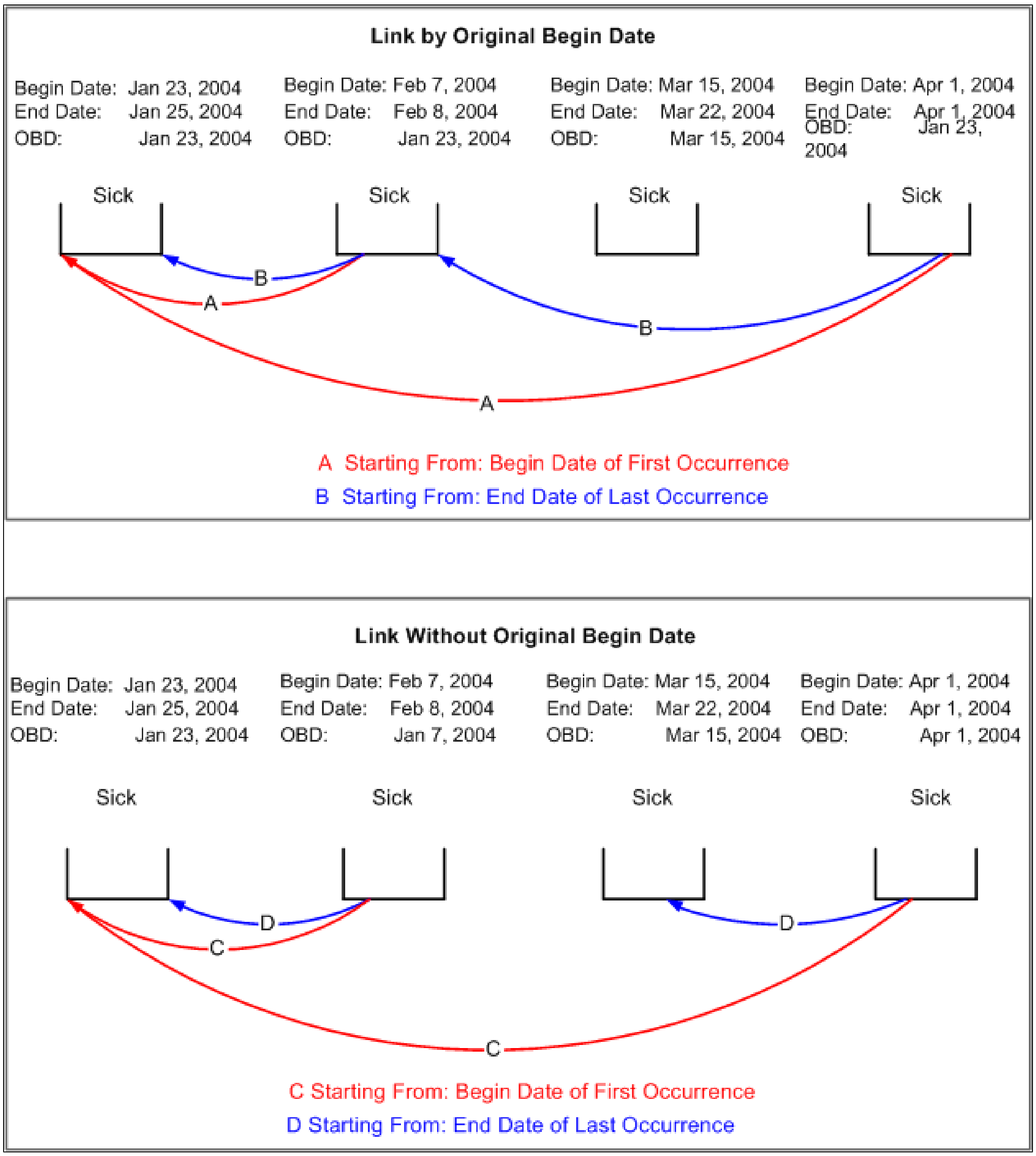
For example, if a payee is out from January 23 to January 25 because of a broken leg and is out again from February 7 to February 8 for the same reason, this table shows how the absence is entered for the person on the Absence Event Entry page:

Absence Type	***Reason (not entered online)***	***Begin Date***	***End Date***	***Original Begin Date***
Sick	Broken leg	January 23	January 25	January 23

Absence Type	Reason (not entered online)	Begin Date	End Date	Original Begin Date
Sick	Broken leg complications	February 7	February 8	January 23

Image: Linking absences with and without original begin date

This diagram gives examples of how linking works.



System Elements for Overwriting Daily Data from User Defined Fields

You can use up to 16 system elements to overwrite absence data that's entered into the user-defined fields (labeled Date 1, Date 2, Decimal 1, Decimal 2, and so on) on the Absence Event Input Detail page. When you run the Take process, the system writes the values that are assigned to the system elements to the daily data in the Absence Results (GP_RSLT_ABS) table in place of the user-entered values. You can use system elements to overwrite data for every day of an absence event or for selected days.

The following table lists the system elements, the corresponding fields that they overwrite in the Absence Results table, and the labels for the user-defined fields on the Absence Event Input Detail page:

System Element	***Field Overwritten in Absence Results Table***	***Field Labels on Absence Event Input Detail Page***
EVT CONFIGx DT UPD	EVT CONFIGx DT	Date 1, 2, 3, 4
EVT CONFIGx DC UPD	EVT CONFIGx DC	Decimal 1, 2, 3, 4
EVT CONFIGx CH UPD	EVT CONFIGx CH	Character 1, 2, 3, 4
EVT CONFIGx MN UPD	EVT CONFIGx MN	Monetary 1, 2, 3, 4

where x = 1, 2, 3, or 4

For example, say that a user enters a value of 100 USD in the Monetary 1 field (EVT CONFIG1 DC) on the Absence Event Input Detail page. Using the EVT CONFIG1 DC UPD system element, you can have the system write 150 USD to the result table for the first day of the absence event, and use the value entered by the user for the remaining days of the event

To use the system elements:

- Specify which user-defined fields can be overwritten.

  Select these fields on the Absence Take - User Defined Result Fields page.

- Use a formula or rule to define the conditions for assigning a value to the system elements.

Related Links

Absence Take - Period Page
Absence Take - User Defined Result Fields Page

Absence Take Name Page

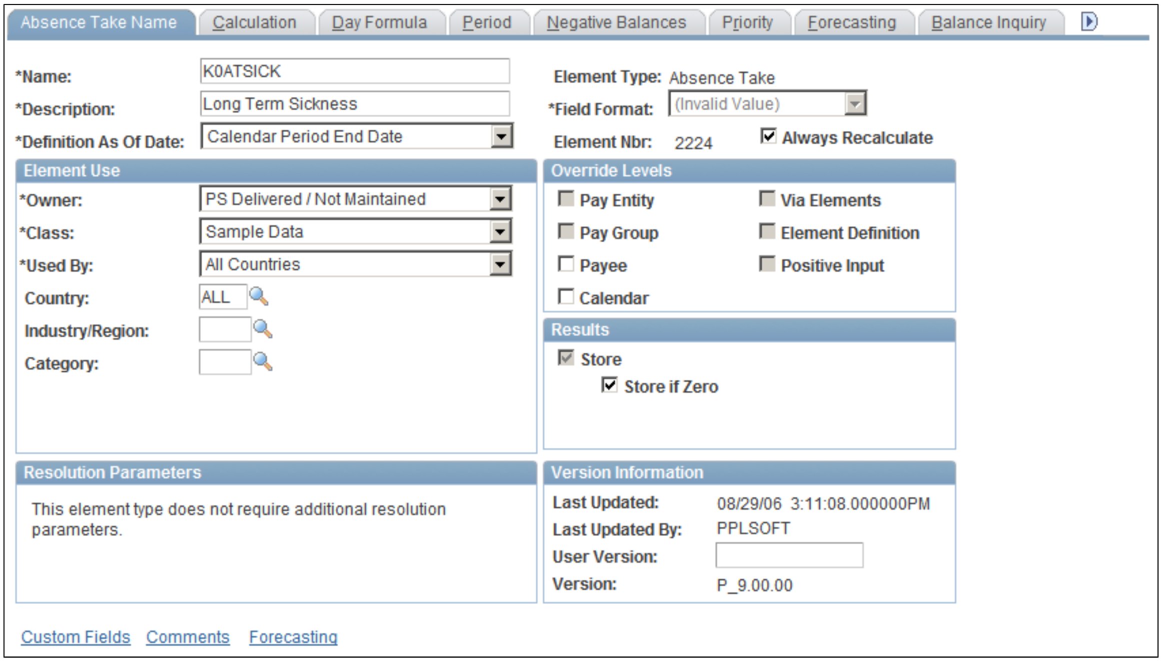
Use the Absence Take Name page (GP_PIN) to name the element and define basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Absence Take Name

Image: Absence Take Name page

This example illustrates the fields and controls on the Absence Take Name page.



You must name every element and define its basic parameters on an Element Name page. All element components in Absence Management share the same first Element Name page (GP_PIN).

Enabling Configuration of Forecasting

Before you can define forecasting rules for a take element on the Absence Take - Forecasting page, you need to enable the take element for forecasting. To do this, click the Forecasting link at the bottom of the Absence Take Name page to access the Forecasting page. Select the Forecasting Used check box. Select the Forecasting Required check box if users are required to run the forecasting process before entering an absence through the Absence Event Entry page.

To avoid degrading system performance, enable the forecasting feature only for those takes that you're interested in forecasting.

Related Links

Defining Element Names

Absence Entry, Approval, and Self Service Features

Absence Take - Calculation Page

Use the Absence Take - Calculation page (GP_ABS_TAKE) to define general calculation rules for take elements, select the absence type, link entitlement elements, and specify whether absence events require online approval.

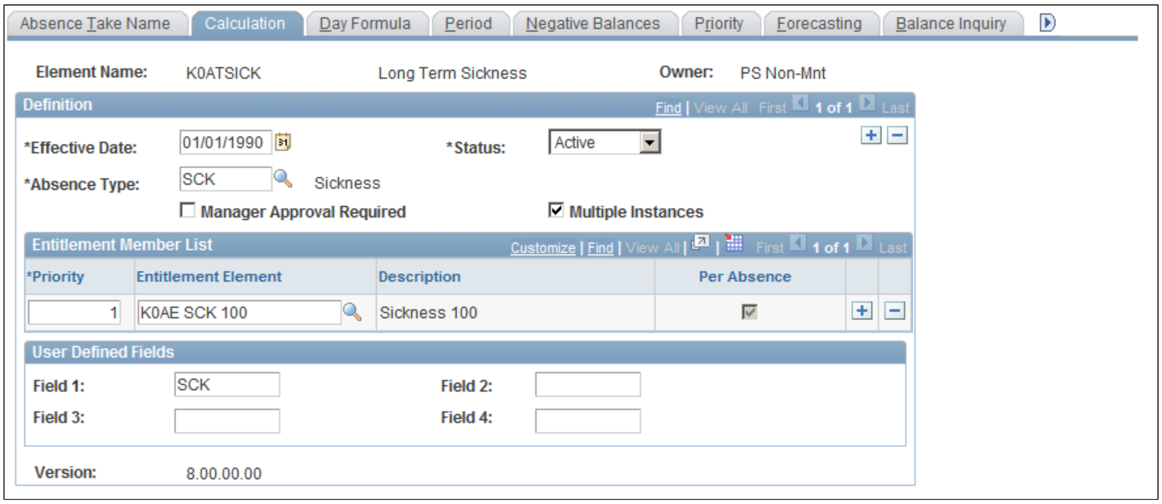
Also contains user-defined fields.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Calculation

Image: Absence Take - Calculation page

This example illustrates the fields and controls on the Absence Take - Calculation page.



Absence Type

Select the absence type. You define absence types on the Absence Types page.

Manager Approval Required

Select if a manager must approve every absence that is associated with this take. When a user enters an absence, someone must select the Manager Approved check box on the Absence Event Input Detail page, or the event will not be processed when you run the Take process. The system does not verify that the user who selects the check box is a manager.

Note: This field does not apply to absence requests entered through the self service pages. Fields on the self service setup pages control the approval requirements for these requests.

Multiple Instances

Select to have the system create a separate bundle for the instances of positive input that are generated for the earning or deduction elements (associated with this take element).

For example, say that a payee is sick on two separate occasions during the January processing period:

- Event 1: January 1-2.
- Event 2: January 20-22 .

If Multiple Instances is selected, the system creates one row of positive input for Event 1 and one row of positive input for Event 2, enabling you to report the two events separately.

Both Absence Begin Date and Absence Period Begin Date are populated when you select this check box, so select it if these dates are significant to your earning and deduction processing rules.

If this check box is cleared, the system bundles the positive input that is generated for all absence events that occur for this take during the same period. A single row of positive input will represent the consolidated absence events.

Entitlement Member List

Use these fields to link the take element to one or more entitlement elements. When you run the Take process, the system reduces entitlement balances in the order that you specify. For example, if you link vacation take to entitlement for floating holidays and then to vacation entitlement, the system uses the floating holiday entitlement until it's depleted and then reduces vacation entitlement.

All entitlement elements that you add to the Entitlement Member List must be of the same type: per-absence entitlement or frequency-based entitlement. The first element that you add to the list limits the choice of entitlement elements that you can add in subsequent rows.

Priority

Enter up to three digits to identify the relative order in which the absence take should be applied to the entitlement element.

Entitlement Element

Select the entitlement element that you want to link to the take element.

If you've already added a row for an entitlement element, you can select only absence-based or frequency-based entitlement elements, depending on the Specify Frequency option selected on the Calculation page.

Per Absence

If the entitlement is absence-based (the Calculate When Absence Occurs option is selected on the Calculation page), the system selects this check box. The value that you select for the first row determines the type of entitlement elements that you can select in additional rows.

User Defined Fields

The system provides four user defined fields that you can use to add any information you want to the take definition. When you run the Take process, the data that you enter populates the TAKE CONFIG1 through TAKE CONFIG4 system elements.

Field 1: through Field 4:

Enter up to 10 alphanumeric characters in each field.

Absence Take - Day Formula Page

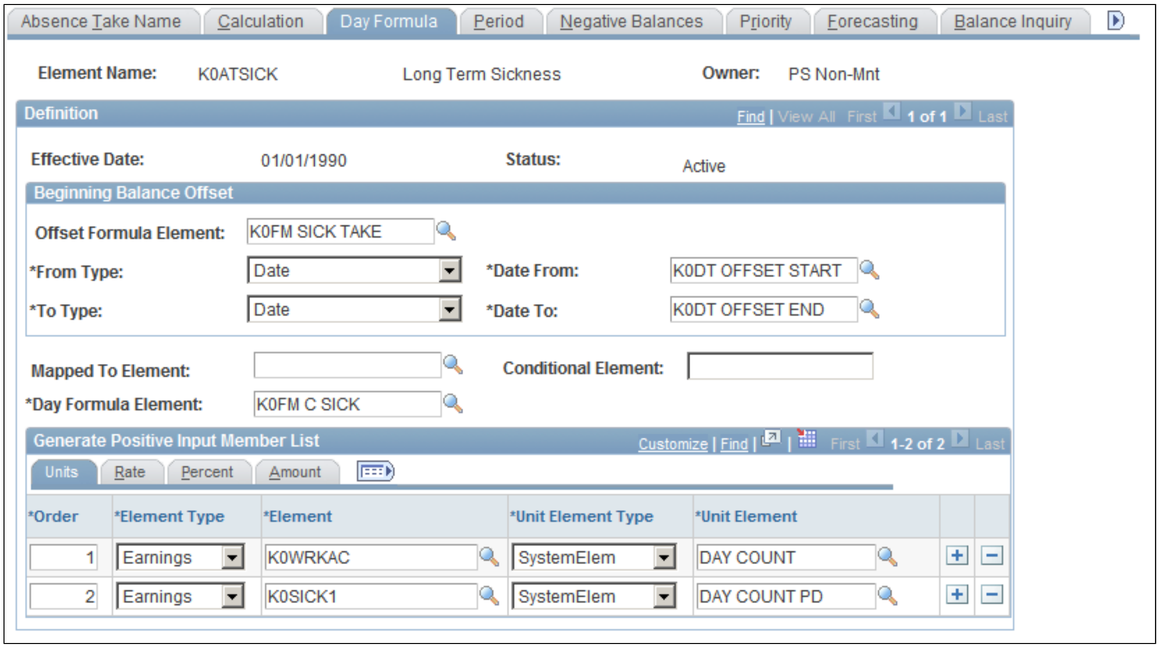
Use the Absence Take - Day Formula page (GP_ABS_TAKE2) to specify the day formula for calculating the day count; linked earning and deduction elements; conditions for reducing the beginning entitlement balance; and mapped take elements.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Day Formula

Image: Absence Take - Day Formula page

This example illustrates the fields and controls on the Absence Take - Day Formula page.



Beginning Balance Offset

If the take element is linked to a per-absence entitlement, select a formula that defines the conditions under which the beginning entitlement balance is reduced. The system executes the beginning balance offset formula only if the entitlement element is resolved (the conditional resolution formula is true).

You might use this feature to reduce entitlement when a payee has already received entitlement for related absences that occurred in the past. For example, you could use the beginning balance offset to reduce a sickness entitlement amount by the number of days that were used during the last 12 months.

Offset Formula Element

Select the formula that the system is to execute. The formula is executed each day of the period that you define in the Date From and Date To fields, but only if the entitlement element is resolved. It should return the number of units that you want the system to subtract from the beginning entitlement balance.

When the formula is executed, the system loops through the daily absence rows that are defined by the Date From and Date To fields and resolves the formula per row for every take element.

For example, your formula assigns a unit amount to each row (or day) that is associated with the variable SICK_PD_TAKEN. If the variable is a member of the entitlement balance accumulator and has an action of subtract, then each day that it resolves, it contributes to the accumulator and subtracts from the beginning entitlement balance.

It's important that the formula specify which take elements and events you want the system to consider. Your formula can look at any information in the daily absence rows.

From Type, To Type, Date From and Date To

Select the type of element that defines the begin *(From)* date or end *(To)* date of the period to which the formula is applied. Values are *Bracket-Date, Calendar Date, Date, Formula-Date, System Element-Date,* and *Variable-Date. (Calendar Date* enables you to select a date; *Date* enables you to use a *Date* element.)

In the Date From and Date To fields, select the name of the element that defines the date. Or, if you selected *Calendar Date,* select a date in this field.

Mapped To Element

For the system to generate take for another take element at the same time that it generates take for this element, select the name of the linked element.

When the Take process resolves the element, it inserts a row of duplicate absence daily data for the current day that is being processed, but alters the take element and the take user-defined fields.

Important! The order in which you add mapped take elements to the take process list is critical. The element that you select in this field is always processed after its source element. Otherwise, the linked take element is not resolved.

Conditional Element

If you completed the Mapped To Element field, select a conditional formula that is executed for each day of the absence event to determine whether to generate a duplicate entry for the linked element.

If the formula returns an amount other than zero, or if you leave this field blank, a duplicate row is created.

Day Formula Element

Select the formula element that the system uses to evaluate each day of the absence event. The goal of the formula is to return the units for the absent day to compare to the absence entitlement balance. The Take process uses the take rules, the beginning balance, and the absent units to calculate the paid and unpaid units to pass to payroll.

The day formula interprets each absent day in any way that your plan requires. For example, if a payee is scheduled to work 8 hours but works only three hours, the day count formula determines whether this constitutes absence for a full day, half a day, no days, or five-eighths of a day.

For example, your day formula might look like this:

```
IF SCHED_HRS > 0
THEN 1 ->> WRK_DAY
ELSE 0 ->> WRK_DAY
END IF
```

Assume that a payee is on vacation from February 1 to 5:

Wednesday, February 1, 8 hours

Thursday, February 2, 8 hours

Friday, February 3, 8 hours

Saturday, February 4, 0 hours

Sunday, February 5, 0 hours

The day formula evaluates each day. When the system processes February 1, it populates the system element, SCHED HRS, and the day formula, *WRK DAY,* resolves to 1. On January 4, the payee is not scheduled to work. The system populates SCHED HRS with 0, so *WRK DAY* resolves to 0.

Generate Positive Input Member List

Complete these fields to have the Take process generate positive input for one or more earning and deduction elements with a calculation rule of Rate × Units or Rate × Units × Percent. Specify the supporting element that returns a value for the Units component of the calculation rule. You can also select the supporting elements that will return the percent, rate, and amount values.

Common Page Information

Order

Enter up to three digits to specify the order in which the Take process should generate positive input for the earning or deduction elements when performing the day-by-day processing for this take. The lower the number, the sooner the element will be processed.

Order is important only if there are dependencies between the elements. For example, if data generated by Earning 1 is needed to resolve Earning 2, assign Earning 1 a lower order number.

Element Type

Select the type of element positive input that is to be generated when you run the Take process: *Deduction* or *Earning.*

Element

Select the name of the earning or deduction element for which the positive input should be generated.

Only earnings and deductions with a calculation rule of "Rate x Unit", or "Rate x Unit x Percent" are allowed.

Units

Unit Element Type

Select the type of supporting element that returns the value of the paid or unpaid units that are associated with the earning or deduction. The elements are: *Accumulator, Bracket, Formula, SystemElem,* or *Variable.*

For example, to return the number of paid units that are calculated by the day formula, you could select the system element DAY COUNT PD. Or, to return the number of unpaid units, you could select DAY COUNT UNPD.

To convert the units that are returned by the day formula—from days to hours, for example—use a formula element that uses the following system elements:

- DAY COUNT (result of the day formula).
- DAY COUNT PD (paid portion of the day formula).
- DAY COUNT UNPD (unpaid portion of the day formula).
- SCHED HRS (hours that the payee was scheduled to work).

Note: For absence take elements that do not have associated absence entitlement elements, the system does not generate the paid and unpaid elements. You must use DAY COUNT.

Unit Element

Select the name of the supporting element that returns the units that are associated with the earning or deduction element.

Rate

Select the Rate tab.

Rate Element Type

Select the type of supporting element that returns the value of the Rate component. Values are: *Bracket, Formula, SystemElem,* or *Variable.*

The take process applies the instructions that you enter day by day. If the value of the Rate component changes (during the absence period, for example) the change is applied on the correct day.

For example, if payees receive 100 percent of their payment for an illness and the rate changes due to seniority, you might use a system element to retrieve the correct rate for the generated positive input.

Rate Element

If you selected an element type, select the name of the supporting element that returns the value of the Rate component.

Percent

Select the Percent tab.

Percent Element Type

If the calculation rule for the earning or deduction element is defined as Rate x Unit x Percent, select a supporting element that returns the value of the Percent component. Values are *Bracket, Formula, SystemElem,* and *Variable.*

The Take process applies the instructions that you enter day by day. If the value of the percent components changes (during the absence period, for example), the change is applied on the correct day.

For example, if payees receive 100 percent of their pay for the first 30 days of an illness and 75 percent for each day thereafter, you might use a bracket element that returns the appropriate percent, based on the length of the absence.

Percent Element

If you selected an element type, select the name of the supporting element that returns the value of the Percent component.

Amount

Select the Amount tab.

Amount Element Type

Select an element that returns the value of the amount component for the earning or deduction element.

The amount overrides any values returned by other components of the element's calculation rule. Although you can still select elements to return the rate or percent, the values of these components are not used for calculations.

Values are *Accumulator, Bracket, Formula, SystemElem,* or *Variable.*

Amount Element

Select the name of the element that returns the value of the Amount component.

Related Links

Understanding Processing Elements

Absence Take - Period Page

Use the Absence Take - Period page (GP_ABS_TAKE3) to define eligibility, minimum absence, or wait per absence requirements.

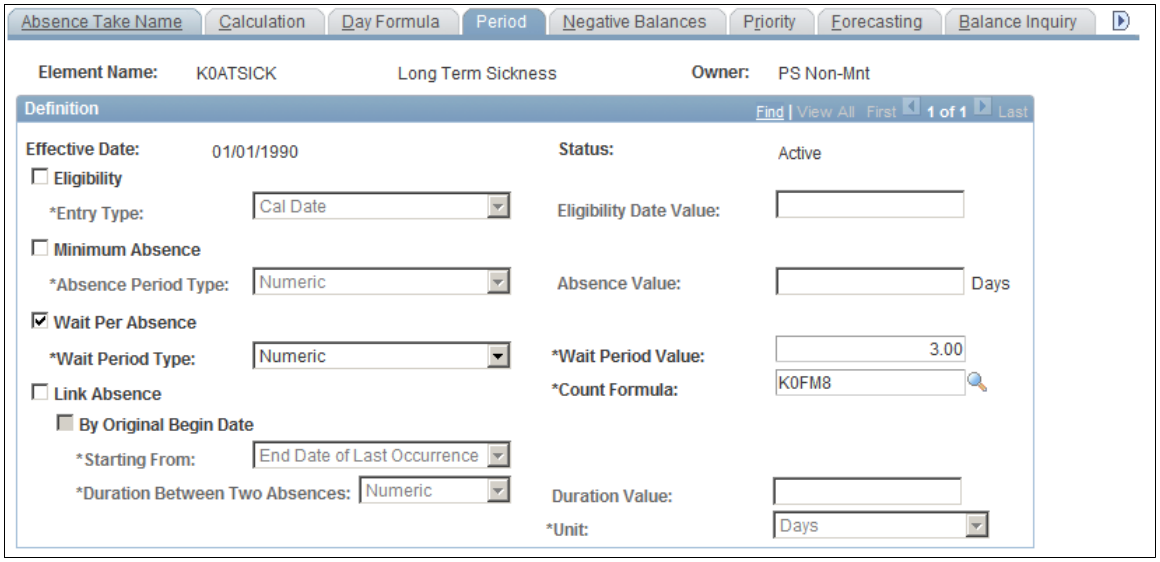
Link related absences.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Period

Image: Absence Take - Period page

This example illustrates the fields and controls on the Absence Take - Period page.



Eligibility

Complete the Eligibility, Entry Type, and Eligibility Date Value fields if payees are eligible to use entitlement only on or after a certain date.

Eligibility Select to define an eligibility period for this take.

Entry Type and Eligibility Date Value In the Entry Type field, select the type of supporting element that defines the eligibility date. The Take process treats days that are taken before the eligibility date as unpaid units. Absences that are taken on or after this date can be applied against the entitlement balance. For example, if the eligibility date is June 1, an absence on June 1 qualifies for payment.

Values are *Bracket, Cal Date, Date, Formula, System Element,* and *Variable. (Cal Date* enables you to select a specific date; *Date* enables you to select a date element.)

In the Eligibility Date Value field, select the name of the element that defines the date. Or, if you selected *Calendar Date* in the Entry Type field, select the appropriate date.

Minimum Absence

Complete the Minimum Absence, Absence Period Type, and Absence Value fields if payees must be absent a minimum number of calendar days before an absence event is paid. If the absence event is longer than the minimum period, the entire absence qualifies for payment. If the minimum period is not met, the entire absence is unpaid. (The system does not consider linked absences when determining whether the minimum period has been met. Linked absences are described below.)

The system refers to the end date of an absence to determine whether the minimum period has been met—even when the end date falls in a different calendar period.

Minimum Absence

Select to define a minimum absence rule for this take.

Absence Period Type and Absence Value

In the Absence Period Type field, select the type of supporting element that defines the minimum absence period. The period must be in calendar days. Values are *Accumulator, Bracket, Duration, Formula, Numeric, System Element,* and *Variable.*

In the Absence Value field, select the name of the element. Or, if you selected *Numeric* in the first field, enter up to 8 digits in this field.

For example, if an absence of less than 4 days is unpaid, select *Numeric* in the first field and type *4* in the field to the right.

Wait Per Absence

Complete the Wait Per Absence, Wait Period Type, Wait Period Value, and Count Formula fields if each absence event must satisfy a minimum waiting period before it can be paid. When the minimum wait period is met, the payee can be paid only for the period of time that exceeds the wait period.

If you define a Wait Per Absence and also select the Link Absence check box on this page, you can create a formula that enables linked events to share the same waiting period.

Wait Per Absence

Select to define a minimum waiting period for each absence.

Wait Period Type and Wait Period Value

In the Wait Period Type field, select the type of supporting element that defines the number of remaining wait units the payee must be absent before the event can be paid. This element is resolved on the first day of the absence event.

Values are *Accumulator, Bracket, Duration, Formula, Numeric, System Element,* and *Variable.*

In the Wait Period Value field, select the name of the element. Or, if you selected *Numeric* in the first field, enter up to 8 digits in this field. For example, if you select *Numeric,* and you enter *3* in the field to the right, the first three days of the absence are not paid.

If you select the Link Absence check box to link related events, you can have the value that is returned by a Period formula apply to the linked absence period, rather than to each event.

In a Period formula, you can reference one of the following system elements:

- LINK YES-NO (linked event, yes or no) is set to Yes if the current event is linked to a previous event.

- ABS CUM LINK WAIT (cumulative linked wait) captures the total wait units that are taken for the linked events and the current event.

  Values are stored on the absence results table and carried forward from period to period.

Count Formula

If you selected Wait Per Absence, select a formula in this field. The count formula interprets the days that are to be counted against the wait period. This formula is similar to, and usually the same as, the day formula, though this is not a requirement. For example, you might want the day formula to consider workdays and the count formula to consider calendar days.

The count formula is resolved each day of the absence event until the wait period is met.

Note: For payees to be compensated for partial hours worked on the day that the waiting period is met, the count formula must be the same as the day formula.

Linking

Link Absence

Select to have the system link related absences.

By Original Begin Date

Select to have the system link the current absence event to the last absence event with the same original begin date.

If you do not select this check box, the system treats the event begin date as the original begin date.

Starting From

Specify the start date that the system uses to determine if a linked absence falls within the allowed period. When you run the Take process, the system compares the first day of the current absence event to the date that you specify in this field. If the period is greater than that defined by the Duration Between Two Absences field, the absences are not linked. Values are:

End Date of Last Occurrence: The system looks at the end date of the last matching event. (If you selected By Original Begin Date, the last matching event is the last event with the same original begin date.)

Begin Date of First Occurrence: The system looks at the begin date of the first matching event.

Duration Between Two Absences, Duration Value and Unit

In the Duration Between Two Absences field, select the type of element that defines the duration period. Values are *Accumulator, Bracket-Numeric, Duration, Formula-Numeric, Numeric, System Element-Numeric,* and *Variable-Numeric.*

In the Duration Value field, select the name of the element that defines the duration period. If you selected *Numeric* in the

Duration Between Two Absences field, enter the number of units here.

In the Unit field, select the unit of measurement you want to use. Values are *Days, Months,* and *Weeks.*

Absence Take - Negative Balances Page

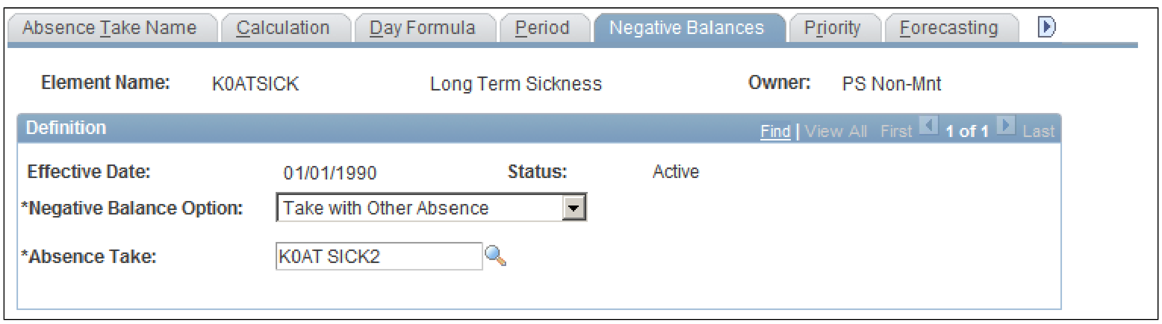
Use the Absence Take - Negative Balances page (GP_ABS_TAKE4) to define negative balance rules (what happens when the entitlement balance is not sufficient to cover an absence).

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Negative Balances

Image: Absence Take - Negative Balances page

This example illustrates the fields and controls on the Absence Take - Negative Balances page.



On this page, you specify what the system is to do if a payee's absence take exceeds the entitlement balance; that is, if the entitlement balance drops below zero. You can allow payees to:

- Carry a negative balance up to the limit that you specify.
- Take the absence as unpaid time.
- Use the accrued entitlement that is associated with another type of absence.

Negative balance rules do not take effect until the payee has depleted all the linked entitlements that are defined on the Calculation page.

Negative Balance Option

Specify what the system is to do if a payee's absence take exceeds the entitlement balance; that is, if the entitlement balance drops below zero. Valid values are:

- *Allow Negative Balance* – Select if your organization allows employees to take more paid time than they have accrued. Absence time that exceeds accrued entitlement is paid up to the limit that you specify.
- *Take as Unpaid Time* – Select to process any take that exceeds the entitlement balance as unpaid time. When you run the Take process, the system element DAY COUNT

UNP is populated with the number of unpaid units. (To have unpaid units processed as a deduction, add the deduction element to the grid at the bottom of the Day Formula page.)

- *Take with Other Absence* – Select if payees can apply the entitlement that is associated with another type of absence to this take.

  When this option is selected the Absence Take field will open below. Select the take element that is associated with the entitlement that you want to use.

  For example, your organization pays 100 percent of salary for the first 60 days of maternity leave and 50 percent for the next 30 days. You create two take elements, one called Maternity60 and another called Maternity30. When you define Maternity60, you select *Take with Other Absence* and link to the Maternity30 element. When the payee's actual maternity leave is entered on the Absence Event Entry page, all 90 days are entered, using the Maternity60 element. The system pays the first 60 days at 100 percent, depleting the maternity entitlement. The system then redirects the next 30 days to the Maternity30 element; that is, it adds a new row for each day after the sixtieth day, using the redirected element.

Limit Type and Limit Value

These fields are only available if the Negative Balance Option selected is *Allow Negative Balance.*

To limit the amount of negative entitlement balance allowed, select the supporting element that defines the limit. Any take that exceeds the limit will populates the DAY COUNT UNP system element. A limit of 3, for example, indicates that up to three days will be paid.

In the Limit Value, select the name of the element. If you selected *Numeric* in the first field, enter a number in this field.

Absence Take

These fields are only available if the Negative Balance Option selected is *Take with Other Absence.*

Select the take element that is associated with the entitlement that you want to use.

Absence Take - Priority Page

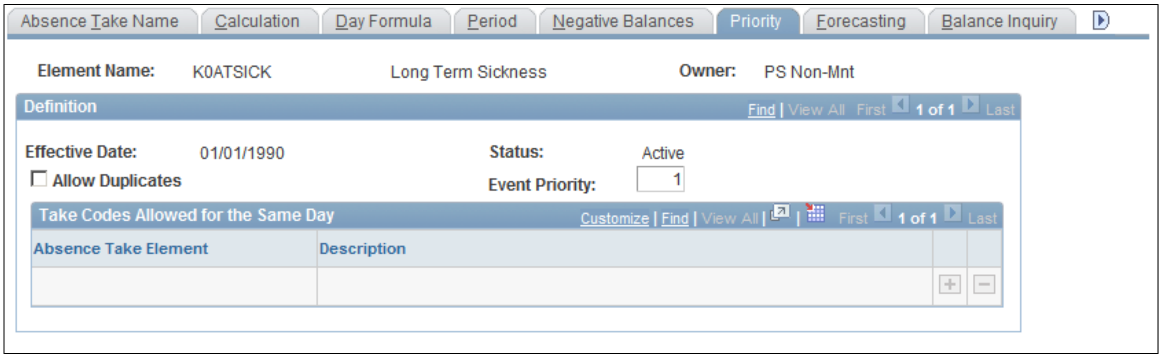
Use the Absence Take - Priority page (GP_ABS_TAKE5) to specify if users can enter more than one absence for a payee for the same day and to assign a priority to absence takes if only one type of absence is allowed each day.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Priority

Image: Absence Take - Priority page

This example illustrates the fields and controls on the Absence Take - Priority page.



Allow Duplicates

Select to enable users to enter more than one absence for the same day on the Absence Event Entry page. For example, if an employee has a two-hour union meeting in the morning and takes six hours of vacation on the same day, select Allow Duplicates to enable the user to enter and save the two absences for the same day. Clear this check box to prevent users from entering more than one absence for the same day.

When a user enters multiple events for the same day on the Absence Event Entry page and tries to save the entries, the system displays a message. If the user clicks OK, the system applies the take definition with the highest priority for the date in conflict (that is, the event with the lowest priority number).

You designate the priority of the take element in the Event Priority field. The priority number appears on the Absence Event Entry page when you enter an absence using this take element.

Using the same example, if you want the system to display the above message when a user tries to save the entries for a union meeting and vacation that occur the same day, do not select Allow Duplicates.

Event Priority

You can specify the priority of this absence take element in relation to others by entering a unique number of up to three digits in this field. Lower numbers represent higher priority.

When a user tries to enter more than one type of absence for the same day, and duplicates are not allowed, the system displays a message that provides information about take priorities. It also enables the user to invoke a process that causes the system to use the take definition with the highest priority for the date in conflict.

Take Codes Allowed for the Same Day

Absence Take

If you selected Allow Duplicates, specify the types of absences that can be taken the same day. Add a row for each allowable absence take element. Select at least one element.

When you run the Take process, the system calculates total partial hours that were written to the results table for events that occurred on the same day. It returns the total to the system element named ABS CUM PARTIAL HR. (You might consider creating a formula that generates an error if scheduled hours exceed total partial hours.)

Absence Take - Forecasting Page

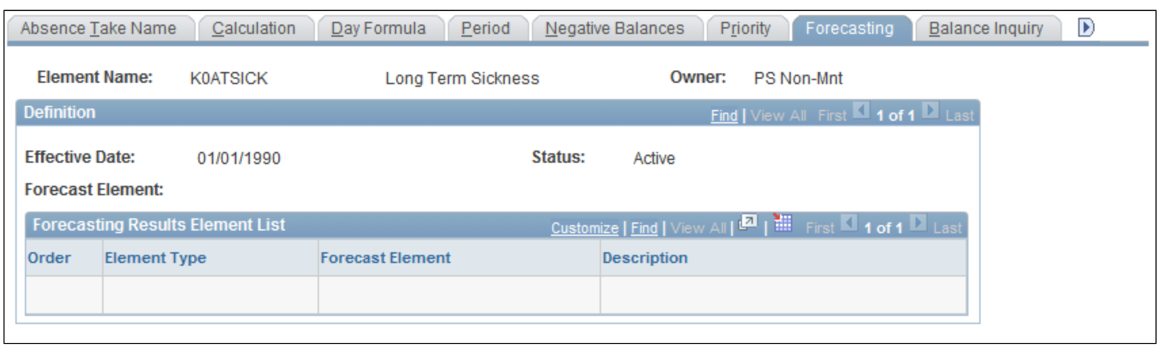
Use the Absence Take - Forecasting page (GP_ABS_TAKE6) to specify the formula to use for absence forecasting and the list of elements that are displayed by the Absence Forecasting process.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Forecasting

Image: Absence Take - Forecasting page

This example illustrates the fields and controls on the Absence Take - Forecasting page.



Complete the Forecasting page if you want users to be able to run the Forecast process when entering absences.

Note: To enter information on this page, the Forecasting Used check box must be selected on the Forecasting page that you access through the link at the bottom of the Absence Take – Name page.

Forecast Element

Select the formula that you want the system to resolve during the Forecasting process.

Only formulas with a field type of character are allowed. The system resolves this formula for each day of the absence event immediately after the day is evaluated (after the DAY COUNT, DAY COUNT PD, and DAY COUNT UNPD elements are resolved). It stores the last resolved value.

As an example, say you want your formula, named FM ELIG, to return a value of ELIGIBLE or NOT ELIGIBLE depending on whether a payee has enough entitlement to cover an absence. Your forecast formula might look like this:

```
IF DAY COUNT UNP > 0
THEN NOT ELIGIBLE >> FM ELIG
ELSE ELIGIBLE >> FM ELIG
ENDIF
```

Forecasting Results Element List

This group box controls what appears on the Absence Forecast Results page (in the Absence Event Entry component) after you run the Forecasting process. Select the elements for which you would like to view results. For example, you may want a duration element to display the length of the absence and an accumulator element to display the entitlement balance.

The elements that you select should be those that are normally resolved during absence processing. Element types are: *Accumulator, Bracket, Date, Duration, Formula, System Element,* and *Variable.*

Related Links

Absence Formulas

Absence Take - Balance Inquiry Page

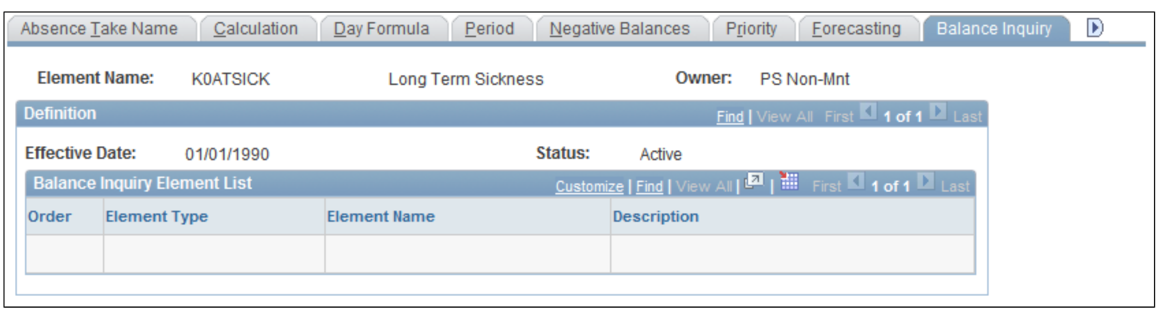
Use the Absence Take - Balance Inquiry page (GP_ABS_TAKE7) to list the elements that are displayed by the Balance Inquiry process.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Balance Inquiry

Image: Absence Take - Balance Inquiry page

This example illustrates the fields and controls on the Absence Take - Balance Inquiry page.



Note: To enter information on this page, the Forecasting Used check box must be selected on the Absence Take Name page.

Balance Inquiry Element List

This group box controls what appears on the Forecast Balance page after you run the Balance Inquiry process. Select the elements for which you would like to view results; for example, accumulators that track entitlement balances for the take, and system elements that help explain the balances.

Element types are: *Accumulator, Bracket, Date, Duration, Formula, System Element,* and *Variable.*

Absence Take - User Defined Result Fields Page

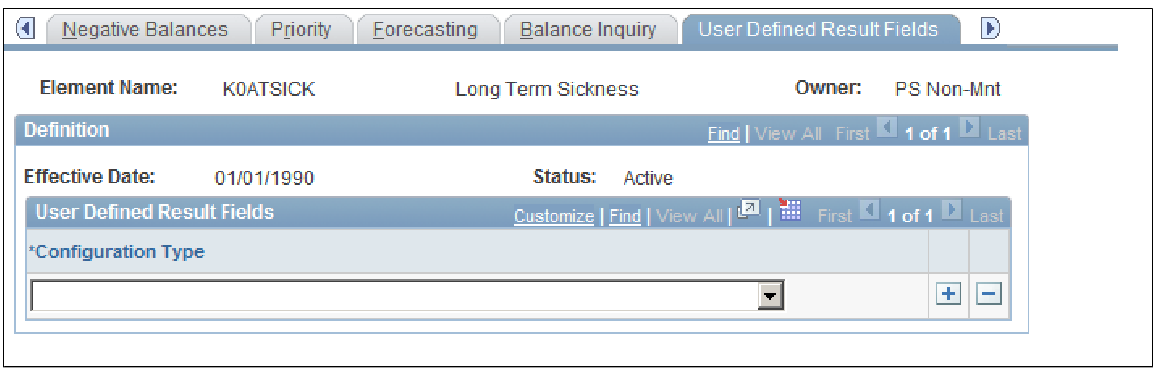
Use the Absence Take - User Defined Result Fields page (GP_ABS_TAKE8) to select the user-defined fields that can be overwritten by a system element during processing.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, User Defined Result Fields

Image: Absence Take - User Defined Result Fields page

This example illustrates the fields and controls on the Absence Take - User Defined Result Fields page.



In the Configuration Type field, select the user-defined fields that can be overwritten by a system element. During batch processing, the value that's assigned to the corresponding system element will overwrite the user-entered value in the absence results table (GP_RSLT_ABS). Select only those fields that you will use in your rules.

For example, to specify that the value a user enters in the Date 3 field on the Absence Event Input Detail page can be overwritten, select *User Defined Date 3* in the Configuration Type field.

Related Links

Understanding Absence Element Setup

Absence Take - Supporting Element Override Page

Use the Absence Take - Supporting Element Override page (GP_ELM_DFN_SOVR) to override the value of a bracket, date, duration, formula, or variable element that is used in the definition of the take element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Takes, Supporting Element Override

Preparing Absence Elements for Use

Once you've created absence entitlement and take elements, follow these steps to prepare them for use:

1. Assign elements to payees.

   Begin by adding the elements to an element group. (Element groups are linked to eligibility groups, which are linked to pay groups. A pay group is associated with each payee.) Payees can accrue entitlement and be paid for absences only when they are associated with absence elements. Exception: It is not necessary to assign per-absence entitlement elements to payees. When you assign related take elements, payees are eligible for the per-absence entitlement. To assign entitlement elements that are defined at the Payee Level (you selected *Payee Lvl* in the Entitlement field on the Absence Entitlements - Calculation page), use the Entitlement/Take Assignment page.

2. Add elements to the absence processing framework.

   Sections tell the system which elements to resolve during processing. You can create a separate section for the entitlement and take processes, or you can create one section for both, depending on your organization's needs. Per-absence entitlement elements do not need to be included on a process list via a section. They are processed automatically when the Take program processes the related take element.

Related Links

Defining Element Groups

Setting Up Absence Entitlement Balance Forecasting and Inquiry

This topic provides an overview of how to enable absence forecasting and balance inquiry, and discusses how to:

- Create a transaction definition.
- Filter absence events from the forecasting process.

Pages Used to Create a Transaction Definition and Filter Self Service Absence

Page Name	***Definition Name***	***Navigation***	***Usage***
Transaction Definition	GP_TXN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Forecast Transactions, Transaction Definition	Create a transaction definition by linking a calendar group template to the Absence Forecasting process or Balance Inquiry process. A transaction definition is tied to a specific country.
Forecasting Filter	GP_TXN_FILTER	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Forecast Transactions, Forecasting Filter	Select the status of the absence self service absences that the system is to consider when you run the Forecasting process. If integrating with Time and Labor, the status selected will be considered with forecasting processes on Timesheets also.

Understanding How to Enable Absence Entitlement Balance Forecasting and Inquiry

Before using absence forecasting or balance inquiry, you must activate these features for each absence take and entitlement element to which they apply, except for per-absence entitlement elements. For example, to forecast entitlement for vacations only, you activate forecasting for the vacation take and vacation entitlement elements.

Following is an overview of steps to enable absence forecasting or balance inquiry:

1. Define forecast formulas for absence takes (absence forecasting only).

   A forecast formula evaluates an absence according to the business rules you define. For example, your formula might determine if there is sufficient entitlement to cover an absence and, if not, what action to take. It returns a user-defined character string that appears on the Absence Event Entry page. For example, it might display "Eligible" or "Success" if there is enough entitlement to cover an absence. The system resolves the forecast formula for each day of the absence, immediately after it resolves the day count, day count paid, and day count unpaid. Only the last value of the formula is stored and is moved to the Absence Event table (GP_ABS_EVENT) during the Absence Forecasting process. The value is also moved to the results table (GP_RSLT_ABS) when the event is processed during the Absence Take process.

   The formula can check to see if there are any unpaid units for the day and why the units are unpaid—perhaps because of a waiting period. To determine this, you refer to other absence system elements, such as the beginning wait balance, ABS BEGIN WAIT BAL, and the ending balance, ABS END WAIT BAL.

   You can use the results of the forecast formula to invoke other actions. For example, you might create a formula, that when resolved to Eligible, populates the units element that is used to generate positive input. (You select the Units element on the Take - Day Formula page.)

2. Enable forecasting and/or balance inquiry for the take element on the Forecasting page that you access through the Element Name page.

    a. For absence forecasting, indicate whether forecasting is allowed (select Forecasting Used) or required (select Forecasting Required).

    b. For balance inquiry, select Forecasting Used.

    Note: The Forecasting Used field is not used to enable forecasting for absence self-service. To enable forecasting for absence self-service select the Allow Forecasting field on the Forecasting Messages page on the Country Take component.
    If you are integrating with PeopleSoft Time and Labor, the Allow Forecasting field on the Forecasting Messages page of the Country Take component. is used to enable forecasting on Timesheets.

    ---

3. Complete the Take - Forecasting and Take - Balance Inquiry pages, as applicable.

    a. For absence forecasting, select the forecast formula and the elements that are to return the results of the forecast process on the Take - Forecasting page.

    b. For balance inquiry, select the elements that are to return the results of the balance inquiry process on the Take - Balance Inquiry page.

4. Enable forecasting for associated entitlement elements.

    Repeat step 2 for each linked, frequency-based entitlement element.

    Note: For entitlements the Forecast Used field will also apply to those entitlements used in event entry through absence self service, as well as, Time and Labor Timesheets if you are integrating with Time and Labor.

    ---

5. Enable forecasting for redirected take elements.

    If you've redirected this take element to another take element on the Take - Negative Balances page, follow step 2 for the redirected take element and its associated entitlement elements.

6. Create a Calendar Group template.

    When you run the Forecasting or Balance Inquiry process, the system must know which absence calendars to refer to so that it can identify the elements to process, the period of time to evaluate, and so on. Use the Calendar Group page to select the applicable absence calendars. (These should be the same calendars that you use when running the Take and Entitlement processes.) Also select the Use as a Template check box on the Calendar Group page to indicate that the calendar group is to be used by the forecasting process.

    The template should cover the forecasting period, which runs from the earliest calendar that has not been finalized for the payee to the end date of the latest absence event (or the as of date, for Balance Inquiry). Most likely, you'll want the calendar group to span one or more years. (It can include up to 225 calendars.) The template should also include all pay groups whose employees could be forecasted.

7. Create transaction definitions.

Use the Transaction Definition page to link the calendar group template (created in the previous step) to the absence forecasting or balance inquiry process. If you plan to use both processes, create a transaction definition for each. When you launch the Forecasting or Balance Inquiry process, the transaction ID tells the system which calendar group to look for.

8. Specify the status of the absence events to be considered by the Forecasting process.

   You have the Forecasting process consider only those absence events that are in one of the statuses that you specify. Use the Forecasting Filters page to select the statuses.

Related Links

Absence Entry, Approval, and Self Service Features

Forecasting Absence Entitlement Balance During Absence Entry

Viewing Current Absence Entitlement Balances and Running the Absence Entitlement Balance Inquiry Process

Defining Element Groups

Transaction Definition Page

Use the Transaction Definition page (GP_TXN) to create a transaction definition by linking a calendar group template to the Absence Forecasting process or Balance Inquiry process.

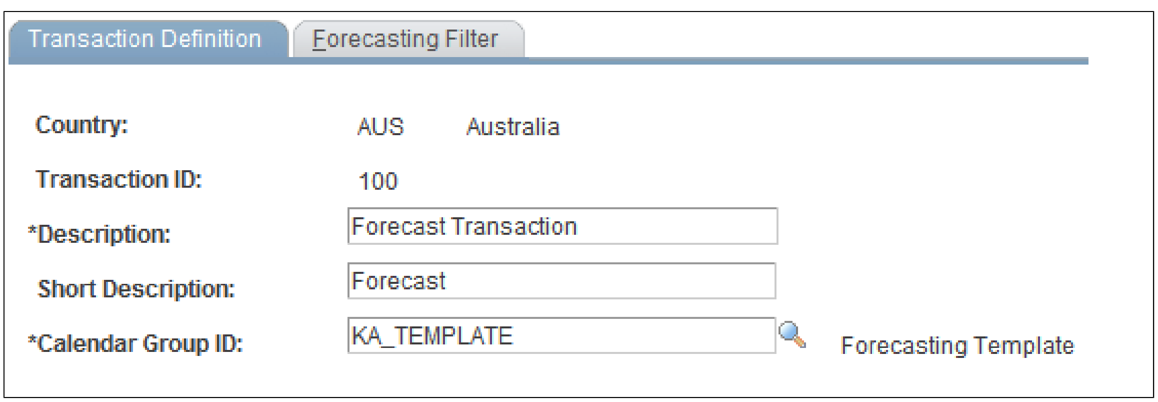
A transaction definition is tied to a specific country.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Forecast Transactions, Transaction Definition

Image: Transaction Definition page

This example illustrates the fields and controls on the Transaction Definition page.



Transaction ID

Values are:

100: Absence Forecasting process.

110: Balance Inquiry process.

Note: You can define one of each type of transaction ID per country.

Calendar Group ID	Select the appropriate calendar group ID. You can choose from the list of calendar group IDs that have been set up as templates.

Forecasting Filter Page

Use the Forecasting Filter page (GP_TXN_FILTER) to select the status of the absence self service absences that the system is to consider when you run the Forecasting process.

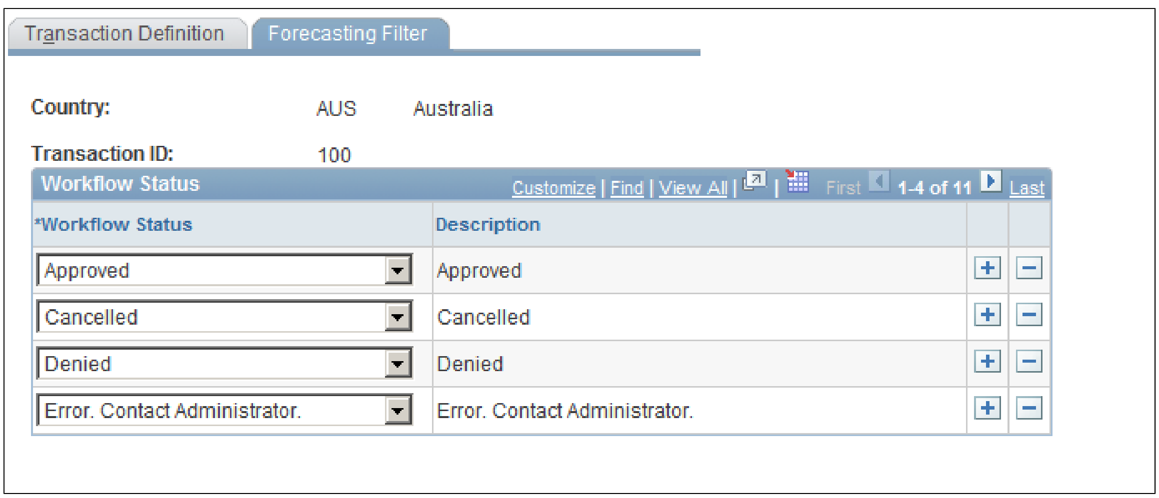
If integrating with Time and Labor, the status selected will be considered with forecasting processes on Timesheets also.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Absence Elements, Absence Forecast Transactions, Forecasting Filter

Image: Forecasting Filter page

This example illustrates the fields and controls on the Forecasting Filter page.



The system uses status values, such as Saved, Submitted, and Approved, to track and manage the approval of absence requests.

If you are using absence self service, use this page to specify which absence statuses the system is to consider when using forecasting. For example, you may want the forecasting process to evaluate only those absences that have a status of *Approved.* In this case, you would select *Approved* in the Workflow Status field.

Note: If integrating with Time and Labor, use this page to specify which absence statuses the system is to consider when using forecasting on Timesheets.

When an absence is requested through the Absence Event Entry page the Workflow Status field is set to blank. If you run the absence forecasting, such events will be considered during forecasting. If you have events entered through event entry and self service, when you run forecasting it will consider all the events entered through event entry plus those entered through self service and whose statuses were included in the Forecasting Filter page.

Chapter 12

Using Schedules

Understanding Work Schedules

In Absence Management, work schedules provide a way to communicate and manage workforce attendance expectations. They also enable the absence process to determine when a payee's absence falls on a scheduled work day. For exception time reporting payees, you set up schedules and enter exception data. For positive time reporting payees, the system compares reported hours with schedules to determine pay.

Note: Absence Management and PeopleSoft Time and Labor use many of the same pages and records for schedule setup and assignment. If you're using both applications, you need to create and assign schedules only once. The information that displays on the scheduling pages may vary somewhat, depending on which application you use to access them.

This topic discusses:

- Types of schedules.
- Types of shifts.
- Schedule definitions and calendars.
- Rotating schedules.
- Self service scheduling features.
- Schedule settings.

Type of Schedules

You can define three main types of schedules:

- Punch schedules include punch detail such as In, Out, Meal, Break, and Transfer.
- Elapsed schedules show the duration of time to be worked—for example, eight hours on Monday.
- Flex schedules are practical when a payee has some flexibility to begin and end the workday.

Types of Shifts

A shift represents a set of punch types from which it is built. You can create three types of shifts:

- Elapsed shifts

  Define one elapsed punch entry for the shift, such as an elapsed shift of 8 hours, which is non-clock time. Elapsed shifts cannot exceed 24 hours.

- Punch shifts

  Use punch shifts to create shifts that define specific work times. Punch shifts are defined by an in punch and the first subsequent instance of an out punch. Other punches such as break, meal, or transfer, can occur between the in and out punches. Punch times are associated with each punch. The duration of a punch can be entered, or the system can calculate the duration when the next punch time is entered.

- Flex (flexible) shifts

  The system supports flexible shifts, giving payees latitude for beginning and ending shifts. You can enter core, required hours and the weekly number of hours that the flexible shift requires, but the system uses the weekly information only if you set up an array for processing.

  See Defining Array Elements.

Example: Flex Shifts

Type of Flex Shift	In Punch	Out Punch	Scheduled Hours	Flex Start	Flex End	Flex Weekly Hours
1 Flex Band	06:00	18:00	8	09:00	15:00	40
2 Flex Range	06:00	19:00	8			40
3 Flex Core	00:00	23.59	8 (daily average)	09:00	15:00	40
4 Flex Core Plus	00:00	23.59	8	09:00	15:00	40

In this example:

1. Payees begin and end their workdays within a range of flexible hours in the morning and afternoon (begin between 06:00 and 09:00 and end between 15:00 and 18:00). They must work 8 hours a day, 40 hours a week and must work during the core hours, 09:00 to 15:00. A payee's begin and end times can vary daily within the flexible hours.
2. Payees work any 8 hours during the day, within a range of flexible hours (between 06:00 and 19:00), and there's no company-defined core period. They must work 40 hours a week.
3. Payees work anytime during the week, provided that they work 40 hours a week and during the core hours, 09:00 to 15:00. A payee's begin and end times can vary daily within the flexible hours, and the length of the workday can vary, provided that the weekly 40-hour requirement is met.
4. Payees work 40 hours a week and during the core hours, 09:00 to 15:00. A payee's begin and end times can vary daily within the flexible hours, but the workday must be 8 hours.

Schedule Definitions and Schedule Calendars

A schedule definition defines a work schedule and is identified by a schedule ID. After creating schedule definitions, you can assign them to pay groups and payees. The same schedule can be assigned to multiple pay groups. You also have the option of creating and assigning a personal schedule to a given payee.

The system uses schedule definitions to derive schedule calendars and to resolve payee schedules. A schedule calendar is a range of dates with specified work and non-work time.

Rotating Schedules

You can define rotating schedules that enable you to assign the same schedule to several payees with different start dates. For example, a basic rotating schedule for a continuously operating factory operation might consist of:

- Seven days
- One off
- Seven afternoons
- One off
- Seven nights
- Five off

To keep the factory staffed 24 hours, seven days per week, there are four groups, or rotations, of workers. Each rotation uses the same schedule, but the actual days are staggered so that there is always one rotation covering each of the shifts. This table represents what the actual rotations would look like for a month:

Start Day	***Rotation 1***	***Rotation 2***	***Rotation 3***	***Rotation 4***
1	Day	Off	Afternoon	Night
2	Day	Afternoon	Off	Night
3	Day	Afternoon	Night	Off
4	Day	Afternoon	Night	Off
5	Day	Afternoon	Night	Off
6	Day	Afternoon	Night	Off
7	Day	Afternoon	Night	Off
8	Off	Afternoon	Night	Day
9	Afternoon	Off	Night	Day
10	Afternoon	Night	Off	Day
11	Afternoon	Night	Off	Day
12	Afternoon	Night	Off	Day
13	Afternoon	Night	Off	Day

Start Day	***Rotation 1***	***Rotation 2***	***Rotation 3***	***Rotation 4***
14	Afternoon	Night	Off	Day
15	Afternoon	Night	Day	Off
16	Off	Night	Day	Afternoon
17	Night	Off	Day	Afternoon
18	Night	Off	Day	Afternoon
19	Night	Off	Day	Afternoon
20	Night	Off	Day	Afternoon
21	Night	Off	Day	Afternoon
22	Night	Day	Off	Afternoon
23	Night	Day	Afternoon	Off
24	Off	Day	Afternoon	Night
25	Off	Day	Afternoon	Night
26	Off	Day	Afternoon	Night
27	Off	Day	Afternoon	Night
28	Off	Day	Afternoon	Night

Self-Service Scheduling Features

Self-service scheduling pages are available to managers and payees. Managers can use these pages to view schedules, view payee's scheduling preferences and change schedule assignments, and create schedules for individual payees. Employees can use these pages to view their monthly schedules and to enter personal scheduling preferences.

Schedule Settings

Use the Schedule Settings page to define the labels to display for punch types, the range of dates for the Dates table (TL_DATES_TBL), and other scheduling settings. The Dates table stores date-related information, such as the day of week, day of month, and calendar year that the system needs to build calendar schedules.

Related Links

Schedule Settings Page
Using Self-Service Scheduling Features for Managers
Using Self-Service Scheduling Features for Employees

Creating and Viewing Schedules

To create schedules, use the Schedule Groups (SCH_GROUP), Shifts (SCH_SHIFTS), Workdays (SCH_WRKDAY), and Definitions (SCH_DEFINITION) components.

This topic provides an overview of schedule creation and discusses how to:

- Define schedule groups.
- Set up shifts.
- Define workdays.
- Create schedule definitions.
- Define shift details for schedule definitions.
- View schedule calendars.

Note: Self-service pages are available to managers for creating, viewing, and modifying work schedules.

Pages Used to Define and View Schedules

Page Name	***Definition Name***	***Navigation***	***Usage***
Schedule Group	SCH_GROUP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Schedule Groups, Schedule Group	Define schedule groups.
Shift	SCH_SHIFT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Shifts, Shift	Set up elapsed, flex, and punch shifts.
Workday	SCH_WRKDAY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Workdays, Workday	Set up workdays.
Definition	SCH_DEFINITION	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Definitions, Definition	Define basic schedule definition details.
Schedule Shifts	SCH_DEFINITION_2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Definitions, Schedule Shifts	Define shifts for schedule definitions.
Shift Information	SCH_DEFN_SEC	Click the More link on the Definitions - Schedule Shifts page.	Define or view shift details.

Page Name	Definition Name	Navigation	Usage
Schedule Calendar	SCH_CLND_VW_SEC	Click the Show Calendar link on the Definitions - Shifts page.	View the schedule calendar derived from a specific schedule definition.

Related Links

Using Self-Service Scheduling Features for Managers

Understanding Schedule Creation

To create work schedules:

1. Create schedule groups.

   Schedule groups provide a way to organize schedules and group payees with like schedules. Each schedule group is associated with a SetID (as is each shift, workday, and schedule definition). When you assign schedules, you select the schedule group, which filters the schedules that you can assign.

2. Create shifts (optional).

   You can create elapsed, flex, and punch shifts with the Shifts component (SCH_SHIFT) or you can enter shift information manually when you create a schedule definition.

3. Create workdays (optional).

   You can create workdays to be used as labels for the days within a schedule definition.

4. Create schedule definitions.

   Schedule definitions comprise a series of short term or long term workdays. When you create schedule definitions, you can incorporate predefined shifts and workdays. You can also enter shift information manually.

5. View schedule calendar.

   The system derives the schedule calendar from the schedule definition.

Creating Personal Schedules

At times, you may want to create a schedule definition that applies only to a specific payee. In these cases, you use the Personal Schedule Definition component (SCH_DEFN_ADHOC) that you access through the Work Schedule Assignment page. The personal schedule definition pages are identical to the pages in the Schedule Definition component that you use to define all other work schedules.

Related Links

Personal Schedule Definition - Definition Page

Schedule Group Page

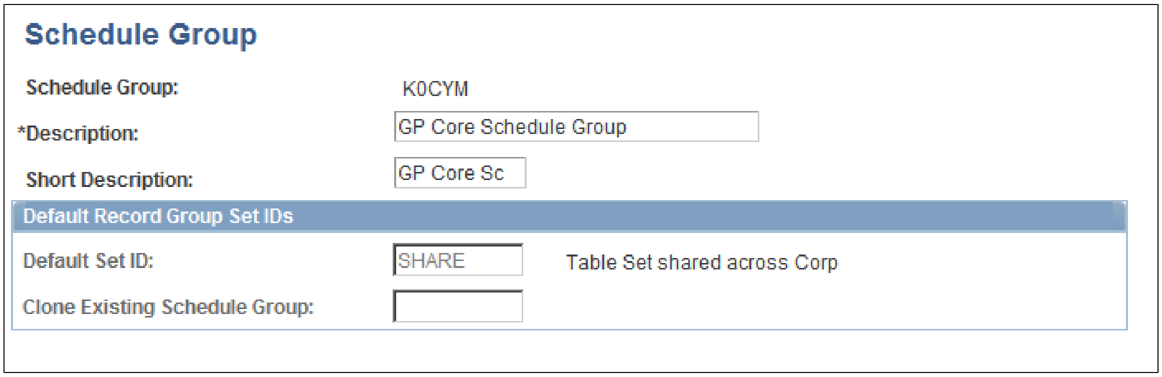
Use the Schedule Group page (SCH_GROUP) to define schedule groups.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Schedule Groups, Schedule Group

Image: Schedule Group page

This example illustrates the fields and controls on the Schedule Group page.



Think of a schedule group as a way to organize schedules. Shifts, workdays, and schedule definitions are created based on a SetID value. Schedule groups group these together by way of the Set Control value.

When you assign a schedule to a pay group or directly to a payee, you must first select the associated schedule group. This selected schedule group filters the schedules that you can choose from.

Clone Existing Schedule Group	If you clear the Default SetID field, you can select a schedule group to clone. The system copies the SetID from the definition of the cloned schedule group.

Related Links

"Understanding PeopleSoft HCM System Data Regulation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Shift Page

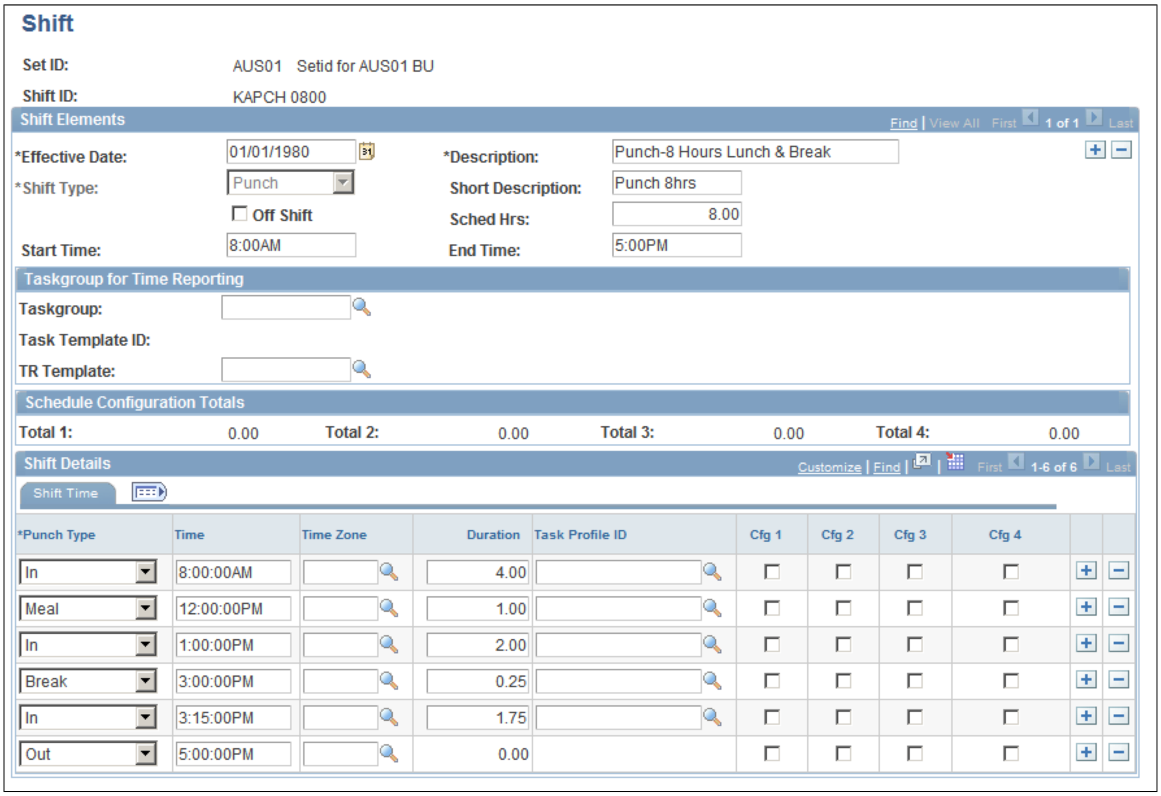
Use the Shift page (SCH_SHIFT) to set up elapsed, flex, and punch shifts.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Shifts, Shift

Image: Shift page

This example illustrates the fields and controls on the Shift page.



Effective Date

Enter a date for this shift. If you modify a previously saved shift, the effective date that you select has some limitations. You cannot change the effective date of the shift to:

A date before the earliest effective date of all workdays that contain that shift.

A date later than the start date of any schedule calendar containing it.

A date later than the earliest effective date of all pay groups whose default schedule IDs contain that shift.

Shift Type

Select a type. Options are:

Elapsed: Only the *Elapsed* punch types appear in the prompt. An *Elapsed* shift can contain only one punch entry.

Punch: In, Out, Break, Meal, and *Transfer* punch types can be entered. The Flex Shift Information group box doesn't appear on the page. To save punch shifts, you need an *In* and *Out* punch.

Flex: Only *In* and *Out* punches can be entered. The Flex Shift Information group box appears, available for entry. To save flex shifts, you need an *In* and *Out* punch.

If you change this field in Add mode and punch detail is already entered, you're warned that punch detail is deleted if the type field is changed. For all effective-dated rows, the system deletes the punch details for all effective-dated rows and the type field is updated to the new type that you selected.

Having saved a shift as one type, you cannot change it to another.

Off Shift

Select to identify this day as an off day.

Note: If you are including off days for the self service absence duration calculation you will need to add the hours you would like to use for an off day in the duration field.

Scheduled Hrs (scheduled hours)

Displays the total amount of work time for the shift. For example, you require payees to punch in at 09:00 and punch out at 17:00, but the shift includes a one-hour non-punch lunch break. The field calculates nine hours, but your organization is paying for eight hours worked, so the scheduled hours are eight.

This field's value is calculated from the sum of the durations of punches in the group box at the bottom of the page—except *Meal* punches. You can edit this number for *Punch* and *Flex* shifts. For an *Elapsed* shift, this field equals the *Elapsed* punch entry's duration and is unchangeable.

If you make changes affecting punch time or punch duration, the Scheduled Work Hours field recalculates.

Start Time and End Time

These fields indicate the starting and ending times of the shift. For fixed and punch shifts, the system populates these fields automatically based on the information you enter in the Shift Detail group box.

Taskgroup for Time Reporting

This group box enables you to view time reporting and task elements while you build the schedule definition. It appears only if you have Time and Labor installed.

Taskgroup

Select a taskgroup. The system populates the Time Reporting Template ID field with the associated time reporting template.

See "Understanding Task Reporting Requirements *(PeopleSoft HCM 9.2: Time and Labor)*".

Task Template ID

Displays the task template associated with the taskgroup you select. Click the link next to view details about the task template.

See "Understanding Task Reporting Requirements *(PeopleSoft HCM 9.2: Time and Labor)*".

Time Reporting Template ID

The system populates this field with the time reporting template associated with the taskgroup you select. Click the link next to this field to view details about the time reporting template.

See "Creating Time Reporting Templates *(PeopleSoft HCM 9.2: Time and Labor)*".

The task template and the related time reporting template determine which task elements and time reporting elements appear as columns in the grid for scheduling purposes.

Schedule Configuration Totals

Total durations appear for the punches being tracked. For each selected check box that appears in the group box at the bottom of the page, the corresponding configuration total is updated with the number of hours corresponding to the total of all marked entries.

Flex Shift Information

If the *Flex* shift type is selected, these times represent the required core hours for the flex shift.

Core Begin and Core End

Enter the times for the core period, the period when payees must be at work, excluding meal and break time. The core begin time must be after the shift's *In* punch; the core end time must be before the shift's *Out* punch.

Weekly Hours

Enter how many hours this shift requires.

Shift Details

This group box label varies, depending on which shift type you selected. Saving the shift requires at least one line of punch detail.

Type

Select a punch type. You cannot have consecutive punches (except transfer punches) of the same type. Options are:

In: Start of a work period—at the beginning of a shift or for returning to work after a break or meal. The first punch of a punch or flex shift must be an *In* punch. Punch and flex shifts cannot be saved if an *In* punch lacks a punch time and duration.

Transfer: Start of a work period that generally denotes a change in task and compensation-related characteristics.

Break: Start of a break period. If you enter a *Break* punch, you must follow this with an *In* or *Transfer* punch.

Meal: Start of a meal period. If you enter a *Meal* punch, an *In* or *Transfer* punch must follow immediately, or the system can't save the page.

Out: Start of unpaid, non-work time. Required as the last punch of a punch or flex shift. The *Duration* field is unavailable for entry. You can't enter an *Out* punch if an *In* punch doesn't precede it somewhere in the shift. *Punch* and *Flex* shifts cannot be saved if an *Out* punch lacks a punch time. For a *Punch* or *Flex* shift, you must enter an *Out* punch. No punches can be added to a shift after the *Out* punch row.

Elapsed: For *Elapsed* shifts. The associated duration reflects the elapsed duration of the shift. An *Elapsed* shift cannot be saved if an *Elapsed* punch lacks a punch duration.

Note: This documentation uses *punch* and *punch type* interchangeably.

Time

For *Punch* and *Flex* shifts; all punches (except the *Out* punch) in *Punch* and *Flex* shifts require a time and duration. Enter the time this punch is scheduled. The first punch time of a shift must be entered. You can enter subsequent punch times, or the system can calculate punch times based on the duration of the preceding punch.

If you change the time of a punch besides the last punch, the duration changes, based on the new and the subsequent punch time. If it's not the first punch, the duration of the previous punch changes, based on the changed punch's new punch time.

If you enter a punch time, the system calculates the duration based on the punch time of the previous row. If you enter a duration, the system calculates this field on the next punch row.

Time Zone

Enter a time zone that is assigned to time entered for this shift.

Duration

Displays the length of the punch in hours. You can enter it, or the system can calculate it when the next punch time is entered.

If you change the time of a punch besides the last punch, the duration changes, based on the new and the subsequent punch time. If it's not the first punch, the previous punch's duration changes, based on the changed punch's new punch time.

If you delete a row, the duration of the punch above the deleted row changes to the difference between the punch times of that row and of the row that followed the deleted row.

The system warns you if a punch or flex shift is over 24 hours.

The duration is displayed as a percentage of an hour.

You can store a determined number of hours in this field when a shift is marked as an off-shift. This duration will be helpful in absence self service when calculating either absence end date or duration.

Cfg1 to Cfg4 (schedule configuration) These fields are populated based on check boxes that you select in the Shift Details group box. The corresponding Schedule Configuration Total fields are updated with the corresponding number of hours.

For example, to have the system calculate how many hours in a shift are in the morning and how many in the afternoon, select Cfg1 for morning punches and Cfg 2 for afternoon punches.

Note: These fields are available for off days for flex and punch schedules used with the absence self-service duration calculation.

Workday Page

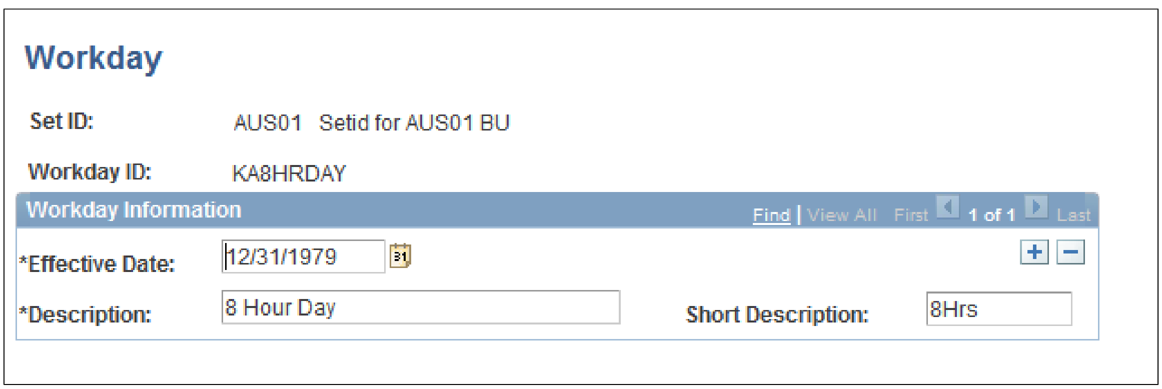
Use the Workday page (SCH_WRKDAY) to set up workdays.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Workdays, Workday

Image: Workday page

This example illustrates the fields and controls on the Workday page.



You use workdays to group shifts when creating a schedule definition. Enter an effective date and a description for the workday. The effective date of a workday must be earlier than or equal to the effective dates of the schedule definitions in which you use it.

Note: Setting up workdays is not a prerequisite for creating schedule definitions. You can define shift information that is not grouped by workday when you create schedule definitions.

Definition Page

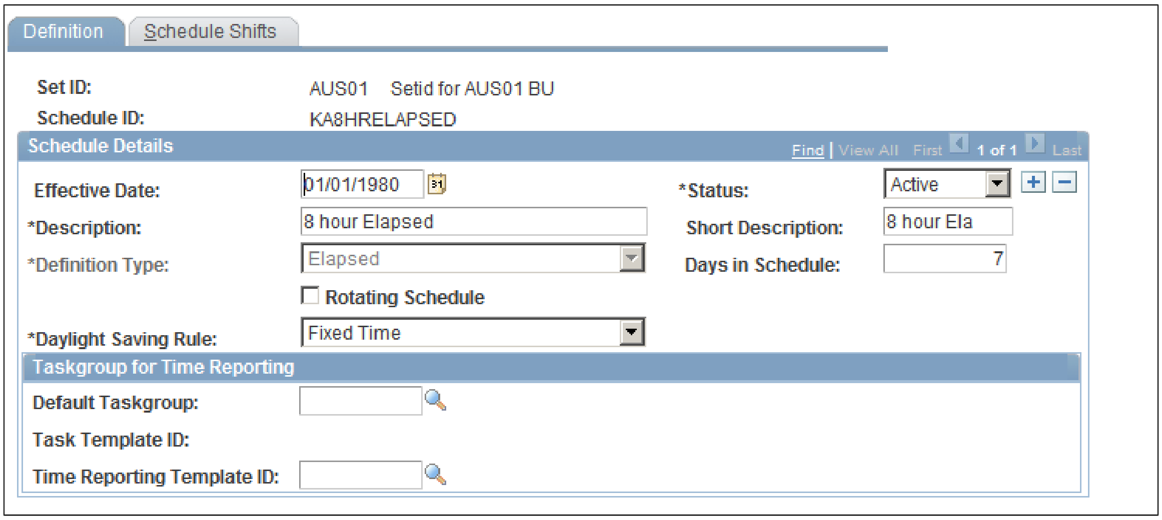
Use the Definition page (SCH_DEFINITION) to define basic schedule definition details.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Definitions, Definition

Image: Definition page - Definitions

This example illustrates the fields and controls on the Definition page - Definitions.



Schedule ID Displays the value that you entered to access this page.

Schedule Details

Effective Date Enter the first day of the schedule definition. For example, if the schedule begins on a Monday, make sure that the date you enter falls on a Monday.

Definition Type Select a type. Options are:

Elapsed: Only *Elapsed* shifts can be used in the definition.

Punch: Only *Punch* shifts can be used in the definition.

Flex: Only *Flex* shifts can be used in the definition.

You cannot combine different types of shifts in the same definition.

If you change this field in Add mode and shift detail rows are already entered, you're warned that shift detail rows are deleted if the type field is changed.

When a schedule definition is saved as a particular type, such as *Elapsed,* it cannot be changed to another type, such as *Punch.*

Rotating Schedule Select to indicate that this definition is for a rotating schedule. When you select this check box, the Rotation Details group box becomes available.

Num Days in Schedule (number of days in schedule)

Enter the number of days in the schedule. You can change this at anytime. If you do make a change, the system automatically inserts or deletes the appropriate number of rows from the SCH _DEFN_DTL table to ensure that there is one row for each day in the schedule.

Daylight Saving Rule

This field applies to punch and flex schedules.

Select the method that the system uses to resolve the schedule on days where daylight saving time changes fall within a shift.

Fixed Time: The system uses the specified out time that you enter even if it shortens or lengthens the shift by one hour.

Fixed Duration: The system adjusts the schedule to maintain the total duration that you specify for the shift.

Taskgroup for Time Reporting

This group box enables you to view the time reporting and task elements while you build the schedule definition. It appears only if you have Time and Labor installed.

Default Taskgroup

Select a taskgroup. The system populates the Time Reporting Template ID field with the associated time reporting template.

See "Understanding Task Reporting Requirements *(PeopleSoft HCM 9.2: Time and Labor)*".

Task Template ID

Displays the task template associated with the taskgroup you select. Click the link next to view details about the task template.

See "Understanding Task Reporting Requirements *(PeopleSoft HCM 9.2: Time and Labor)*".

Time Reporting Template ID

The system populates this field with the time reporting template associated with the taskgroup you select. Click the link next to this field to view details about the time reporting template.

See "Creating Time Reporting Templates *(PeopleSoft HCM 9.2: Time and Labor)*".

The task template and the related time reporting template determine which task elements and time reporting elements appear as columns in the grid for scheduling purposes.

Rotation Details

Use this group box to determine the rotating pattern of the schedule. You create multiple rotation IDs that share the same schedule, but start on different days.

Rotation ID

Enter an ID for each rotation.

Relative Day

Enter the day that the rotation starts in relation to the first day of the schedule. For example, if you enter *8* in this field, the associated rotation begins 7 days after the first day.

	Note: You may not enter *0* or a number greater than the total number of days in the schedule
Add Rotations	Click to insert a new rotation. The system prompts you to enter the number of days between rotations to determine the relative day of the new rotation.

Schedule Shifts Page

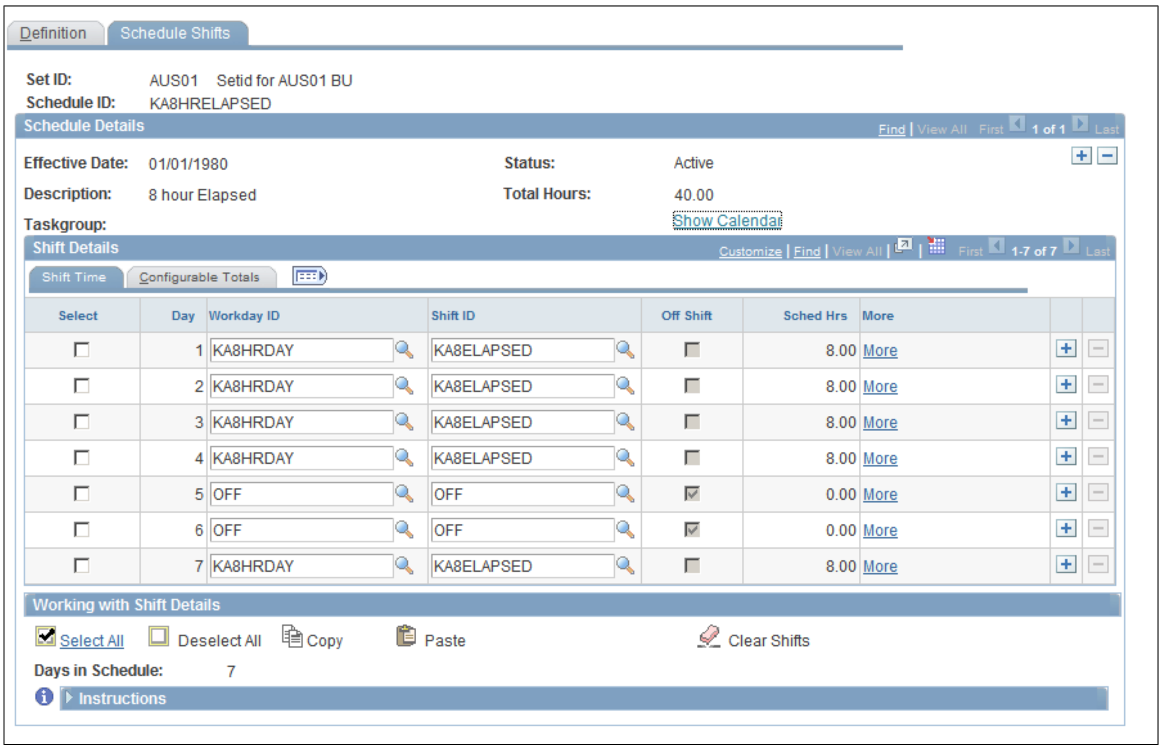
Use the Schedule Shifts page (SCH_DEFINITION_2) to define shifts for schedule definitions.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Definitions, Schedule Shifts

Image: Schedule Shifts page - Definitions

This example illustrates the fields and controls on the Schedule Shifts page - Definitions.



You can use this page to define shift information for schedules in two ways:

- Using predefined workdays and shifts.

  Use the Workday ID and Shift ID columns to select predefined workday and shifts. The system populates the remaining columns based on the shift you enter.

- Manually (for flex and punch schedules).

  The type of schedule that you are defining determines the columns that appear in the Shift Details grid. For punch schedules, the system displays the default punch pattern and labels defined on the

Schedule Settings page. To see all available punch types, select *All Punches* in the Punch Pattern field. For flex schedules, the system includes fields for In, Out, and Sched Hrs (scheduled hours). For elapsed schedules, it includes fields for identifying an off shift and scheduled hours.

To specify an off shift, you can select a predefined off shift, or select the Off Shift check box and enter an in and out time. When selected the system will deactivate the More link. It allows you to add duration hours for off days.

Click the Show Calendar link to view the schedule calendar that the system derives from the schedule definition.

Click the More link to access the Shift page where you can view or enter details for a shift.

See Schedule Settings Page.

Copying, Pasting, and Clearing Shifts

Select the check box in the Select column. This makes the Copy, Paste, and Clear Shifts links available so that you can quickly copy, insert, and delete rows of workday and shift information.

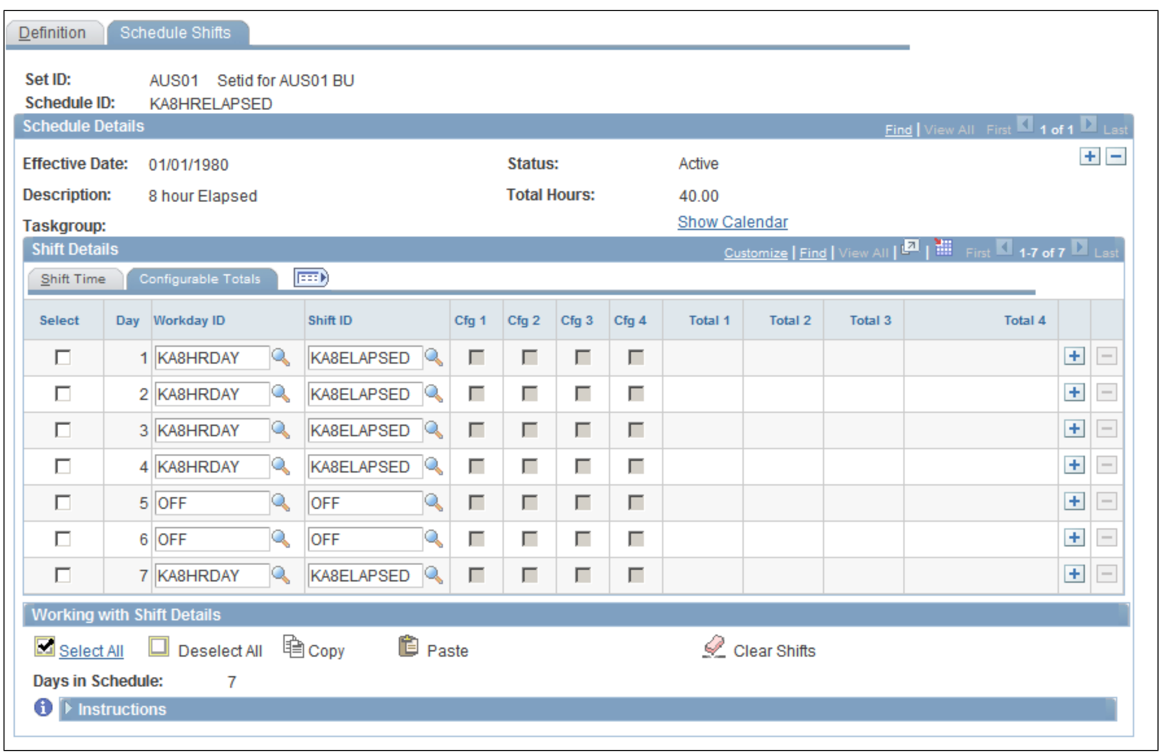
See Shift Page.

Configuration Totals

Select the Configuration Totals tab.

Image: Schedule Definition - Schedule Shifts page: Configurable Totals tab

This example illustrates the fields and controls on the Schedule Definition - Schedule Shifts page: Configurable Totals tab.



This tab displays the total hours that are associated with each configuration indicator. You can use the configuration totals in absence rules.

Schedule Calendar Page

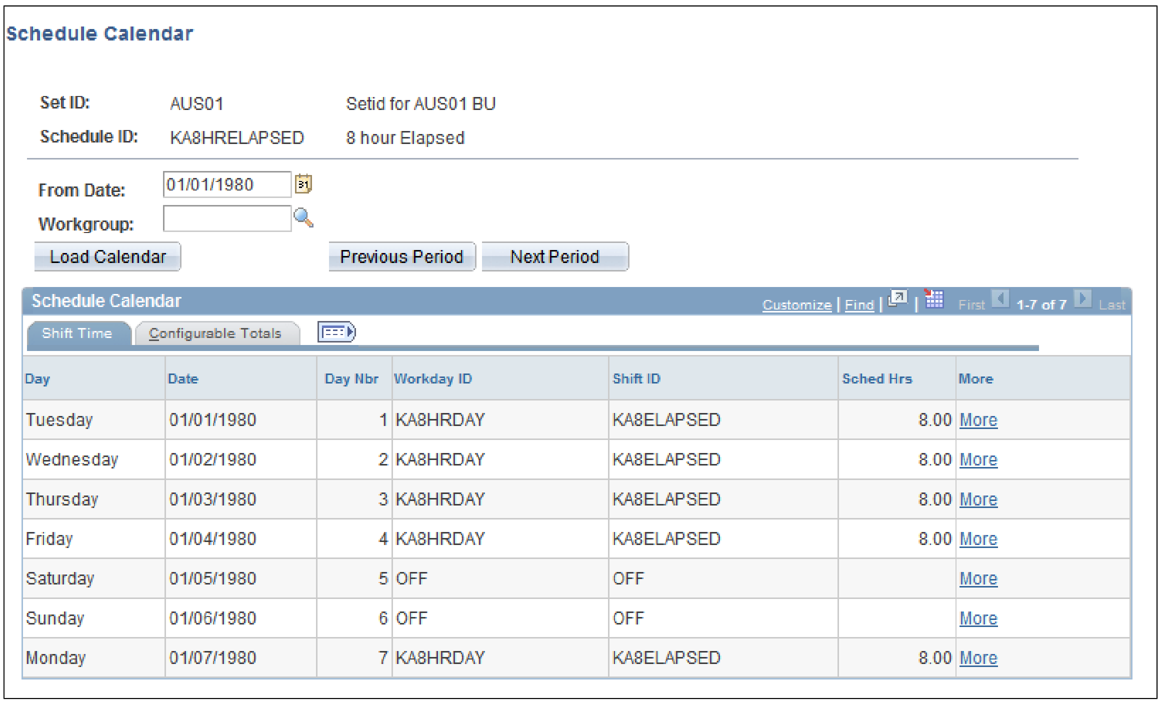
Use the Schedule Calendar page (SCH_CLND_VW_SEC) to view the schedule calendar derived from a specific schedule definition.

Navigation

Click the Show Calendar link on the Definitions - Shifts page.

Image: Schedule Calendar page

This example illustrates the fields and controls on the Schedule Calendar page.


Schedule Calendar

Set ID: AUS01 Setid for AUS01 BU

Schedule ID: KA8HRELAPSED 8 hour Elapsed

From Date: 01/01/1980

Workgroup:

Load Calendar Previous Period Next Period

Schedule Calendar Customize | Find | First 1-7 of 7 Last

Shift Time Configurable Totals

Day	Date	Day Nbr	Workday ID	Shift ID	Sched Hrs	More
Tuesday	01/01/1980	1	KA8HRDAY	KA8ELAPSED	8.00	More
Wednesday	01/02/1980	2	KA8HRDAY	KA8ELAPSED	8.00	More
Thursday	01/03/1980	3	KA8HRDAY	KA8ELAPSED	8.00	More
Friday	01/04/1980	4	KA8HRDAY	KA8ELAPSED	8.00	More
Saturday	01/05/1980	5	OFF	OFF		More
Sunday	01/06/1980	6	OFF	OFF		More
Monday	01/07/1980	7	KA8HRDAY	KA8ELAPSED	8.00	More

This page enables you to view the schedule calendar that the system derives from a specific schedule definition.

From Date	Enter the starting date of the schedule calendar you want to view. By default this page displays the schedule calendar starting with the effective date of the associated schedule definition.
Rotation ID	Select the rotation ID for which you want to view a schedule calendar. This field appears only if there are rotation IDs defined for the schedule calendar.
Workgroup	Enter the workgroup for which you want to view a schedule calendar. This field is available only if Time and Labor is installed.

Load Calendar Click to view the schedule calendar for the selected date and workgroup.

Previous Period Click to view the schedule calendar for the previous period.

Next Period Click to view the schedule calendar for the next period.

Validating Work Schedules

For punch type schedules, when a change is made to a shift, the related schedule(s) may need to be re-validated.

Page Used to Validate Schedules

Page Name	*Definition Name*	*Navigation*	*Usage*
Schedules to be Validated	SCH_CLND_REFRESH	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Schedules to be Validated	Validate a schedule after making a change to a shift.

Schedules to be Validated Page

Use the Schedules to be Validated page (SCH_CLND_REFRESH) to validate a schedule after making a change to a shift.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Schedules, Schedules to be Validated

This page contains a list of schedules that need validating because a related shift was modified for punch type schedules. The system displays a schedule ID, description and status for each schedule that needs validating.

Click the Validate button to validate the schedule or click the Show Schedule link to access the Schedule Definition page.

Defining Holiday Schedules

When you run the Absence Take process, the system refers to the payee's holiday schedule to determine if a reported absence occurred on a holiday.

By default, a payee inherits the holiday schedule for the pay group. You can assign a different holiday schedule to a payee using the Job Data - Payroll page.

Page Used to Define Holiday Schedules

Page Name	*Definition Name*	*Navigation*	*Usage*
Holiday Schedule	HOLIDAY_SCHED_TBL	Set Up HCM, Foundation Tables, Organization, Holiday Schedule, Holiday Schedule	Define holiday schedules.

Assigning Work Schedules

This topic provides an overview of work schedule assignment and discusses how to:

- Assign work schedules to a payee.
- Create personal schedule definitions.
- Compare work schedule rotations.

Pages Used to Assign Work Schedules

Page Name	*Definition Name*	*Navigation*	*Usage*
Pay Group Name	GP_PYGRP_NAME	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups, Pay Group Name	Assign a schedule group and a schedule to a pay group.
Assign Work Schedule	SCH_ASSIGN	Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Assign Work Schedule, Assign Work Schedule	Assign payees' long-term schedules or alternate schedules.
Personal Schedule Definition - Definition	SCH_DEFINITION	From the Assign Work Schedule page, click the Create Schedule link (which is only visible when the assignment method is Create Personal Schedule).	Define schedule definition details for a specific payee.
Personal Schedule Definition - Schedule Shifts	SCH_DEFINITION_2	From the Assign Work Schedule page, click the Create Schedule link (which is only visible when the assignment method is Create Personal Schedule). Select the Schedule Shifts page.	Define shift details for a specific payee.

Page Name	Definition Name	Navigation	Usage
Schedule Calendar	SCH_CALENDAR	From the Assign Work Schedule page, click the Show Schedule link for a rotating schedule to access the Schedule Calendar page. (The Show Schedule link appears when the assignment method is Use Default Schedule or Use Predefined Schedule.) Click the Compare Rotations link on the Schedule Calendar page.	Compare selected rotations to see what the pattern rotations look like as of the effective date of the schedule assignment.

Understanding Work Schedule Assignment

After you create work schedules, you assign a schedule group and a schedule ID to each pay group using the Pay Group Name page. By default, a payee inherits the schedule group and work schedule that are associated with the payee's pay group. (Pay groups are assigned to payees using the Payroll page of the Job Information component.)

You can explicitly assign a schedule to a payee other than the pay group default using the Assign Work Schedules component (GP_SCH_ASSIGN). You can also use this component to assign an alternate schedule to a payee and access the Personal Schedule Definition component (SCH_DEFN_ADHOC) where you can define a personal schedule for the payee.

When you assign a schedule to a payee, the system deletes any workday overrides for that payee that are of a different type than the schedule assignment (for example, *Elapsed* instead of *Punch*) and that have a date later than or equal to the new assignment.

Managers can use self-service pages to assign schedules to payees and to change schedule assignments.

Note: For schedule assignment, the Workforce_Sync Message must be active on the PERSON_DATA queue, which comes with the PeopleSoft Integration Broker feature.

Assign Work Schedule Page

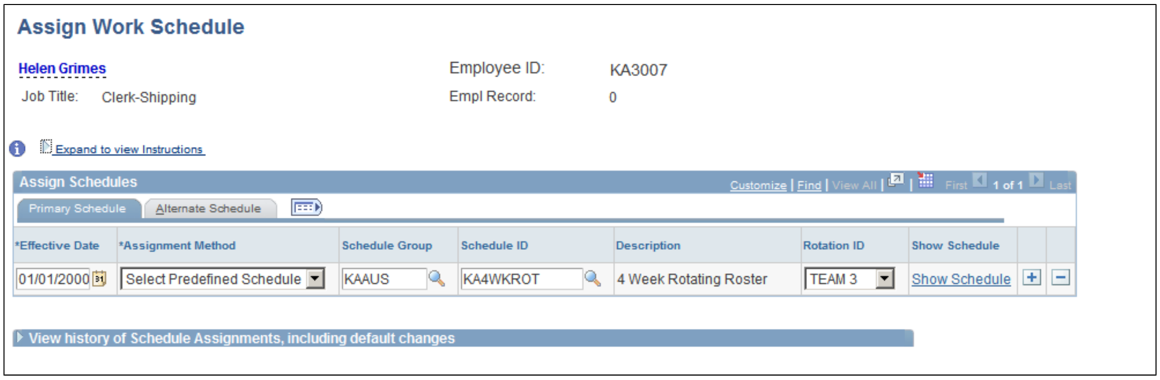
Use the Assign Work Schedule page (SCH_ASSIGN) to assign payees' long-term schedules or alternate schedules.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Assign Work Schedule, Assign Work Schedule

Image: Assign Work Schedule page

This example illustrates the fields and controls on the Assign Work Schedule page.



Primary Details Tab

Assignment Method

Select from the following options:

- *Create Personal Schedule:* Select to create an effective-dated schedule for this payee. When you select this option, the Create Schedule link appears.
- *Select Predefined Schedule:* Select a schedule group and schedule ID to associate with the payee.
- *Use Default Schedule:* Select to assign the default schedule for the payee's pay group.

Schedule Group

If the assignment method is *Select Predefined Schedule* or *Create Personal Schedule,* select the schedule group to assign to the payee. Each schedule group is associated with a SetID that determines which schedules you can associate with the payee (if you are assigning a predefined schedule) or which predefined workdays and shifts you can use (if you are creating a personal schedule).

If the assignment method is *Use Default Schedule,* the system displays the schedule group that the payee inherits from the pay group.

Schedule ID

If the assignment method is *Select Predefined Schedule,* select the schedule to assign to the payee.

If the assignment method is *Use Default Schedule,* the system displays the schedule ID that the payee inherits from the pay group.

If the assignment method is *Create Personal Schedule,* the system populates this field with the payee's employee ID and five zeros. For example, if the payee's employee ID is KA3007, the schedule ID is KA300700000.

Rotation ID

This field appears if the selected schedule is a rotating schedule. It is used to determine the relative day in the schedule to which the payee should be assigned.

Show Schedule

This link appears if the assignment method is *Use Default Schedule* or *Select Predefined Schedule.* Click to access the Schedule Calendar page where you can view the schedule as of the effective date of the schedule assignment. For rotating schedules, you can click a link on the Schedule Calendar page to compare rotations.

Create Schedule

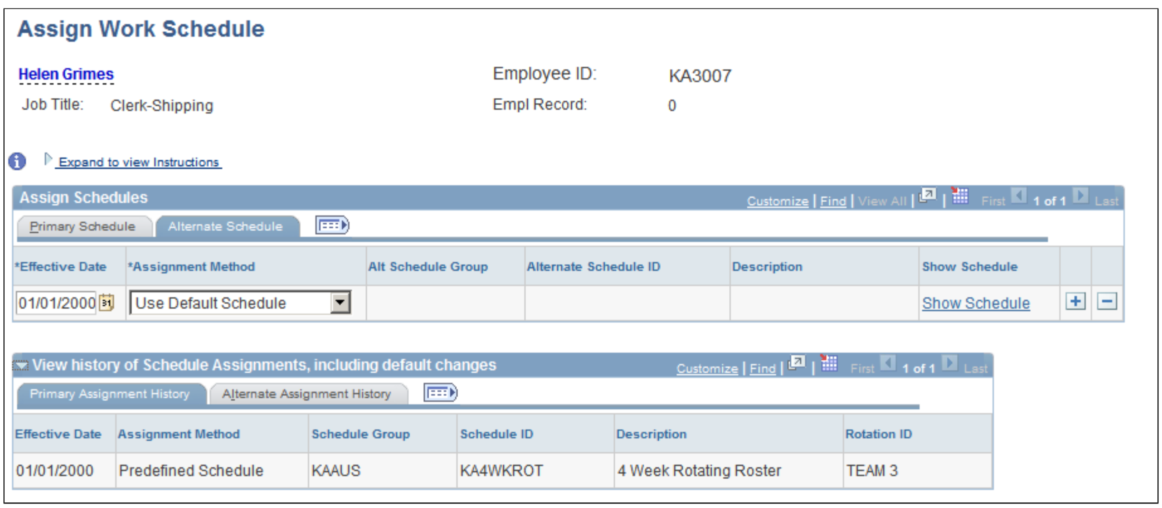
This link appears if the assignment method is *Create Personal Schedule.* Click to access the Personal Schedule Definition component where you can define a schedule for this payee.

Alternate Details Tab

Select the Alternate Details tab.

Image: Assign Work Schedule page: Alternate Details tab

This example illustrates the fields and controls on the Assign Work Schedule page: Alternate Details tab.



Use this tab to assign an alternate schedule to a payee. The fields on this tab are similar to the fields on the Primary Details tab.

Viewing the History of Schedule Assignments

When you click the link to expand the history section of the page, the system displays all of the schedule assignments, including any changes to the default schedule assigned to the payee's pay group.

Personal Schedule Definition - Definition Page

Use the Personal Schedule Definition - Definition page (SCH_DEFINITION) to define schedule definition details for a specific payee.

Navigation

From the Assign Work Schedule page, click the Create Schedule link (which is only visible when the assignment method is Create Personal Schedule).

Define the payee's schedule in the same way that you create a schedule definition. Personal schedules, however, cannot be rotating schedules.

Related Links

Definition Page

Schedule Calendar Page

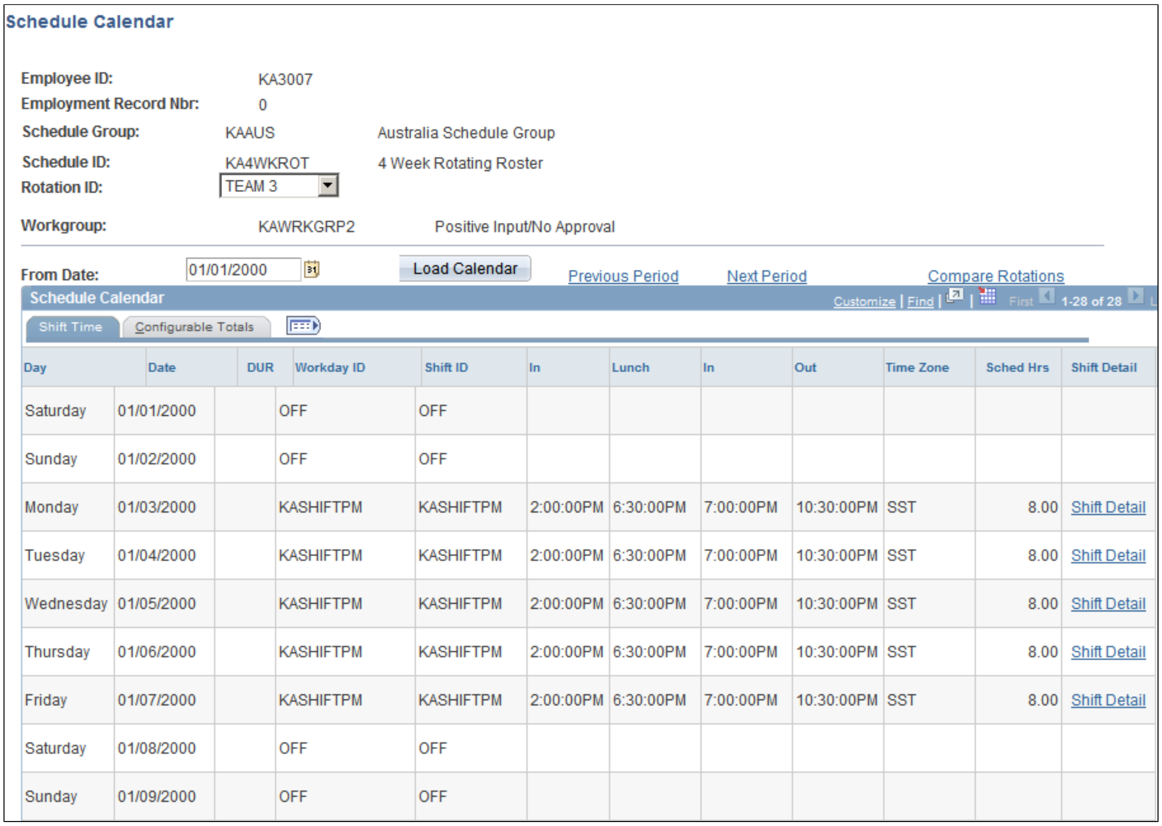
Use the Schedule Calendar page (SCH_CALENDAR) to compare selected rotations to see what the pattern rotations look like as of the effective date of the schedule assignment.

Navigation

From the Assign Work Schedule page, click the Show Schedule link for a rotating schedule to access the Schedule Calendar page. (The Show Schedule link appears when the assignment method is Use Default Schedule or Use Predefined Schedule.) Click the Compare Rotations link on the Schedule Calendar page.

Image: Schedule Calendar page

This example illustrates the fields and controls on the Schedule Calendar page.



The displayed schedule pattern is the length of the actual schedule. For example, if the schedule is 28 days, that is the actual pattern that displays.

Compare Rotations	Click to select the rotations to compare. The system displays a list of the rotation IDs that are associated with the schedule. Select those that you want to compare and click the Load Rotations button.

Using Self-Service Scheduling Features for Managers

Managers can use self-service pages in Absence Management to assign, view, change, and override work schedules. In addition to viewing coverage, assigned shifts, and total work hours, managers can find replacements, swap shifts, copy schedules, and make short- and long-term schedule changes.

This topic discusses how to:

- Manage schedules.

- Override shifts.
- Select default options.
- Find replacements.
- Copy schedules.
- Swap schedules.
- Assign and create schedules.

Pages Used to Manage Schedules

Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Schedules	SCH_MNG_DAILY SCH_MNG_WEEKLY SCH_MNG_DRANGE	Manager Self Service, Time Management, Manage Schedules, Manage Schedules, Weekly Schedules	View a payees' schedule and access linked pages to update schedules.
Daily Detail for <date>	SCH_MNG_DAILY_DTL	Click the <x> Hours link on the Manage Schedules page.	View details for a given shift and override shift information.
Manage Schedule Options	SCH_MNG_OPTIONS	Manager Self Service, Time Management, Manage Schedules, Manage Schedules Click the Schedule Display Options link at the bottom of the page.	Define default settings for the Manage Schedules page.
Schedule Preferences	SCH_EE_PREF	Manager Self Service, Time Management, Manage Schedules, Schedule Preferences Click the payee's name.	View an employee's contact and schedule preferences. This page is used in additional ways.
Find Replacement	SCH_MNG_REPLACE	Manager Self Service, Time Management, Manage Schedules Select a payee and click the Find Replacements button.	Find a replacement for an employee.
Copy Schedules	SCH_MNG_COPY	Manager Self Service, Time Management, Manage Schedules Select a payee and click the Copy Schedules button.	Copy an employee schedule to be used by another employee.

Page Name	Definition Name	Navigation	Usage
Swap Schedules	SCH_MNG_SWAP	Manager Self Service, Time Management, Manage Schedules Select a payee and click the Swap Schedules button.	Swap two employees' schedules.
Assign Work Schedule	SCH_ASSIGN	Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Assign Work Schedule, Assign Work Schedule	Assign payees' long-term schedules or alternate schedules.

Weekly Schedules Page

Use the Weekly Schedules page (SCH_MNG_WEEKLY) to view a payees' schedule and access linked pages to update schedules.

Navigation

Manager Self Service, Time Management, Manage Schedules, Manage Schedules, Weekly Schedules

Image: Weekly Schedules page (1 of 3)

This example illustrates the fields and controls on the Weekly Schedules page (1 of 3).

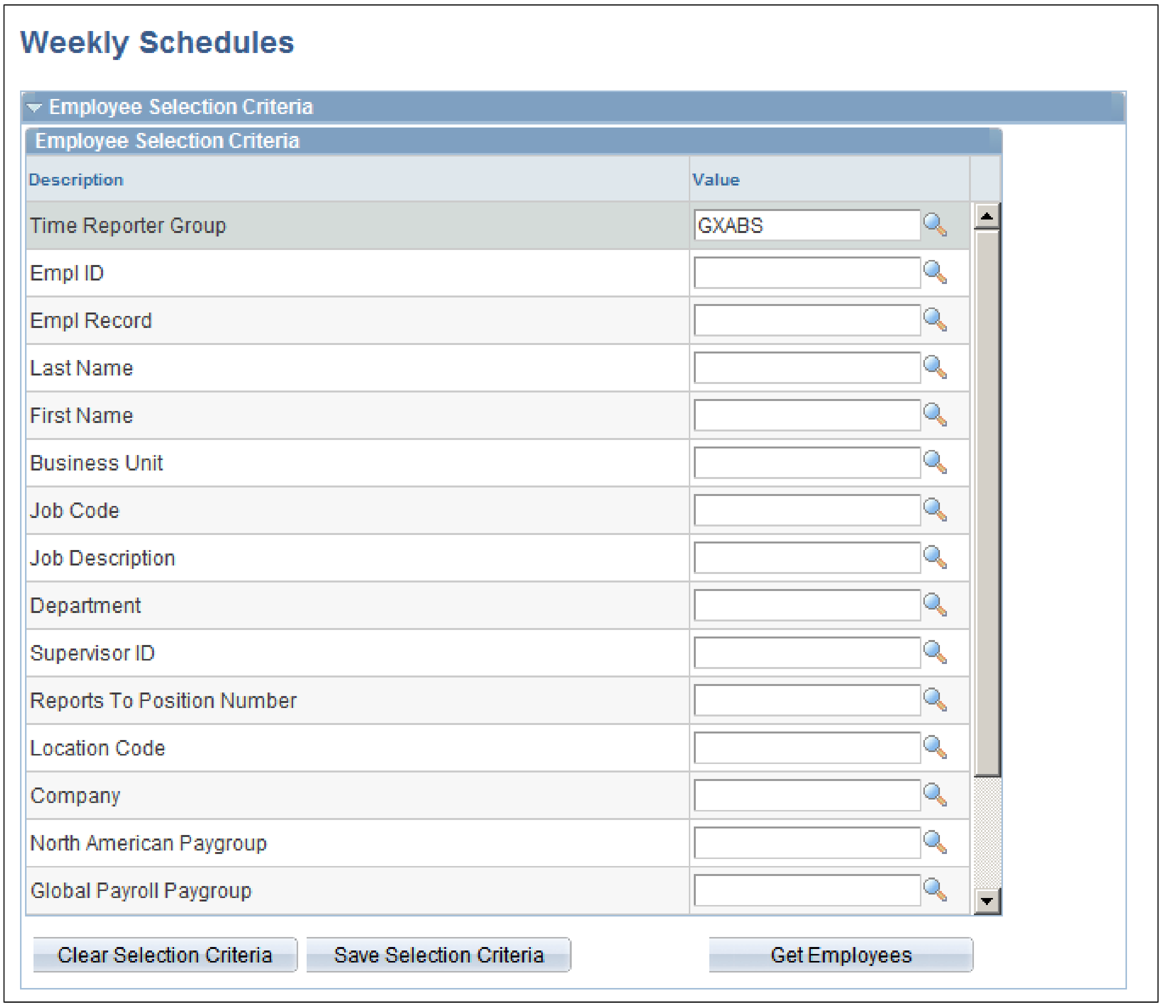


Image: Weekly Schedules page (2 of 3)

This example illustrates the fields and controls on the Weekly Schedules page (2 of 3).

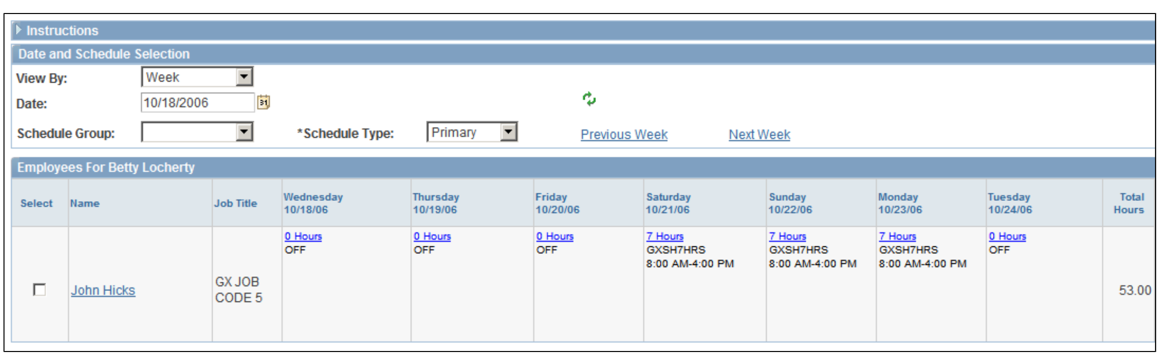
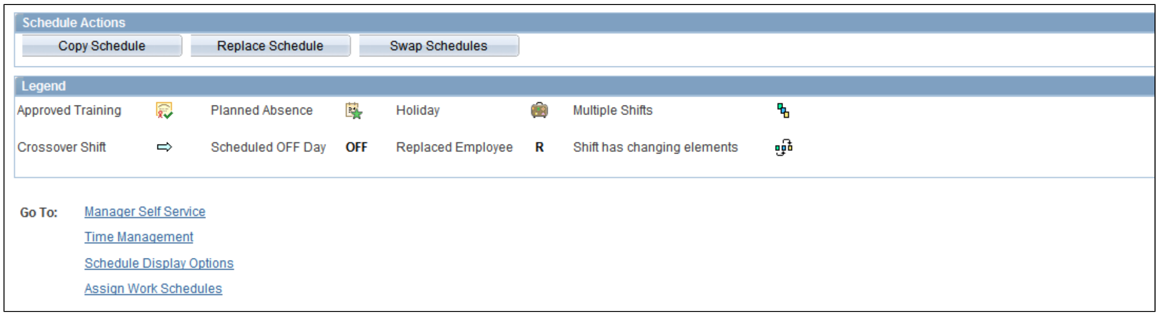


Image: Weekly Schedules page (3 of 3)

This example illustrates the fields and controls on the Weekly Schedules page (3 of 3).



When you access this page, the system displays either the Daily, Weekly, or Date Range Schedules pages, depending on the default set on the Manage Schedules View Options page.

Enter values in Employee Selection Criteria and click the Get Employees button to filter the list of payees that requires changes or review. Fields for Workgroup and Taskgroup apply only if Time and Labor is installed. The North American Pay Group field applies only if Payroll for North America is installed; the Global Payroll Pay Group field does not apply.

View By — Select *Day, Week,* or *Date Range* to view the listed payees and their schedules using the time period chosen. The value that you select here determines the labels that appear on various links and date fields.

- If you select *Day,* you can also enter the start time and end time.
- If you select *Date Range,* the maximum number of days the date range can span is 31.

Schedule Type — Values are *Primary* or *Alternate.*

Coverage — This field appears only if you view by day. Options are *Scheduled* and *Unscheduled.*

Refresh — Click to refresh the page after selecting viewing preferences.

Employees for <Manager Name>

The system lists the payees that meet your selection criteria.

Select — This field works with the schedule action fields.

Name — Click the employee's name to access the Schedule Preferences page where you can view the employee's schedule preferences before making scheduling changes.

<x Hours> — Click this link to access the Daily Details page for a given shift to view the shift details or override the shift.

Schedule Actions

The schedule actions of Schedule Replacements, Swap Schedules, and Copy Schedules are audited.

Schedule Replacements	To find a replacement for this payee, select the payee and click the Replacements button.
Copy Schedules	To copy this payee's schedule, select the payee and click the Copy Schedules button. The Copy Schedules page opens so that you can specify which payees are to inherit the copied schedule.
Swap Schedules	To swap two payees' schedules, select the two payees and click the Swap Schedules button.

Legend

Events such as approved training, planned absence, and holiday are denoted on the schedule with buttons. A crossover shift indicates a shift that continues past midnight. Approved training can be designated only if Time and Labor is installed.

If a day has multiple shifts, the first shift information appears along with the multiple shifts button. The second shift and its details appear on the Daily Details for <date> page.

Note: To have the system display buttons for approved training, planned absences, holidays, and no shows, you must select these options on the Manage Schedules View Options page.

Daily Detail for <Date> Page

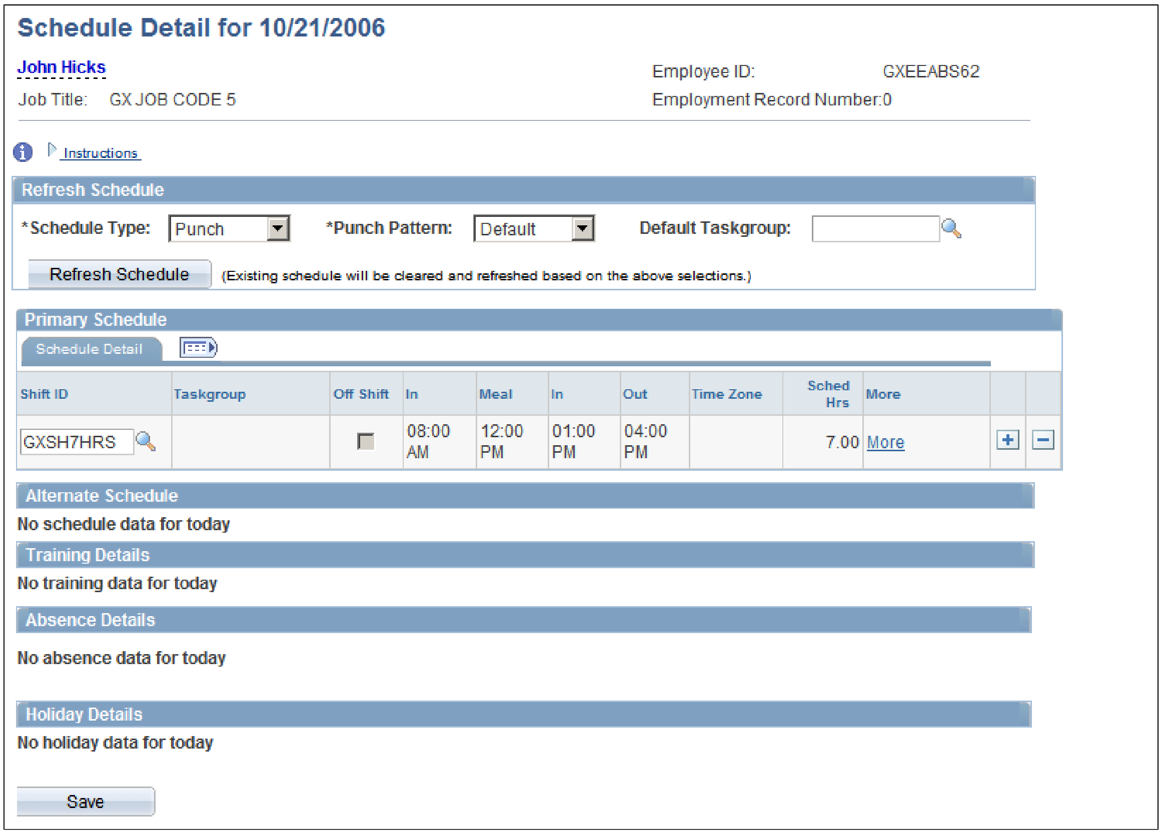
Use the Daily Detail for <date> page (SCH_MNG_DAILY_DTL) to view details for a given shift and override shift information.

Navigation

Click the <x> Hours link on the Manage Schedules page.

Image: Daily Detail for <date> page

This example illustrates the fields and controls on the Daily Detail for <date> page.



Manage Schedule Options Page

Use the Manage Schedule Options page (SCH_MNG_OPTIONS) to define default settings for the Manage Schedules page.

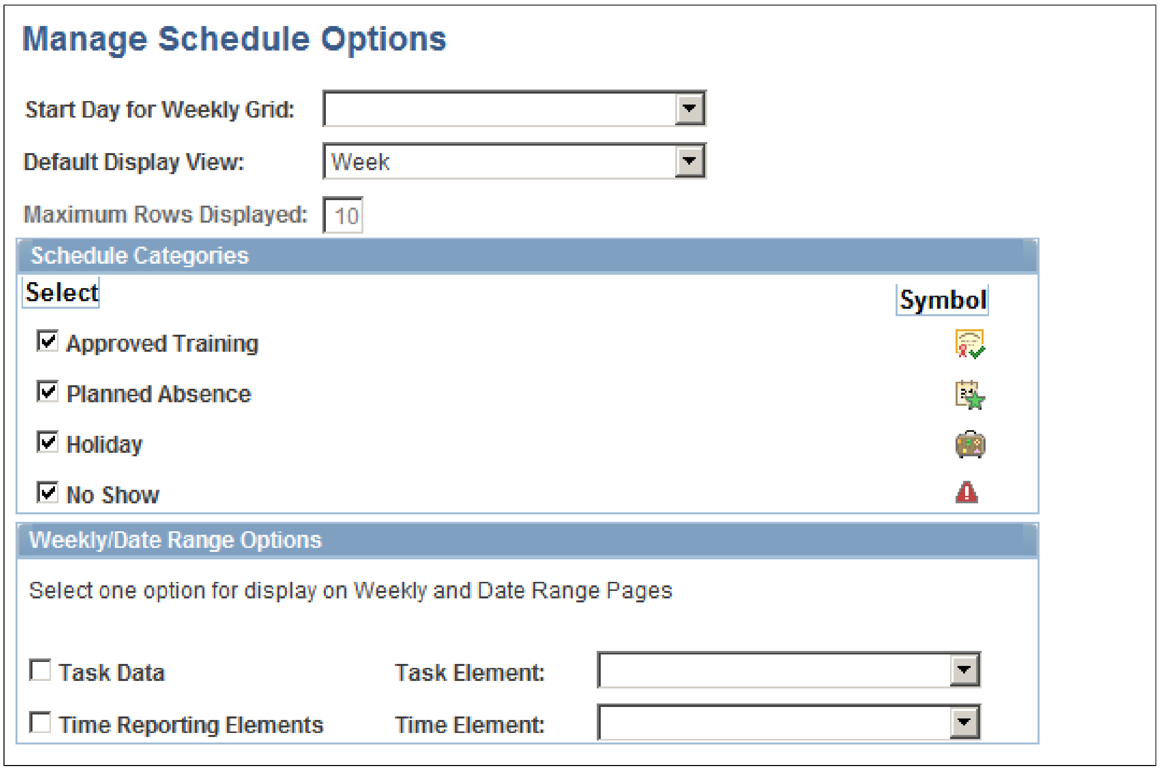
Navigation

Manager Self Service, Time Management, Manage Schedules, Manage Schedules

Click the Schedule Display Options link at the bottom of the page.

Image: Manage Schedules Display Options page

This example illustrates the fields and controls on the Manage Schedules Display Options page.



Use this page to define default settings for the Manage Schedules page.

Start day for Weekly Grid	Select the day of the week that is to appear first in the scheduling grid.
Default Display View	Select *Date Range, Day,* or *Week* to have the system display the daily, weekly, or date range pages when you access the Manage Schedules page.
Maximum Rows Displayed	Enter the maximum number of payees to display on each page.

Schedule Categories

Select the types of events you want the system to mark on the schedule. The system displays the corresponding symbol on the relevant day.

Approved training applies only if Time and Labor is installed. In this case, the system can identify training days that are recorded in PeopleSoft Learning Management and HR: Manage Training.

Planned absences represent requested and approved absences (from the GP_ABS_EVENT table). If Time and Labor is installed, planned absences also include leaves of absence for Base Benefits customers.

No show information applies to payees with a punch schedule and can be reported only if Time and Labor is installed. The *No Shows* value only displays for the Daily Schedules page. *No Shows* information is stored, so any *No Shows* information from the past can be viewed.

Weekly/Date Range Options

If Time and Labor is installed, you can display one type of task data and one time reporting element on the weekly or date range pages.

Finding Replacements

Access the Find Replacements page.

This page lists all payees who are not scheduled for the shift or time range for which you need a replacement. It excludes payees for whom an absence has been entered. If Time and Labor is installed, it can also exclude payees who are scheduled for training.

Using the replacement feature is appropriate when you want to replace an absent payee with another payee who is not already scheduled to work during that time period.

Select the employee who will act as a replacement and click the Replace button. The system displays an *R* next to the replaced employee in the daily cell on the Manage Schedules pages (day, week or date range).

The person who is replacing the employee inherits the schedule. The replaced employee retains the original schedule for appropriate payment if the employee reports an absence for that day.

If you need to undo the replacement, click the View Daily Details link in the cell for the replaced employee (the cell that displays the *R*). Click the Undo Replacement button and then click OK.

Copy Schedules Page

Use the Copy Schedules page (SCH_MNG_COPY) to copy an employee schedule to be used by another employee.

Navigation

Manager Self Service, Time Management, Manage Schedules

Select a payee and click the Copy Schedules button.

Select one or more employees who are to receive the copied schedule and click the Copy button. The whole day is copied for the date or range of dates defined.

Note: If you selected *Day* as the View By option on the Manage Schedules page, the Date field is display only.

Swap Schedules Page

Use the Swap Schedules page (SCH_MNG_SWAP) to swap two employees' schedules.

Navigation

Manager Self Service, Time Management, Manage Schedules

Select a payee and click the Swap Schedules button.

Change the start date and end date if required and click the Swap button. The whole day's schedule is swapped between the two employees, or all the days listed if it is a range of dates.

Important! Avoid using the swap feature to replace an absent payee. If you use the swap feature, and the payee reports an absence, the payee may not be correctly compensated for the absence. This is because the absence process refers to the swapped schedule (which might be for an off shift or different shift), rather than the payee's actual schedule, to determine the amount of time off.

Note: If you selected the *Day* View By option, the Date field on this page is display only.

Assigning and Creating Schedules

Use the Assign Work Schedule page (SCH_ASSIGN) assign long-term schedules or alternate schedules.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Assign Work Schedule, Assign Work Schedule

You can use this page to assign work schedules to a payee and to access pages for viewing assigned schedules and for creating a schedule for a particular payee. These pages are the same as the pages that administrators use to assign schedules and create personal schedules.

Related Links

Assigning Work Schedules

Using Self-Service Scheduling Features for Employees

Employees can use self-service pages in Absence Management to enter their schedule preferences, such as preferred contact information for schedule updates, willingness to work a compressed work week, and daily shift preferences. When a manager wants to replace, swap, or copy a schedule, the employee preferences can be viewed to determine the best available replacement or schedule.

This topic discusses how to set up schedule preferences.

Pages Used to Enter Scheduling Preferences and View Schedules

Page Name	*Definition Name*	*Navigation*	*Usage*
Schedule Preferences	SCH_EE_PREF	Self Service, Time Reporting, User Preferences, Schedule Preferences	Enables employees to view and update their schedule related preferences.

Page Name	Definition Name	Navigation	Usage
Personal Information	HR_EE_PERS_INFO	Click the Update your contact information link on the Schedule Preferences page.	View contact information and access pages where you can update it.
Monthly Schedule	SCH_EE_MONTHLY SCH_EE_PREF	Self Service, Time Reporting, View Time, Monthly Schedule, Monthly Schedule	Enables employees to view their schedules.

Schedule Preferences Page

Use the Schedule Preferences page (SCH_EE_PREF) to enables employees to view and update their schedule related preferences.

Navigation

Self Service, Time Reporting, User Preferences, Schedule Preferences

Contact Preference

The employee's preferred phone number and email address appear. If PeopleSoft eProfile is installed, you can click a link to access the Personal Information page, where you can update the contact information.

Schedule Preferences

For each day of the week, enter the shift or start and end times you prefer to work.

Willing to work a compressed work week

Define whether or not you will work a compressed work week.

Shift

Enter the shift you prefer to work. This field is populated based on the employee ID. If the current user has a schedule assigned, the only shifts available in the drop-down list box are those shifts that correspond to the user's schedule ID and the SetID determined by the user's schedule group. If the user has no schedule assigned, the Shift ID field is hidden.

Note: There is no validation between start and end times and shifts. No logic exists to verify that the times entered fall within the shift, if one is entered.

Start Time, End Time

Enter the start and end times you prefer to work.

Willing to work overtime

Enter whether you will work overtime.

Willing to work double shifts

Enter whether you will work a double shift.

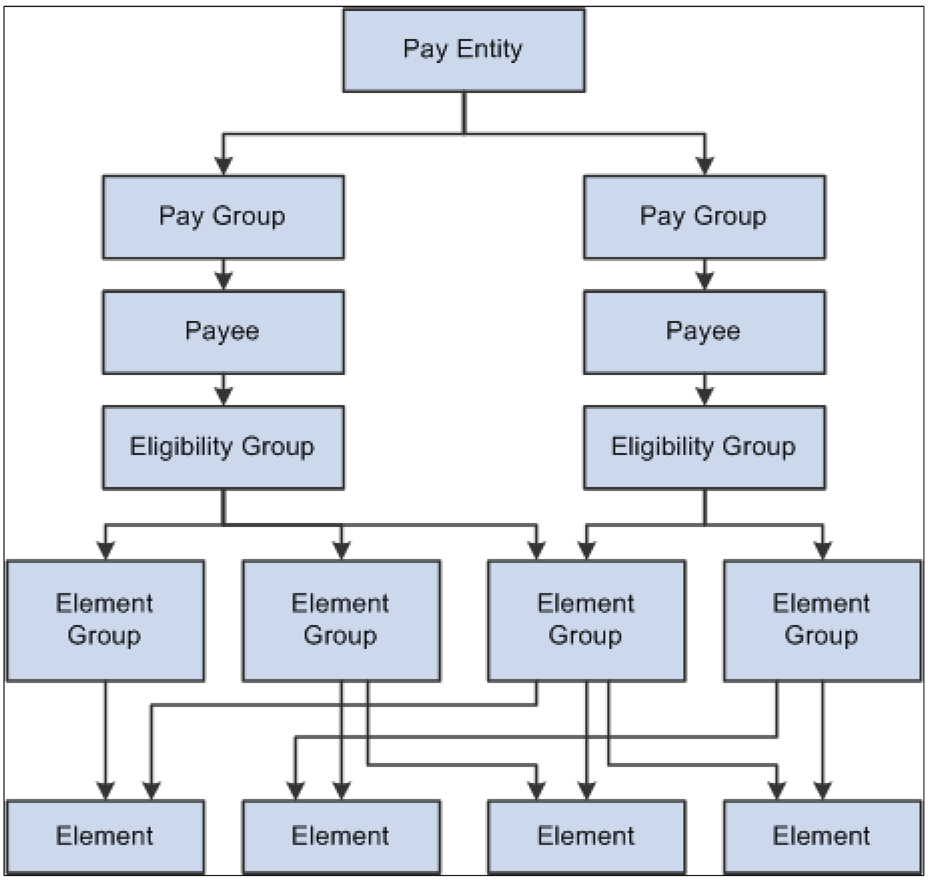
Chapter 13

Defining the Organizational Structure

Understanding the Organizational Structure

Image: Organizational structure of Absence Management

This diagram shows the components of the Absence Management organizational structure for absence processing.



Elements are the basic building blocks of Absence Management. Element groups are used to communicate lists of elements to eligibility groups. Eligibility groups are associated with pay groups. Payees who share absence characteristics belong to pay groups. Multiple pay groups are linked to a single pay entity, the business organization that pays payees.

Eligibility groups and element groups are used to control which elements a payee receives. Element Groups contain individual elements such as , absence entitlements and absence takes. Eligibility Groups in turn contain Element Groups. This two-level approach allows for a more efficient set up; for example, you can assign each payee to an eligibility group, such as one for managers, and another for staff employees.

Defining Element Groups

This topic provides an overview of element groups and discusses how to:

- Name an element group.
- Insert elements into element groups.

Pages Used to Define Element Groups

Page Name	***Definition Name***	***Navigation***	***Usage***
Element Group Name	GP_PIN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Element Groups, Element Group Name	Name the element group and define its basic parameters.
Element Group Members	GP_ELEMENT_GROUP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Element Groups, Element Group Members	Insert elements into element groups.

Understanding Element Groups

To identify numerous elements you can define element groups, such as one for absence take elements, and another for absence entitlement elements. You can use element groups to:

- Assign the same set of elements to a group of payees.

  For example, you might group absence entitlement elements into one element group, and absence take elements into another and use only those two element group names to specify absence elements.

- Create list sets.

  A list set is a collection of elements and parameters that you can use in any process or report that requires a list of elements.

Related Links

Understanding Off-Cycle Processing

Element Group Name Page

Use the Element Group Name page (GP_PIN) to name the element group and define its basic parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Element Groups, Element Group Name

You name every element and define its basic parameters on an Element Name page. All element components within Absence Management share the same first Element Name page (GP_PIN).

Related Links

Defining Element Names

Element Group Members Page

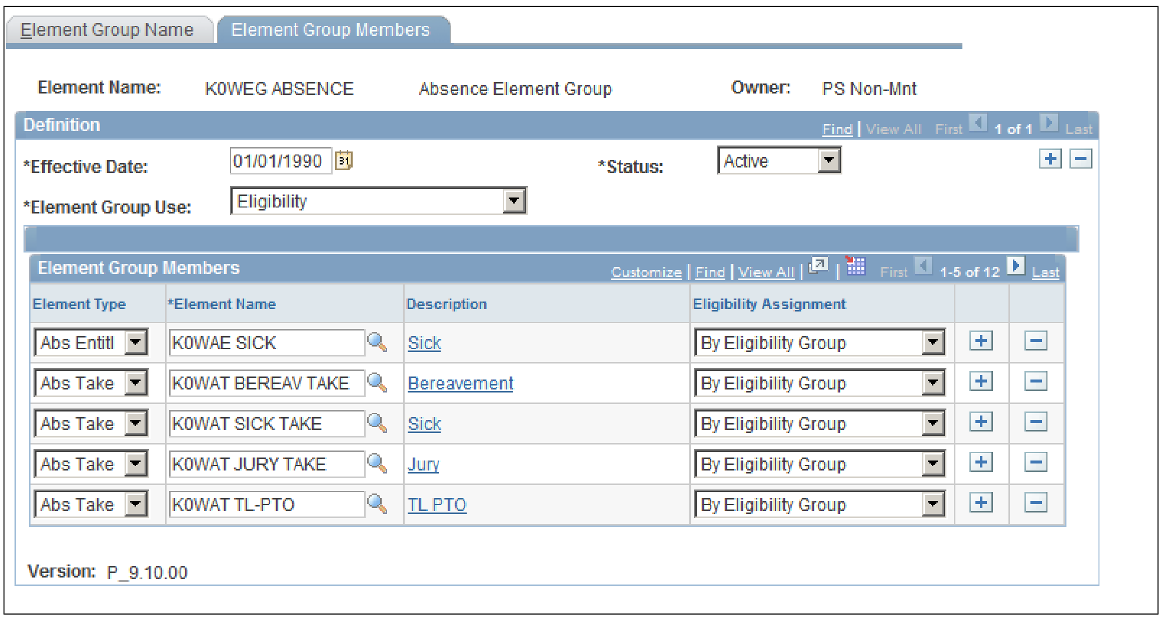
Use the Element Group Members page (GP_ELEMENT_GROUP) to insert elements into element groups.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Element Groups, Element Group Members

Image: Element Group Members page

This example illustrates the fields and controls on the Element Group Members page.



Use caution when making changes to element groups that are referenced by list sets. Changes to element groups affect related list sets. For more information about list sets, their use, and their relationship to element groups, see Understanding Applications and List Sets.

Element Group Use	Define the way that this element group will be used. This field limits the entry types available in the Element Group Members group box. Values are: • *All-purpose:* Select if this element group can be used for eligibility processing, to define a process set for off-cycle processing, or with list set functionality. • *Eligibility:* This is the default value. Select if this element group is to be used only for eligibility processing.

- *Process Set:* Select if this element group identifies a limited set of elements to be processed for a given segment. This type of element group is available for off-cycle processing. The inclusion of an element in this group does not waive eligibility requirements; payees must still be eligible for these elements for the elements to be resolved.
- *Application:* Select to use this element group specifically with the list set functionality. Selecting this value will avail the Applications - Static/Dynamic group box and the Application Default Sort Order field.

Note: The system requires that the Element Group Use field value be the same for *multiple* effective-dated rows. Therefore, if you add a second effective-dated row to this page, the system populates the new effective-dated row's Element Group Use field by default to the value on the original or earliest effective-dated row, and makes the Element Group Use fields unavailable for entry on all effective-dated rows. So, as long as there's only one row, you can edit the Element Group Use field value. When you insert more than one row, all rows will have the same Element Group Use field value (the value of the original or earliest effective-dated row) and all rows will have the Element Group Use field unavailable for entry.

Applications - Static/Dynamic

Select whether the element group is a static or dynamic list of elements. Static element groups include a list of elements in the Element Group Members group box. Dynamic element groups include only a SQL Where clause - Dynamic Selection Criteria field - that dynamically determines which elements are included in the group every time the element group is called. The Where clause can also contain an Order By clause to sort the selected elements. This option is only available when Element Group Use is *Application.*

Element Group Members

Element Type

Select the type of element that you're adding to the element group. Values are *Absence Entitlement, Absence Take, Deduction, Earnings,* and *Element Group.*

Note: When nesting element groups (that is, including element groups within element groups), the member groups must have the same use option as the parent group.

Element Name

Select the element name that corresponds to the entry type selected.

Description

Click to open the element's definition component in a separate browser window.

Eligibility Assignment

Select the method for assigning the selected element to a payee. This field enables you to indicate whether a payee gets the element processed simply by inclusion in the eligibility group or whether you have to assign the element via the payee-level Earnings/Deductions Assignment page or enter positive input. This field is only available when Group Use Type is *Eligibility* or *All-Purpose.*

Values are:

By Eligibility Group: For elements that apply to most or all payees who are associated with this element group via an eligibility group.

By Payee: For payee-level elements.

This field is hidden when you select *Process Set* for the element group use. It is also hidden when the entry type is *Element Group.*

Application Default Sort Order Enter the sequence number used to sort the element. To display multiple elements on the same line, use the same sequence number. This field is only available when Group Use Type is *Application* or *All-Purpose.*

Changing the Element Group Use Field

When needed, you can change the Element Group Use value after you have created the element group. When the field value is changed, the system conducts the following checks:

- If the field value is *Eligibility* or *Process Set* and the element group is being used in that specific area, the system will only allow a change to *All-purpose.*
- If the field value is *Eligibility* or *Process Set* and the element group is not being used in that specific area, the system will allow any change.
- If the field value is *All-purpose,* the system will only allow a change if it does not alter any current usage (that is, the system will not allow a change to *Eligibility* if the Element Group is used to define a process set.

Defining Eligibility Groups

This topic provides an overview of eligibility groups and discusses how to insert element groups into eligibility groups.

Page Used to Define Eligibility Groups

Page Name	***Definition Name***	***Navigation***	***Usage***
Eligibility Group	GP_ELIG_GROUP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Eligibility Groups, Eligibility Group	Insert element groups into eligibility groups.

Understanding Eligibility Groups

Eligibility groups indicate the specific elements for which a certain payee population may be eligible. Eligibility groups contain one or more element groups and are often used to differentiate types or levels of workers. For example, you can create an eligibility group of element groups pertaining to company executives.

You assign a default eligibility group to each pay group. Payees assigned to a pay group inherit the eligibility group from the pay group definition. You can override a pay group definition by payee by stating a different eligibility group at the payee level.

Eligibility Group Page

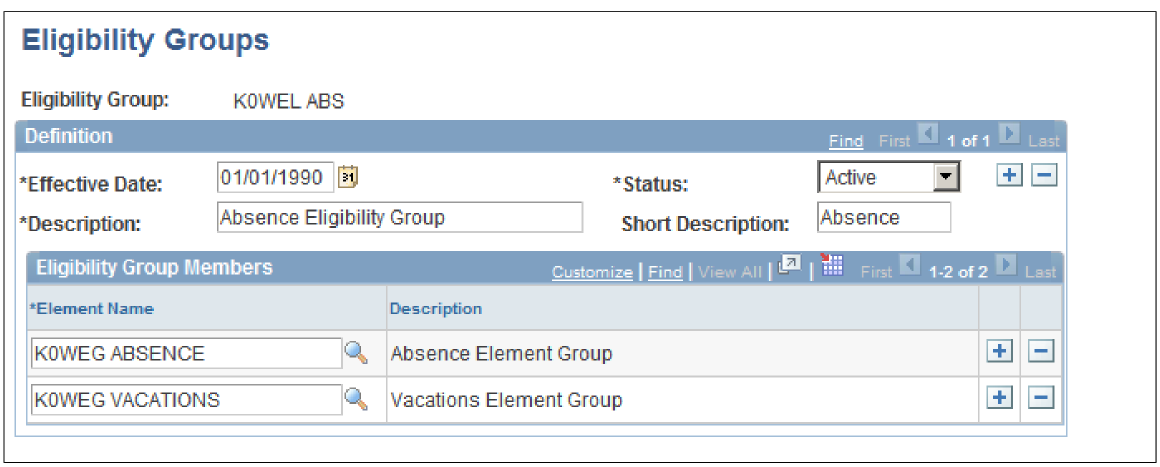
Use the Eligibility Group page (GP_ELIG_GROUP) to insert element groups into eligibility groups.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Eligibility Groups, Eligibility Group

Image: Eligibility Group page

This example illustrates the fields and controls on the Eligibility Group page.



Element Name Select the name of the element group to associate with this eligibility group. To select additional element groups, add more rows.

Defining Pay Entities

This topic provides an overview of pay entities and discusses how to:

- Enter address information for a pay entity.
- Enter processing details for a pay entity.

Note: This topic discusses the first two pages of the Pay Entity component. The other pages in the Pay Entity component, including the Retro Limits page and the Supporting Elements Override page are discussed elsewhere in this documentation.

Pages Used to Define Pay Entities

Page Name	***Definition Name***	***Navigation***	***Usage***
Pay Entity Address	GP_PYENT_NAME	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities, Pay Entity Address	Enter address information for a pay entity.
Processing Details	GP_PYENT_PRCS_DTL	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities, Processing Details	Enter processing details for a pay entity.

Related Links

Setting Backward and Forward Retro Limits

Defining Pay Entity Overrides

Understanding Pay Entities

A pay entity is the organization that is responsible for paying payees. You can also use a pay entity to define the type of currency for processing calculations. The pay entity is a legal definition of an organization from a absence and payroll perspective. In many cases, an organization and a pay entity are identical. Absence Management doesn't define a relationship between an organization and a pay entity. If several organizations are held by the same holding organization, the holding organization can be the pay entity, or one organization can have several subsidiaries that are individual pay entities. The system defines most accumulators by pay entity.

Batch Processing

Batch processing uses the data on the Processing Details page to determine which elements to load. Only elements that are defined for *All Countries* (on the Element Name page) and those defined for *Specific Country,* where the country equals the pay entity country are loaded.

If any element with a different country has been referenced, the batch program logs an error. Depending on that element's importance, the process might cease. If it cannot continue, it issues the following message:

Element %1 (PIN %2) not loaded into UPINA. (N/A for country: %3).

If the process can continue, it issues one of these messages:

Element %1 (PIN %2) - and data for the element - not loaded into the process. (N/A for country: %3)

Element %1 of parent element %2 on Process List %3 is not found in %4. (PIN number %5)

Note: Reasons other than country assignment can prevent an element from being loaded.

Pay Entity Address Page

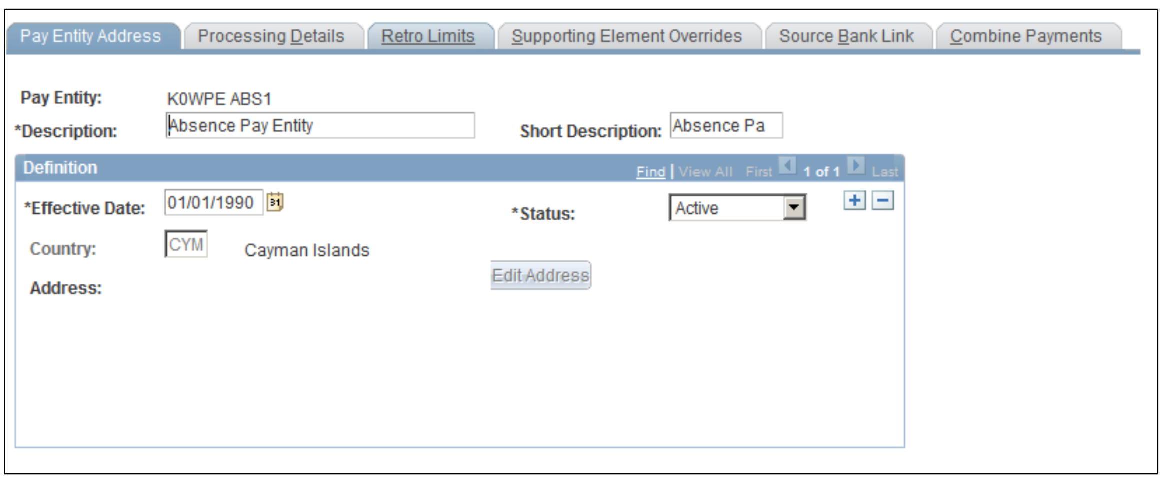
Use the Pay Entity Address page (GP_PYENT_NAME) to enter address information for a pay entity.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities, Pay Entity Address

Image: Pay Entity Address page

This example illustrates the fields and controls on the Pay Entity Address page.



Country	Select the country where your pay entity is located.
Address	Click the Edit Address link to enter the pay entity address. The system displays the appropriate address fields for the selected country. Address information fields aren't required; therefore, you can enter only the information that applies to your organization's pay entity. Leave other fields blank.

Processing Details Page

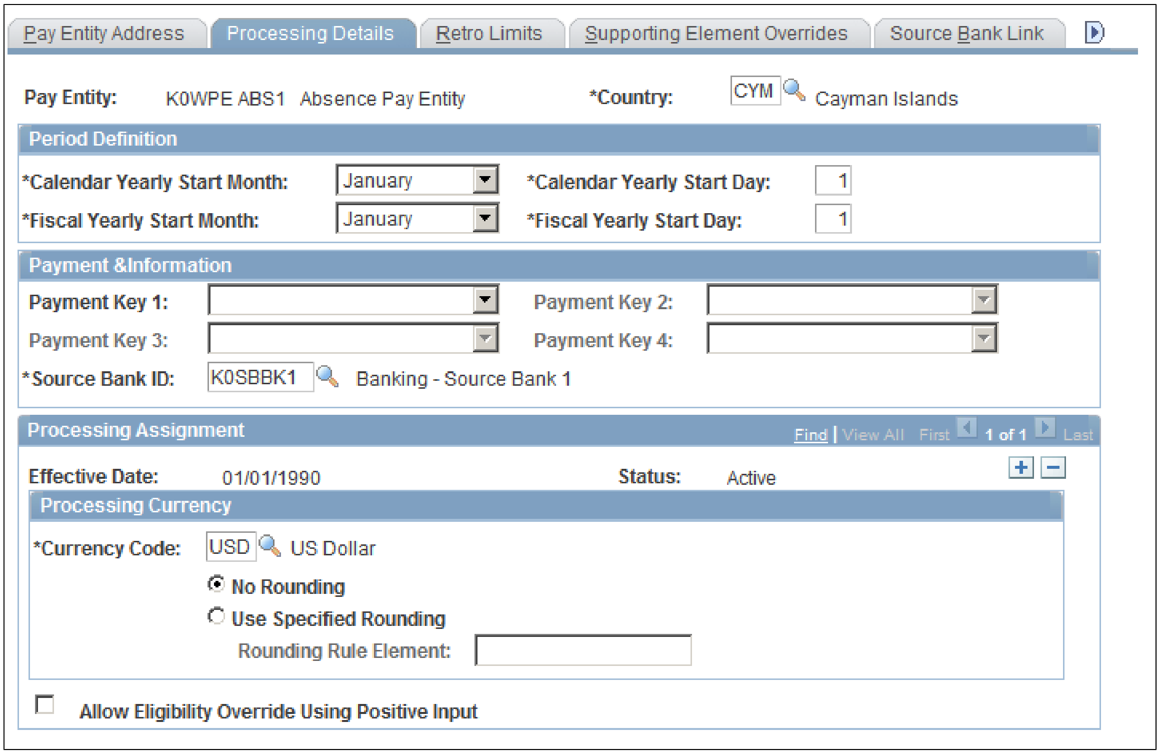
Use the Processing Details page (GP_PYENT_PRCS_DTL) to enter processing details for a pay entity.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities, Processing Details

Image: Processing Details page

This example illustrates the fields and controls on the Processing Details page.



Warning! Do not modify fields above the effective-dated area of the page after implementation. Doing so can destroy the integrity of retroactive and accumulator calculations.

Country	Select the processing country for this pay entity.

Period Definition

Calendar Yearly Start Month and Calendar Yearly Start Day	Enter the start date for the pay entity's calendar year. This date becomes the default start date for accumulators that are based on calendar year, unless you specify otherwise in the accumulator definition.
Fiscal Yearly Start Month and Fiscal Yearly Start Day	If your pay entity operates on a fiscal year that's different from the calendar year, enter the start date of the fiscal year. This date is used as the default start date for accumulators that are based on fiscal year, unless you specify otherwise in the accumulator definition.

Payment Information

Payment Key 1−4 The Payment Key fields are not applicable to Absence Management.

Source Bank ID This field is required. You must create a "dummy" Source Bank ID and enter it in this field.

See "Understanding Bank and Bank Branch Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Processing Currency

The processing currency defined at the pay entity level is the unit to which other currencies are converted before calculations are made.

Currency Code Select the default processing currency, which the system uses for calculations and reports and as the default for any element without an associated currency.

Note: If the effective date changes during a pay period, the system uses the currency that's effective at the end of that pay period. Any change of currency should coincide with the beginning of a pay period.

No Rounding Select to prevent rounding in currency conversion.

Use Specified Rounding Select to have the system run a rounding rule for currency conversion, regardless of the value's source (for example, positive input, accumulators, or historical rules).

Rounding Rule Element If you selected Use Specified Rounding , enter the rounding rule element that you want to use for rounding.

Eligibility Override allowed via

Positive Input This check box does not apply to Absence Management. The default setting for this check box is cleared.

Related Links

Understanding Retroactive Processing

Understanding the Core Application Architecture

Understanding Overrides

Defining Pay Groups

This topic provides an overview of pay groups and overrides of pay group defaults and discusses how to:

- Define pay group parameters.

- Define default rounding, proration, and frequency conditions for a pay group.

Note: This topic discusses the first two pages of the Pay Group component. The other page in the Pay Group component is the Supporting Elements Override page which is discussed elsewhere in this documentation.

Pages Used to Define Pay Groups

Page Name	***Definition Name***	***Navigation***	***Usage***
Pay Group Name	GP_PYGRP_NAME	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups, Pay Group Name	Define pay group parameters.
Defaults	GP_PYGRP_DFLT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups, Defaults	Define default rounding, proration, and frequency conditions for a pay group.

Related Links

Understanding Overrides

Understanding Pay Groups

A pay group is a logical grouping of qualifying individuals for absence management and contains payees who share pay characteristics. All payees in a pay group must have the same absence calculation process and belong to the same pay entity.

Understanding Overrides of Pay Group Defaults

When you set up a pay group, you define a number of default settings, such as eligibility group and work schedules, that apply to payees associated with the pay group.

However, you can set up pay group rule overrides for absence elements, which is useful when certain rules don't apply to specific groups of payees.

Group together payees who typically receive the same type of absence elements. This enables you to define elements that apply to most members of a pay group. You can create any exceptions via payee-level overrides or override the default pay group.

Pay Group Name Page

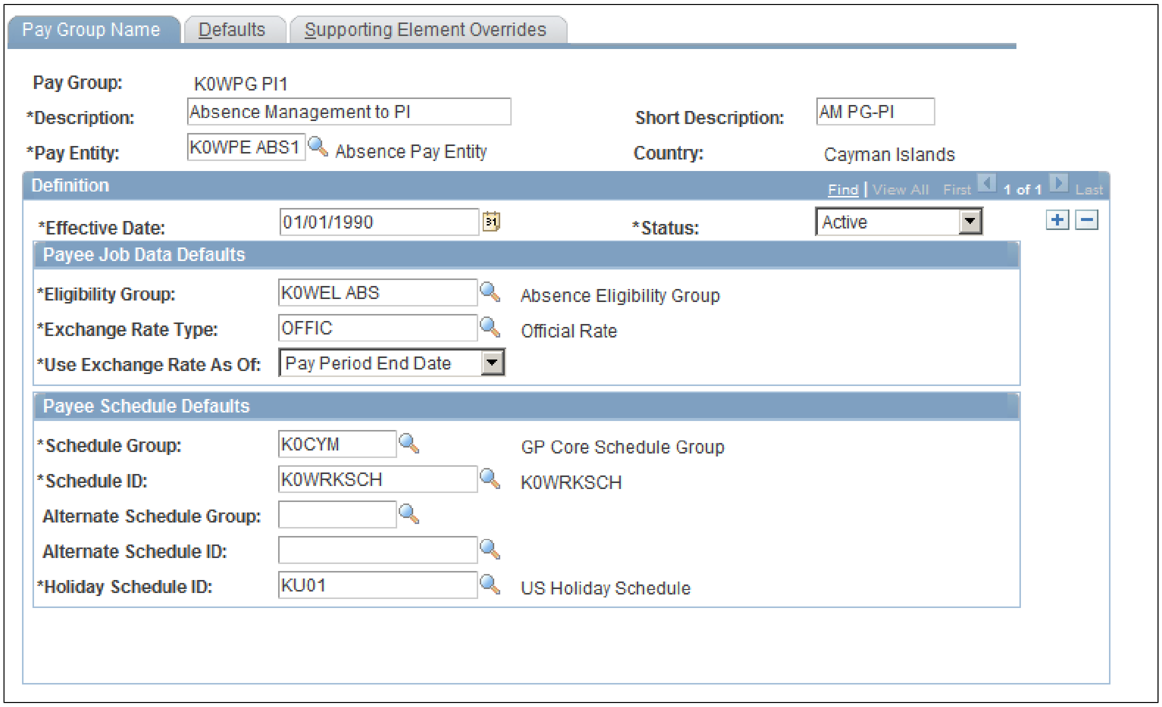
Use the Pay Group Name page (GP_PYGRP_NAME) to define pay group parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups, Pay Group Name

Image: Pay Group Name page

This example illustrates the fields and controls on the Pay Group Name page.



Pay Entity Select the pay entity to associate with this pay group. You can link each pay group with only one pay entity.

Warning! Once you've processed absences, never change the pay entity. Doing so can corrupt your data.

Payee Job Data Defaults

In this group box, you can define numerous default settings for a pay group. The effective date applies to the entire group box; therefore, you can change these options simultaneously if you have schedule, business process, or rule changes.

Note: Not every payee in a pay group has the same eligibility group, exchange rate type, or holiday schedule. You can override any default for an individual on the Job Data - Payroll page. Defaults can be overridden for certain periods of time through effective-dating. On the Job Data - Payroll page, the Absence Managementgroup box that includes eligibility group and exchange rate type appears only if you set the Absence System field to *Absence Management.*

See Understanding Overrides.

See "Understanding Job Data *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

Eligibility Group Select the default eligibility group to associate with this pay group.

Apply elements to payees in pay groups via eligibility groups. An eligibility group must be associated with a pay group. A payee is assigned to an eligibility group through the default defined at the pay group level. This default value can be overridden at the payee level.

Note: Payees in an eligibility group are eligible for elements at the payee level, but if a payee isn't in an eligibility group for which an element is valid, that payee cannot be eligible for that element.

Exchange Rate Type

Select the default exchange rate type that's used for currency conversions for this pay group during processing. You can specify an element in a currency other than the processing currency. During processing, it is converted to the processing currency, using this exchange rate information. Define exchange rate types on the Market Rate Type page.

Use Rate As Of

Select the effective date for use in retrieving the exchange rate. The options correspond to the dates that you associate with this pay group. Values are *Pay Period Begin Date, Pay Period End Date,* and *Payment Date.*

Payee Schedule Defaults

Define scheduling defaults for a pay group. Payees can be assigned a work schedule and an alternate work schedule based on the scheduling defaults defined for the payee's pay group.

Schedule Group

Select the schedule group for the pay group. Schedule groups allow you to categorize schedules into specific groups.

Schedule ID

Select the schedule ID for the pay group.

Rotation ID

Select the rotation ID for the selected the schedule ID. Rotation IDs are used with rotating schedules. Rotating schedules can be assigned to several payees with different schedule begin days.

Note: The Rotation ID field only appears if you select a rotating schedule.

Alternate Schedule Group

(Optional) Select an alternate schedule group for the pay group.

Alternate Work Schedule

(Optional) Select an alternate work schedule. A payee can be associated with an alternate work schedule for some absences.

Alternate Rotation ID

(Optional) Select an alternate rotation ID for the pay group.

Note: The Alternate Rotation ID field only appears if you select a rotating schedule.

Holiday Schedule

Select the holiday schedule for the pay group. The pay group's holiday schedule is used in processing if you do not select a different holiday schedule for the payee on the Job Data -

Payroll page. However, the pay group holiday schedule is not entered as a default on the payee's Job record.

Related Links

Defining Pay Entities
Proration and Segmentation
Defining Proration Rules
Understanding Work Schedules
"Understanding Currency *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Defaults Page

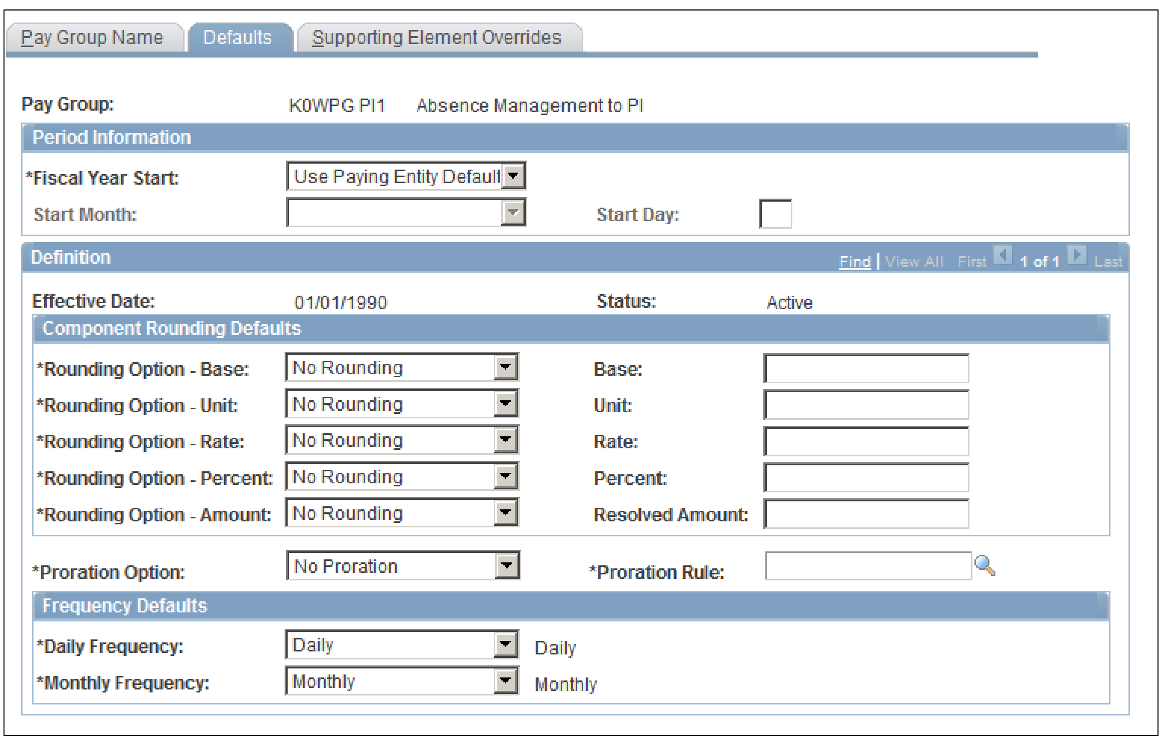
Use the Defaults page (GP_PYGRP_DFLT) to define default rounding, proration, and frequency conditions for a pay group.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups, Defaults

Image: Defaults page

This example illustrates the fields and controls on the Defaults page.



Period Information

Define dates for your pay group's fiscal year.

Fiscal Year Start	Define the start date of your organization's fiscal year for this pay group. Values are: *Use Paying Entity Defaults:* The next two fields become unavailable. *Use Specified Start Date:* Complete the next two fields.
Start Month and Start Day	Enter the first month and the first day of the start month in your organization's fiscal year.

Component Rounding Defaults

Specify default rounding rules for absence elements at the pay group level. You can specify rounding for individual absence elements when those elements are defined or direct the system to follow the pay group default settings.

Rounding Option - Base, Rounding Option - Unit, Rounding Option - Rate, Rounding Option - Percent and Rounding Option - Amount	Select an option to determine whether these components of an entitlement element can be rounded before calculation. Values are: *No Rounding:* Prevents rounding of the component. *Use Specified Rounding:* Enter a rounding rule in the corresponding field on the right.
Resolved Amount	Select the rounding rule to apply to the resolved amount for absence elements. Rounding occurs after the system resolves the element's calculation rule. Values are: *No Rounding:* Prevents rounding of the amount. *Use Specified Rounding:* Enter a rounding rule in the field on the right.
Proration Option	Select either *No Proration* or *Use Specific Proration.*
Proration Rule	If you selected *Use Specific Proration* in the Proration Option field, enter the proration rule that is to be used as the default proration rule for elements being used to process this pay group. In defining an earning or deduction element, you can have the system use the pay group default value or have it specify a unique rule for a certain earning or deduction element.

Frequency Defaults

Use this group box to define the frequency defaults used in multiple absence calculation components.

Note: The system calculates the daily and monthly pay rates that appear on the Job Data - Compensation page based on the frequency factors associated with the pay group assigned to each payee (on the Job Data - Payroll page). As a result, if you use these corresponding daily and monthly rate system elements directly within your Absence Management rules, you will need to ensure that the frequency factors associated with the pay group coincide with the values to which you expect these values to resolve. Otherwise, rates may not be in sync (because the system retrieves daily and monthly rates directly from Job Data.)

Related Links

"Defining a Frequency ID and Country-Specific Defaults *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Defining Rounding Rule Elements

Defining Proration Rules

Defining Rate Code Elements

"Understanding Frequency IDs *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Chapter 14

Using Calendars

Understanding Calendars

This section lists common elements and discusses:

- Calendar process flow.
- Creating calendars.

Common Elements Used for Calendars

Calendar	Identifies which payees to process and the run type and absence period. It can include instructions for generation control, excluding certain elements from processing, overriding supporting elements, and providing other information.
Calendar Group	When you start an absence process, you must enter the calendar group ID that identifies the calendar or set of calendars to process, or in the case of off-cycle runs, the set of off-cycle groups to process. You can process multiple calendars or off-cycle groups simultaneously. Calendar groups are keyed by country, so you can include multiple calendars or off-cycle groups for the same country in a single calendar group.
Period	Defines the absence period and frequency for your processing run. You attach an absence period to an absence run by linking it to a calendar. Like run types, absence periods are reusable.
Run Type	A user-defined method of identifying an absence run. The run type identifies the process list to use, whether to process retroactive triggers. It's also used in generation control, historical rules, and retroactive matching processes. You attach a run type to an absence run process by linking it to a calendar. Because you define the run type information outside the calendar, you can link the same run type to multiple calendars. For example, if a weekly and a monthly pay group use the same process list, you might set up one run type and link it to multiple calendars. The effective date enables you to switch process lists or retroactive trigger processing actions and yet reproduce a retroactive calculation with old settings.

Related Links

Understanding Segmentation Setup

Defining Generation Control Elements

Defining Historical Rule Elements

Understanding Retroactive Processing

Calendar Process Flow

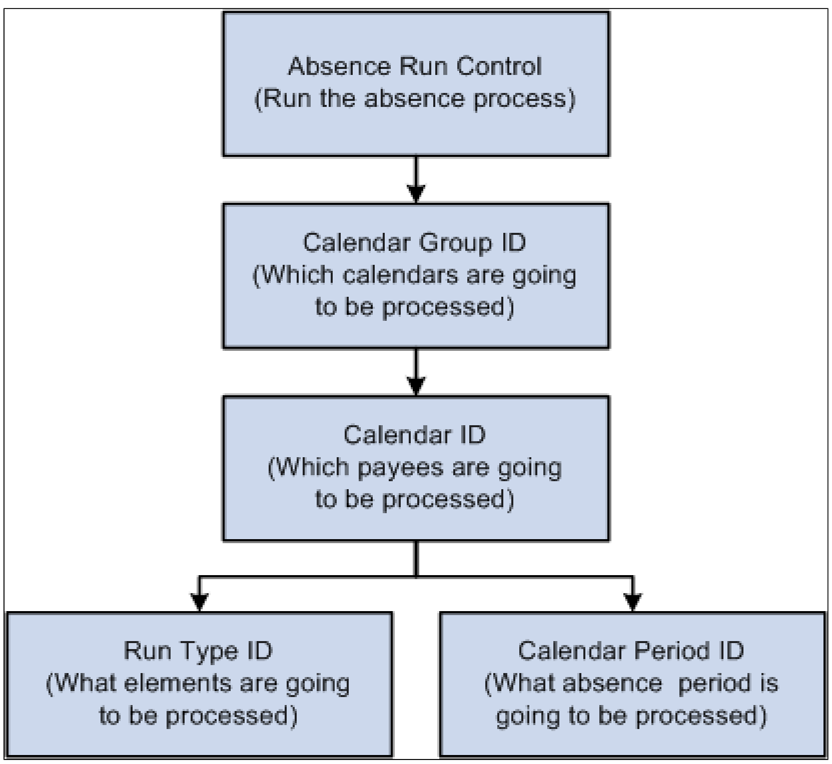
When processing an absence run, the system must determine which payees to process; what earnings, deductions, and other elements to process for selected payees; and what time period to process.

For on-cycle processing, calendars unify this information. Calendars link the components that tell the system whom and what to process for which absence period.

Note: With off-cycle processing, off-cycle groups, rather than calendars, identify which payees to process, the elements to process, and the time period.

Image: Component Interaction

This diagram illustrates how components interact to produce an on-cycle absence batch processing run.



Related Links

Understanding Off-Cycle Processing

Creating Calendars

To create calendars, use the Calendars (GP_CALENDAR) component or the Automatic Calendar Creation (GP_AUTO_CAL) component. You can use the CI_GP_CALENDAR component interface to load data into the table for the GP_CALENDAR component.

Calendars bring payees in a selected pay group together with the rules and processes for calculating an absence run. You can define calendars by:

- Defining a single calendar with the Calendars component.

  When you define a calendar with this feature, you can enter instructions for generation control, overrides, or elements to exclude from processing.

- Using the Automatic Calendar Creation component to define multiple calendars simultaneously.

  You can use the Calendars component to edit an automatically generated calendar.

Note: Before you create calendars you must define the run type and period ID associated with the calendar.

See Prerequisites.

Defining Run Types

This topic discusses how to specify processing parameters.

Page Used to Define Run Types

Page Name	***Definition Name***	***Navigation***	***Usage***
Run Types	GP_RUN_TYPE	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Run Types, Run Types	Specify the process list to be used, whether to process retroactive triggers, and other processing parameters.

Run Types Page

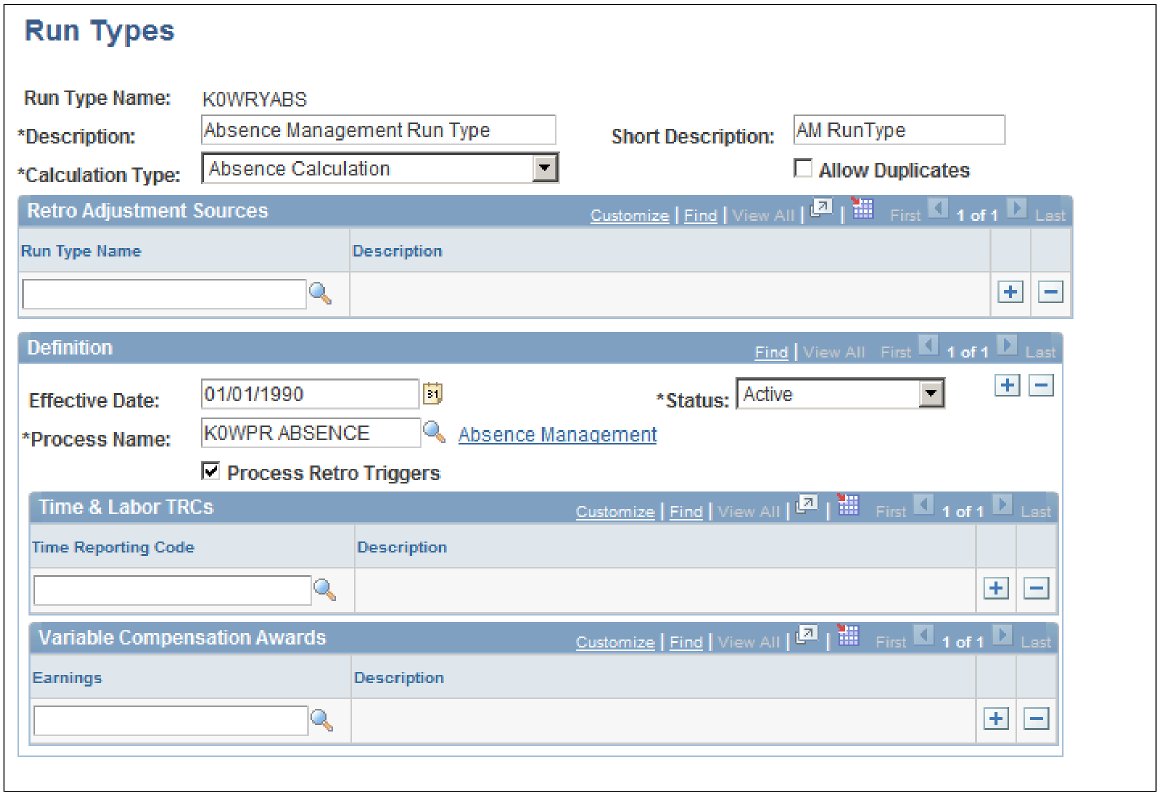
Use the Run Types page (GP_RUN_TYPE) to specify the process list to be used, whether to process retroactive triggers, and other processing parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing, Run Types, Run Types

Image: Run Types page

This example illustrates the fields and controls on the Run Types page.



Note: After processing begins, you cannot edit fields on the Run Types page. To make changes, cancel the absence run.

Calculation Type	Select or *Absence Calculation. Payroll Calculation* is not applicable to Absence Management.
Allow Duplicates	Select to allow duplicate segments. If you don't select this check box, then while the payee selection process creates the segment status records, the system determines whether other segment stat records exist with the same employee ID, employee record, pay group, run type, period ID, segment from dates and segment to dates (both must match), and a segment status of *Active.* The system creates a new segment stat record if a matching one doesn't exist. This check box ensures that duplicates are or aren't made in certain situations. For example, you might create a calendar

to calculate off-cycle payments but need to avoid paying the payees again during the regular payroll cycle. If the check box isn't selected, the system notes those occurrences and doesn't double-pay. If you're creating a calendar to process bonus or commission payroll runs, you might have multiple calendar IDs defined and the same payee is allowed to be paid in more than one calendar. If the check box is selected, the appropriate payees are paid twice.

Note: Regardless of setting, the system never creates overlapping segments for the same payee within a calendar. If you have processed a partial period with payee calendar overrides or an off-cycle advance, on subsequent processing of the same calendar the system will only process remaining portions of the period, thus avoiding processing overlaps.

Retro Adjustment Sources

Run Type Name

Enter additional run types for which the system includes retroactive adjustments during the pay run. For example, you can select a bonus run type as an additional retroactive adjustment source for your regular payroll run type. This enables you to automatically forward retroactive deltas for payee bonuses during your regular payroll run so that your payees don't have to wait for the more infrequent and irregular bonus pay runs to receive their retroactive bonus adjustments.

Definition

Process Name

Enter the process list, selecting from absence process lists, depending on your selection in the Calculation Type field.

Process Retro Triggers

Select this check box to process retroactive triggers. You might ignore retroactive triggers when running a bonus entitlement run but include processing of retroactive triggers with all regular absence runs.

Retroactive triggers are processed for any payee who's identified in any calendar ID with this check box selected.

You can override this field at the calendar and calendar group ID level.

Time & Labor TRCs

Time Reporting Code

This field is not applicable to Absence Management.

Variable Compensation Awards

Earnings This field is not applicable to Absence Management.

Creating Periods

To process an absence run, specify the time period to calculate by using a period ID, which identifies the begin date, end date, and frequency of an absence period.

To create periods, use the Periods (GP_CALENDAR_PERIOD) component or the Automatic Period Creation (GP_AUTO_PRD) component. You can use the CI_GP_CALENDAR_PERIOD component interface to load data into the table for the GP_CALENDAR_PERIOD component.

This topic discusses how to:

- Define a single period.
- Use automatic period creation.

Pages Used to Create Periods

Page Name	***Definition Name***	***Navigation***	***Usage***
Periods	GP_CALENDAR_PERIOD	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Periods, Periods • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Periods, Periods	Define a single absence period.
Automatic Period Creation	GP_AUTO_PRD	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Periods - Automated Creation, Automatic Period Creation • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Automatic Period Creation, Automatic Period Creation	Define multiple absence periods.

Periods Page

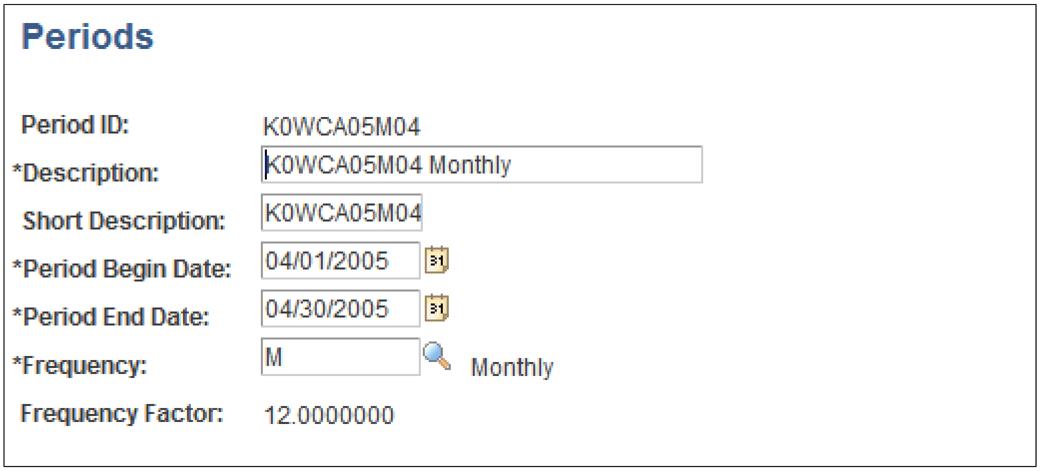
Use the Periods page (GP_CALENDAR_PERIOD) to define a single absence period.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Periods, Periods
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Periods, Periods

Image: Periods page

This example illustrates the fields and controls on the Periods page.



Note: After processing begins, you cannot edit fields on the Periods page. To make changes, cancel the absence run.

Period Begin Date and Period End Date

Enter the dates for the period being calculated.

Because multiple calendars that use the same absence period can have different payment dates, you specify the payment date on the Calendar Definition page.

Frequency

Enter the frequency. The system uses this to deannualize an entitlement element that's defined without generation control frequency. When generation control frequency is defined for an element, the following occurs:

- If there's a match between the element generation control and the calendar ID generation control, the generation control frequency is used for the deannualization factor.
- If there's no match between the element generation control and the calendar ID generation control, the element isn't resolved, with a couple of exceptions.

Note: Entitlement elements have two generation control fields, one for the primary element and one for adjustment processing.

Frequency Factor

Displays the factor for annualization and deannualization.

Examples of the Time and Frequency Data That a Period ID Can Define

This table lists examples of how you can define different periods by varying the end date and frequency:

Begin Date	***End Date***	***Frequency***
June 1	June 7	Weekly
June 1	June 30	Monthly
June 1	June 15	Semimonthly
June 1	August 31	Quarterly

Frequency Examples

Assume that there are four elements, each element begins with a gross amount of 1200. This table lists the effect of combining various frequency options (the value of each element after frequency option application appears in the last row of the table):

Frequency	***Element 1***	***Element 2***	***Element 3***	***Element 4***
Amount	1200	1200	1200	1200
Frequency (Element Definition)	Monthly (12)	Monthly (12)	Monthly (12)	Monthly (12)
Generation Control Frequency	None	Monthly (12)	Monthly (12)	Annual (1)
Absence Period Frequency	Semimonthly (24)	Semimonthly (24)	Semimonthly (24)	Semimonthly (24)
Calendar Generation Control Frequency	None	Monthly (12)	None	Semimonthly (24)
Calculated Amount (Amount * Annualization factor/ deannualization factor)	600 (Amount * Frequency/ Absence Period Frequency)	1200 (Amount * Frequency/ Generation Control Frequency)	Not resolved	24 000 (Amount * Frequency/ Generation Control Frequency)

Related Links

Defining Generation Control Elements

Automatic Period Creation Page

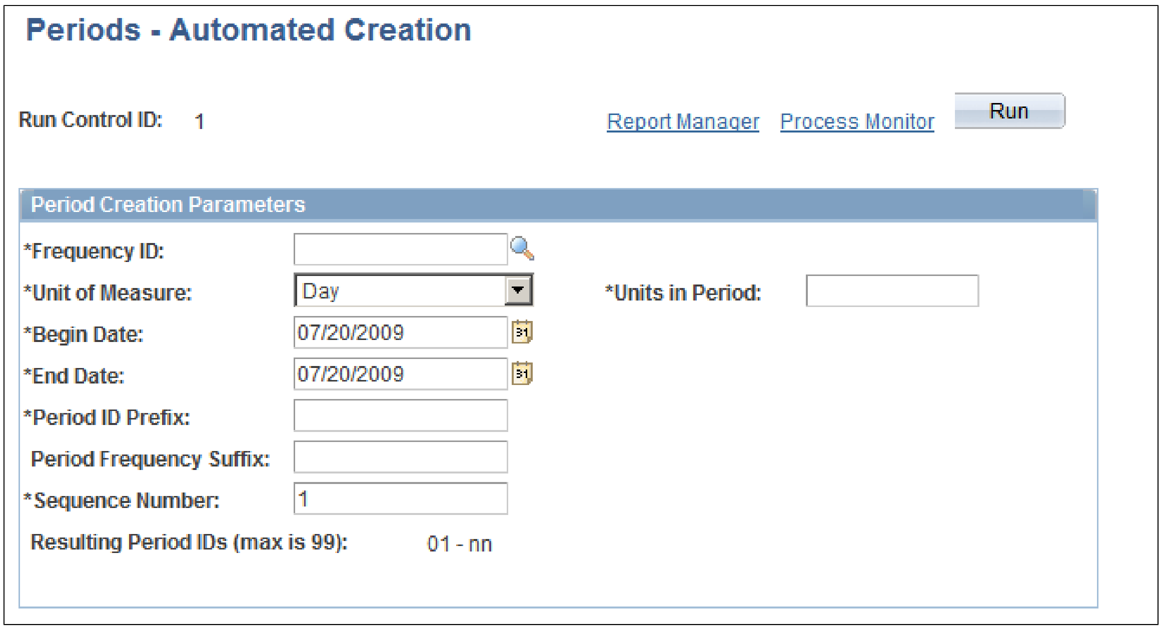
Use the Automatic Period Creation page (GP_AUTO_PRD) to define multiple absence periods.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Periods - Automated Creation, Automatic Period Creation
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Automatic Period Creation, Automatic Period Creation

Image: Automatic Period Creation page

This example illustrates the fields and controls on the Automatic Period Creation page.



Enter the period creation parameters and click the Run button.

Frequency ID

Enter the calendar period frequency. This field is also used to generate the period description.

Note: The system doesn't edit your entry to ensure it's consistent with the values in the Unit of Measure and Units in Period fields.

See Periods Page.

Unit of Measure

Select the unit of measure for the periods.

The *Day* and *Month* values, used in conjunction with the Units in Period field determine the number of days or months in a period.

The *Semimonth* value represents 15 days. The first semimonthly period always includes days 1 to 15. The second period includes days 16 to 28, 29, 30, or 31, depending on the month. When you select this value, the Units in Period becomes unavailable.

Units in Period

Enter the number of units in each generated period.

Begin Date and End Date

Enter the first day of the first period being generated and the last date through which the system should generate periods.

The system generates all periods for which the end date is before or equal to the end date that you enter.

Period ID Prefix

Enter a prefix of up to seven alphanumeric characters. The system creates a unique period ID for each period it creates, by adding the period frequency suffix and a consecutive sequence number to the prefix.

Period Frequency Suffix

Enter the period frequency suffix that's added to the period ID. The default is the first letter of the selected frequency ID.

Sequence Number

Enter for the first period. The system assigns a sequential number to each following period that you create.

This is useful when you create periods for the same year in separate runs. Suppose that you want to generate six periods for a monthly payroll. You enter *1* in this field, and the process creates periods 1 to 6. Later, when you generate periods for the remaining months, you enter *7* here.

Resulting Period IDs (max is 99)

This field combines the period ID prefix, period frequency suffix, and sequence number to show you what periods the process will create. For example, if you enter a period ID prefix of *PAY2001,* a period frequency suffix of *M,* and a sequence number of *1,* the periods generated are PAY2001M01 - PAY2001Mnn where nn represents the number of the last period created.

Examples: Unit of Measure and Units in Period Combinations

This table gives examples of periods defined using different combinations of unit of measure and units in period:

Unit of Measure	*Units in Period*	*Result*
Day	7	Each period represents seven days (for a weekly payroll).
Day	14	Each period represents 14 days (for a biweekly payroll).
Semimonth	Not applicable.	Each period represents 15 days (for a semimonthly payroll), but the periods go from 1 to 15 and from 16 to the last day of the month.
Month	1	Each period represents a month (for a monthly payroll).

Unit of Measure	Units in Period	Result
Month	3	Each period represents three months (for a quarterly payroll).

Creating Single Calendars

This section lists prerequisites and discusses how to:

- Link criteria associated with a calendar.
- Override generation control frequencies for a calendar.
- Override supporting elements for a calendar.
- Exclude elements from a calendar.

Note: After processing begins, you cannot edit the fields on the Calendars component, other than to add payees to the list of payees to be processed. To modify these pages, cancel the process.

Pages Used to Create Single Calendars

Page Name	Definition Name	Navigation	Usage
Calendars - Definition	GP_CALENDAR1	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars, Definition • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars, Definition	Link together the pay group, period ID, run type ID, target calendar ID, and payee selection criteria associated with a calendar.
Calendars - Generation Control	GP_CALENDAR3	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars, Generation Control • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars, Generation Control	Override generation control frequencies for a calendar.

Page Name	*Definition Name*	*Navigation*	*Usage*
Calendars - Supporting Element Overrides	GP_CALENDAR2	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars, Supporting Element Overrides • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars, Supporting Element Overrides	Override the value of a bracket, date, duration, formula, or variable element associated with a calendar.
Calendars - Excluded Elements	GP_CALENDAR4	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars, Excluded Elements • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars, Excluded Elements	Exclude earnings, deductions, take, or entitlement elements from a calendar.

Prerequisites

Before creating a calendar, define the run type and period ID associated with the calendar.

Note: Calendars are associated with a single pay group. If you change a payee's pay group assignment, period segmentation results. For example, if a payee changes from pay group PGA to PGB on June 15, days 1−14 are processed with the PGA calendar and days 15−30 with the PGB calendar.

Related Links

Defining Run Types

Creating Periods

Calendars - Definition Page

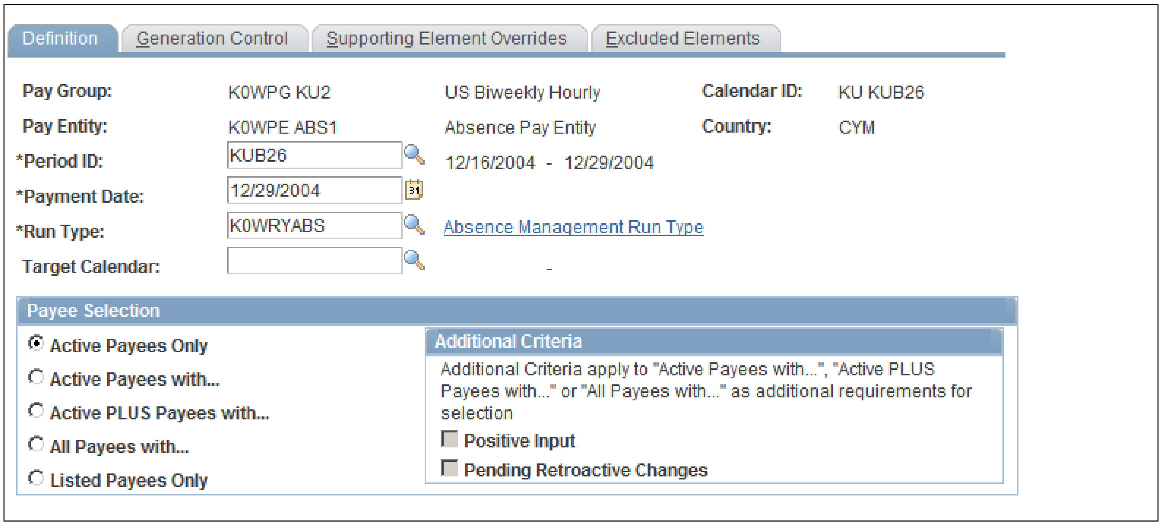
Use the Calendars - Definition page (GP_CALENDAR1) to link together the pay group, period ID, run type ID, target calendar ID, and payee selection criteria associated with a calendar.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars, Definition
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars, Definition

Image: Calendars - Definition page

This example illustrates the fields and controls on the Calendars - Definition page.



Period ID

Enter the absence period the calendar represents. The corresponding dates appear in the Begin Date and End Date fields.

Payment Date

Enter the date when payees are paid. In certain countries, this date is important for tax calculations.

Run Type

Enter the run type that identifies the process list to be used for this calendar run. (The run type also identifies whether retroactive triggers are to be processed.)

<run type description>

Click to access the Run Types page, where you can specify the process list to be used, whether to process retroactive triggers, and other processing parameters.

See Run Types Page.

Target Calendar

Enter a target calendar ID if you're defining an absence processing run or any processing run that generates positive input. Identifies the target calendar for the daily data or positive input being generated. Absences cannot be targeted back in time, so the target calendar end date cannot be earlier than the end date of the current period ID. Target calendar is only required when using Absence Management as a stand alone application or along with Global Payroll. If your generated positive input is to be sent to Payroll for North America or to a third-party payroll application, then you don't need to define a target calendar.

Payee Selection

Identify which payees in the selected pay group to include in the calendar that you're defining. You can have the system identify the payees, or you can list the payees manually. Active payees are those who were active in the pay group for at least one day during the absence period.

The information that you enter here gives the system basic information about which payees to process for a particular calendar.

Note: A calendar created for active payees must be unique based on the combination of pay group, period ID, and run type, reducing the possibility of duplicate calculations.

Active Payees Only

Select to include all active payees with no other qualifying criteria.

Active payees are those who were active in the pay group for at least one day during the absence period.

Active Payees with...

Select to include only those active payees who have pending retroactive triggers. If you select this option, you must select the Pending Retroactive Changes check box.

Active PLUS Payees with...

Select to include all active payees and payees who were ever active in the pay group, but only if they have pending retroactive triggers. . If you select this option, you must select the Pending Retroactive Changes check box.

All Payees with...

Select to include only those payees who have pending retroactive triggers. If you select this option, you must select the Pending Retroactive Changes check box.

Listed Payees Only

Select to list payees for processing, rather than have the system identify them automatically. The Payee List group box becomes available.

You can use this option to pay one payee or a small group of payees.

Positive Input

This check box is not applicable to Absence Management.

Pending Retroactive Changes

Becomes available if you select Active Payees with..., Active PLUS Payees with...., or All Payees with.

If you select this check box and Active Payees with..., the calendar processes active payees who have pending retroactive triggers.

If you select this check box and Active PLUS Payees with..., the calendar processes active payees or payees who have pending retroactive changes.

This check box enables you to include inactive payees in an active-only run based on the occurrence of a retroactive change that affected the inactive payee.

Payee List

The system displays this group box if you select the Listed Payees Only option.

EmplID

Enter the payees that the calendar processes. Anyone on the payee list must be a current or previous member of the pay group associated with this calendar. While the calendar remains open, you can add to the payee list.

Calculate Thru Date

The default value for this field is the last day of the period selected in the Period ID field. If you want to perform the calculation of a payee for part of a absence period, you can enter an earlier date. The system calculates only segments that end on or before the date that you enter.

Calendars - Generation Control Page

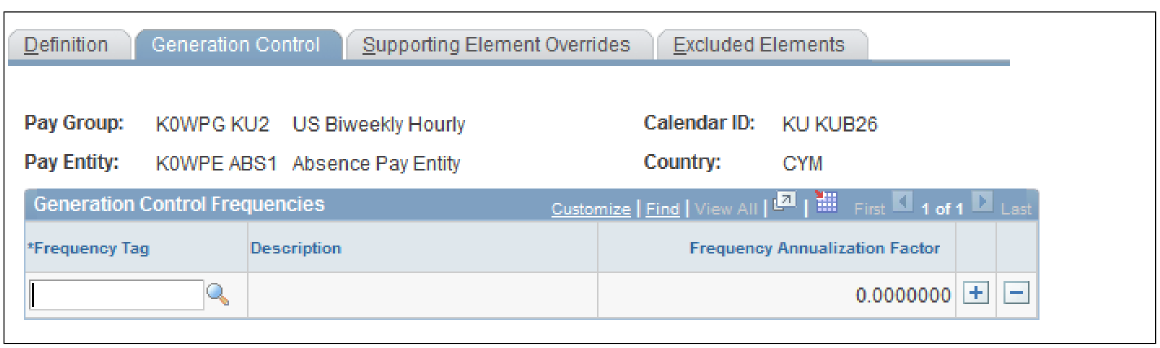
Use the Calendars - Generation Control page (GP_CALENDAR3) to override generation control frequencies for a calendar.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars, Generation Control
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars, Generation Control

Image: Calendars - Generation Control page

This example illustrates the fields and controls on the Calendars - Generation Control page.



To have a frequency compared with generation control frequencies entered at the element level—for eligibility and deannualization purposes—enter those frequencies here.

Frequency Tag

Enter the frequency ID to be overridden.

Frequency Annualization Factor

Displays the frequency factor associated with the selected frequency ID.

Eligibility Example

Suppose that you have a weekly pay group and absence period. This pay group has an entitlement that's processed only during the first absence period of every month. You create a generation control frequency called *1st of Month* (with a factor of 12), which you assign to the entitlement, and attach the frequency *1st of Month* to the first calendar of each month.

When the system processes the entitlement, it compares the element's generation control frequency with the calendar values. If they match, the entitlement passes eligibility. If not, the entitlement fails eligibility and isn't processed. If the generation control and calendar have multiple frequency values and there's a match on more than one frequency but the factors aren't the same, the system sets the payees in error.

Related Links

Generation Control

Calendars - Supporting Element Overrides Page

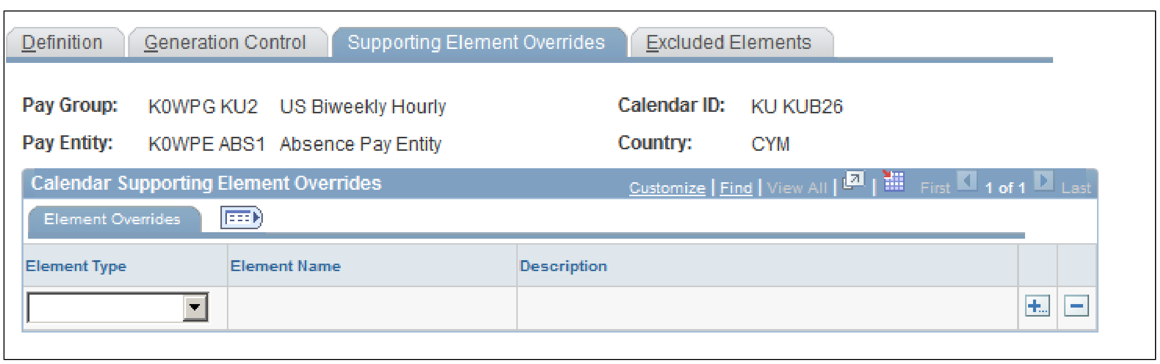
Use the Calendars - Supporting Element Overrides page (GP_CALENDAR2) to override the value of a bracket, date, duration, formula, or variable element associated with a calendar.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars, Supporting Element Overrides
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars, Supporting Element Overrides

Image: Calendars - Supporting Element Overrides page

This example illustrates the fields and controls on the Calendars - Supporting Element Overrides page.



Calendar Supporting Element Overrides

Element Type

Select the element type. Values are: *Bracket, Date, Duration, Formula,* and *Variable.*

Element Name

Select the particular element to override.

Numeric Value

Enter an override value. When the system encounters the specified element on the process list, it applies the override value that you defined in this field. The override value can itself be overridden by positive input instructions, payee overrides, and so on.

Related Links

Understanding Overrides

Calendars - Excluded Elements Page

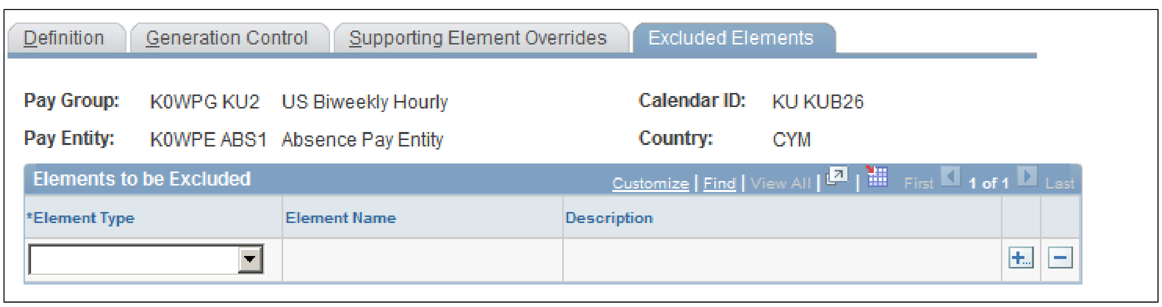
Use the Calendars - Excluded Elements page (GP_CALENDAR4) to exclude earnings, deductions, take, or entitlement elements from a calendar.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars, Excluded Elements
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars, Excluded Elements

Image: Calendars - Excluded Elements page

This example illustrates the fields and controls on the Calendars - Excluded Elements page.



Element Type

Select the element type. Values are: *Absence Entitlement* and *Absence Take,* or *Deduction* and *Earnings,* depending on the type of calendar.

Element Name

Enter the element to be excluded from processing. The element is not processed.

Note: To exclude an element from processing, the element must be defined to enable calendar overrides.

Related Links

Understanding Overrides

Creating a Set of Calendars

This section lists prerequisites and discusses how to create a set of calendars.

Page Used to Create a Set of Calendars

Page Name	***Definition Name***	***Navigation***	***Usage***
Automatic Calendar Creation	GP_AUTO_CAL1	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars - Automated Creation, Automatic Calendar Creation • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Automatic Calendar Creation, Automatic Calendar Creation	Run the Automatic Calendar Creation process to create a set of calendars.

Prerequisites

Before creating a series of calendars, define the run type and periods associated with the calendars. Use the automatic period creation feature to create periods automatically.

Note: Calendars are associated with a single pay group. If you change a payee's pay group assignment, period segmentation results.

Related Links

Defining Run Types
Creating Periods

Automatic Calendar Creation Page

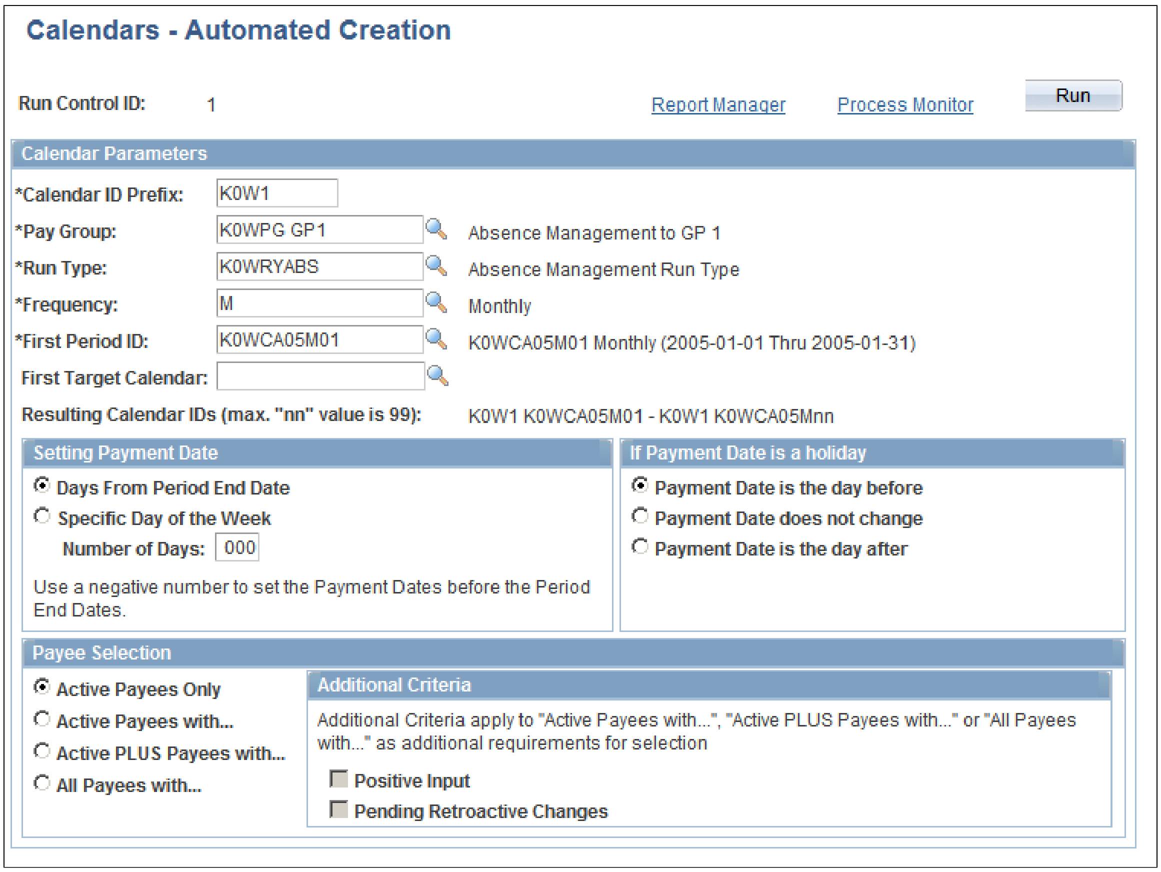
Use the Automatic Calendar Creation page (GP_AUTO_CAL1) to run the Automatic Calendar Creation process to create a set of calendars.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendars - Automated Creation, Automatic Calendar Creation
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Automatic Calendar Creation, Automatic Calendar Creation

Image: Automatic Calendar Creation page

This example illustrates the fields and controls on the Automatic Calendar Creation page.



Calendar ID Prefix

Enter a prefix of up to seven alphanumeric characters. The system creates a unique calendar ID for each calendar it creates, by adding this prefix to the period ID associated with the calendar and the number of the calendar.

For example, if the first period ID is PAY2001M01 and you enter a prefix of REGULAR, the calendar ID for the first generated calendar becomes REGULAR PAY2001M01.

Pay Group

Enter the pay group for which the calendars are being built.

Run Type

Enter the run type to which the calendars are associated.

Frequency

Enter the frequency for creating the calendars.

First Period ID

Enter the first period that the system uses to build calendars. The period IDs from which you select are based on the frequency ID.

The system generates calendars for the number of consecutive periods that you defined when creating the periods.

First Target Calendar

If you're defining calendars for an absence run that generates positive input for a different calendar, enter the target calendar ID for the first calendar being created. This field is optional.

Based on this ID, the system determines the sequential target calendars to use for auto created calendars.

Note: For the system to determine sequential target calendars, the calendar entered in the First Target Calendar field must follow a standard naming convention that ends with two digits to describe the month or any other period that the calendar represents. For example, you can select a first target calendar of *GXCI CPY2000M01,* because the system can use the last two digits to determine the appropriate sequential target calendars. If you select a nonstandard first target calendar, such as *GW10204P,* you receive an error message if you click Save or Run.
This process enables you to create up to 99 calendars, but each one must be based on an existing target calendar. For example, if you try to generate calendars ABS001 through ABS099, but the only target calendars that exist are PAY001 through PAY050, the system cannot create calendars ABS051 through ABS099.

Setting Payment Date

Days From Period End Date and Number of Days

This option is not applicable to Absence Management.

Specific Day of the Week

This option is not applicable to Absence Management.

If Payment Date is a Holiday

The options that are available in the group box do not apply to Absence Management.

Payee Selection

This group box is identical to the Payee Selection group box on the Calendars - Definition page except that Listed Payees Only is not an option.

Related Links

Calendars - Definition Page

Defining Calendar Groups

This topic provides an overview of calendar groups and discusses how to create a calendar group ID.

Page Used to Create Calendar Groups

Page Name	***Definition Name***	***Navigation***	***Usage***
Calendar Group	GP_CALENDAR_RUN	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendar Groups, Calendar Group Global Payroll & Absence Mgmt, Absence and Payroll Processing, Off Cycle, Off Cycle Calendar Group, Calendar Group	Define the calendar ID of the of the off-cycle groups to process together. Calendars are processed in the order listed.

Understanding Calendar Groups

To set up calendar groups, use the Calendar Groups (GP_CALENDAR_RUN) component. You can use the CI_GP_CALENDAR_RUN component interface to load data into the table for the Calendar Groups component.

A calendar group identifies calendars to process together for an on-cycle run or the off-cycle groups to process for an off-cycle run. When creating a calendar group, consider that:

- The processing phases defined on the run control page are performed across all members of the calendar group; therefore, group together calendars that require identical calculations.
- Elements from different countries cannot be processed simultaneously.

  Don't include calendars that represent pay entities from different countries—based on the calendar's pay group—in the same calendar group.
- A calendar's order in the calendar group ID determines the calculation processing sequence.

Processing Sequence

Run calendars in absence period date order, because many absence processes are based on the order in which calendars are run and thus finalized. Running calendars non sequentially can affect how accumulators and retroactive limit dates are handled—inserting a calendar that isn't for the next sequential absence period can create unexpected results.

Calendars that are run out of absence period order experience these accumulators issues:

- Accumulators are included in calendar processing by determining which finalized absence calendar (for the country being processed) is the most recent.
- Accumulator values are stored for each calendar based on the accumulator from and to dates, not the absence period begin and end dates.

If the accumulator from and to dates include any day in the absence period, the accumulator is written to the results tables.

- An accumulator might not be written to the results tables and therefore wouldn't be included in the next calendar, preventing referencing or updating of the accumulator values.
- Accumulator balances might be inaccurate.

  Suppose that you run a March calendar before a February calendar. The accumulator balances that are included as starting balances for the February calendar would include the results from the March calendar.

Calendars that are run out of absence period order experience these retroactive limit date issues:

- Retroactive limit dates are determined based on the first calendar that's encountered—for a payee—within a calendar group ID.

  Although other calendars might be encountered later that have earlier absence period dates, the retroactive limit date is determined by the first calendar's dates.
- When processing retroactive situations, the system determines which calendars to rerun by looking for the earliest calendar finalize time stamp where the calendar period end date is greater than the trigger effective date.

  Suppose that you run and finalize calendars in this order: January (Calendar 1), February (Calendar 2), another January (Calendar 3), and March (Calendar 4). If you have retroactive data for February 15, then Calendar 2, Calendar 3, and Calendar 4 run again.

Related Links

Understanding Off-Cycle Processing

Calendar Group Page

Use the Calendar Group page (GP_CALENDAR_RUN) to define the calendar ID of the of the off-cycle groups to process together.

Calendars are processed in the order listed.

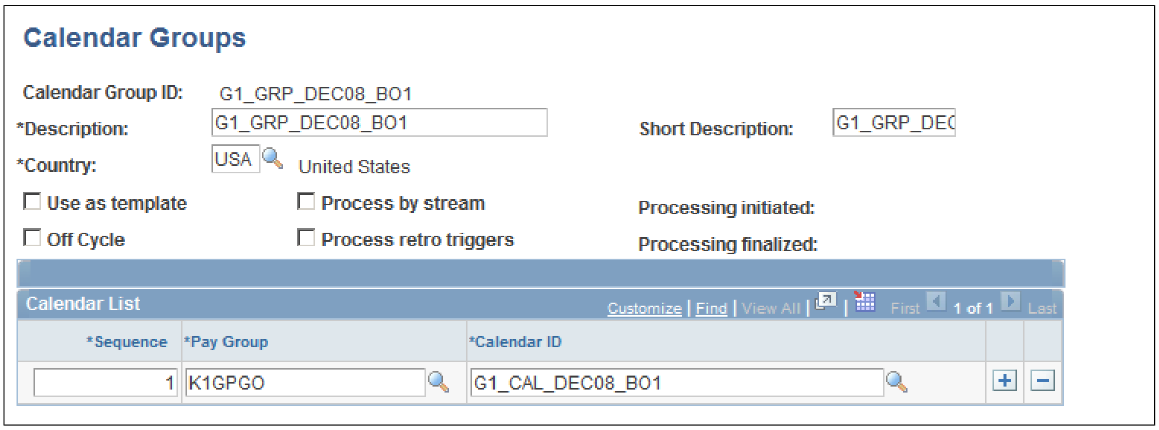
Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Define Calendars, Calendar Groups, Calendar Group

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Off Cycle, Off Cycle Calendar Group, Calendar Group

Image: Calendar Group page

This example illustrates the fields and controls on the Calendar Group page.



Note: After processing begins for an on-cycle run, you should not edit the fields on the Calendar Group page. To modify this page, cancel the absence run.

Use as template	Select to use this calendar group to run the online Absence Forecasting or Balance Inquiry process. This option is not available for off-cycle processing. See Absence Management Overview.
Process by stream	Select to use stream processing for this calendar group. This feature is typically not used for off-cycle processing.
Off cycle	Select if this calendar group is to be used for off-cycle processing.
Process retro triggers	Select to process retroactive triggers for this calendar group. For on-cycle processing, the default value is based on the Process Retro Triggers field on the Run Types page. If any run type indicates that retroactive triggers should be processed, the default is to select this option. For off-cycle processing, you must select this check box if any of the off-cycle groups that you add to this calendar group include correction transactions.

Calendar List

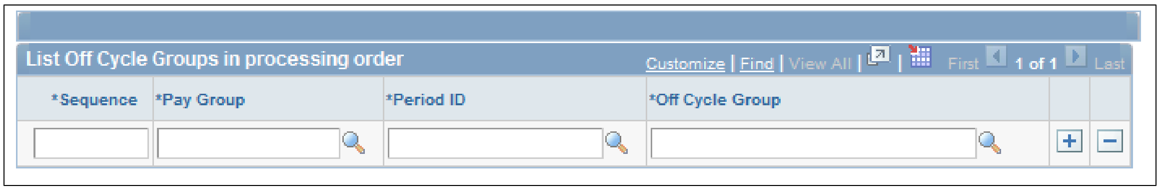
List the calendars to process together. The number that you enter in the Sequence field determines the calendar processing order. This grid is hidden when you select the Off cycle check box.

List off-cycle groups in processing order

The following grid appears only when you select the Off cycle check box. List the off-cycle groups to process. An off-cycle group identifies the off-cycle transactions to be processed for a specific pay group and period.

Image: Entering values for off-cycle groups

This example illustrates the fields and controls on the Entering values for off-cycle groups.



Related Links

Absence Management Overview

Entering Calendar Override Instructions for a Payee

This topic provides an overview of calendar overrides and discusses how to:

- Select the calendars to override.
- Enter processing instructions for a period segment.

Pages Used for Entering Calendar Override Instructions for a Payee

Page Name	***Definition Name***	***Navigation***	***Usage***
Payee Calendar Groups	GP_PYE_RUN	Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Payee Calendar Groups, Payee Calendar Groups	Select the calendars for which to enter special processing instructions for a payee.
Segment Details	GP_PYE_RUN_SEC	Click the Segment Details link on the Payee Calendar Groups page.	Create period segments for a payee and identify which segments to process.

Understanding Calendar Overrides

You can create additional segments for a payee and calendar and enter processing instructions for a specific segment.

Suppose that in March, you issue advance pay to someone who's taking vacation from April 1 to 15. Because the payee is to receive half of April's pay in March, you're paying only the salary for April 16–30 in April. You can use the Payee Calendar Groups page to accomplish this.

You create a calendar group that includes March and April. To issue the absence advance pay in March, you use the Payee Calendar Groups page for March to indicate that the payee is to be paid for both the March calendar and April 1–15. For April, you use the April calendar group but this time indicate that the payee is being paid for April 16–30 only.

You can specify which effective-dated rules the system applies when processing a calendar segment and which period's accumulators it updates. For example, when paying the April amount in March, you can instruct the system to apply the earning rules that are in effect in March and update the accumulators for March. Or you can instruct the system to use the rules that will be in effect in April.

Note: As an alternative to using calendar overrides to process an absence advance payment, you can enter instructions for an advance using the Off Cycle On Demand component (GP_ONDEMAND) and run an off-cycle payroll.

Payee Calendar Groups Page

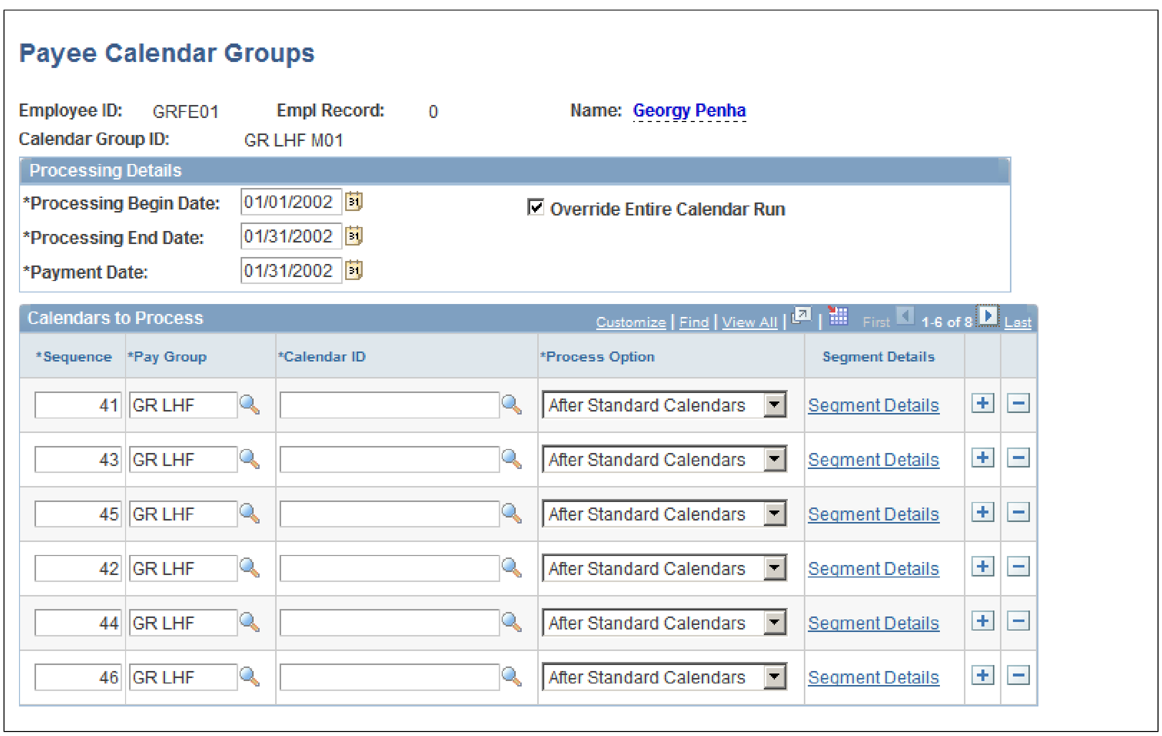
Use the Payee Calendar Groups page (GP_PYE_RUN) to select the calendars for which to enter special processing instructions for a payee.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Payee Calendar Groups, Payee Calendar Groups

Image: Payee Calendar Groups page

This example illustrates the fields and controls on the Payee Calendar Groups page.



Processing Begin Date, Processing End Date, and Payment Date

Enter processing begin and end dates, and a payment date. These fields apply to processing effective-dated elements whose definition as of date (defined on the Element Name page) is set to *Process Begin Date, Process End Date,* or *Payment Date.*

The dates determine which effective-dated rules (element definitions) to use for these elements and which period's accumulators to update for the elements.

Say that the definition as of date for an entitlement element is set to *Process End Date.* When the system encounters the element during the batch process, it retrieves the element definition that was in effect on the date entered in the Processing End Date field.

The system also updates the accumulators for the period in which the processing begin date or the processing end date falls.

Override Entire Calendar Run

Select to have the system process only calendars or segments that you designate for processing in the Calendars to Process group box or on the Segment Details page.

If you do not select this check box, the system processes the calendars that you want to override (those listed in the Calendars to Process group box), plus any other calendars that are included in the calendar group.

Calendars to Process

In this group box, select the calendars for which you want to specify special processing instructions for the payee.

Sequence

Enter a number that determines the calendar processing order.

Pay Group

Enter the pay group that's associated with the calendar to be overridden.

Calendar ID

Enter the calendar to override.

Process Option

Applies only if the Override Entire Calendar Run check box is not selected (that is, you are overriding selected calendars only). Select the process option to determine whether the system is to process the calendars that have override instructions before or after all other calendars in the calendar group. Values are: *Before Standard Calendars, After Standard Calendars,* and *Not Applicable.*

Segment Details

Click this link to access the Segment Details page.

Segment Details Page

Use the Segment Details page (GP_PYE_RUN_SEC) to create period segments for a payee and identify which segments to process.

Navigation

Click the Segment Details link on the Payee Calendar Groups page.

Segment Begin Date and Segment End Date	Enter the dates to process in the calendar period and the dates not to process. Provide instructions for the entire calendar period.

Note: To have the system calculate absence for part of a calendar period, you must create one or more period segmentation triggers for the payee. The trigger effective date must correspond to the dates that you enter on the Segment Details page. For example, to process absence for February 1 to 9, but not for the rest of the month, define a segmentation trigger for February 10.

Related Links

Trigger Table Data

Chapter 15

Entering Absences

Entering, Updating, and Voiding Absence Events

This topic provides an overview of absence entry and discusses how to:

- Enter, update, and void absence events.
- Enter detailed information about an absence.

Pages Used to Enter, Update, and Void Absence Events

Page Name	***Definition Name***	***Navigation***	***Usage***
Absence Event Entry	GP_ABS_EVENT	Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Absence Event, Absence Event Entry	Enter, update, and void absences. Start the Absence Forecasting process.
Absence Event Input Detail	GP_ABS_EVENT_SEC	Click the Details link on the Absence Event Entry page.	Enter detailed information for an absence, including the reason, processing action, manager approval, user-defined data, entitlement adjustment, and partial hours.

Understanding Absence Entry

When a payee is absent from work at a normally scheduled work time, you record the absence take, the begin and end dates, and other details that you want to track.

Absences can be entered:

- Through the Absence Event Entry page.

  Payroll administrators use this page to record absence events.

- Through self service absence pages.

  Payees and managers can use self service pages to enter requests for absences; managers can also approve requests through the self service pages.

  If you are using PeopleSoft Time and Labor with your Absence Management, you can access the Absence Management Self-Service pages through the Time and Labors' Timesheet page.

  See Understanding the Absence Request Transactions.

See "Reporting Time *(PeopleSoft HCM 9.2: Time and Labor)*".

This documentation discusses the absence entry tasks for payroll administrators.

Absence Event Entry Steps

Following are the steps for entering an absence event:

1. Access the Absence Event Entry page for the payee.
2. Select the absence take element and enter the begin and end dates of the absence.
3. If applicable, enter the partial hours that the payee was absent and the original begin date of the absence.
4. Click the Details link to access the Absence Event Input Detail page, where you can enter other details that are related to the absence, if applicable.
5. If the Forecasting process is required for the take that you entered, return to the Absence Event Entry page and follow the procedures for forecasting entitlement during absence entry. You receive a warning message if you try to save absence entries for the take without first running the Forecasting process.

See Forecasting Absence Entitlement Balance During Absence Entry.

Absence Event Entry Page

Use the Absence Event Entry page (GP_ABS_EVENT) to enter, update, and void absences.

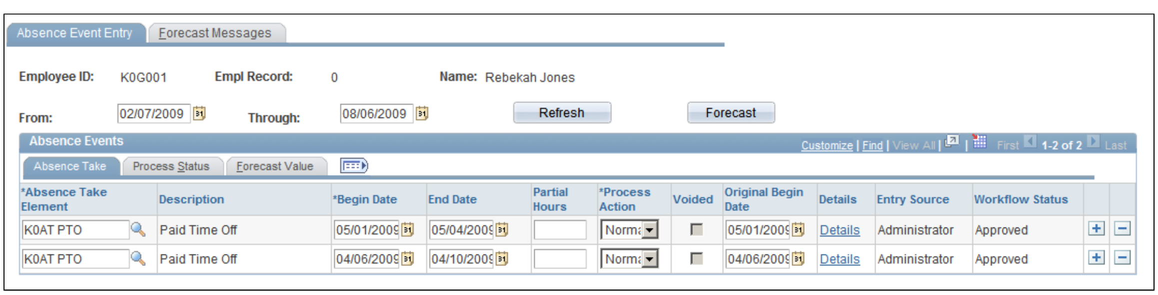
Start the Absence Forecasting process.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Absence Event, Absence Event Entry

Image: Absence Event Entry page

This example illustrates the fields and controls on the Absence Event Entry page.



To enter a new absence, insert a row and complete the fields described below. To make changes to a row, delete the row and add a new one.

Note: If you enter absences with overlapping dates, and your absence rules do not allow you to enter more than one absence for the same day, an error message appears when you try to save the events. If you've elected to use the automatic priority processing feature and have assigned a priority number to your absence take elements, the system determines which take element has priority for the date in question and offers the option of executing priority processing. You define absence priority rules on the Absence Take - Priority page.

Absence Take

From and Through

The user can display absence request that fall within a specified date range by entering dates in the From: and Through: fields. If the From, Through or both dates is left blank, the system will initialize the search based on the default dates.

The From and Through date range is determined by the Default History Date Range values entered on the History Grid page of the Country component. If the Default History Date Range has not been set up the system uses the current date minus 90 days for the From field and the current date plus 90 days for the Through field.

See Defining Self Service Absence Rules by Country.

Refresh

Click the Refresh button after entering, changing, or removing dates in the From: and Through: fields.

Note: If you do not click Refresh after changing the From or Through fields you will get an error message that tells you that you must click the Refresh button. You are able to proceed with absence entries once the Refresh button has been clicked.

Absence Take Element

Select the Absence Take element that corresponds to the payee's absence. (You can select from all absence take elements that are defined by your organization, not just those for which the payee is eligible.)

Begin Date and End Date

Enter the begin and end dates of the absence. If there's a break in the absence, enter each event separately. For example, if a payee is out sick for two days, returns to work for three days, and then is out sick again, enter two absence events. If the absence includes a weekend (say, Thursday to Monday), enter one absence event.

The system uses the Take definition that is in effect on the begin date that you specify.

Partial Hours

For absences of less than a full day, enter the number of hours that the payee was absent.

If the payee was absent for more than one day (the begin and end dates are different), the system assumes that the partial hours apply only to the first day of the absence. To specify otherwise, click the Details link to access the Absence Event Input Detail page.

Process Action

For a new absence event, the default is *Normal.*

Select *Void* to void an absence that has already gone through the Take process. The event is not processed in subsequent runs. Instead, the Process Action is reset to *Normal* and the Voided check box is automatically selected during the next Take process.

During retroactive processing, a new version of the results is calculated without the voided event. Positive input is not generated from the voided event, and the results for earning/ deduction have deltas.

Voided

Selected if you voided the event and ran the take process.

This field can also be selected if you're using the automatic priority processing feature and have assigned a priority number to your absence take elements. If you save absence entries with overlapping dates, the system voids the event with the lower priority and creates a new event for the days that do not overlap.

Original Begin Date

Enter a date in this field if your absence take rules allow you to link this absence to a previous absence that was taken for the same reason. (The Link Absence and By Original Begin Date options are selected on the take element's Period page.)

If this absence is related to another absence, enter the begin date of the original absence.

Example: A payee is out sick for the following periods of time:

Absence Type	***Reason (not entered online)***	***Absence Begin Date***	***Absence End Date***	***Original Begin Date***
Sick	Sprained wrist	May 15	May 16	May 15
Sick	Flu	June 1	June 5	June 1
Sick	Wrist didn't heal properly	June 10	June 10	May 15

Entering the same original begin date for the first and third absence events tells the system that the absences are related. If you defined the take element to link absences, the system checks to see if the current absence occurred within the time frame allowed for linking. If it did, the two events are linked.

The default value for Original Begin Date is the begin date. Changing the begin date here does not update the original begin date.

Details

Click to display the Absence Event Input Detail page, where you can enter additional information about the absence.

Entry Source

Displays the origin of absence event. The values are: *Administrator, Time & Labor, Third Party, Employee Self Service, Manager Self Service, Employee Timesheet,* and *Manager Timesheet.*

Work Flow Status

Displays the current workflow status of the employee extended absence, manager extended absence, administrator extended absence, and absence event. The values are: *Saved, Needs Approval, Pushed Back, Denied, Approved,* and *Cancelled*.

Forecast

After entering absence events, click this button to start the Forecasting process. To use this button, absence forecasting must be enabled for one or more take elements.

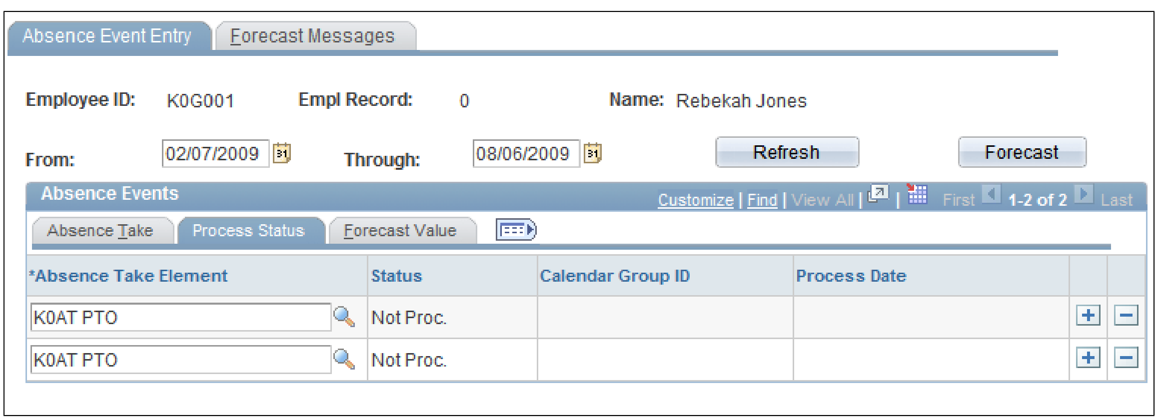
Process Status

Select the Process Status tab.

This tab displays information on the status of the absence event process and is meant for use by administrators.

Image: Absence Event Entry page - Process Status tab

This example illustrates the fields and controls on the Absence Event Entry page - Process Status tab.



Status

Displays the status of the absence event as it relates to processing in payroll. Valid values are *Not Proc.* (Not Processed), *Processed*, and *Finalized*.

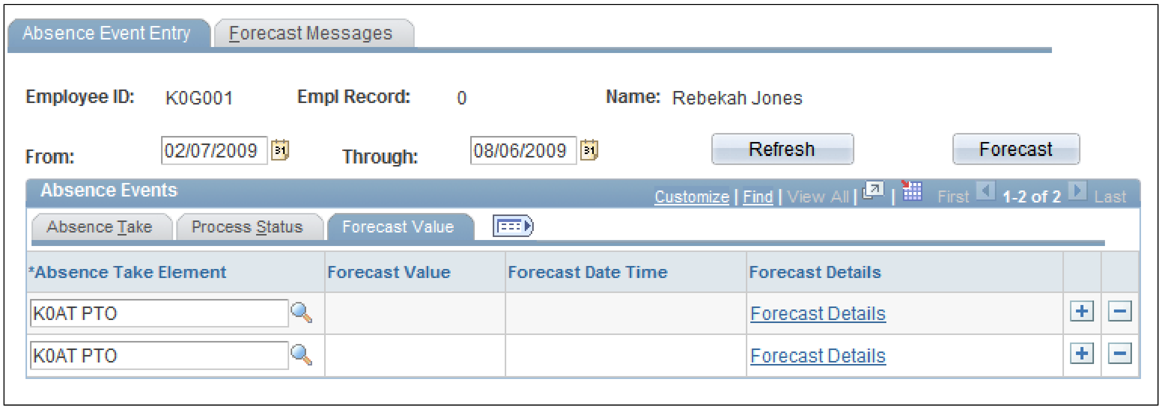
Note: Absence events with a status of *Finalized* will be set to *Processed* if the absence event has been retroactively processed during an on cycle or off cycle calculation

Forecast Value

Select the Forecast Value tab.

Image: Absence Event Entry page - Forecast Value tab

This example illustrates the fields and controls on the Absence Event Entry page - Forecast Value tab.



Forecast Value

The alphanumeric value resolved by the forecasting element. You associate a forecasting formula with a take element on the Take − Forecasting page. (For example, your forecast element might return a value of *Eligible* or *Not Eligible.*

Forecast Date Time

The last date and time that the Forecasting process was run for the take element.

Forecast Details

Select the link to display the Absence Forecast Results page.

Deleting Absence Event Rows

The Delete row button will be available or grayed out based on the Payroll Status and the Delete Option selected on the Event Entry page. When the Delete Option selected is *All Events Except Processed* the Delete row button is disabled on all processed rows and finalized rows. When the Delete Option selected is *All Event Except Finalized* the Delete row button is disabled on all finalized rows.

A warning is issued when you select to delete an absence event and you have selected the Delete Option of All Events Except Finalized. The warning message states, ”Are you sure you want to delete the Event %1 Begin Date %2 End Date %3?” The explanation attached to this message states, “This absence event has already been processed. If you delete this event you might have to reprocess the absence to correct the results.”

See Defining Self Service Absence Rules by Country.

Absence Event Input Detail Page

Use the Absence Event Input Detail page (GP_ABS_EVENT_SEC) to enter detailed information for an absence, including the reason, processing action, manager approval, user-defined data, entitlement adjustment, and partial hours.

Navigation

Click the Details link on the Absence Event Entry page.

Image: Absence Event Input Detail page (1 of 2)

This example illustrates the fields and controls on the Absence Event Input Detail page (1 of 2).

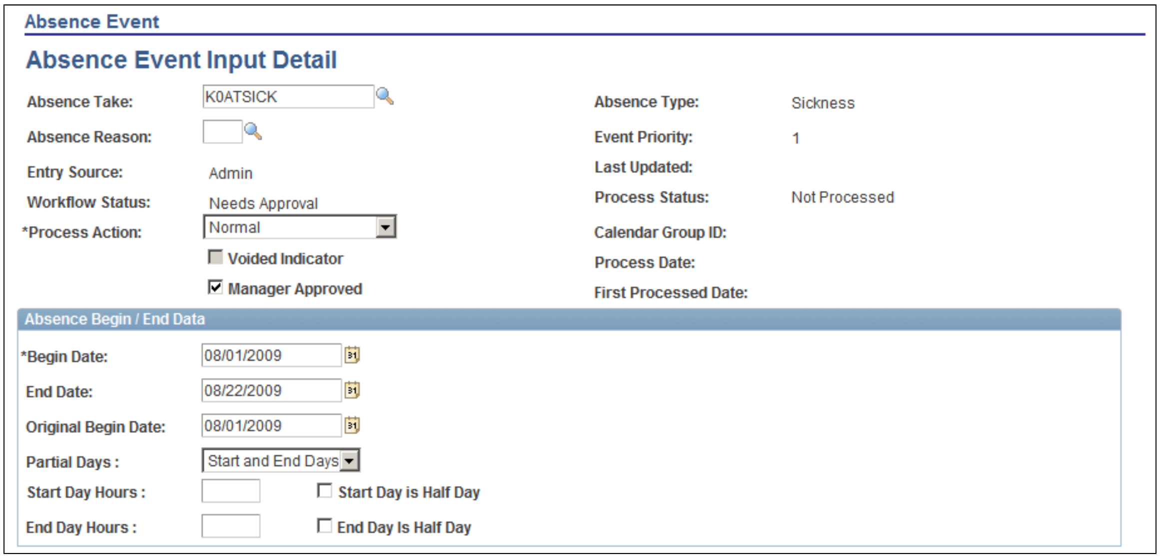
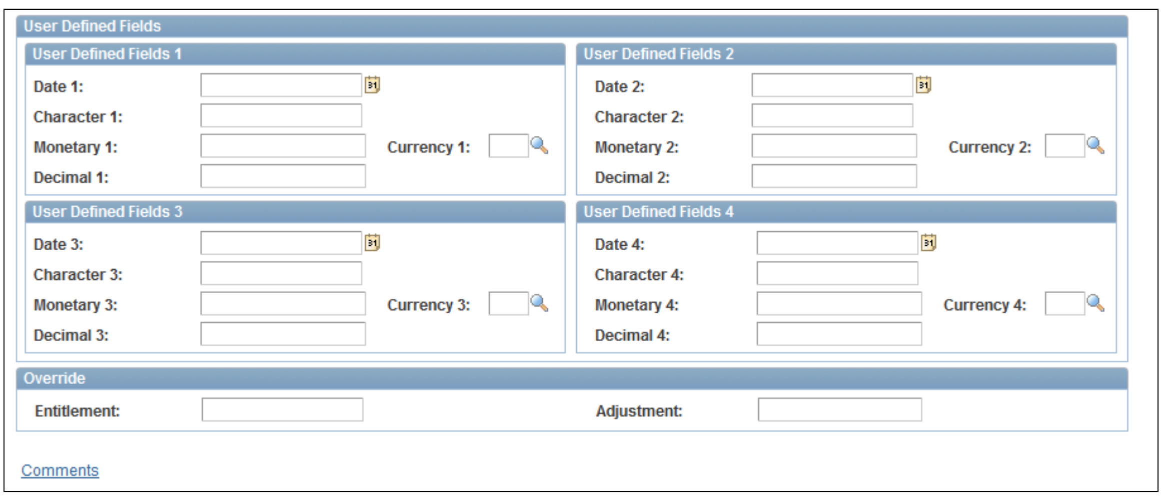


Image: Absence Event Input Detail page (2 of 2)

This example illustrates the fields and controls on the Absence Event Input Detail page (2 of 2).



Absence Take Displays the take element that you selected on the Absence Event Entry page.

Absence Type The absence type for the Take element is displayed.

Absence Reason You can select an absence reason from those that were in effect as of the absence begin date. You define absence reasons on the Absence Types page and link an absence type to a take element on the Take - Calculation page.

Event Priority	Displays the priority number of the take element if one was assigned on the Absence Take - Priority page. If you enter more than one absence for the same date, you can use the automatic priority processing feature when you save your entries. The system compares the priority numbers of the overlapping absences to determine which take rule to apply for the date in conflict. The lower the number, the higher the priority.
Entry Source	Identifies the source of the absence, employee extended absence, manager extended absence, and administrator extended absence data. Values are: *Admin:* The absence event entry was created using the Absence Event Entry page. This is the default for new entries using the Absence Event Entry page. *Third Party Time and Labor:* The absence event entry was created using a third-party interface. *Employee Self Service:* The absence event entry was created using the Absence Self Service Employee request page. *Manager Self Service:* The absence event entry was created using the Absence Self Service Manager request page. *Employee Timesheet:* The absence event entry was created using Employee Timesheet page *Manager Timesheet:* The absence event entry was created using Manager Timesheet page.
Manager Approved	Select to have the absence processed when you run the take process. This check box is selected, by default, if you defined the absence take element (on the Absence Take - Calculation page) as not requiring manager approval.
Last Updated	This date appears after you save your entry.
Workflow Status	Displays the current workflow status of the absence take.
Process Status	Displays the status of the absence event as it relates to processing in payroll. Valid values are *Not Processed*, *Processed*, and *Finalized*.
Calendar Group ID	Displays the calendar group for which the absence take was processed.
Process Date	This field displays the most recent processing date for this absence event.
First Processed Date	The value in this field represents the original processing date for the absence event. The Process Date and First Processed Date

fields show different processing dates, in the case of retroactive processing.

Absence Begin / End Data

Begin Date, End Date, and Original Begin Date

These fields display the dates that you entered for the absence event on the main page. Any changes that you make here update the main page.

Data that you enter in the following fields is used in absence calculations only if the data is referenced by your absence formulas.

Partial Days

Specify which days of the absence event are partial days.

If the Calculate End Date or Duration option is enabled on the Absence (setup) page, and the Unit Type is *Hours*, the system does consider any partial hours or half-day entries that are entered in this group box when it calculates the end date or duration.

For example, an employee has a work schedule of 8 hours per day from Monday through Friday. The employee reports an absence from Monday, January 8, 2007 through Wednesday, January 10, 2007. Then employee takes a half day off on Monday and full days off for the rest of the absence.

Example 1: The Country Take set up is defined as follows:

- Unit Type = *Hours.*
- Allow Partial Days = Selected.
- Partial Days = *Partial Hours.*

With these settings, to correctly enter the absence data the employee should report:

- Start Date = *January 8, 2007.*
- End Date = *January 10, 2007.*
- Partial Days = *Start Day Only.*
- Start Day Hours = *4.*

Example 2: The Country Take set up is defined as follows:

- Unit Type = *Hours.*
- Allow Partial Days = Selected.
- Partial Days = *Half Days.*

With these settings, to correctly enter the absence data the employee should report:

- Start Date = *January 8, 2007.*
- End Date = *January 10, 2007.*
- Partial Days = *Start Day Only.*
- Start Day is Half Day = Selected.

Warning! If the absence unit type is defined in days in the Country Take setup, we do not recommend using partial days options.

Note: Data that you enter in the following fields is used in the absence calculation process only if the data is referenced by your absence formulas.

The available options in the Partial Days field when the absence is calculated in days include:

- *All Days*
- *End Day Only*
- *None*
- *Start Day Only*
- *Start and End Days*

Start Day Hours, End Day Hours, and All Day Hours

Enter the number of hours the payee was absent for the first day of the absence, the last day of the absence, or all days of the absence, respectively.

Start Day is Half Day, End Day is Half Day, and All Days are Half Days

Select if the payee was absent exactly half a day.

Start Day Start Time, End Day Start Time, and All Days Start Time

Enter the scheduled start time for the specified workday or workdays.

Important! These fields are not available unless you have installed Oracle Workforce Scheduling and you select an option in the Partial Days field.

See "Understanding Integration with Oracle Workforce Scheduling *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Start Day End Time, End Day End Time, and All Days End Time

Enter the scheduled end time for the specified workday or workdays.

Important! These fields are not available unless you have installed Oracle Workforce Scheduling and you select an option in the Partial Days field.

See "Understanding Integration with Oracle Workforce Scheduling *(PeopleSoft HCM 9.2: Application Fundamentals)*".

User Defined Fields

You can enter data in up to 16 user-defined fields. When you run the Take process, the system writes the data to the daily records, so that it's available to the count formulas.

A system element in the GP_ABS_EVENT record corresponds to each user-defined field. The naming conventions are:

- EVT CONFIG1(2, 3, 4) DT for date values.
- EVT CONFIG1(2, 3, 4) DC for decimal values.
- EVT CONFIG1(2, 3, 4) CH for character values.
- EVT CONFIG1(2, 3, 4) MN for monetary values.

Definition of abbreviations: Event configurable 1(2,3,4) date/decimal/character/monetary

For example, employees take 100 percent or 80 percent pay for sick time. If they take 100 percent, they lose a day of vacation for each set of five sick days that they take. You enter *100* or *80* in one of the decimal fields to specify the employee's choice and use a formula that counts the number of vacation days that the employee loses in each case.

Note: Values entered in the user defined fields can be overwritten during the Take process, depending on your take rules.

Note: The user-defined fields on this page are not related to the user-defined fields that appear on the Absence Take - Calculation page.

Override

If the absence take element is associated with a per-absence entitlement element, use this group box to override the standard entitlement amount or adjust the payee's entitlement balance. To override the entitlement amount or adjust the entitlement balance for a frequency-based entitlement, use the Absence Adjustment page.

Important! Use the same type of units as those that are used to define the entitlement element.

Entitlement	To override the entitlement for this event, enter the number of units in this field. If the take is linked to more than one entitlement element, the number overrides the entitlement for the first linked element only.
Adjustment	To adjust the entitlement balance, enter the number of units in this field. (That number populates the automatically assigned adjustment element.) Enter a negative number to reduce the entitlement balance.

Related Links

Defining Absence Take Elements

Absence Take - User Defined Result Fields Page

Forecasting Absence Entitlement Balance During Absence Entry

This topic provides an overview of forecasting and discusses how to:

- Review absence entitlement balance forecasting results.
- Review forecasting messages.

Pages Used to Forecast Absence Entitlement Balances

Page Name	*Definition Name*	*Navigation*	*Usage*
Absence Forecast Results	GP_ABS_EVT_FCS_SEC	Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Absence Event, Absence Event Entry Click the Forecast Details link on the Forecast Value tab on the Absence Event Entry page.	Review the results of the Forecasting process for a specific absence event and any take elements that are mapped to it.
Forecast Messages	GP_ABS_FCST_MSG	Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Absence Event, Forecast Messages	Review the messages that are generated during the Forecasting process.
Forecast Message Detail	GP_ABS_FCS_MSG_SEC	Click the Details link on the Forecast Messages page.	Review the text of a selected error or warning message.

Understanding Absence Entitlement Balance Forecasting

Use the Absence Forecasting process to evaluate the impact of an absence event. To use this feature, you must have defined the forecasting rules that are applicable to your organization and enabled the absence forecasting feature.

Absence Forecasting Steps

Following are the steps for using absence forecasting:

1. Enter a payee’s actual or anticipated absence events on the Absence Event Entry page.
2. Click the Forecast button to start the process.

   The system does not automatically save your absence request before initiating the Forecasting process. Although the system prompts you to save before leaving the page, it is not necessary to save your forecast information before or after the Forecasting process.

3. If applicable, check the Forecast Messages page to see if errors or warnings were generated during the process.

4. Correct errors and rerun the process.

   Each time you run the Forecasting process, the system overwrites the previous forecast data.

5. View the results by clicking the Forecast Details link on the Absence Event Entry page.

Forecasting and Retroactivity

In absence forecasting the forecasting period includes those calendars that should be reprocessed due to the presence of an unprocessed retro trigger. The absence event change must create a retro trigger in order for the forecasting period to include a finalized calendar whose period includes the effective date of the trigger.

Example of Absence Forecasting with Retro

An employee has an absence entitlement balance of 16 hours once the September run is finalized. During October's run the employee is absent for 24 hours, October 17 – October 19. Because there is not enough entitlement to cover this absence, a portion of the absence will go unpaid. The rules as defined for this absence mark this event as Ineligible.

If the end date is changed to October 18, there is enough entitlement and the event is marked as Eligible. The change to the event creates a retro trigger and therefore the October calendar is processed again during forecasting.

Note: The absence event change must create a retro trigger in order for the forecasting period to include a finalized calendar whose period includes the effective date of the trigger. In addition, the earliest retro trigger (not limited to retro triggers from the absence event) that satisfies the retro limit is selected to determine which template calendar is the starting point for retro processing. The calendar period end date must be greater than or equal to the minimum effective date of the retro triggers that are greater than or equal to the retro limit date.

Related Links

Absence Entry, Approval, and Self Service Features

Absence Forecast Results Page

Use the Absence Forecast Results page (GP_ABS_EVT_FCS_SEC) to review the results of the Forecasting process for a specific absence event and any take elements that are mapped to it.

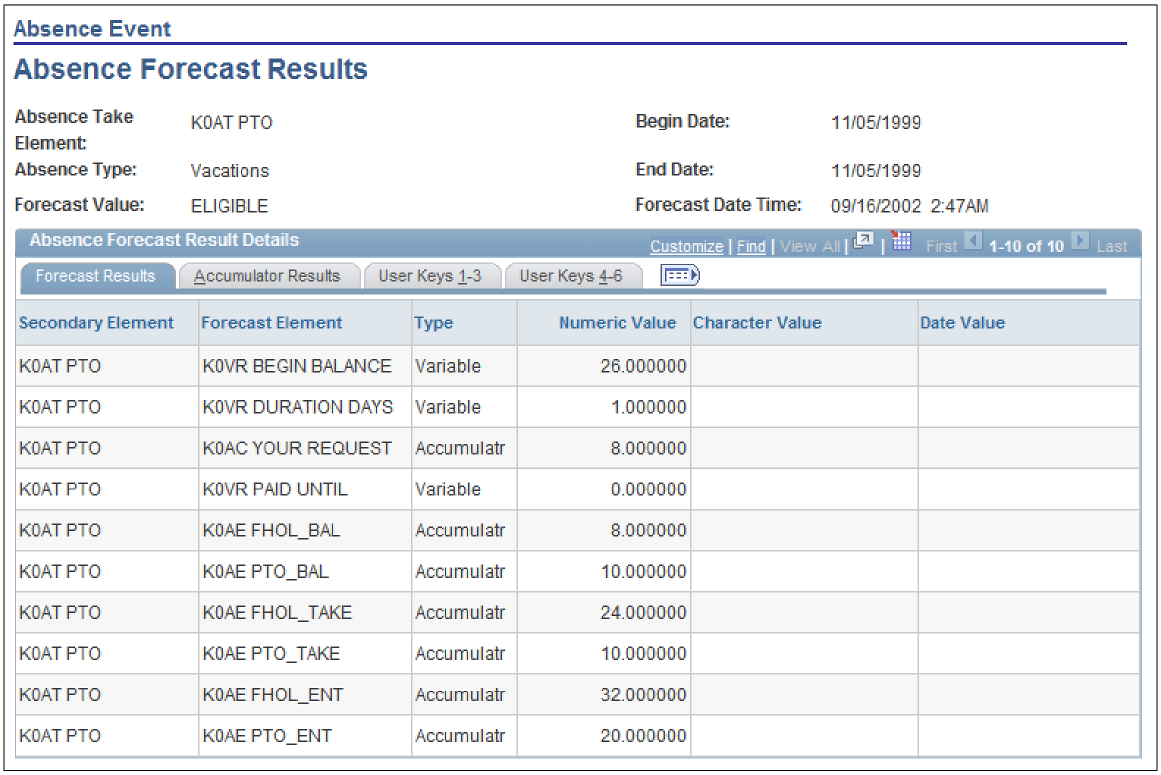
Navigation

Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Absence Event, Absence Event Entry

Click the Forecast Details link on the Forecast Value tab on the Absence Event Entry page.

Image: Absence Forecast Results page

This example illustrates the fields and controls on the Absence Forecast Results page.


Absence Event

Absence Forecast Results

Absence Take Element: K0AT PTO | Begin Date: 11/05/1999

Absence Type: Vacations | End Date: 11/05/1999

Forecast Value: ELIGIBLE | Forecast Date Time: 09/16/2002 2:47AM

Absence Forecast Result Details | Customize | Find | View All | First 1-10 of 10 Last

Forecast Results | Accumulator Results | User Keys 1-3 | User Keys 4-6

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
K0AT PTO	K0VR BEGIN BALANCE	Variable	26.000000		
K0AT PTO	K0VR DURATION DAYS	Variable	1.000000		
K0AT PTO	K0AC YOUR REQUEST	Accumulatr	8.000000		
K0AT PTO	K0VR PAID UNTIL	Variable	0.000000		
K0AT PTO	K0AE FHOL_BAL	Accumulatr	8.000000		
K0AT PTO	K0AE PTO_BAL	Accumulatr	10.000000		
K0AT PTO	K0AE FHOL_TAKE	Accumulatr	24.000000		
K0AT PTO	K0AE PTO_TAKE	Accumulatr	10.000000		
K0AT PTO	K0AE FHOL_ENT	Accumulatr	32.000000		
K0AT PTO	K0AE PTO_ENT	Accumulatr	20.000000		

Forecast Results

This tab displays the forecasted value for each element that appears on the Absence Take - Forecasting page, along with related take elements.

Secondary Element

Displays the name of the take element that the results pertain to. This can be the take element listed on the Absence Take - Forecasting page, a redirected take element, or a “mapped to” take element that’s associated with that take.

Note: You identify redirected take elements on the Take - Negative Balance page and “mapped to” elements on the Absence Take - Day Formula page. Redirected take element can be redirected to other take elements. For example, if A redirects to B, which redirects to C, then C can appear in this field.

Forecast Element, Type

Displays the name of the element for which a value has been forecast, followed by its type.

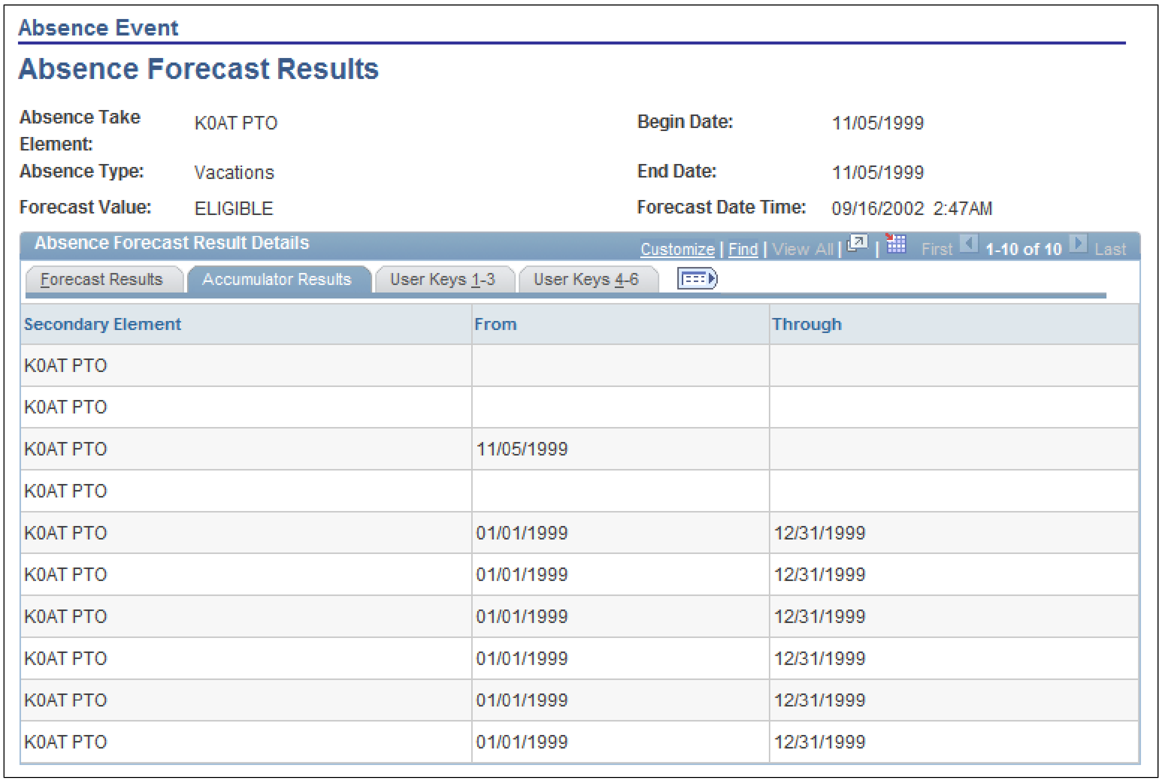
A value displays for each element listed on the Take - Balance Inquiry page.

Reviewing Accumulator Results

Select the Accumulator Results tab.

Image: Absence Forecast Results page: Accumulator Results tab

This example illustrates the fields and controls on the Absence Forecast Results page: Accumulator Results tab.



Absence Event

Absence Forecast Results

Absence Take Element: K0AT PTO | Begin Date: 11/05/1999

Absence Type: Vacations | End Date: 11/05/1999

Forecast Value: ELIGIBLE | Forecast Date Time: 09/16/2002 2:47AM

Absence Forecast Result Details — Customize | Find | View All | First 1-10 of 10 Last

Forecast Results | Accumulator Results | User Keys 1-3 | User Keys 4-6

Secondary Element	From	Through
K0AT PTO		
K0AT PTO		
K0AT PTO	11/05/1999	
K0AT PTO		
K0AT PTO	01/01/1999	12/31/1999
K0AT PTO	01/01/1999	12/31/1999
K0AT PTO	01/01/1999	12/31/1999
K0AT PTO	01/01/1999	12/31/1999
K0AT PTO	01/01/1999	12/31/1999
K0AT PTO	01/01/1999	12/31/1999

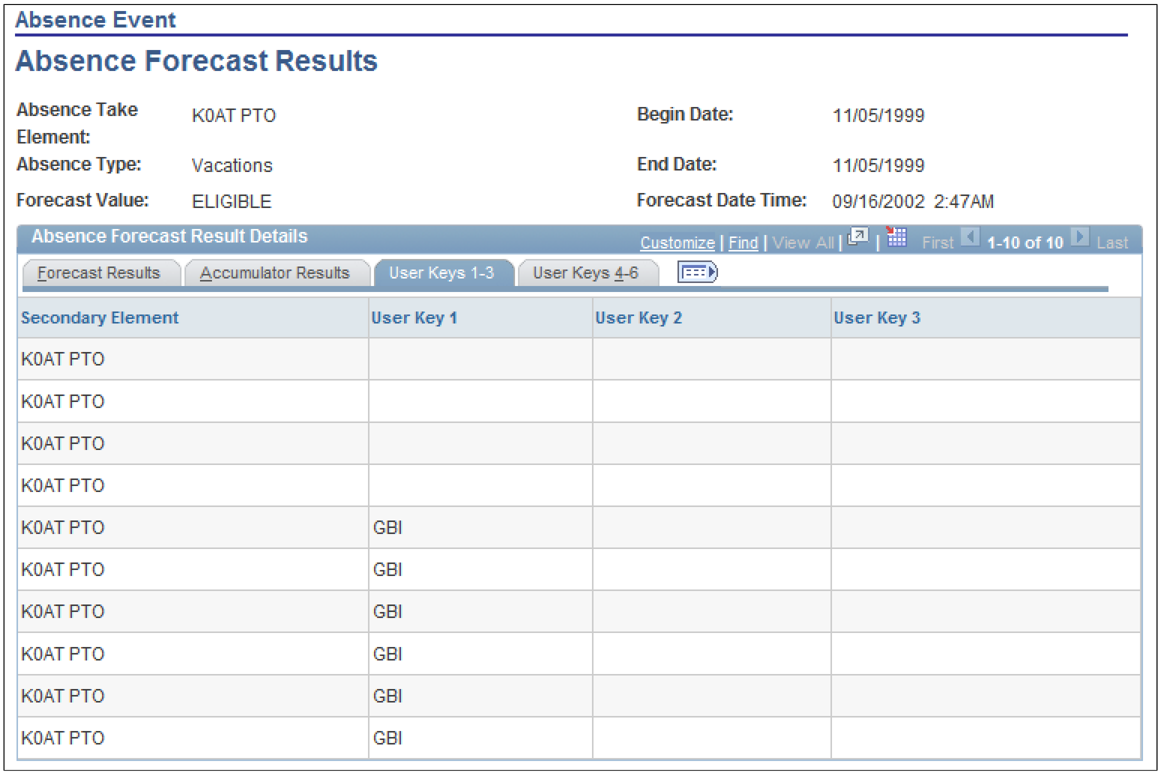
The begin and end dates of the accumulation period are displayed for any accumulators that are included in the Forecasting Results Element List on the Absence Take - Forecasting page.

Reviewing User Keys

Select the User Keys tab.

Image: Absence Forecast Results page: User Keys tab

This example illustrates the fields and controls on the Absence Forecast Results page: User Keys tab.



The values of the accumulator's user keys are displayed for any accumulators that are included in the Forecasting Results Element List on the Absence Take - Forecasting page.

Forecast Messages Page

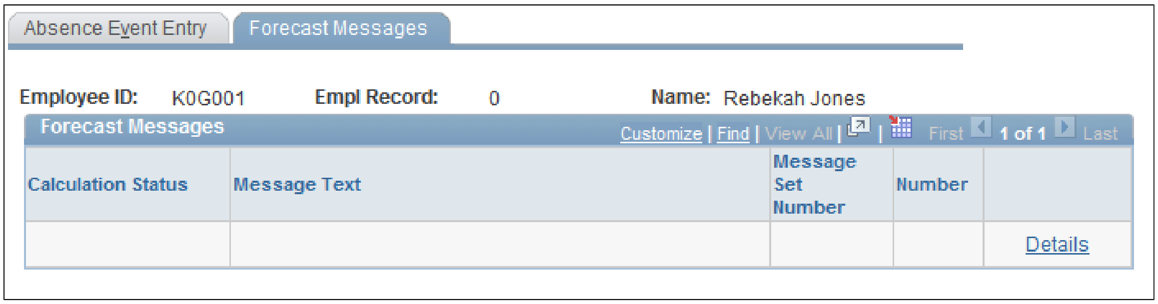
Use the Forecast Messages page (GP_ABS_FCST_MSG) to review the messages that are generated during the Forecasting process.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Absence Event, Forecast Messages

Image: Forecast Messages page

This example illustrates the fields and controls on the Forecast Messages page.



Calculation Status	Identifies the phase of processing during which the error or warning occurred.
Message Text	Displays the abbreviated text of the message and other information about the message.

Related Links

Status Codes and Process Indicators

Reviewing System Generated Forecasting Error Status Messages

Viewing Current Absence Entitlement Balances and Running the Absence Entitlement Balance Inquiry Process

Use the Balance Inquiry feature to view a payee's current entitlement balance for a take. You can also run the Balance Inquiry process to return the values of the elements that are specified on the Absence Take - Balance Inquiry page. Typically, one of these elements returns the absence balance for the take. Values are displayed as of the date that you specify.

In this topic, we discuss how to:

- View current balances for payees.
- Start the Balance Inquiry process.

Pages Used to Start the Balance Inquiry Process and View Balances

Page Name	***Definition Name***	***Navigation***	***Usage***
Current Balance	GP_ABS_CUR_BAL	Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Review Absence Balances, Current Balance	View a payee's current entitlement balances.

Page Name	*Definition Name*	*Navigation*	*Usage*
Forecast Balance	GP_ABS_FCST_BAL	Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Review Absence Balances, Forecast Balance	Starts the Balance Inquiry process and view the results.

Related Links

Status Codes and Process Indicators

Current Balance Page

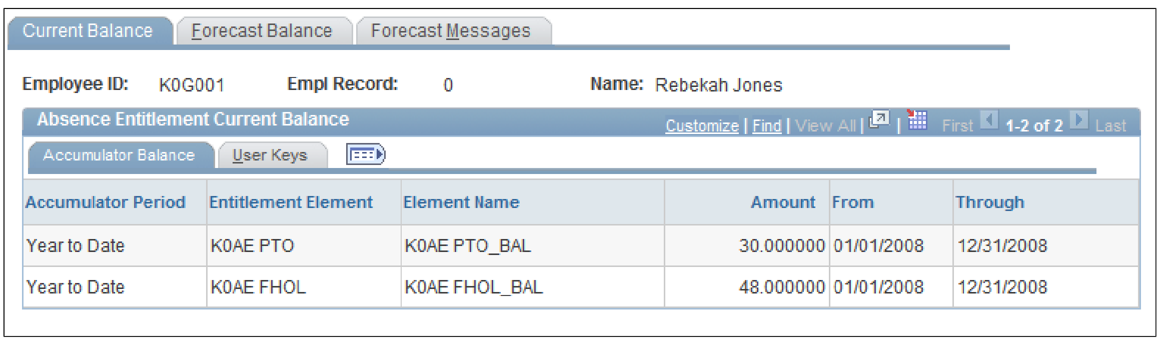
Use the Current Balance page (GP_ABS_CUR_BAL) to view a payee's current entitlement balances.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Review Absence Balances, Current Balance

Image: Current Balance page - Accumulator Balance tab

This example illustrates the fields and controls on the Current Balance page - Accumulator Balance tab.



Accumulator Balance Tab

For the period of time defined by the From and Through dates this tab displays the payee's entitlement balances as of the most recent run of the Entitlement process for the payee.

User Keys Tab

This tab displays the value that was entered for each user key defined on the Entitlement Accumulators page.

Related Links

Absence Entitlements - Auto Generated Accumulators Page

Forecast Balance Page

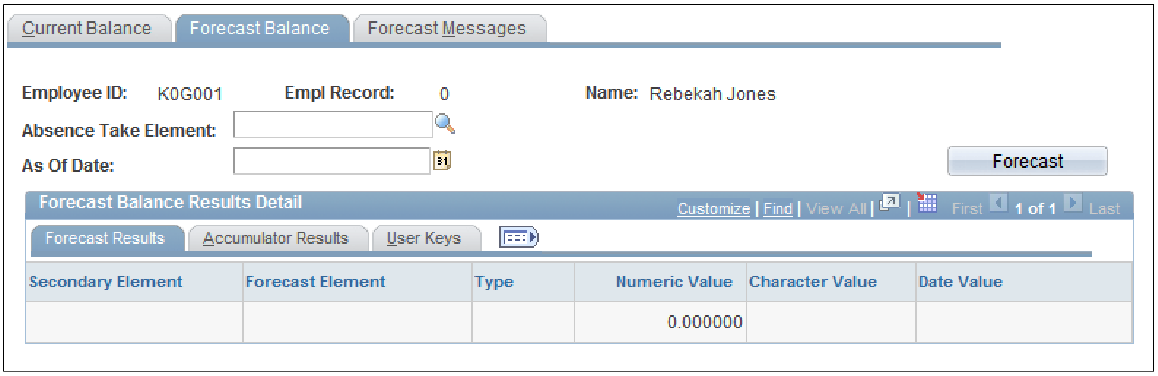
Use the Forecast Balance page (GP_ABS_FCST_BAL) to starts the Balance Inquiry process and view the results.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Review Absence Balances, Forecast Balance

Image: Forecast Balance page: Forecast Results tab

This example illustrates the fields and controls on the Forecast Balance page: Forecast Results tab.



Following are the steps for running the Balance Inquiry process:

1. Select the take element and the As of Date for which you want to display forecasted results.
2. Click the Forecast button.
3. View the results in the Forecast Balance Results Detail group box.

   The tabs in this group box are identical to the tabs on the Absence Forecast Results page.

See Absence Forecast Results Page.

Adjusting and Overriding Entitlement Balances

You can adjust or override a payee's entitlement balance in several ways.

In this topic, we discuss how to:

- Adjust entitlement.
- Redefine a frequency-based entitlement rule.

Pages Used to Adjust Entitlements

Page Name	***Definition Name***	***Navigation***	***Usage***
Adjust Balances - Absences	GP_PI_MNL_AE	Global Payroll & Absence Mgmt, Payee Data, Adjust Balances, Absences, Adjust Absence Balances	Adjust a payee's frequency-based entitlement for a single calendar period. Before you can enter an adjustment, you must set up the corresponding absence calendar.
Assign Entitlements and Takes	GP_ABS_OVRD	Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Assign Entitlements and Takes, Assign Entitlements and Takes	Redefine a frequency-based entitlement rule for a payee for a specified period of time. Specify whether a take or frequency-based entitlement element is processed for a payee.

Adjust Balances - Absences Page

Use the Adjust Balances - Absences page (GP_PI_MNL_AE) to adjust a payee's frequency-based entitlement for a single calendar period.

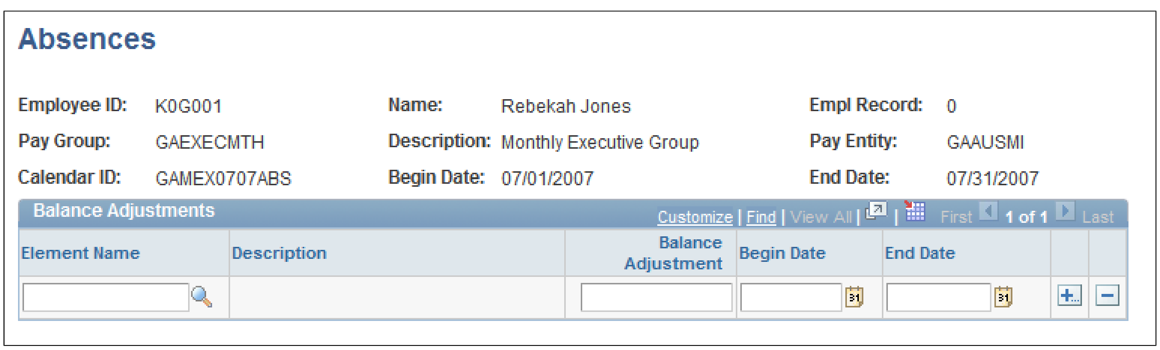
Before you can enter an adjustment, you must set up the corresponding absence calendar.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Adjust Balances, Absences, Adjust Absence Balances

Image: Adjust Balances - Absences page

This example illustrates the fields and controls on the Adjust Balances - Absences page.



The Absence Entitlement process follows the instructions you enter on this page.

Note: You can also enter one time adjustments to a per-absence entitlement when entering an absence event.

Note: You cannot adjust or delete entitlement elements inserted through the Leave Donations process on this page. Use the Adjust Leave Program Balances page to adjust leave donation balances.

Balance Adjustments

Enter each adjustment that applies to this payee for the selected absence calendar. You cannot enter more than one adjustment for the same element.

Element Name

Select the entitlement element for which you want to enter an adjustment. The prompt table displays only frequency-based entitlement elements that are defined for positive input overrides on the Element Name page.

Balance Adjustment

Enter the adjustment units. You can enter a positive or negative number. The amount is added to or subtracted from the beginning entitlement balance when you run the Entitlement process. Generation control for the adjustment is ignored.

Begin Date and End Date

These dates determine in which segment the adjustment is made, if the calendar period is segmented.

- If you leave the Begin Date field blank, the system assumes that the date is the same as the Begin Date on the Calendar - Definition page. The system does not use the begin date for processing.
- If the End Date differs from the Calendar End Date, and the calendar period is segmented, the end date determines the segment or slice to which the adjustment is assigned.

See Absence Event Entry Page.

Related Links

Adjust Leave Program Balances Page

Assign Entitlements and Takes Page

Use the Assign Entitlements and Takes page (GP_ABS_OVRD) to redefine a frequency-based entitlement rule for a payee for a specified period of time.

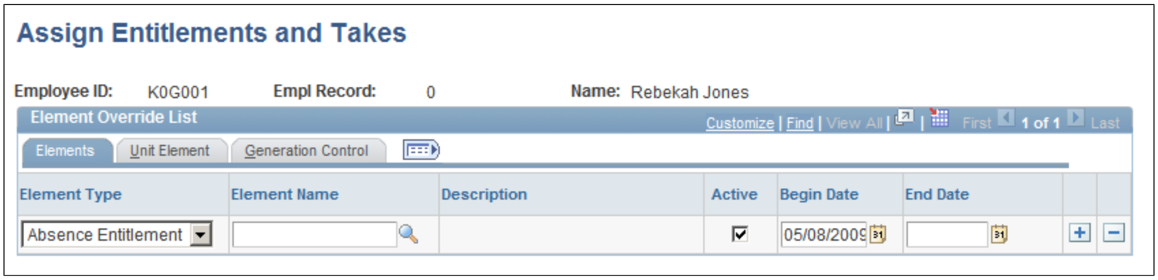
Specify whether a take or frequency-based entitlement element is processed for a payee.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Assign Entitlements and Takes, Assign Entitlements and Takes

Image: Assign Entitlements and Takes page

This example illustrates the fields and controls on the Assign Entitlements and Takes page.



To override a per-absence entitlement rule, use the Absence Event Entry page.

Note: To override an entitlement or take element, the Payee override option must be selected on the Element Name (GP_PIN) page.

Elements

Element Type

Specify the type of element to override: *Absence Entitlement* or *Absence Take*.

Element Name

Select the name of the element to override. Only elements that allow payee overrides are listed; the system does not check payee eligibility.

If you selected *Absence Entitlement* as the entry type, you can select a frequency-based entitlement element only.

Active

Selected by default. Clear if you don't want the system to resolve this absence element for the payee.

Begin Date and End Date

Enter the date that the override instructions become effective and the last date to which the override instructions apply.

Unit Element

Unit Element Type

To change the supporting element that is used to calculate the entitlement units, select *Accumulator, Bracket, Formula, Numeric, Payee Level, System Element,* or *Variable.*

If you select *Numeric*, enter the value in the Entitlement Unit field.

For all other element types, select the element name in the *Element Name - Unit* field.

Frequency and Frequency ID

Specify the frequency for the system to apply when granting the entitlement. Values are *Pay Period* and *Other.*

If you select *Other,* select the frequency in the Frequency ID field; for example, *Monthly.*

Generation Control

Generation Control Option

You can override the generation control condition that is defined for the take or entitlement element on the Element Name page. You can enter instructions here even if you didn't specify generation control details at the element level. Values are:

None: System ignores the generation controls that you originally defined at the calculation rule level.

Specify: Enter a generation control value in the field to the right.

Element (the default): System uses the generation control that was defined when the element was set up.

Reviewing Daily Absence Records

The following table lists the pages that display the results of a batch absence process:

Process	***Tables Populated***	***Inquiry Pages and Display***
Take	GP_RSLT_ABS (Daily absence rows)	Absence Data pages. Daily data that is generated by the Take process.
	GP_RSLT_ACUM	Accumulators page. Updated entitlement balances.
	GP_RSLT_PI_DATA	Results by Calendar: Positive Input - Absence page. Balances adjustments made to frequency based entitlement elements that are processed for the absence calendar.
	GP_RSLT_ABS	Results by Calendar - Calendar Results: Absence Data. Also Results by Calendar Group - Calendar Results: Absence Data. The absence type, reason, and forecast value.
	GP_GEN_PI_DATA	Generated positive input from the take process is stored in this table. (Note: This is the principal table that Absence Management uses to provide information to the payroll system.)

Process	***Tables Populated***	***Inquiry Pages and Display***
Entitlement	GP_RSLT_ACUM	Accumulators page. Updated entitlement balances.
	GP_RSLT_PIN	Supporting Elements page. Entitlement units with supporting elements.

Related Links

Viewing Positive Input Results
Viewing Daily Results of the Absence Take Process

Chapter 16

Managing Extended Absences

Understanding Extended Absences

This topic provides an overview of:

- Attachments in extended absences
- Configurable sections in extended absences

The Absence Management self service framework supports extended leave requests, such as FMLA (Family Medical Leave Act) and Canadian Leave requests, as well as other extended absences such as Statutory Sick Pay and Statutory Maternity Pay, and so on. The framework for extended absences contains elements that enable you to attach supporting documents and notes to extended absence requests. In addition, the framework provides a mechanism to enable you to implement eligibility validations rules at different levels, for example country, state, customer, and so on, without having to customize PeopleSoft components.

Understanding Attachments in Extended Absences

The attachment feature enables you to attach files to a PeopleSoft application. An administrator can add URLs or common files to a component or page. Attachments include PDF files, spreadsheet files, document files, URLs, and so on. You can also define the types of attachments that users can add to a specific row of application data, such as medical or adoption certificates, fitness for duty forms, and so on.

Although the types of attachments you can add to a page are essentially unlimited, attachments are categorized as one of the following:

- Attachments are any previously created electronic file that the administrator wants users to be able to download.
- URLs are links to dynamic files or web sites.
- Notes are free-form text that the user can enter through the attachment framework page in the PeopleSoft application.

Note: Only attachments and URLS are defined on the Define Attachments page. Notes are created by the user through the attachment pages of the PeopleSoft application.

Note: The Define Attachments page enables an administrator to create document definitions, as well as attachments and URLs. Document definitions are types of files that users can upload to the system. For example various medical certificates or evidence of class completion.

Adding Attachments to Extended Absences Process Flow

Here are the steps for defining attachments within the attachment framework for PeopleSoft Absence Management:

- Define Authorization ID

  These IDs provide users with security authorizations for accessing attachments, such as the ability to create, update and delete attachments.

- Define Authorization Entry ID

  The Authorization Entry IDs enable you to attach Authorization IDs to planned attachments, notes, or URLs.

  Note: The description you enter in for an Authorization Entry ID defines the name of the link as it appears to users on the Extended Absence Request page.

- Define Configuration ID

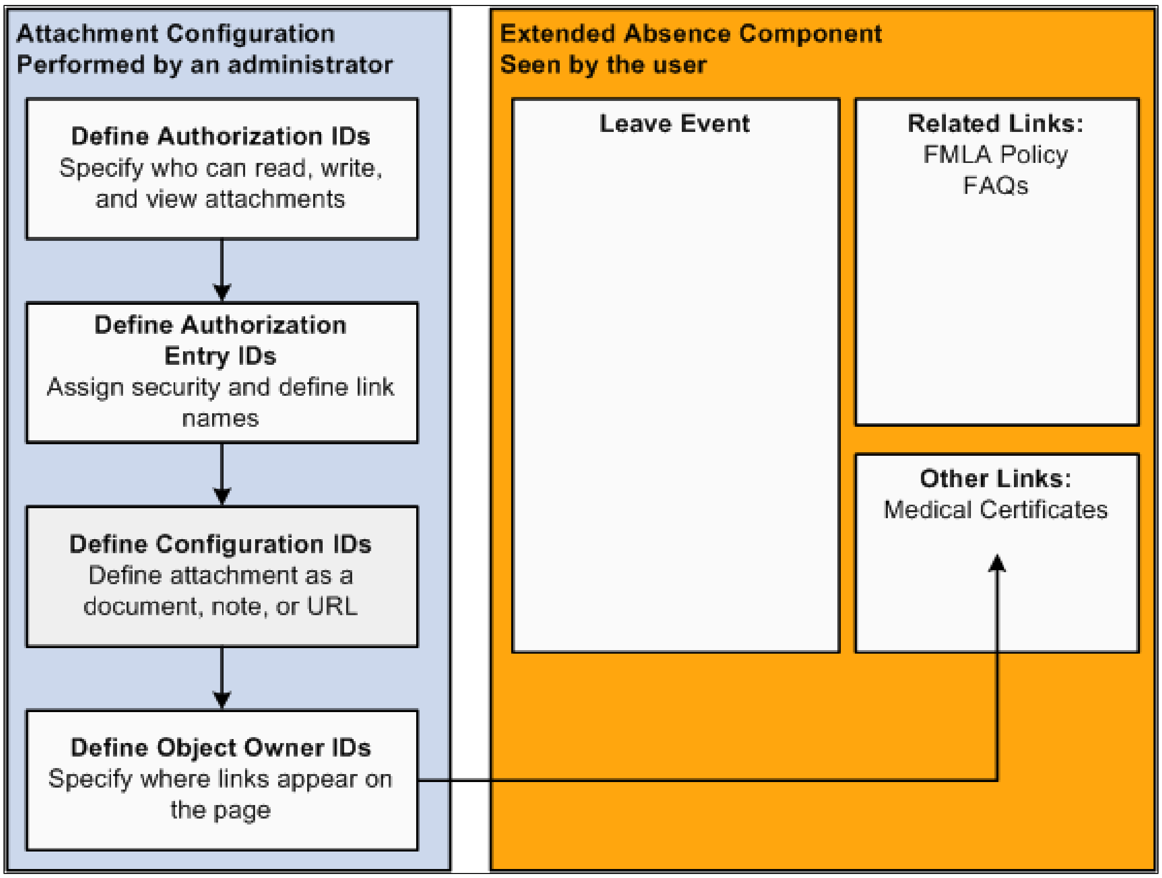
  The Configuration ID links Authorization Entry IDs and defines whether an attachment is a downloadable file, a document the user uploads, or a link to a URL.

- Define Object Owner ID

Object Owner IDs define where links appear on the Extended Absence component. For extended absences, use the *HGA* Object Owner ID for Absence Management, and associate your Configuration ID's with the *Absence Element* Context Key.

Image: Adding attachments to extended absences process flow

This graphic shows the process flow for adding attachments to extended absences.



Example: Defining Authorization IDs

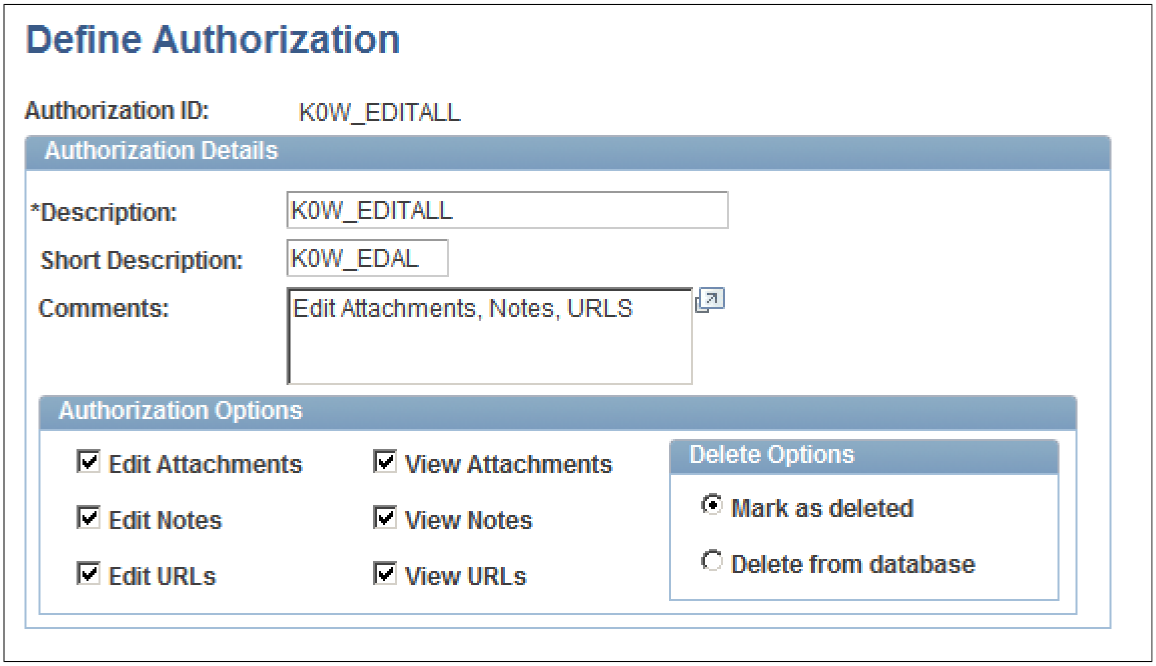
Use the Authorization ID to provide a variety of security authorizations to users regarding the ability to read, write, or view attachments.

For example, the authorization ID *K0W_EDITALL* has the Edit Attachments, Edit Notes, and Edit URLs check boxes selected. This means that roles with the *K0W_EDITALL* authorization ID can edit all attachments, notes, and URLS.

The following graphic displays the Define Authorization page (Set Up HCM, Common Definitions, Attachments, Define Authorization, Define Authorization) with the K0W_EDITALL Authorization ID.

Image: Define Authorization page - displaying the K0W_EDITALL Authorization ID

This example illustrates the fields and controls on the Define Authorization page - displaying the K0W_EDITALL Authorization ID.



See "Define Authorization Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Example: Defining Authorization Entry IDs

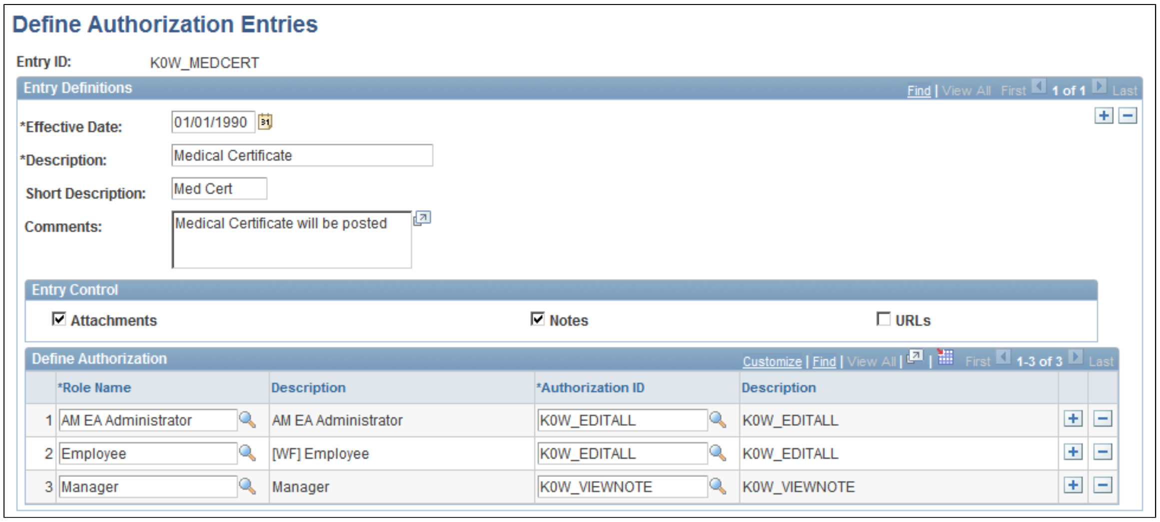
Use the Authorization Entry IDs to attach Authorization IDs to each of the planned types of attachments, notes, and URLs.

For example, in the following graphic, the *K0W_EDITALL* Authorization ID on the Define Authorization Entries page (Set Up HCM, Common Definitions, Attachments, Define Authorization Entries, Define Authorization Entries) is associated with two roles in the *Medical Certificate* Authorization Entry ID.

This allows the manager to view attachments or notes, and the AM EA Administrator and the employee can add, edit, or delete attachments or notes related to the medical certificate.

Image: Define Authorization Entries page - displaying the K0W_EDITALL Authorization ID associated with two roles

This example illustrates the fields and controls on the Define Authorization Entries page - displaying the K0W_EDITALL Authorization ID associated with two roles.



See "Define Authorization Entries Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Example: Defining Configuration IDs

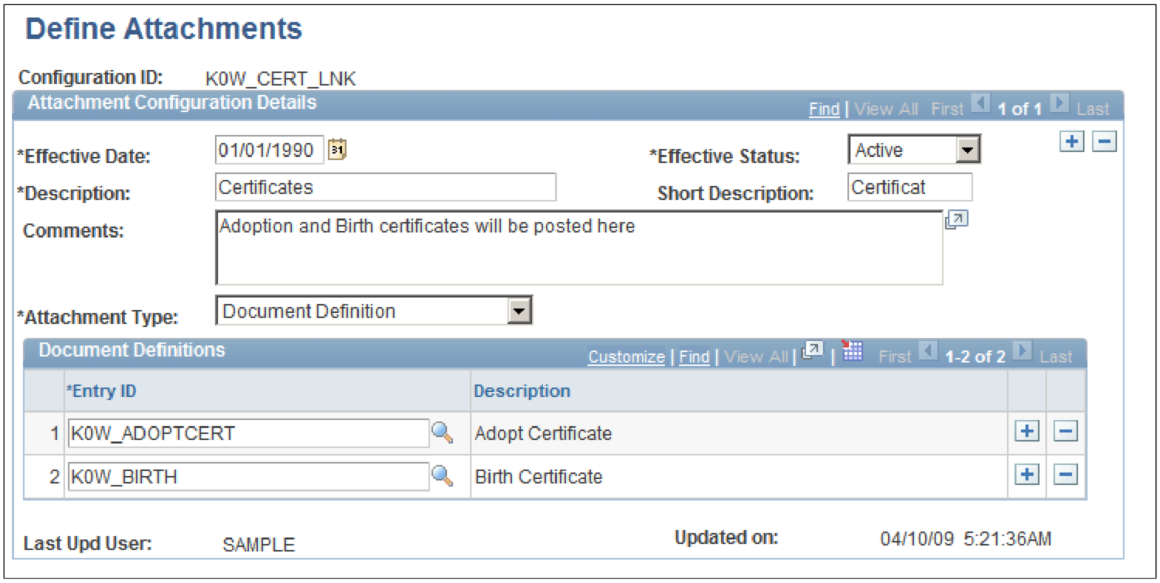
The Configuration ID defines whether an attachment is a downloadable file, a document the user uploads, or a link to a URL.

On the displayed Define Attachments page (Set Up HCM, Common Definitions, Attachments, Define Attachments, Define Attachments) the *K0W_MEDCERT_LINK* Configuration ID describes the Medical

Certificate attachment. This attachment uses the Document Definition attachment type, which enables the user to upload word processing documents, PDF files, spreadsheets, and so on.

Image: Define Attachments page - displaying the Document Definition attachment type for the selected attachment

This example illustrates the fields and controls on the Define Attachments page - displaying the Document Definition attachment type for the selected attachment.



Note: The contents of the Description field define the title of the link that appears in the Extended Absence component.

See "Define Attachments Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

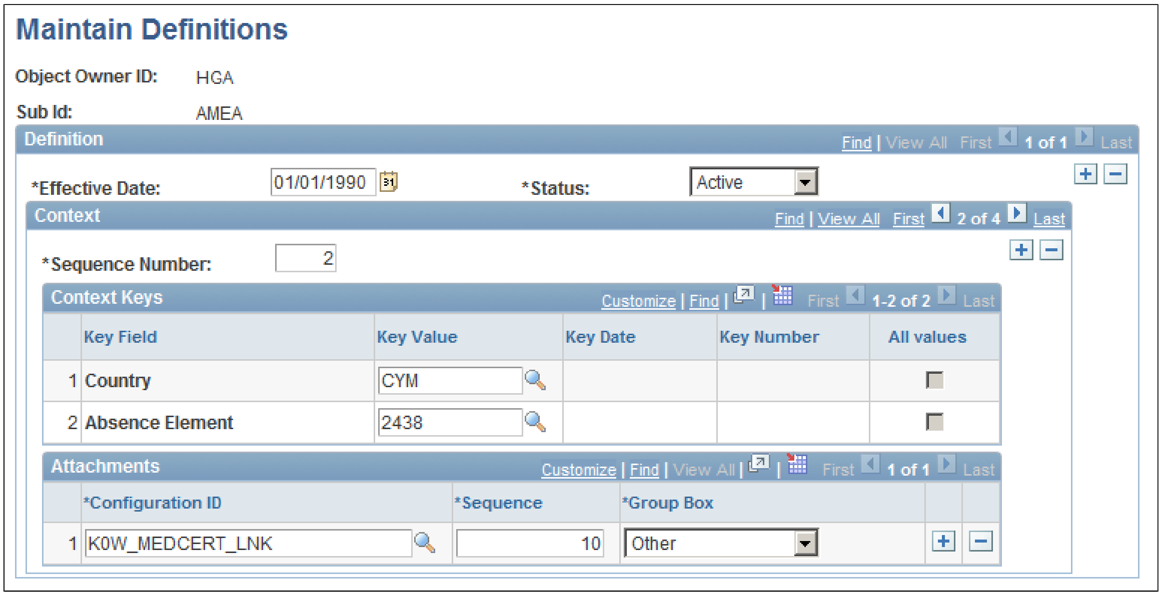
Example: Defining Object Owner IDs

The Maintain Definitions page (Set Up HCM, Common Definitions, Attachments, Maintain Definitions, Maintain Definitions) defines where the links to attachments appear in the Extended Absence component.

In the following graphic, the Attachments region of the page indicates that the *K0W_MEDCERT_LNK* Configuration ID is set up to appear in the Other Links region of the Extended Absence component.

Image: Maintain Definitions page - displaying the location of the attachment link in the Extended Absence component

This example illustrates the fields and controls on the Maintain Definitions page - displaying the location of the attachment link in the Extended Absence component.



See "Maintain Definitions Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Example: Reviewing Extended Absence History

The Extended Absence Request Details page (click the link in Absence Name field on the Extended Absence Request History page) shows the user details about an extended absence request. Any defined attachments appear in the Related Links or the Other Documents regions. The bottom of the Extended Absence Request Details region displays any links to configurable sections.

Image: Extended Absence Request Details page (1 of 2)

This example illustrates the fields and controls on the Extended Absence Request Details page (1 of 2).

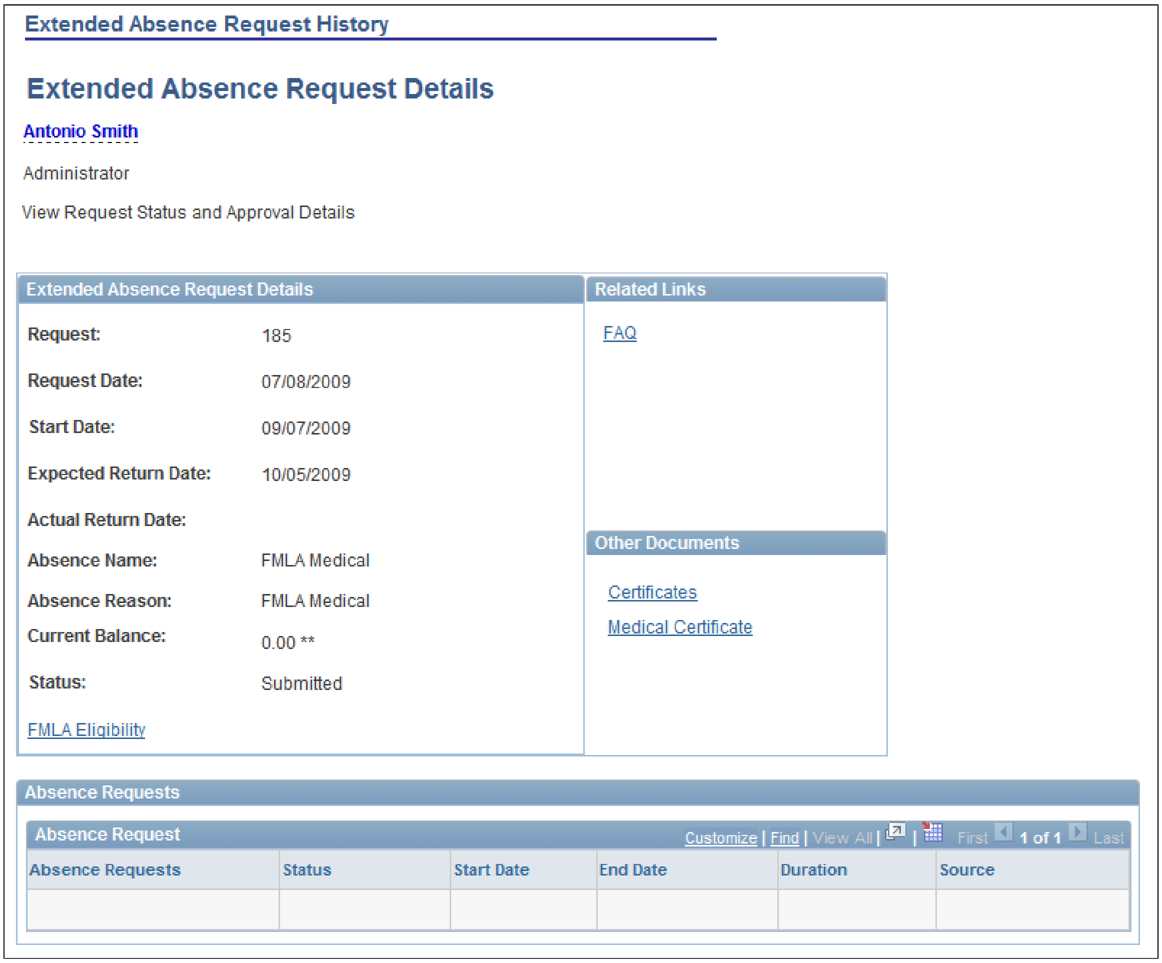
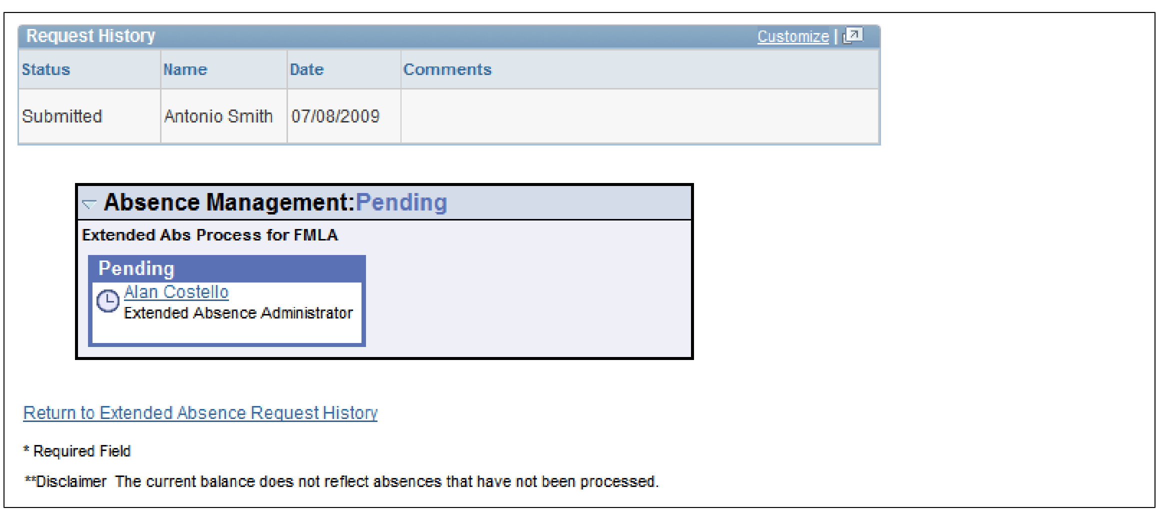


Image: Extended Absence Request Details page (2 of 2)

This example illustrates the fields and controls on the Extended Absence Request Details page (2 of 2).



See Managing Extended Absences.

See the product documentation for *PeopleTools: PeopleCode Developer's Guide* and *PeopleTools: PeopleCode API Reference*.

Related Links

"Configuring Attachments *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Understanding Configurable Sections in Extended Absences

The configurable sections functionality in extended absences is a template-based process. The templates are created and configured by a template administrator. The template administrator determines the sections, or logical groupings of fields, that are included in the template and the sequence of sections and fields within sections. The administrator also sets default values for fields, determine which fields can be edited, and which fields are hidden or display-only.

A configurable section is a set of additional fields and controls that enables you to customize data tracking. You can create your own customized pages and link those pages to the core self service pages. You can create your own customized code using the Absence Management Event Handler technology. Configurable Sections enable you to associate user defined records to an extended absence.

For extended family leave absences, using effective dated rows enables you to track legislative rule changes for both federal and state agencies. In addition, you can keep track of medical certification progress. During an extended absence, your employee or the extended absence administrator may have to make multiple medical certification entries for the same day in order to track multiple medical conditions, or other necessary documentation pertaining to an extended leave request.

Note: The record should have the same key-structure as the main record GP_ABS_EA having EMPLID, EMPL_RCD and TRANSACTION_NBR as key.

Process Flow for Setting up Configurable Sections

Setting up configurable sections in extended absences consists of the following steps:

1. (Optional) Create rules using Global Payroll to store elements that involve extended absence eligibility.

   For example, brackets store information for Federal and State rules, such as the number of weeks allowed for FMLA, or a rollover transaction method versus a fixed transaction method.

2. (Optional) Create an application class.

   The application class must contain the necessary PeopleCode, SQL, and so on, to check for extended absence eligibility. For example, balance and availability is calculated using SQL.

3. Set up the record definition.

   Record definitions identify the necessary records and fields.

4. Set up the section definition.

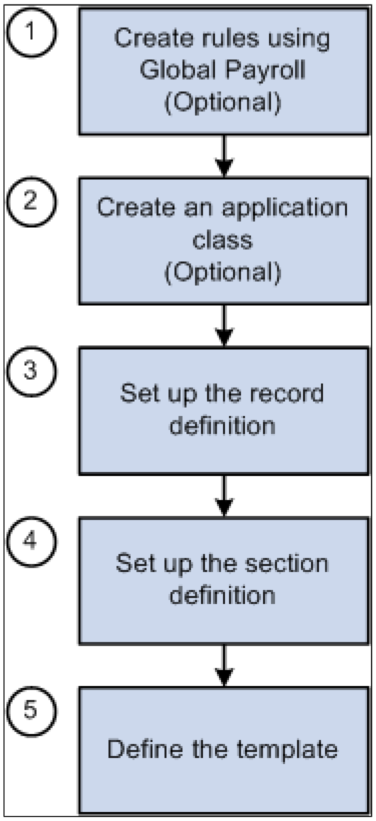
   The identified records and fields are combined into a section.

5. Define the template.

The template combines each of the previously defined components into the configurable section seen by the user.

Image: Process flow for setting up configurable sections

This graphic illustrates the process flow for setting up configurable sections in extended absences.



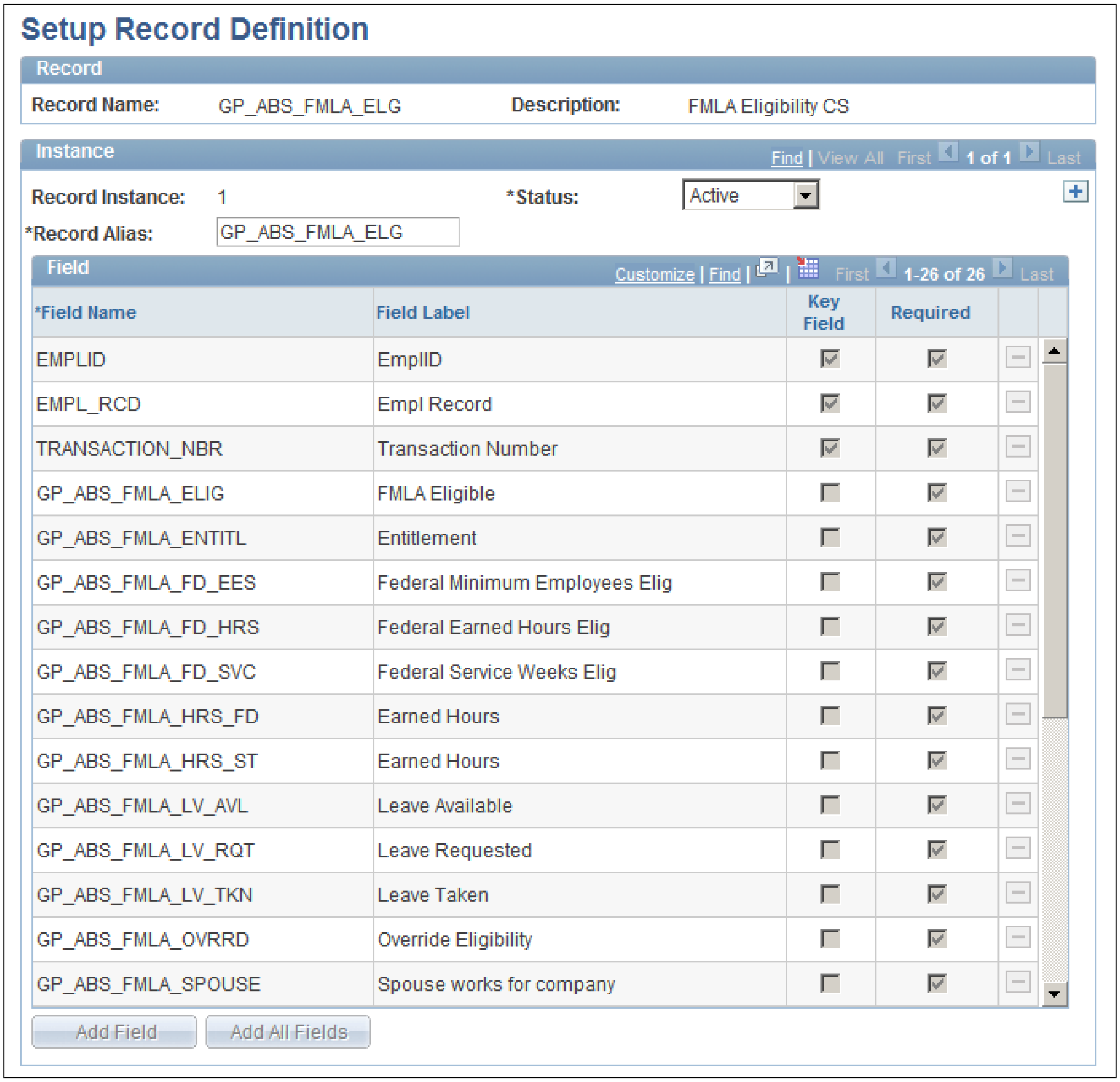
Example: Setting Up a Record Definition

The following examples guide you through the process of setting up a configurable section. The examples demonstrate the set up using the delivered FMLA eligibility configurable section.

The configurable section in this example is based on the GP_ABS_FMLA_ELG Setup Record Definition. The Setup Record Definition page enables you to specify the necessary record and fields in your configurable section.

Image: Setup Record Definition page

This example illustrates the fields and controls on the Setup Record Definition page.



Setup Record Definition

Record

Record Name: GP_ABS_FMLA_ELG Description: FMLA Eligibility CS

Instance Find | View All First 1 of 1 Last

Record Instance: 1 *Status: Active

*Record Alias: GP_ABS_FMLA_ELG

Field Customize | Find | First 1-26 of 26 Last

*Field Name	Field Label	Key Field	Required
EMPLID	EmplID	☑	☑
EMPL_RCD	Empl Record	☑	☑
TRANSACTION_NBR	Transaction Number	☑	☑
GP_ABS_FMLA_ELIG	FMLA Eligible	☐	☑
GP_ABS_FMLA_ENTITL	Entitlement	☐	☑
GP_ABS_FMLA_FD_EES	Federal Minimum Employees Elig	☐	☑
GP_ABS_FMLA_FD_HRS	Federal Earned Hours Elig	☐	☑
GP_ABS_FMLA_FD_SVC	Federal Service Weeks Elig	☐	☑
GP_ABS_FMLA_HRS_FD	Earned Hours	☐	☑
GP_ABS_FMLA_HRS_ST	Earned Hours	☐	☑
GP_ABS_FMLA_LV_AVL	Leave Available	☐	☑
GP_ABS_FMLA_LV_RQT	Leave Requested	☐	☑
GP_ABS_FMLA_LV_TKN	Leave Taken	☐	☑
GP_ABS_FMLA_OVRRD	Override Eligibility	☐	☑
GP_ABS_FMLA_SPOUSE	Spouse works for company	☐	☑

Add Field Add All Fields

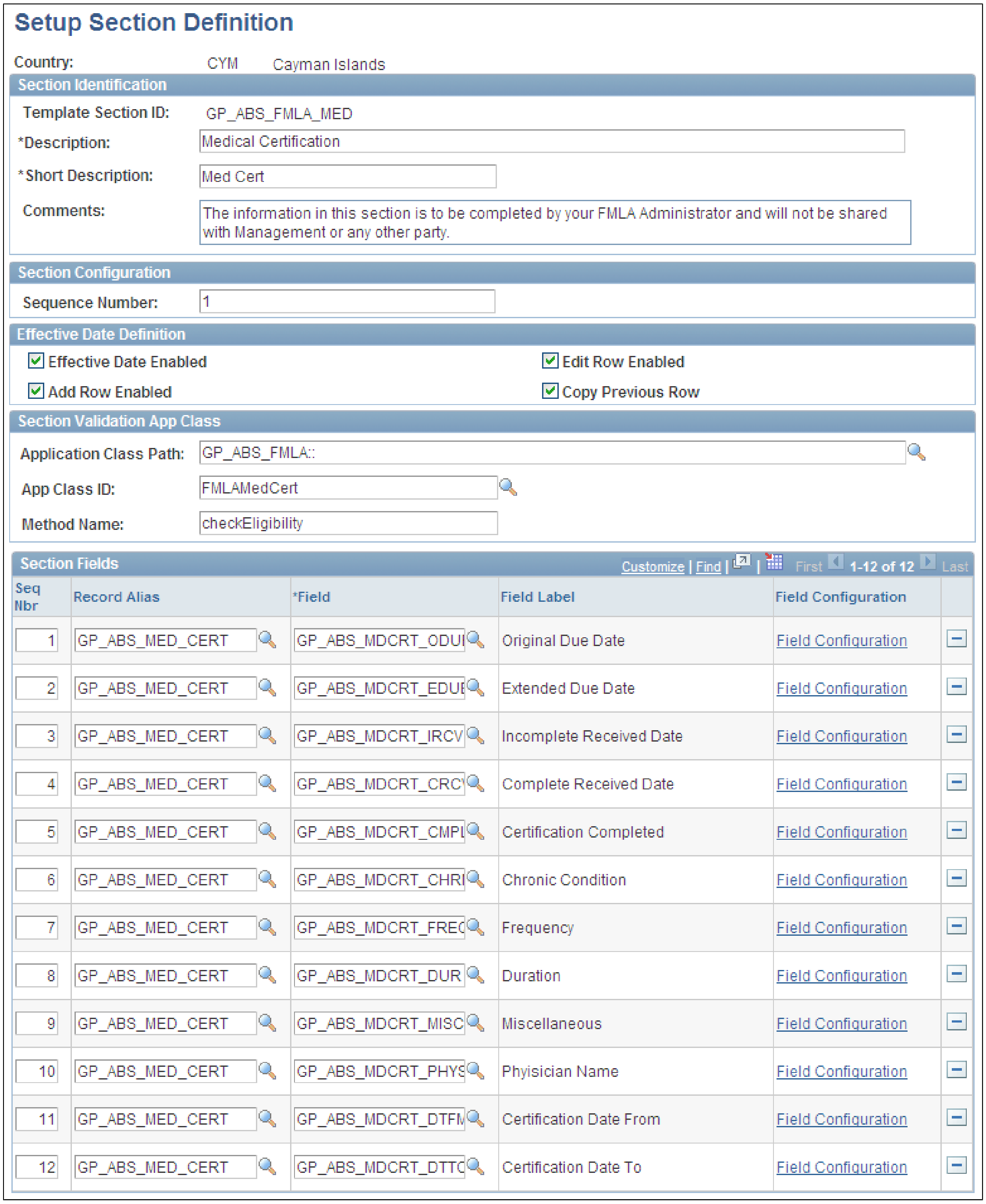
Example: Setting Up Section Definitions

Records and fields are combined into the section using Setup Section Definition page.

Note: In order for the application class code to work, the value in the Method Name field must be *checkEligibility*

Image: Setup Section Definition page

This example illustrates the fields and controls on the Setup Section Definition page.

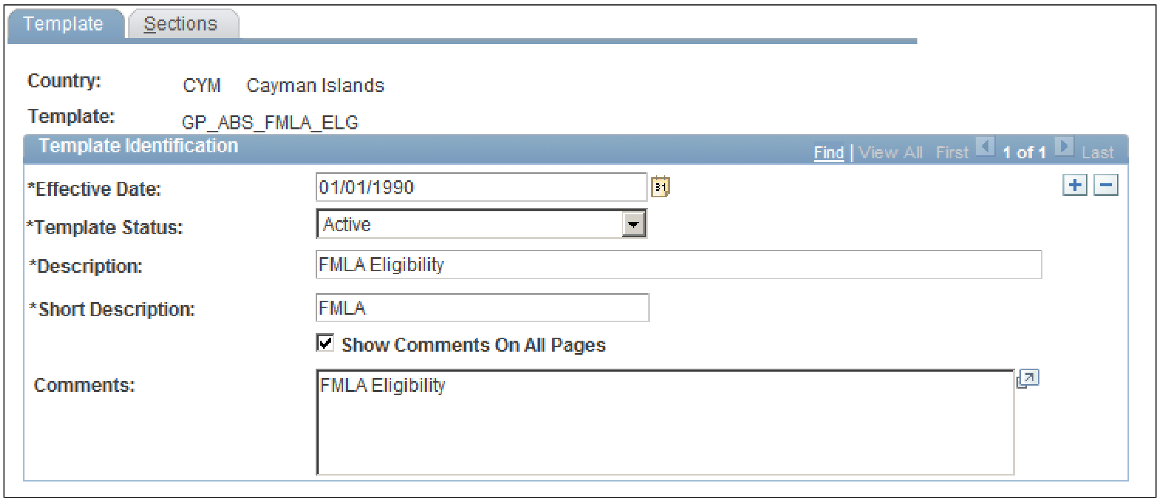


Example: Defining the Template

The template combines each of the previously defined components into the configurable section seen by the user.

Image: Template Definition - Template page

This example illustrates the fields and controls on the Template Definition - Template page.

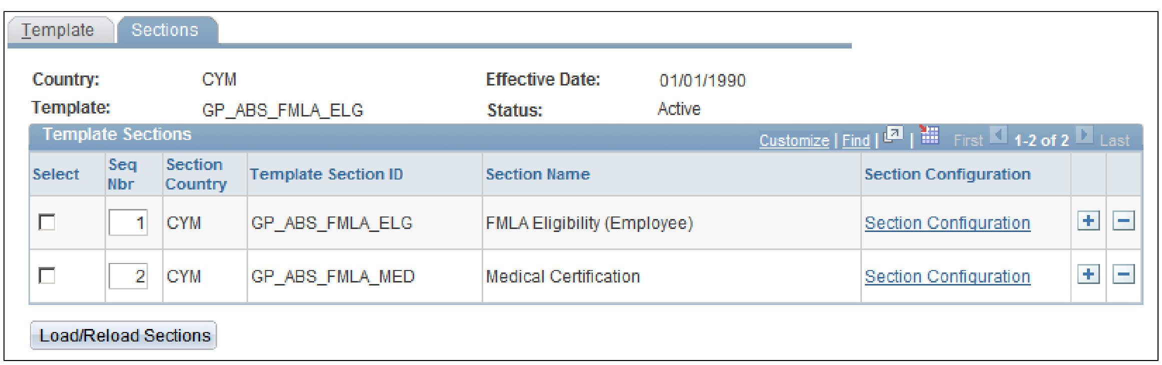


The Template Definition - Sections page enables you to combine the defined sections into an application page that users can access.

Warning! Clicking the Load/Reload Sections button after the section has already been loaded wipes out any existing section fields. You must then manually reenter the section field information.

Image: Template Definition - Sections page

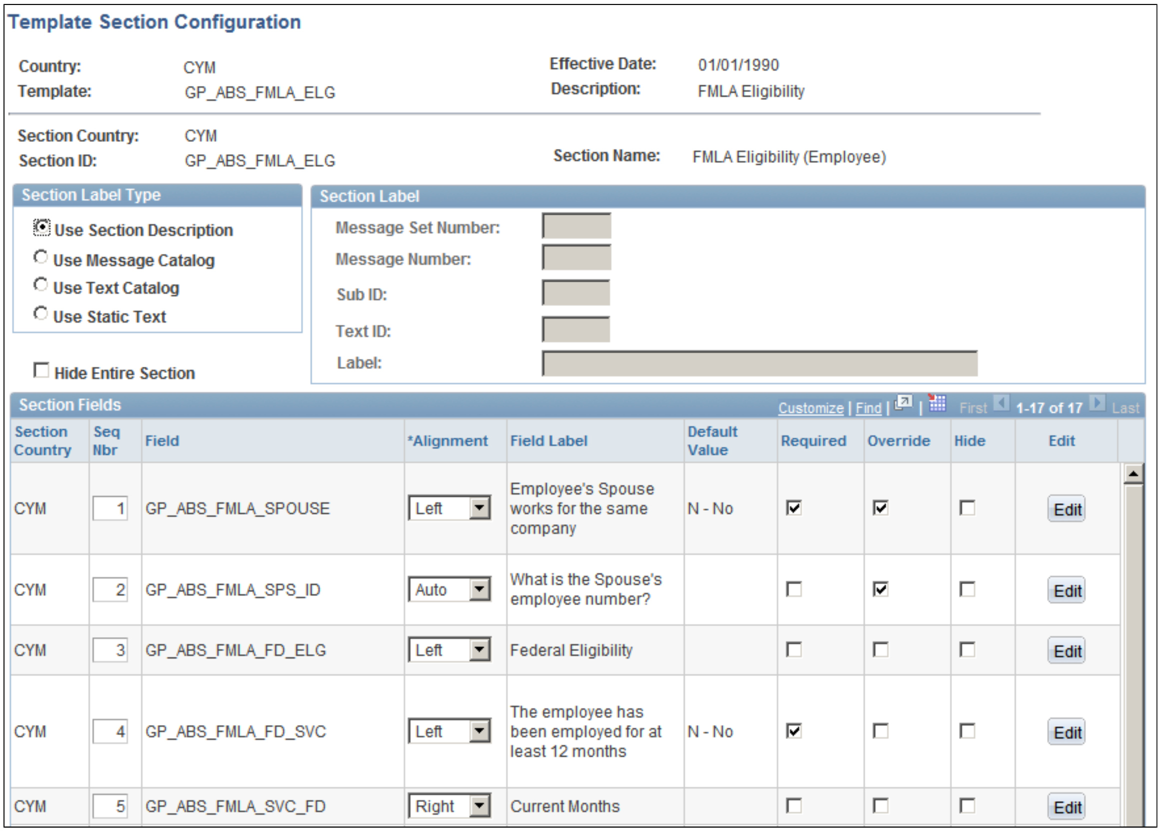
This example illustrates the fields and controls on the Template Definition - Sections page.



The Template Section Configuration page enables you to specify the section label, the alignment of field labels, and the default value of each field in the configurable section.

Image: Template Section Configuration page (partial page only)

This example illustrates the fields and controls on the Template Section Configuration page (partial page only).

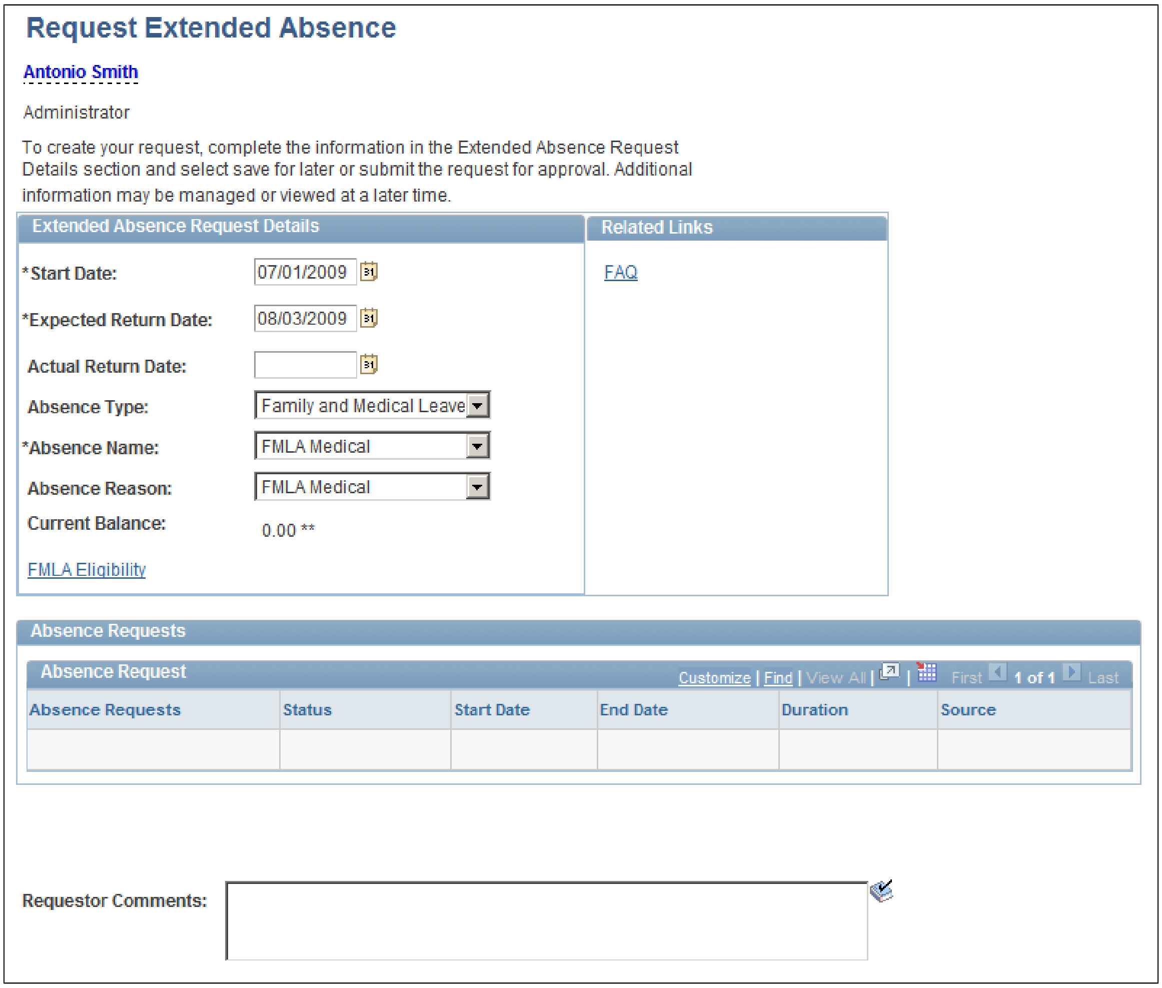


Example: Viewing the Configurable Section

Access the Request Extended Absence page and locate the link to the configurable section, which is labeled as FMLA Eligibility in the following example.

Image: Request Extended Absence page

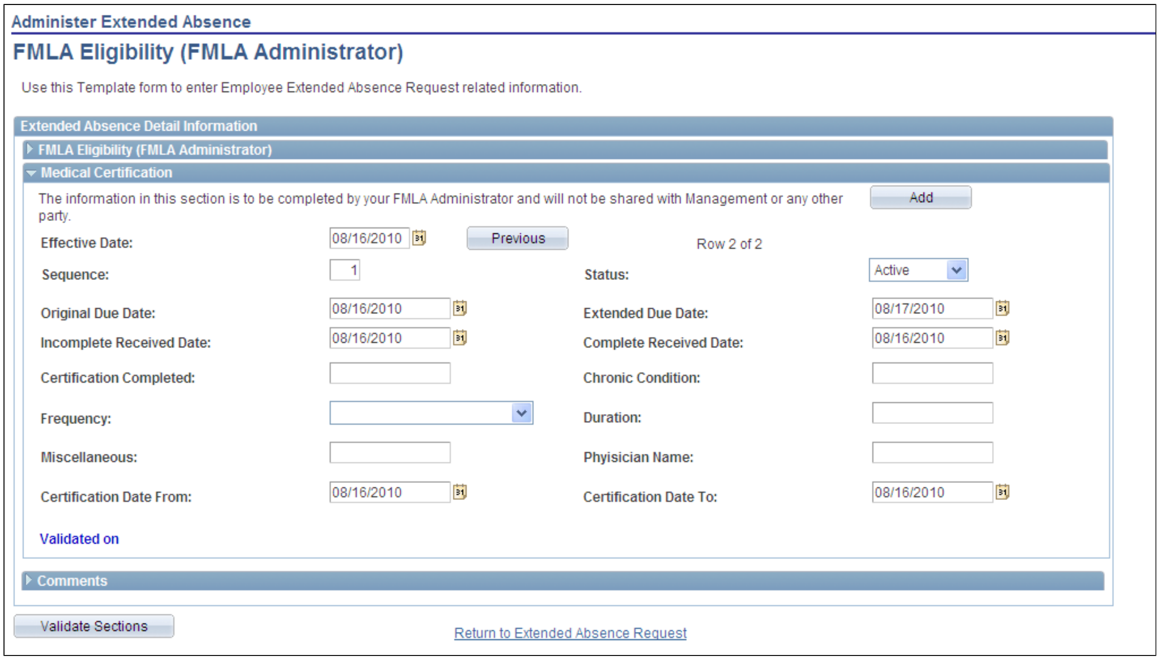
This example illustrates the fields and controls on the Request Extended Absence page.



The configurable section page displays the fields and information specified on the pages specified in the configurable section set up process flow.

Image: Request Extended Absence FMLA Eligibility page (example of configurable section page)

This example illustrates the fields and controls on the Request Extended Absence FMLA Eligibility page (example of configurable section page).



Setting Up Configurable Sections for Extended Absences

This topic discusses how to:

- Set up record definitions.
- Set up section definitions.
- Configure fields in template sections.
- Enter template identification information.
- Define template sections.
- Configure template sections.
- Define section field default values.

Pages Used to Set Up Configurable Sections

Page Name	***Definition Name***	***Navigation***	***Usage***
Setup Record Definition	GP_ABS_RECDEFN	Set Up HCM, Product Related, Global Payroll & Absence Management, Absence Management, Setup Record Definition, Setup Record Definition	Identify the records and fields used in the extended absence template.
Setup Section Definition	GP_ABS_SECDEFN	Set Up HCM, Product Related, Global Payroll & Absence Management, Absence Management, Setup Section Definition, Setup Section Definition	Combine records and fields into sections for use in the extended absence template. Select the fields and the order in which fields appear in a section.
Template Section Field Configuration	GP_ABS_SECDTL`	Click the Field Configuration link on the Setup Section Definition page.	Define the display and edit options per field.
Template Definition - Template	GP_ABS_TEMPL_DEF	Set Up HCM, Product Related, Global Payroll & Absence Management, Absence Management, Template Definition, Template	Enter template identification information.
Template Definition - Sections	GP_ABS_TEMPL_DEF	Set Up HCM, Product Related, Global Payroll & Absence Management, Absence Management, Template Definition, Sections	Combine sections into a page in the extended absence feature.
Template Section Configuration	GP_ABS_TMPL_FLDS	Click the Section Configuration link on the Template Definition - Sections page.	Define the section field properties. Specify whether certain fields are required, display-only or hidden. You can also enter default values.
Section Field Default Value	GP_ABS_TMPL_FLDC	click the Edit button on the Template Section Configuration page.	Specify the default value of record fields in a section.

Setting Up Record Definition Page

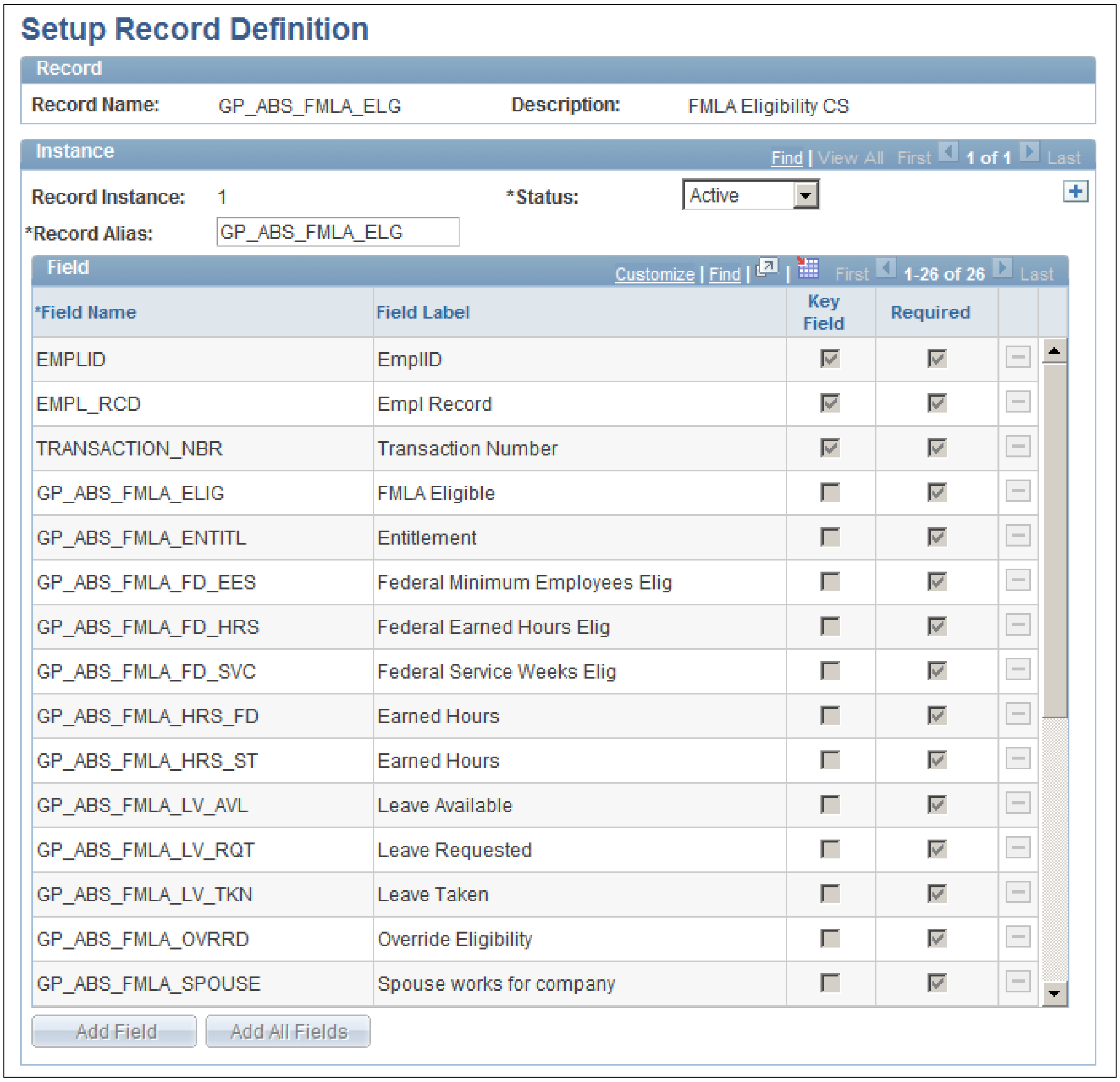
Use the Setup Record Definition page (GP_ABS_RECDEFN) to identify the records and fields used in the extended absence template.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Management, Absence Management, Setup Record Definition, Setup Record Definition

Image: Setup Record Definition page

This example illustrates the fields and controls on the Setup Record Definition page.



Record Alias: Enter an alternate name for the table, the default value is the record name. Using an alternate name enables you to differentiate between different instances of the same record.

Key Field: This field displays the status of the selected field as a key field at the system level.

Required: Select to indicate that the selected field is required for your business process. You cannot change the setting here for fields that are defined as required fields at the system level.

Add Field	Click to add a new row to the group box. You can only select fields that are valid for the specified record.
Add All Fields	Click to add all of the available fields from the specified record.

Setting Up Section Definition Page

Use the Setup Section Definition page (GP_ABS_SECDEFN) to combine records and fields into sections for use in the extended absence template.

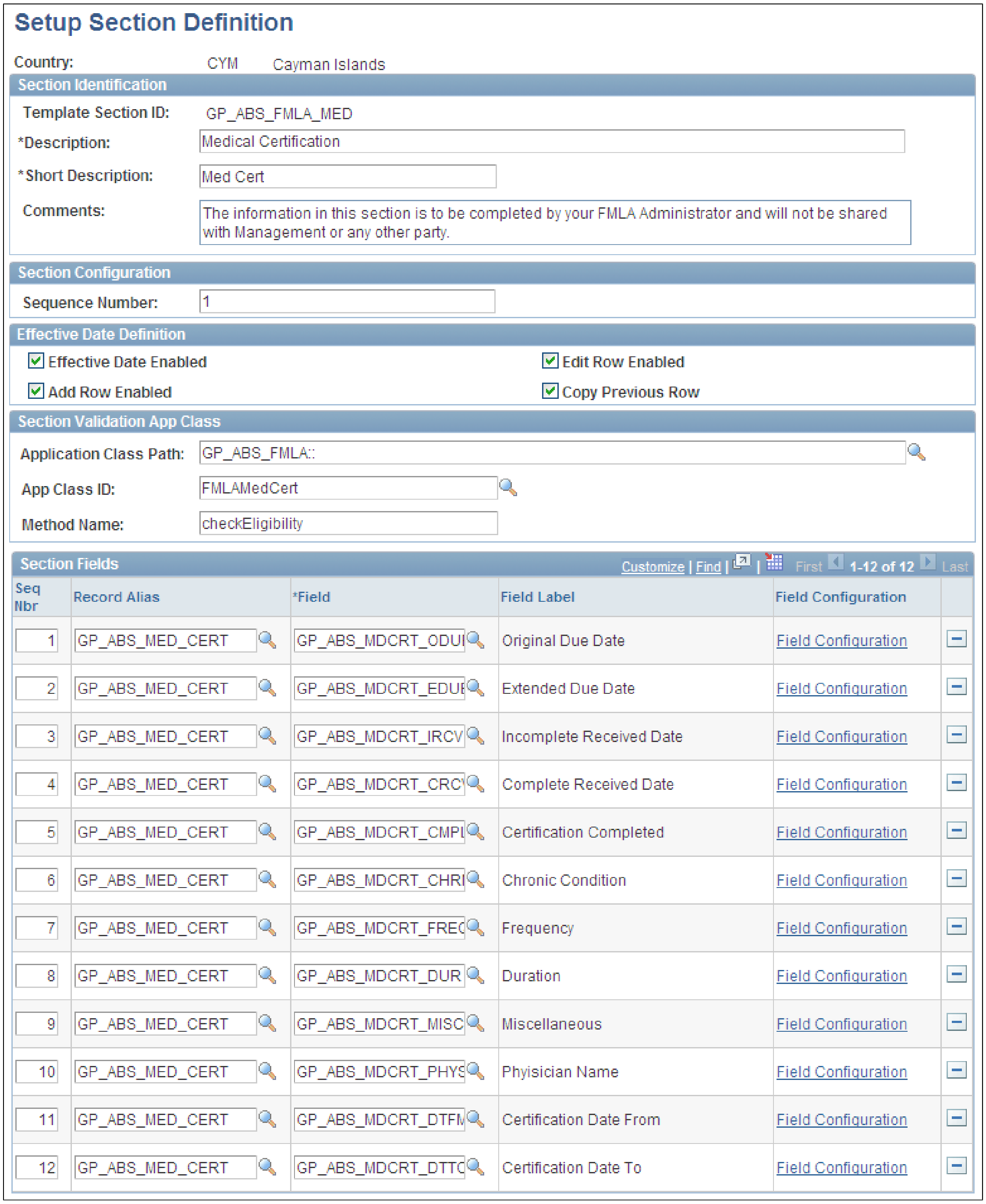
Select the fields and the order in which fields appear in a section.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Management, Absence Management, Setup Section Definition, Setup Section Definition

Image: Setup Section Definition page

This example illustrates the fields and controls on the Setup Section Definition page.



Sequence Number	Enter a number to determine the order of sections on the data entry page

Effective Date Enabled	Select to add effective dated functionality to this section. You cannot select any of the other fields in the Effective Data Definition region until this field is selected.
Edit Row Enabled	Select to enable users to edit the section, unless the transaction is in display-only mode.
Add Row Enabled	Select to enable users to add new rows to the section, by clicking the Add button in the section.
Copy Previous Row	Select to copy the information from the previous row when a user adds a new row to the section. The sequence number and effective date are not copied from the previous row. Deselecting this field causes new rows to appear without any data from the previous row. The fields in the new row are empty and ready for input.
Application Class Path	Select an Application Class Path based on the Application Packages defined within the Application Designer.
App Class ID(Application Class ID)	Select an Application Class from the selected Application Class Path.
Method Name	Enter the executable method defined in the Application Class to trigger the validation of the configurable section.

Section Fields

Record Alias	This refers to the field defined in the Record Definition. An alternate name for the table, the default value is the record name.
Field	The Record Field included on the page as part of the section.
Field Configuration	Click to access the Template Section Field Configuration page

Template Section Field Configuration Page

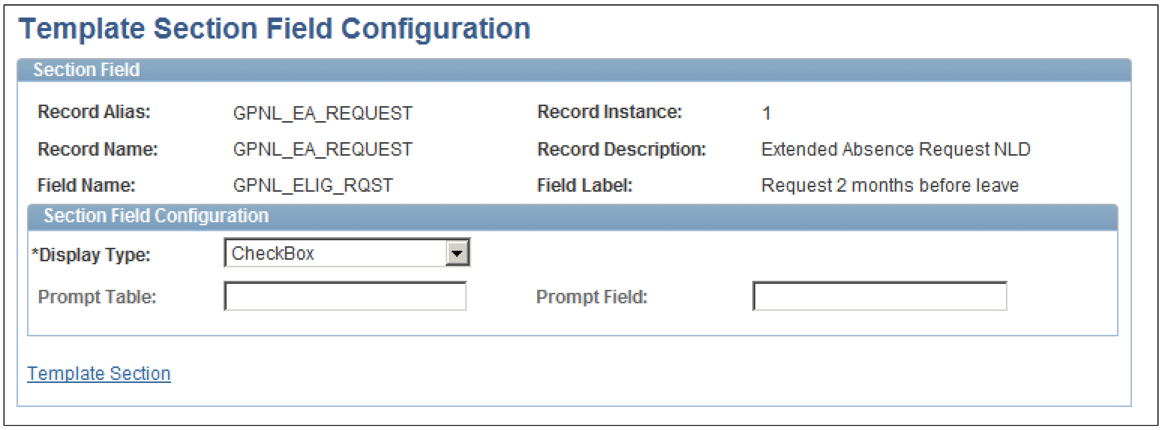
Use the Template Section Field Configuration page (GP_ABS_SECDTL`) to define the display and edit options per field.

Navigation

Click the Field Configuration link on the Setup Section Definition page.

Image: Template Section Field Configuration page

This example illustrates the fields and controls on the Template Section Field Configuration page.



Display Type	Select to choose the display type of the field. Values are: *Short Edit Box*, *Long Edit Box*, *Long DropDown*, *Short DropDown*, *Short Prompt*, *Long Prompt*, *CheckBox*, *Date*.
Prompt Table	Displays the name of the prompt table or substitution variable from the PeopleTools Record Definition table. This value can be modified.
Prompt Field	Enter the field used on the prompt table to select the value.

Template Definition - Template Page

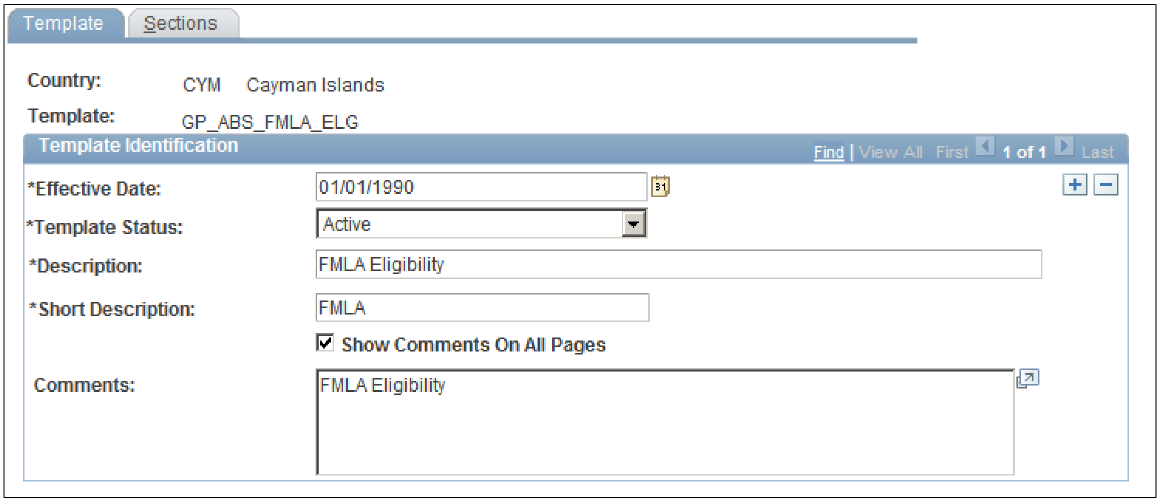
Use the Template Definition - Template page (GP_ABS_TEMPL_DEF) to enter template identification information.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Management, Absence Management, Template Definition, Template

Image: Template Definition - Template page

This example illustrates the fields and controls on the Template Definition - Template page.



Show Comments On All Pages Select to show the comments as additional information on the Configurable Sections page within an extended absence.

Template Definition - Sections Page

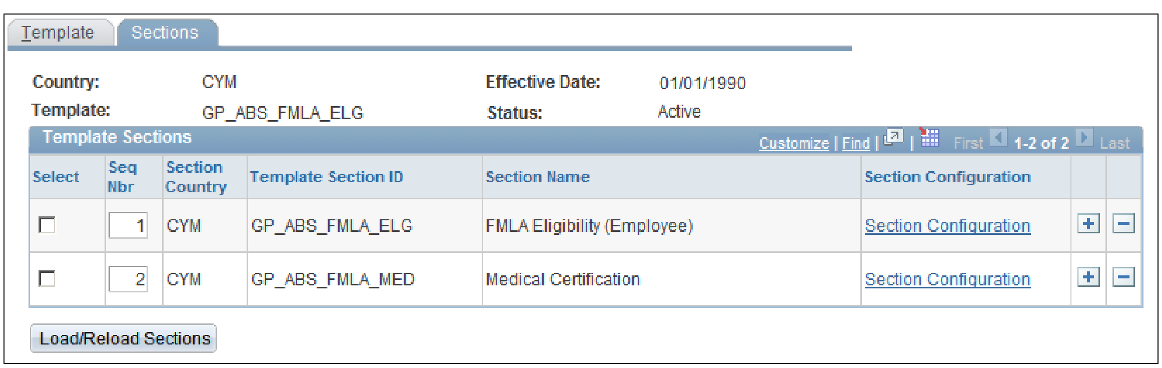
Use the Template Definition - Sections page (GP_ABS_TEMPL_DEF) to combine sections into a page in the extended absence feature.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Management, Absence Management, Template Definition, Sections

Image: Template Definition - Sections page

This example illustrates the fields and controls on the Template Definition - Sections page.



Section Configuration	Click to access the Template Section Configuration page for the specified section.
Load/Reload Sections	Click to load the template sections from the template section setup table.

Template Section Configuration Page

Use the Template Section Configuration page (GP_ABS_TMPL_FLDS) to define the section field properties.

Specify whether certain fields are required, display-only or hidden. You can also enter default values.

Navigation

Click the Section Configuration link on the Template Definition - Sections page.

Image: Template Section Configuration page (1 of 2)

This example illustrates the fields and controls on the Template Section Configuration page (1 of 2).

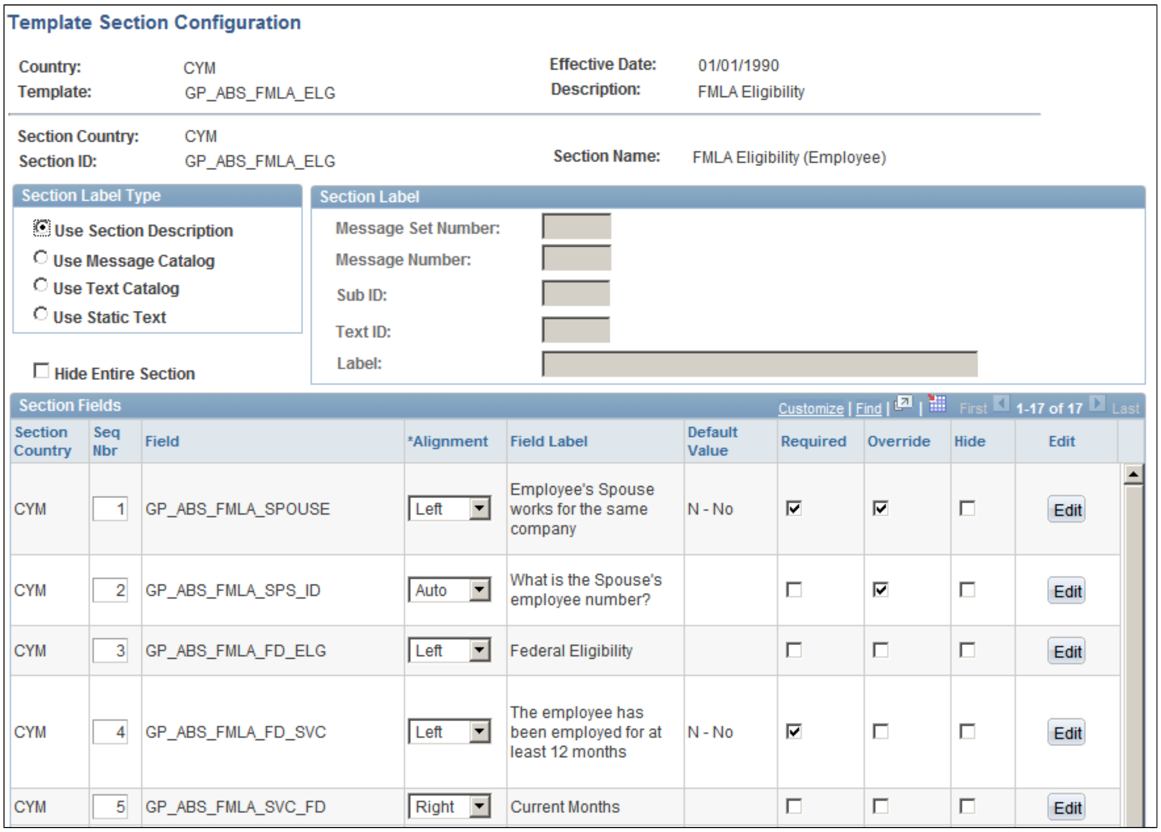


Image: Template Section Configuration page (2 of 2)

This example illustrates the fields and controls on the Template Section Configuration page (2 of 2).

CYM	6	GP_ABS_FMLA_FD_HRS	Left	The employee has worked for at least 1250 hours in the past 12 months	N - No	☑	☐	☐	Edit
CYM	7	GP_ABS_FMLA_HRS_FD	Right	Current Hours		☐	☐	☐	Edit
CYM	8	GP_ABS_FMLA_FD_EES	Left	At least 50 Employees are employed by the employer within a 75 miles radius	N - No	☑	☐	☐	Edit
CYM	9	GP_ABS_FMLA_ST_ELG	Left	State Eligibility		☐	☐	☐	Edit
CYM	10	GP_ABS_FMLA_ST_SVC	Left	The employee has been employed for at least 12 months	N - No	☑	☐	☐	Edit
CYM	11	GP_ABS_FMLA_SVC_ST	Right	Current Months		☐	☐	☐	Edit
CYM	12	GP_ABS_FMLA_ST_HRS	Left	The employee has worked for at least 1250 hours in the past 12 months	N - No	☑	☐	☐	Edit
CYM	13	GP_ABS_FMLA_HRS_ST	Right	Current Hours		☐	☐	☐	Edit
CYM	14	GP_ABS_FMLA_ST_EES	Left	At least 50 Employees are employed by the employer within a 75 miles radius	N - No	☑	☐	☐	Edit
CYM	15	GP_ABS_FMLA_BAL	Left	FMLA Balances		☐	☐	☐	Edit

Section Label Type

Select the method used to choose the content of the section label in the specified template. Different fields in the Section Label region are available for entry depending upon the chosen Label Type. The following list describes the effect of choosing each Label Type on the Section Label region:

- Selecting Use Section Description causes the system to use the description defined in the Section as the section heading on the extended absence configurable page. The user is not required to enter a label.
- Selecting Use Message Catalog enables you to enter a Message Set Number and a Message Number.
- Selecting Use Text Catalog enables you to enter a Sub ID and a Text ID.
- Selecting Use Static Text enables you to enter text in the Label field.

Message Set Number and Message Number

Message sets and number settings come from the PeopleTools message set catalog. Select the message set and message number that you want to appear as the section label. You can select from

	the messages defined in the database. These fields are only available if you select the Use Message Catalog option in the Section Label Type region.
Sub ID and Text ID	Select the Text ID and Sub ID for the text catalog message you want to display as the section label. These fields are only available if you select the Use Text Catalog option in the Section Label Type region.
Label	Enter the text you want to appear as the section label. This field is only available if you select the Use Static Text option in the Section Label Type region.
Hide Entire Section	Select to specify that this section is hidden from the user. For example, if certain information needs to be loaded into the buffer to support the validation, but does not need to be displayed.
Field	The Record Field selected in the section.
Alignment	Select the desired location of the field on the extended absence pages. You can specify that the field appears on the left or right side of the page, or indicate that the system should select the location, based on the available space. Values are: *Left, Right,* and *Auto.*
Field Label	Displays the field label used on the configurable page.
Default Value	The value that initially populates the record field.
Required	Defaulted from the Template Section Field Setup Table; can be overridden by the Template Administrator, but only if the default is No. A field required by definition of PeopleTools must remain required. However, a field that is not required by definition, can be made required on the template.
Override	Select to specify that the end user can enter or override the value of the specified field.
Hide	Select this field to hide the specified field from the end user.
Edit	Click to access the Section Field Default Value page.

Section Field Default Value Page

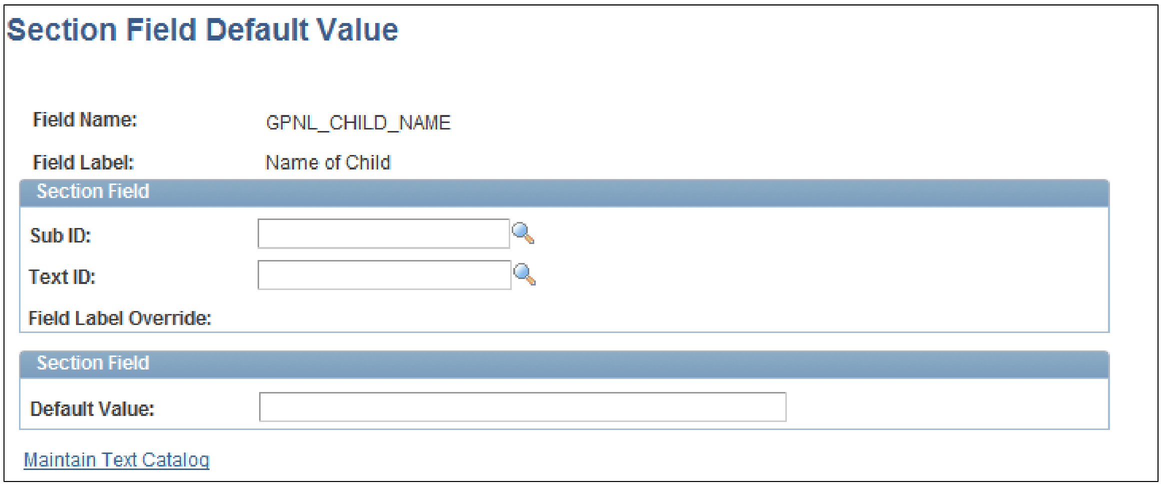
Use the Section Field Default Value page (GP_ABS_TMPL_FLDC) to specify the default value of record fields in a section.

Navigation

click the Edit button on the Template Section Configuration page.

Image: Section Field Default Value page

This example illustrates the fields and controls on the Section Field Default Value page.



Default Value	Enter the value that initially populates the record field.

Setting Up Extended Absences

This topic provides an overview of the high-level setup tasks for self service extended absence transactions.

Setup Tasks for Extended Absences

The setup tasks for extended absences are as follows:

1. Specify that the absence take is allowed as an extended absence in the Country Take (GP_ABS_BAL_SS_DEF) component.

   See Defining Self Service Absence Rules by Take Element.

2. Link an attachment configuration to an extended absence on the Maintain Definitions page.

   On the Maintain Definitions page, you specify the attachment configuration associated with the extended absence element.

   See "Configuring Attachments *(PeopleSoft HCM 9.2: Application Fundamentals)*".

   See Understanding Extended Absences.

3. Link any configurable section templates to each of the extended absence components you are using. Then specify the desired type of user access to the displayed configurable section page.

   See Defining Self Service Absence Rules by Take Element.

4. Register the approval transaction in the Approval Framework through the Register Transactions page.

Note: The Approval Transaction Registry is already populated for the PeopleSoft delivered AM_Extended_Abs approval process ID.

See "Understanding Approvals *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Requesting Extended Absences

This topic discusses how to request extended absences.

Pages Used to Request Extended Absences

Page Name	***Definition Name***	***Navigation***	***Usage***
Request Extended Absence	GP_ABS_EA_REQ	• Self Service, Time Reporting, Report Time, Extended Absence Request • Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Request Extended Absence	Request an extended absence using the defined extended absence types. Review the status of an extended leave
Request Extended Absence Configurable Sections	GP_ABS_DATA	Click the link on the Request Extended Absence page in the Extended Absence Request Details region. The name of this link changes depending upon how configurable sections have been set up for this type of extended absence.	View and complete the additional fields and controls created for the configurable sections for this type of extended absence.
Extended Absence Request Details	GP_ABS_EA_REQ	Click the Submit button on the Request Extended Absence page.	View the details of the current extended absence request

Request Extended Absence Page

Use the Request Extended Absence page (GP_ABS_EA_REQ) to request an extended absence using the defined extended absence types.

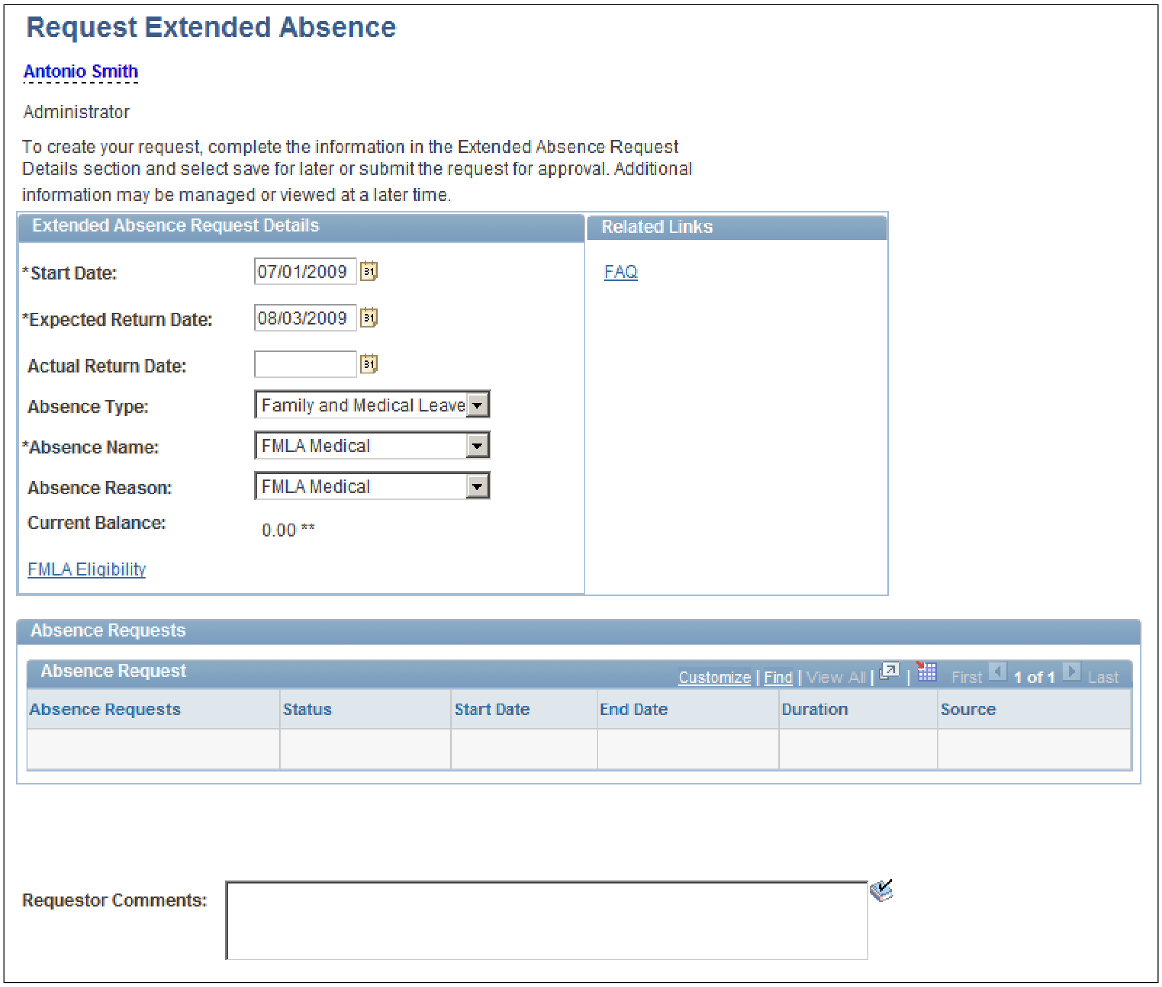
Review the status of an extended leave

Navigation

- Self Service, Time Reporting, Report Time, Extended Absence Request
- Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Request Extended Absence

Image: Request Extended Absence page

This example illustrates the fields and controls on the Request Extended Absence page.



Request Extended Absence

Antonio Smith

Administrator

To create your request, complete the information in the Extended Absence Request Details section and select save for later or submit the request for approval. Additional information may be managed or viewed at a later time.

Extended Absence Request Details

*Start Date: 07/01/2009

*Expected Return Date: 08/03/2009

Actual Return Date:

Absence Type: Family and Medical Leave

*Absence Name: FMLA Medical

Absence Reason: FMLA Medical

Current Balance: 0.00 **

FMLA Eligibility

Related Links

FAQ

Absence Requests

Absence Request — Customize | Find | View All | First 1 of 1 Last

Absence Requests	Status	Start Date	End Date	Duration	Source

Requestor Comments:

The system does not display the entire page until the user enters values for the Start Date, Expected Returned Date, and Absence Take.

Start Date

Select the first day of the extended absence event. The field option defaults to the current date.

End Date

Enter the expected return date.

Absence Type

Select the absence type. The selection you make in this field will limit or filter the selections available in the Absence Name field.

Absence Name

Select the absence name from the available options. The options available depend on the selection in the Absence Type field, the extended absence takes that are enabled in the Country Take setup, and the elements for which the employee is eligible. After

	you select entries in the above fields, the system refreshes the page with additional fields.
Absence Reason	Select the absence reason from the available options. The options available depend on the selection in the Absence Type field.

Request Extended Absence Configurable Sections Page

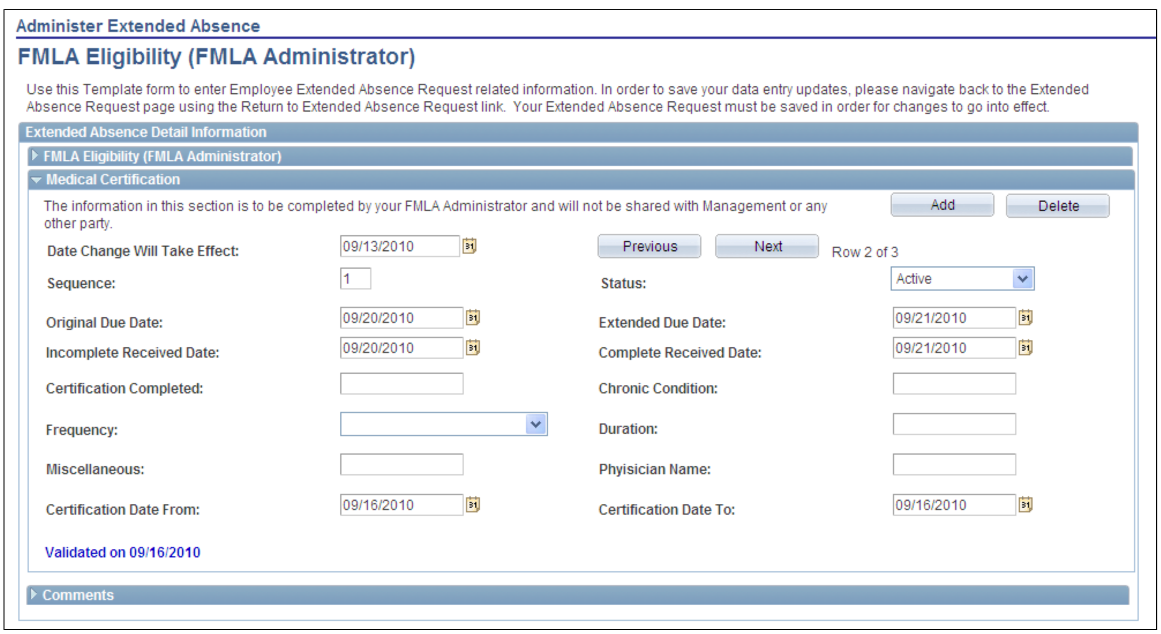
Use the Request Extended Absence Configurable Sections page (GP_ABS_DATA) to view and complete the additional fields and controls created for the configurable sections for this type of extended absence.

Navigation

Click the link on the Request Extended Absence page in the Extended Absence Request Details region. The name of this link changes depending upon how configurable sections have been set up for this type of extended absence.

Image: Request Extended Absence Configurable Sections page (shown as the FMLA Eligibility page)

This example illustrates the fields and controls on the Request Extended Absence Configurable Sections page (shown as the FMLA Eligibility page).


Administer Extended Absence

FMLA Eligibility (FMLA Administrator)

Use this Template form to enter Employee Extended Absence Request related information. In order to save your data entry updates, please navigate back to the Extended Absence Request page using the Return to Extended Absence Request link. Your Extended Absence Request must be saved in order for changes to go into effect.

Extended Absence Detail Information

FMLA Eligibility (FMLA Administrator)

Medical Certification

The information in this section is to be completed by your FMLA Administrator and will not be shared with Management or any other party.

Add Delete

Previous Next Row 2 of 3

Date Change Will Take Effect:	09/13/2010		
Sequence:	1	Status:	Active
Original Due Date:	09/20/2010	Extended Due Date:	09/21/2010
Incomplete Received Date:	09/20/2010	Complete Received Date:	09/21/2010
Certification Completed:		Chronic Condition:	
Frequency:		Duration:	
Miscellaneous:		Phiysician Name:	
Certification Date From:	09/16/2010	Certification Date To:	09/16/2010

Validated on 09/16/2010

Comments

Add	Click to add a new effective-dated row this configurable section. This button is only available when you are editing an extended absence and the Effective Date Enable and Add Row Enabled options have been selected on the Setup Section Definition page.
Delete	Click to delete the current effective-dated row from this configurable section. This button is only available for new rows that have not been saved.

Date Change Will Take Effect	Enter the date on which the information in a configurable section becomes active.
Previous and Next	Click to navigate through effective-dated rows of data in the configurable section. These buttons only appear as they are required for navigation. For example, a configurable section with only one effective-dated row will not display these buttons.
Sequence	Displays the sequence number for this row. This field cannot be edited through the employee Request Extended Absence page, even when editing an extended absence request. You can only edit this field through the Administer Extended Absence component. This field enables you to determine the proper sequencing if you need to enter multiple sets of information on the same date. For example, assume that within a single day the user, or requestor, takes his or her spouse to a doctor for diagnosis in the morning. The doctor recommends that the patient be transferred to an emergency room for immediate treatment. Later, the patient is moved to intensive care within the hospital. By manually entering the sequence number for each of these events, the administrator can facilitate tracking the information related to these different events.
Validated on	Displays the date on which this effective-dated row of the configurable section was validated.
Validate Sections	Click to validate all of the current effective-date sections on the page. **Note:** The system only displays the first error encountered for any invalid sections. You must correct the error situation and then click the Validate Sections button again to see any subsequent validation error messages.

Managing Extended Absences

This topic discusses how to:

- View extended absence history.
- Administer extended absence requests.

Pages Used to Manage Extended Absences

Page Name	***Definition Name***	***Navigation***	***Usage***
Extended Absence Request History	GP_ABS_EA_EEHIST	Time Reporting, View Time, Extended Absence History	View the history of extended absence requests for a specific time period. Review the approval status, and edit existing requests. A link for each extended absence request accesses the Extended Absence Request Details page for the specified request.
Administer Extended Absence	GP_ABS_EA_ADM	Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Administer Extended Absence	The extended absence administrator can edit, approve, deny or push back extended leave requests. The extended absence administrator can also check the extended absence history and view details for an extended absence.

Extended Absence Request History Page

Use the Extended Absence Request History page (GP_ABS_EA_EEHIST) to view the history of extended absence requests for a specific time period.

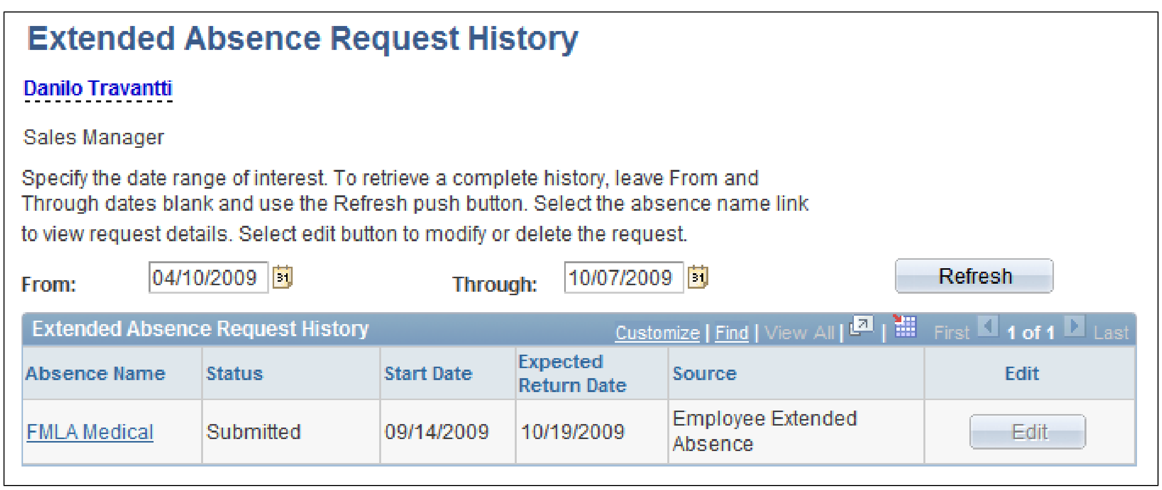
Review the approval status, and edit existing requests. A link for each extended absence request accesses the Extended Absence Request Details page for the specified request.

Navigation

Time Reporting, View Time, Extended Absence History

Image: Extended Absence Request History page

This example illustrates the fields and controls on the Extended Absence Request History page.



Absence Name Click the link in this field to access the Extended Absence Request Details page for the specified extended absence.

Edit Click to access the Extended Absence Request page.

Administer Extended Absence Page

Use the Administer Extended Absence page (GP_ABS_EA_ADM) to the extended absence administrator can edit, approve, deny or push back extended leave requests.

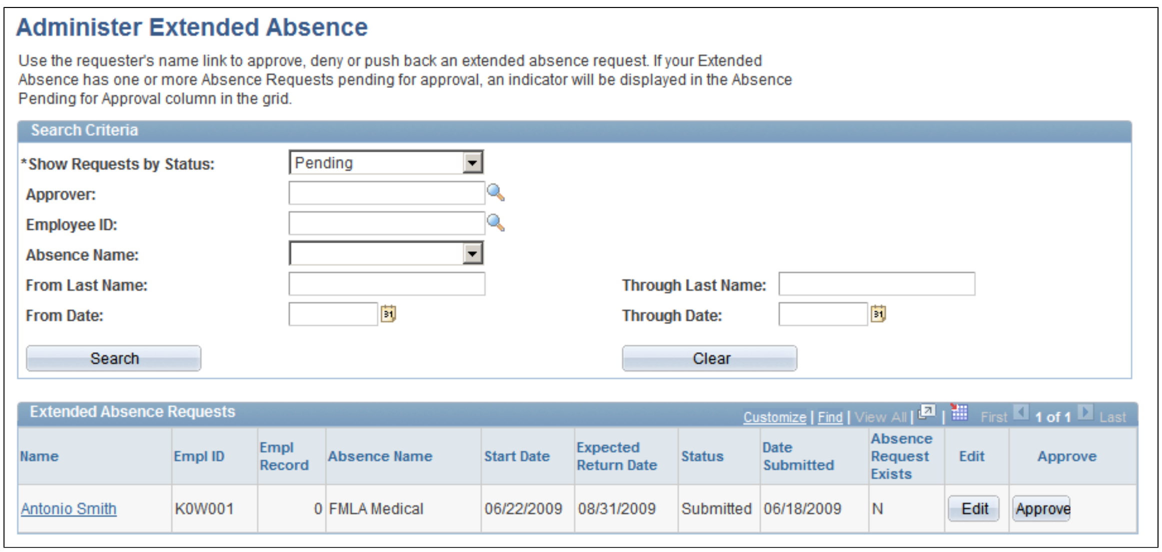
The extended absence administrator can also check the extended absence history and view details for an extended absence.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Maintain Absences, Administer Extended Absence

Image: Administer Extended Absence page

This example illustrates the fields and controls on the Administer Extended Absence page.



Administer Extended Absence

Use the requester's name link to approve, deny or push back an extended absence request. If your Extended Absence has one or more Absence Requests pending for approval, an indicator will be displayed in the Absence Pending for Approval column in the grid.

Search Criteria

*Show Requests by Status: Pending

Approver:

Employee ID:

Absence Name:

From Last Name: Through Last Name:

From Date: Through Date:

Search Clear

Extended Absence Requests Customize | Find | View All | First 1 of 1 Last

Name	Empl ID	Empl Record	Absence Name	Start Date	Expected Return Date	Status	Date Submitted	Absence Request Exists	Edit	Approve
Antonio Smith	K0W001	0	FMLA Medical	06/22/2009	08/31/2009	Submitted	06/18/2009	N	Edit	Approve

When an extended absence has been approved, individual absence requests can be submitted within that extended absence.

Note: After an extended absence request has been saved, the user can upload attachments.

Show Requests by Status Select the status the system uses to filter the results displayed in the Extended Absence Requests region. Values are: *All, Approved, Denied, Pending,* and *Pushback.*

Search Click to populate the Extended Absence Requests region based on the selections made in the Search Criteria region.

Name Click the employee name to view the Extended Absence Requests Details page.

Absence Request Exists	Indicates the presence of one or more absence events beneath the extended absence request.
Edit	Click to edit the information on the Extended Absence Request page for this extended absence.
Approve	Click to view the Extended Absence Request page, and approve, deny, or pushback the extended absence request

Chapter 17

Setting Up Self Service Absence Transactions

Understanding Self Service Setup Tasks

Payees and managers can use web-based browser pages, referred to as self service pages, to enter online requests for absences, view current and future absence balances, and run the Absence Forecasting process. Managers and administrators can also use self service pages to approve, deny, or push back absence requests.

Requests that are entered through the self service pages are treated as actual absences once they are approved, and are included in the Absence Take process.

This section lists prerequisites and common elements and provides an overview of the high-level setup tasks for self service absence transactions.

Prerequisite for Self-Service Setup Tasks

Before you can define take rules for self service absence transactions, you must specify which absence take types are eligible for self service use. On the Absence Take Types page for a given absence type, select the Allow Request in Self Service check box. This enables you to define self service rules for any take element with that absence type.

See Defining Absence Types and Reasons.

Common Elements Used for Self-Service Setup Tasks

Status	When you create a new country-specific or Take-specific rule for absence self service, the rule's default status is Active. Changing the status of a rule to Inactive can impact absence requests that have been entered but not yet approved. Before changing the status of a rule to Inactive, consider how this action will affect already submitted requests.

Setup Tasks for Self Service Absence Transactions

The setup tasks for absence self service are as follows:

1. Define self service rules for each country.

   Country-specific rules apply to all take elements for a given country. They control some of the field displays on the self service pages, and determine who can use the online Forecasting and Balance Inquiry processes. You can define a different set of self service rules for each country.

2. Define self service rules for each take element.

   For each take element that you want to make available to self service users, you define an additional set of rules. These rules specify whether partial-day absences are allowed, approval requirements for absence requests, how to display forecasting results, and other usage rules.

3. Select the entitlement balances to display in the forecasting results.

   If you enable self service users to run the online Forecasting process or Absence Inquiry process, specify which entitlement balances to display to self service users.

4. (Optional) Modify fields labels and page text, as needed.

   The Text Catalog stores the text that appears on the self service pages, including field labels, button names, links, page instructions, and warnings. You can modify this text by editing entries in the Text Catalog.

Note: The sequence of steps 2 and 3 can be reversed.

Defining Self Service Absence Rules by Country

To define country-specific rules for using the absence self service pages, use the Country Configuration (GP_ABS_SS_CNTRY) component.

This topic discusses how to:

- Select fields for displaying entitlement balances.
- Select fields for displaying absence history.
- Select forecasting options and fields.
- Enter balance elements and select display options.
- Select absence event deletion options.

Pages Used to Define Self Service Absence Rules by Country

Page Name	***Definition Name***	***Navigation***	***Usage***
Entitlement Grid	GP_ABS_SS_CNTRY1	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, Entitlement Grid	Select the entitlement fields that appear on the View Absence Balances page.
History Grid	GP_ABS_SS_CNTRY2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, History Grid	Select the history fields that appear on the View Absence Requests page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Forecasting Grid	GP_ABS_SS_CNTRY3	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, Forecasting Grid	Select forecasting options and fields to display on the View Forecasting Details page.
Balances	GP_BAL_ELIG_SS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, Balances	Enter balance elements and select display options on the View Absence Entitlement Balance page.
Event Entry	GP_ABS_EVT_ENTRY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, Event Entry	Select deletion options to allow absent entries to be deleted on the Absence Event Entry page.

Entitlement Grid Page

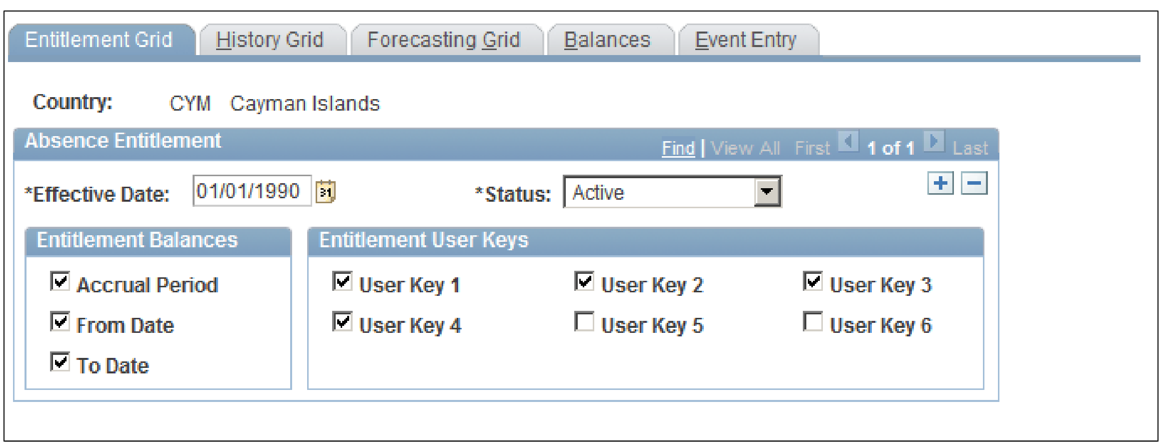
Use the Entitlement Grid page (GP_ABS_SS_CNTRY1) to select the entitlement fields that appear on the View Absence Balances page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, Entitlement Grid

Image: Entitlement Grid page

This example illustrates the fields and controls on the Entitlement Grid page.



The fields on this page control what appears on the View Absence Balances page.

Accrual Period

Select to have the system display the accumulator period for each entitlement balance, for example, *year-to-date* or *month-to-date*. (Define the period for an entitlement accumulator on the Accumulator Periods for Element <element name> page. Select the entitlement accumulators on the Balances page.)

From Date and To Date

Select to display the begin and end dates of the accrual period.

User Key 1...6

Select to display the values of up to six user keys that are associated with the entitlement accumulator. (Define user key values on an entitlement element's Auto Generated Accumulators page.)

History Grid Page

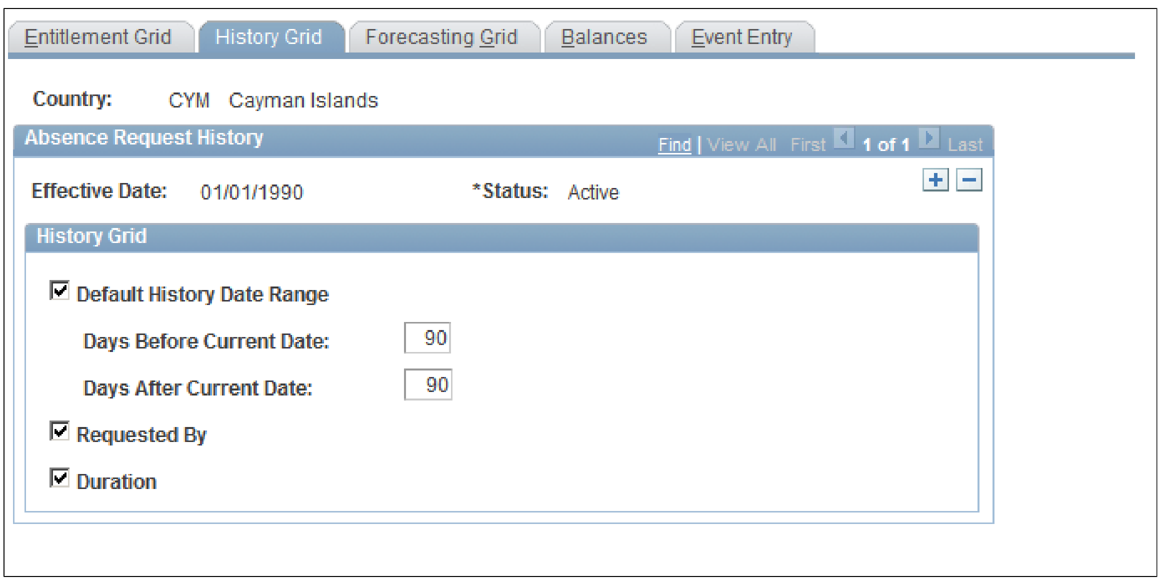
Use the History Grid page (GP_ABS_SS_CNTRY2) to select the history fields that appear on the View Absence Requests page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, History Grid

Image: History Grid page

This example illustrates the fields and controls on the History Grid page.



The fields on this page control what appears on the View Absence Requests page.

Default History Date Range

Select to define the default date range for displaying historical absence events. When you select this check box, the system displays 90 days before the current date and 90 days after the current date.

Note: Users can select dates outside of this date range by editing the From and Through fields on the View Absence Requests page.

Days Before Current Date and Days After Current Date

Use these fields to modify the default date range for displaying historical absence events.

Requested By

Select to display a column that identifies who (which role) submitted each request: the employer, administrator, or manager. Names are not displayed. This field is selected by default.

Duration

Select to display the duration of the absence event. This field is selected by default.

Forecasting Grid Page

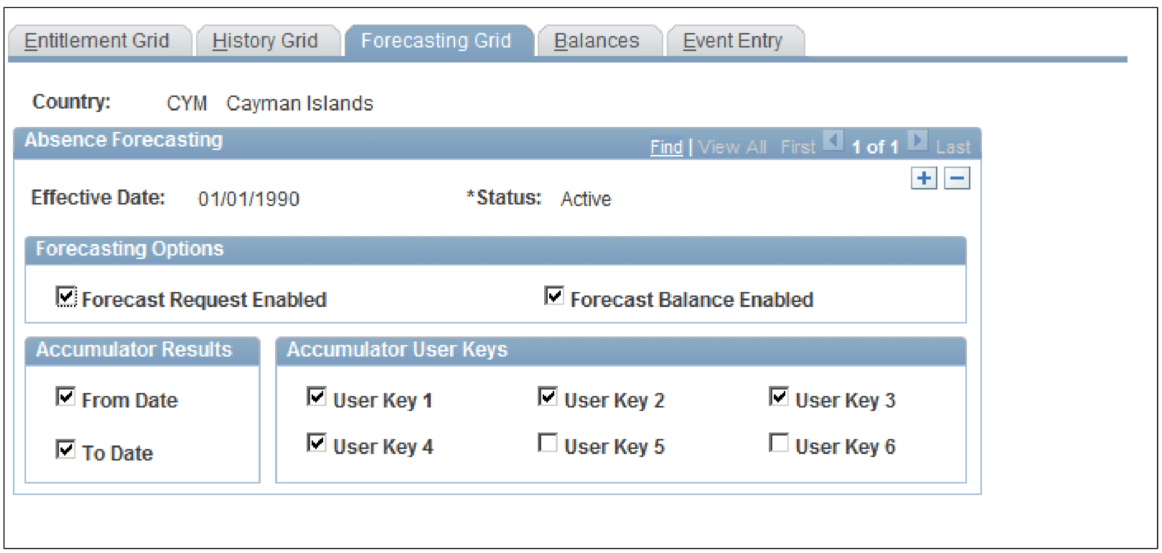
Use the Forecasting Grid page (GP_ABS_SS_CNTRY3) to select forecasting options and fields to display on the View Forecasting Details page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, Forecasting Grid

Image: Forecasting Grid page

This example illustrates the fields and controls on the Forecasting Grid page.



All check boxes on this page are selected by default.

Forecast Request Enabled

Select to enable self service users to run the online Absence Forecasting process. This causes a Forecast Balance button to appear on the Employee - Request Absence page and Manager - Request Absence page.

For self service users to run the forecasting process for a given absence take element, the country take rule for that take element must also allow forecasting. (The Allow Forecasting check box must be selected on the take element's Forecasting Messages page.)

Forecast Balance Enabled

Select to enable self service users to run the online Balance Inquiry process. This causes a View Forecast Balances link to appear on the Request Absence pages and the View Absence Balances pages.

From Date and To Date Select to have the forecasting results display the From Date and the To Date for the forecasted period.

User Key 1...6 Select to display the values of the user keys that are defined for the forecasted entitlement element's accumulator.

Balances Page

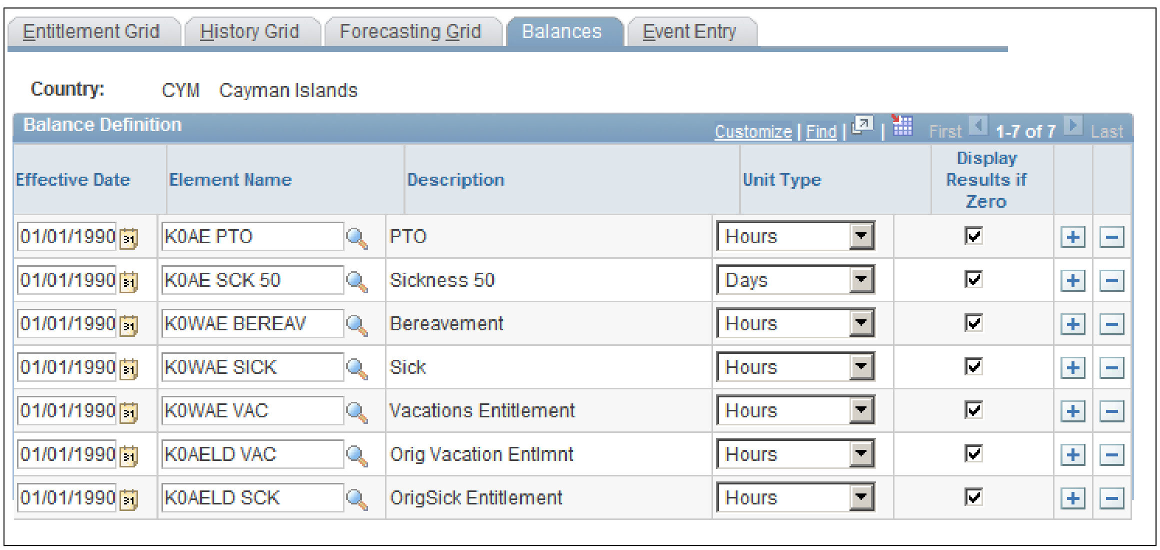
Use the Balances page (GP_BAL_ELIG_SS) to enter balance elements and select display options on the View Absence Entitlement Balance page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, Balances

Image: Balances page

This example illustrates the fields and controls on the Balances page.



The fields on this page control what appears on the View Absence Entitlement Balances page in the Self Service component.

Effective Date The date that the balance accumulator will appear on the View Absence Entitlement Balances page.

Element Name Select the accumulator element for the entitlement balance you want to display.

Unit Type Select *Days* or *Hours* as the units to display on the self service pages. These are units that users see when viewing absence entitlement balances.

Note: The selected unit type should match the unit type defined for the take element.

Display Results if Zero

Select to display the element on the View Absence Entitlement Balances page when there is no balance for that accumulator. The system displays the balances as of the most recent run of the Entitlement process for the employee.

Event Entry Page

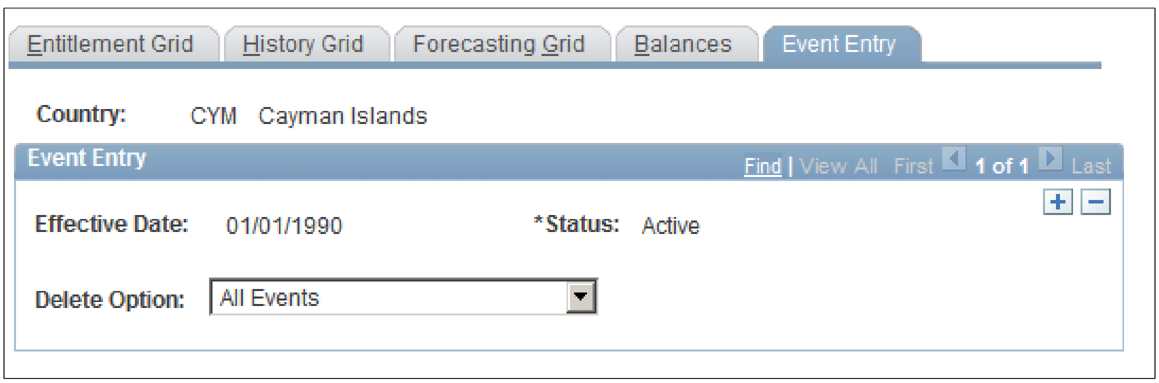
Use the Event Entry page (GP_ABS_EVT_ENTRY) to select deletion options to allow absent entries to be deleted on the Absence Event Entry page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country, Event Entry

Image: Event Entry page

This example illustrates the fields and controls on the Event Entry page.



The fields on this page control deletion options on the Absence Event Entry page.

Delete Option

Select a value to determine which absence events can be deleted on the Absence Event Entry page. Valid values are *All Events*, *All Events Except Finalized*, and *All Events Except Processed*. The delete button is disabled on the Absence Event Entry page for all rows that do not meet the criteria indicated by the Delete Option.

Allow Start and End Time

Select to enable employees to enter a start and end time for absence requests.

Note: This field is only available if you have installed the integration with Oracle Workforce Scheduling

See "Understanding Integration with Oracle Workforce Scheduling *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Related Links

Entering, Updating, and Voiding Absence Events

Defining Self Service Absence Rules by Take Element

To define Take-specific self service absence rules, use the Country Take (GP_ABS_BAL_SS_DEF) component.

This topic provides overviews of PeopleSoft-delivered Approval Process IDs and approval framework events, absence duration and end date calculations, forecasting messages, and discusses how to:

- Define units, administrative rules, and display rules for absence requests.
- Define rules for entering absence dates.
- Define user fields to display.
- Select forecasting rules and messages.
- Customize forecasting messages.
- Link configurable section templates to extended absence components.

Pages Used to Define Self Service Absence Rules by Take Element

Page Name	***Definition Name***	***Navigation***	***Usage***
Absences	GP_ABS_ELIG_SS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, Absences	For a given Take element and country, define absence units (days or hours), who can submit and approve requests, what happens to cancelled requests, and whether to allow partial-day absences. You can also specify whether to display the absence reason and entitlement balances.
Date Rules	GP_ABS_ELIG2_SS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, Date Rules	Define rules for entering absence dates, such as whether absences can begin or end on a holiday or off-day and whether to have the system calculate an absence's end date or duration.
User Fields	GP_ABS_ELIG3_SS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, User Fields	Define user fields.

Page Name	Definition Name	Navigation	Usage
Forecasting Messages	GP_ABS_ELIG4_SS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, Forecasting Messages	Define forecasting rules.
View Messages	GP_ABS_ELIG42_SEC	Click the View Messages link on the Forecasting Messages page.	View the default messages that are returned by the online forecasting process.
Customize Messages	GP_ABS_ELIG4_SEC	Click the Customize Messages link on the Forecasting Messages page.	Customize the messages that are returned by the online forecasting process.
Configurations	GP_ABS_ELIG5_SS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, Configurations	Link configurable section templates to extended absence components and define access to the templates.

Understanding PeopleSoft Delivered Approval Process IDs and Approval Framework Events

Approval Process IDs determine how absence request submissions, approvals, denials, and requests for rework are routed among approvers, requesters, and absence administrators. Self service absence transactions that require action by a user appear in both user worklists and emails. The content of the email message is defined using the Generic Template pages in the PeopleTools Workflow Notifications component. Which email template is used depends on the user's role (approver, requester, or administrator), and the approval framework event.

PeopleSoft Absence Management delivers the following Approval Process IDs:

- AbsenceManagement
- AM_Extended_Abs

Email Notification Templates for Absence Management Self Service Transactions

The following table lists the email template names that are used for each role based on the approval framework event:

Approval Framework Event	Requester Templates	Approver Templates	Administrator Templates	Absence Request Action Button
Launch	GP_ABS_SS_SUB			Submit
Approve		GP_ABS_SS_APPR_ READY		Submit
OnApprove	GP_ABS_SS_APPR	GP_ABS_SS_APPR		Approve

Approval Framework Event	*Requester Templates*	*Approver Templates*	*Administrator Templates*	*Absence Request Action Button*
OnDeny	GP_ABS_SS_DNY	GP_ABS_SS_DNY		Deny
Back		GP_ABS_SS_WRK		Needs Rework (Used when there are multiple levels of approval. For example, when Approver 2 pushes back to Approver 1.)
Terminate	GP_ABS_SS_WRK			Needs Rework
Error			GP_ABS_SS_ERR	NONE

See the product documentation for *PeopleTools: Workflow Technology*.

Understanding Absence Duration and End Date Calculations

Depending on the rules that you define, the system can automatically calculate the duration of an absence event or its end date when a user enters an absence request. Calculation occurs when the user clicks a button on the Request Absence page.

The following factors can affect the calculation of an absence duration or end date:

- Partial-day absences.

  Users can indicate whether partial-day absences apply to the first day of the absence event, all days, the last day, or the first day and the last day.

- Absence Take formulas.

  If the formulas that your organization has defined for absence Take processing do not recognize partial hours, users can enter partial-day absences, but they are not used in calculations.

- Holidays and off days.

  Specify to allow absence to start or end on a holiday or off day. Also, determine the calculation rule on the end date and/or duration.

- Unit type.

  If the unit type defined for the absence (in the Unit Type field on the Absence page) is days, partial hours recorded for an absence event are ignored by the duration and end date calculations.

Calculations for Absences with a Unit Type of Hours

When the unit type defined for the absence is hours, the system calculates the end date and duration of an absence event as follows:

- End Date

To calculate the end date, the system applies the hours entered in the Duration field to the scheduled hours, day by day, starting with the begin date. Partial hours and half-days are taken into account. If there's a negative balance when the end date is reached (that is, scheduled hours for the end date exceed any remaining duration hours) the partial hours for the end date are adjusted to reflect the difference of hours.

An error is generated if the Apply to All Days check box is selected and the duration hours cannot be evenly divided by the partial hours or is not a sum of all scheduled hours divided by two, if half day is selected.

- Duration

  The system adds the scheduled hours for the requested absence dates and adjusts the sum for partial or 1/2 day absences.

Example 1: Calculating End Date

Assume an employee works eight hours each day from Monday to Friday. Saturday and Sunday are off days (zero hour). The employee entered an absence request with a begin date of Wed, January 07 and a duration of 24 hours. The absence take is defined in hours. The following table shows the system-calculated duration for various scenarios:

Start Date	***Duration***	***Start Date Partial Hours***	***1/2 Day Begin Date***	***All Days***	***End Date Partial Hours***	***1/2 Day End Date***	***End Date***	***Comments***
01/07/2004	24	0	N	N	0	N	01/09/2004	8 hrs/ Wed, Thu, Fri
01/07/2004	24	3	N	N	5	N	01/12/2004	3 hrs/ Wed (bgn day); 8hrs/2days; 0 hr/ Sat, Sun; 5hrs/ Mon (end day)
01/07/2004	24	0	Y	N	4	N	01/12/2004	4 hrs/Wed (bgn day); 8hrs/2days; 0 hr/Sat, Sun; 4hrs/ Mon (end day)
01/07/2004	24	0	N	Y / All Days Hrs: 4 Hrs	0	N	01/14/2004	4 hrs/Wed, Thu, Fri; 0 hr/Sat, Sun, 4hrs/Mon, Tue, Wed

Start Date	***Duration***	***Start Date Partial Hours***	***1/2 Day Begin Date***	***All Days***	***End Date Partial Hours***	***1/2 Day End Date***	***End Date***	***Comments***
01/07/2004	24	0	N	Y/ All Days are Half Days	0	N	01/14/2004	4 hrs/ Wed, Thu, Fri; 0 hr/ Sat, Sun, 4hrs/ Mon, Tue, Wed
01/07/2004	24	0	N	Y / All Days Hrs: 5 Hrs	0	N	Error	24 not divisible by 5
01/07/2004	5	5	N	N	0	N	01/07/2004	24 not divisible by 5

Example 2: Calculating Duration

Assume an employee works eight hours each day from Monday to Friday. Saturday and Sunday are off days (zero hour). The employee enters an absence request and provides the begin date and the end date. The absence take is defined in hours. The following table shows the system-calculated duration for various scenarios.

Start Date	***End Date***	***State Date Partial Hours***	***1/2 Day Begin Date***	***All Days***	***End Date Partial Hours***	***1/2 Day End Date***	***Duration***	***Comments***
01/05/2004	01/08/2004	0	N	N	0	N	32	8 hrs/ Mon, Tue, Wed, Thu
01/05/2004	01/08/2004	3	N	N	0	N	27	3 hrs/ Mon; 8hrs/ Tue, Wed, Thu
01/05/2004	01/08/2004	0	N	N	3	N	27	8hrs/ Mon, Tue, Wed; 3hrs/ Thu
01/05/2004	01/08/2004	3	N	N	3	N	22	3 hrs/ Mon; 8hrs/ Tue, Wed; 3hrs/ Thu
01/05/2004	01/08/2004	0	N	Y/All Days Hrs: 3 Hrs	0	N	12	3 hrs/ Mon, Tue, Wed, Thu

Start Date	***End Date***	***State Date Partial Hours***	***1/2 Day Begin Date***	***All Days***	***End Date Partial Hours***	***1/2 Day End Date***	***Duration***	***Comments***
01/05/2004	01/08/2004	0	Y	N	0	N	28	4 hrs/ Mon; 8hrs/ Tue, Wed, Thu
01/05/2004	01/08/2004	0	N	N	0	Y	28	8hrs/ Mon, Tue, Wed; 4 hrs/ Thu
01/05/2004	01/08/2004	0	Y	N	0	Y	24	4 hrs/ Mon; 8hrs/ Tue, Wed; 4 hrs/ Thu
01/05/2004	01/08/2004	0	N	Y/All Days are Half Days	0	N	16	4 hrs/ Mon, Tue, Wed, Thu
01/05/2004	01/10/2004	0	N	N	0	Y	40	8hrs/ Mon, Tue, Wed, Thu, Fri; 0hr/ Sat
01/04/2004	01/08/2004	0	Y	N	0	N	32	0hrs/ Sun; 8hrs/ Mon, Tue, Wed, Thu
01/04/2004	01/10/2004	0	N	Y/All Days are Half Days	0	N	20	0hrs/ Sun; 4hrs/ Mon, Tue, Wed, Thu; 0hr/ Sat

Understanding Forecasting Messages

If you enable self service users to run the online Forecasting process, you can define the message to display at the end of that process. Use the Text Catalog to define the text for up to three messages: a success message, a warning message, and an error message. The entitlement element's forecasting formula specifies the conditions for issuing each message. You will map the value that's returned for each condition to the corresponding message that you define in the Text Catalog.

To define forecasting messages:

1. Use the Text Catalog to define a status message, a description, or both for each possible Forecasting outcome: success, warning, and error.

2. Use the Customize Messages page to map each message type (success, warning, error) to the value returned by the forecasting formula and to specify which text to display from the text catalog.

See Viewing or Modifying Text on Self Service Absence Pages.

Absences Page

Use the Absences page (GP_ABS_ELIG_SS) to for a given Take element and country, define absence units (days or hours), who can submit and approve requests, what happens to cancelled requests, and whether to allow partial-day absences.

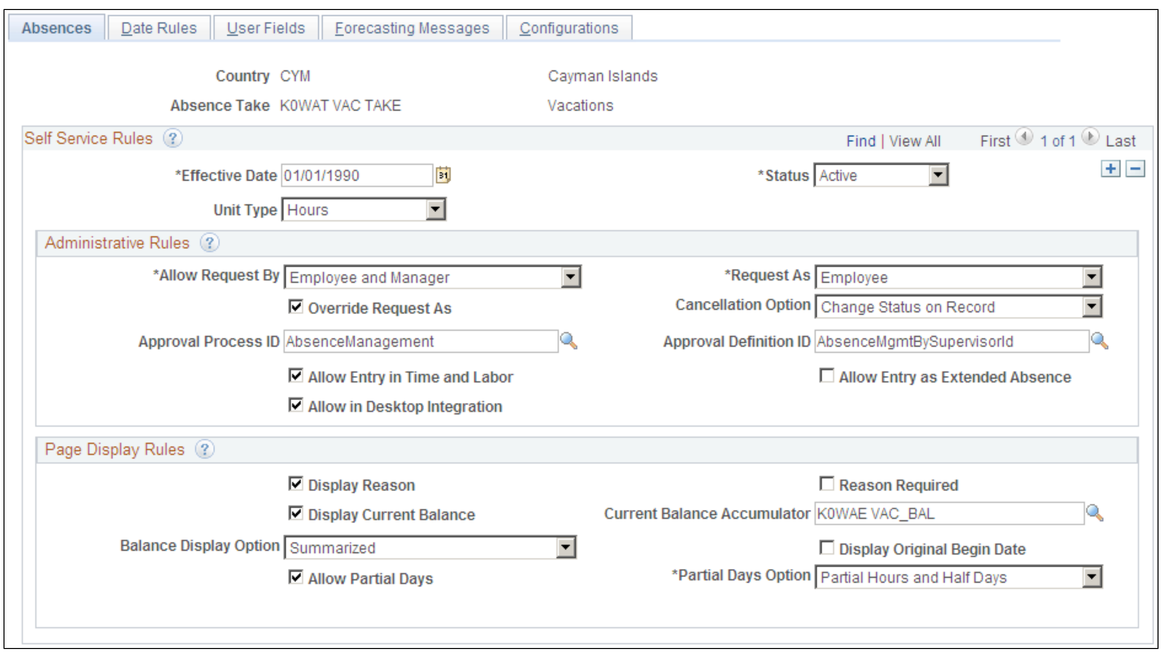
You can also specify whether to display the absence reason and entitlement balances.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, Absences

Image: Absences page

This example illustrates the fields and controls on the Absences page.



Self Service Rules

Unit Type

Select *Days* or *Hours* as the units to display on the self service pages. These are units that users enter when requesting time off.

Note: The selected unit type should match the unit type defined for the Take element.

Administrative Rules

Allow Request By

Specify who can request absences for this Take element through the self service pages. Values are: *Employee*, *Employee and Manager* (default), and *Manager*.

Request As

Specify whether this Take element can be requested as an Employee, Manager, or is Not Applicable in the manager self service page.

Override Request As

Specify whether the Request As option selected can be overridden on the manager self service page.

Approval Process ID

Select the approval Process ID to use for the Country and absence take element. Approval Process ID refers to the technical definitions that control the execution of the approval process and its integration with the Approval Workflow Engine. In addition notifications (emails and worklist) are defined within Approval Process ID.

See "Understanding the Approval Process *(PeopleSoft HCM 9.2: Global Payroll)*".

Approval Definition ID

Select the ID that corresponds to this type of approval, based on how you set up the approval framework. PeopleSoft delivers one approval Definition ID that is used for six delivered Process IDs. The selection of Definition ID for the self service Take elements at the country level depends on how the company has set up Direct Reports.

This field is optional. You can also set up Administrative Rules without entering a value in this field. If you define an absence Take without a Definition ID, the system does not use the approval framework when employees or managers select this Take element on absence self service pages.

See "Understanding the Approval Process *(PeopleSoft HCM 9.2: Global Payroll)*".

Note: If your absence request does not require approval, then leave Approval Process ID and Approval Definition ID blank. The absence request will be automatically approved once the user submits it.

Cancellation Option

Specify what happens when an absence request is cancelled. Options are:

Change Status on Record: (Default) Select to have the system change the status of the request to Cancelled. When a request's status is set to Canceled, you can no longer access the request.

Delete from Database: Select to have the system delete the request from the database.

Allow Entry in Time and Labor

Select to allow absence event entry on the Timesheets page in PeopleSoft Time and Labor. You cannot select both the Allow Entry in Time and Labor field and the Allow Entry as Extended Absence field.

Allow Entry as Extended Absence

Select to enable users to choose this absence take as an extended absence. You cannot select both the Allow Entry in Time and Labor field and the Allow Entry as Extended Absence field.

Allow in Desktop Integration

Select to enable users to choose this absence take when entering absence requests through the desktop integration with Microsoft Outlook. SeeEntering Absence Requests through Microsoft Outlook.

Page Display Rules

Display Reason

Select to enable self service users to specify the reason for the absence. This check box is selected by default.

Reason Required

Select to require that users enter the reason for the absence.

Display Current Balance

Select to display the balance for the absence entitlement element, as of the last finalized absence run on the Request Absence page. The balance will not reflect the number of units that the user is requesting. This check box is not selected by default.

Current Balance Accumulator

If you selected the Display Current Balance check box, select the accumulator element that stores the current balance for this absence Take element.

Balance Display Option

Indicate which value you want the system to display as the current balance, when there are multiple instances of the accumulator with different user keys.

Select one of the following options:

Not Summarized (default). Consider using this option when your rules for displaying the current balance are very complex. Create an accumulator that summarizes the value of the element contributors. The system will display the value of the most current instance of the accumulator.

Summarized. Select this option to have the system display the sum of the values of the multiple instances.

Display Original Begin Date

Select to display the Original Start Date field on the Request Absence page.

Allow Partial Days

This check box works with the Partial Days Option field. Select it to indicate whether partial day absences are allowed.

Do not select the check box if partial days or hours are not allowed.

Partial Days Option

This field becomes available when you select the Allow Partial Days check box. Options are:

- *Half Days:* With this option, users can select a check box to enter a request for a half-day absence. The system determines the number of hours absent by looking at the user's schedule.
- *Partial Hours:* With this option, users can request a partial-day absence by entering the number of absent hours. This is the default option.
- *Partial Hours and Half Days*: With this option, users can request a partial-day absence by selecting a check box for a half-day absence or by entering the number of hours.
- *None* is the default value when the Allow Partial Days check box is not selected.

Allow Start and End Time

Select to enable employees to enter a start and end time for absence requests. You must select the Allow Partial Days check box and choose a partial days option in order to select this check box.

Note: This field becomes available when you install the integration with Oracle Workforce Scheduling.

See "Understanding Integration with Oracle Workforce Scheduling *(PeopleSoft HCM 9.2: Application Fundamentals)*".

In the following example, the Summarized option would return a value of 20 for the KOAE PTO accumulator.

Accumulator	***From***	***To***	***User Key 1***	***User Key 2***	***Value***
KOAE PTO	January 1, 2000	December 31, 2000	CIA A	Pay group A	5
KOAE PTO	January 1, 2001	December 31, 2001	CIA A	Pay group A	8
KOAE PTO	January 1, 2002	July 31, 2002	CIA B	Pay group B	4
KOAE PTO	August 1, 2002	December 31, 2002	CIA B	Pay group B	2
KOAE PTO	January 1, 2003	December 31, 2003	CIA B	Pay group XYZ	1

Related Links

"Target Information Page *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Date Rules Page

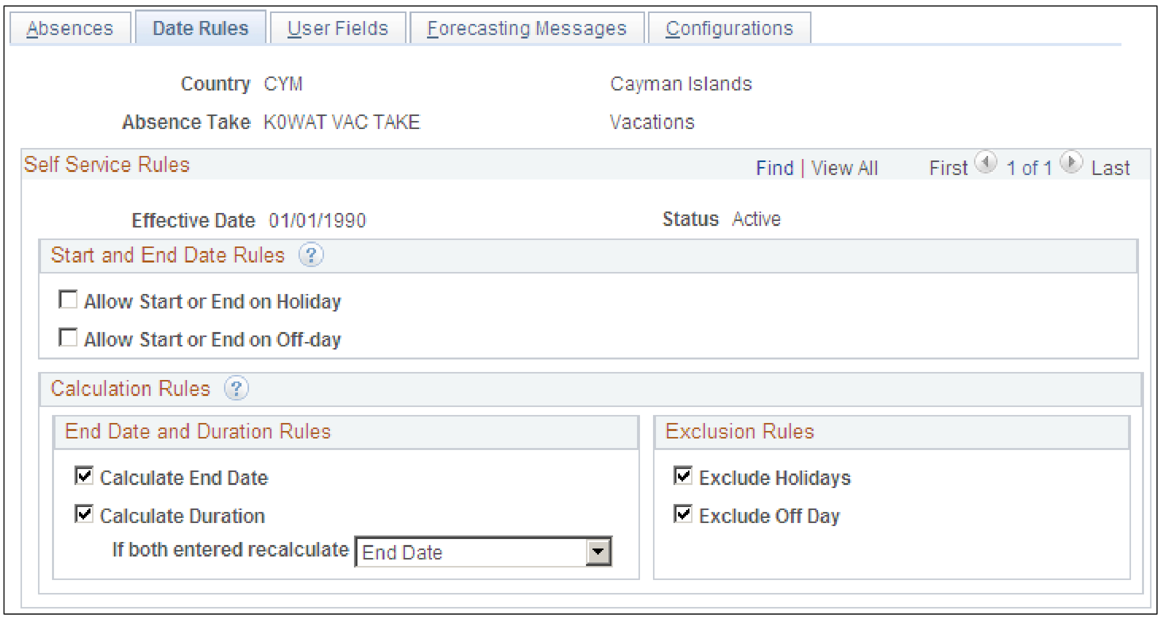
Use the Date Rules page (GP_ABS_ELIG2_SS) to define rules for entering absence dates, such as whether absences can begin or end on a holiday or off-day and whether to have the system calculate an absence's end date or duration.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, Date Rules

Image: Date Rules page

This example illustrates the fields and controls on the Date Rules page.



Start and End Date Rules

Allow Start or End on Holiday Select if the start or end date of the request can fall on a holiday. This field is selected by default.

Allow Start or End on Off-day Select if the start or end date of the request can fall on a day the employee is not scheduled to work. This field is selected by default.

Calculation Rules

The option that you select here causes a Calculate End Date button, a Calculate Duration button, or a Calculate End Date or Duration button to appear on the Request Absence page.

See Understanding Absence Duration and End Date Calculations.

Calculate End Date Select to have the Calculate End Date button appear. When entering an absence request, the user must enter the absence begin date and duration. Clicking the Calculate End Date button causes the system to calculate and display the end date. This is the default selection.

Calculate Duration

Select to have the Calculate Duration button appear. When entering an absence request, the user must enter the absence begin and end dates. Clicking the Calculate Duration button causes the system to calculate and display the duration.

If both entered recalculate

This field controls what happens when a user enters a value in both the End Date and Duration fields while entering an absence request.

- If you select *End Date* this field will be recalculated.
- If you select *Duration*, this field will be recalculated.

Exclude Holidays

Select to exclude holidays from the end date and duration calculation for requested absence events.

Exclude Off Day

Select to exclude non-worked days (based on the employee's schedule) from the end date and duration calculation for requested absence events.

User Fields Page

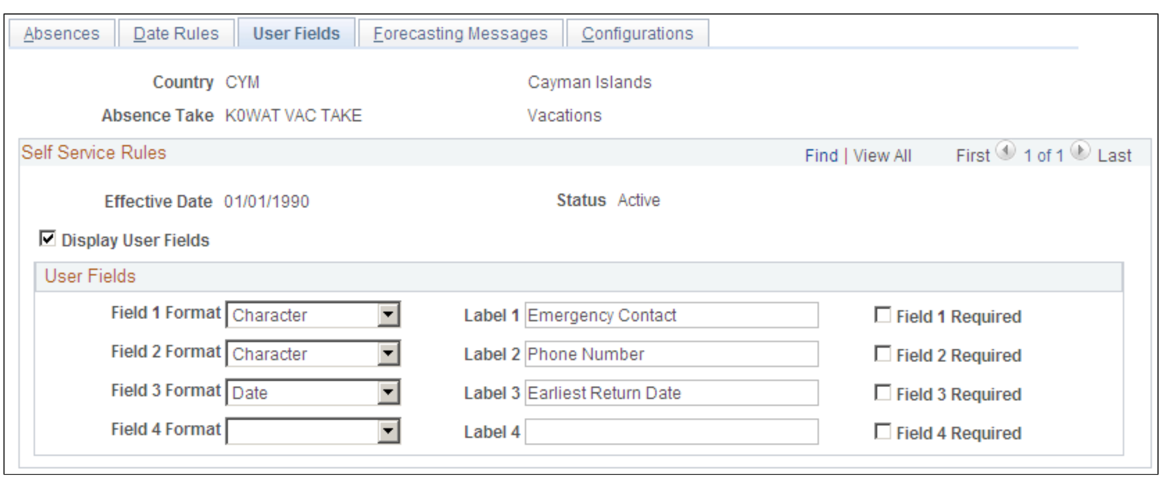
Use the User Fields page (GP_ABS_ELIG3_SS) to define user fields.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, User Fields

Image: User Fields page

This example illustrates the fields and controls on the User Fields page.



Display User Fields

Select to have up to four user-defined fields appear on the Request Absence page.

User Fields

Define up to four fields to appear on the Request Absence page. These fields enable you to collect additional data that you may need for absence tracking. You can use these fields as system elements and embed them in rules to perform a specific task with the information that users enter.

For each field you define, specify the format, the field label, and whether users are required to complete the field.

Field <number> Format Options are *Character, Date, Decimal,* and *Monetary.*

Label <number> Enter up to 30 alphanumeric characters for the field name. To appear on the Absence Detail page, the field must have a label.

Field <number> Required Select if users are required to complete the field.

Forecasting Messages Page

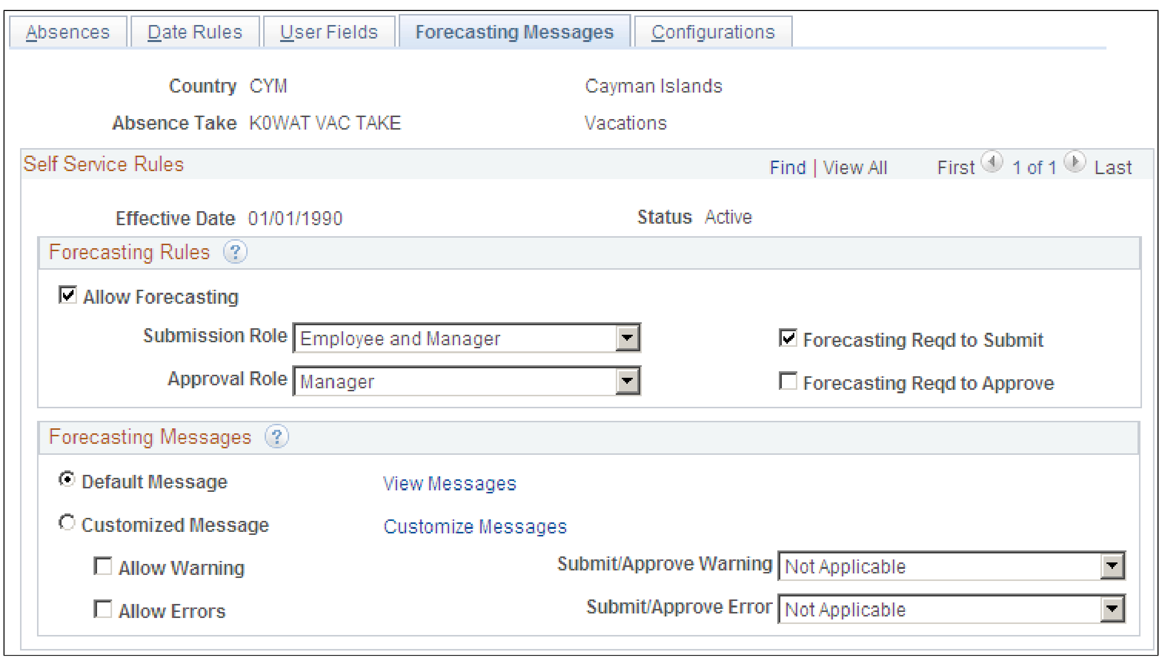
Use the Forecasting Messages page (GP_ABS_ELIG4_SS) to define forecasting rules.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, Forecasting Messages

Image: Forecasting Messages page

This example illustrates the fields and controls on the Forecasting Messages page.



Forecasting Rules

Allow Forecasting Select to enable self service users to run the online forecasting process. A Forecast Balance button will appear on the Request Absence page. This check box is not selected by default.

Note: For self service users to run the forecasting process, the country rules for that Take element must also allow forecasting. (The Forecast Request Enabled check box must be selected on the Forecasting Grid page.)

Submission Role

If forecasting is required before submitting an absence request, specify who must run the process. Options are: *Employee, Manager, Employee and Manager,* and *Not Applicable*(default).

This field works in conjunction with the Forecasting Reqd to Submit check box. If you select the Forecasting Reqd to Submit check box, then you must specify a role in this field.

Forecasting Reqd to Submit (forecasting required to submit)

Select to require that the Forecasting process be run before submitting an absence request. This check box is not selected by default. Depending on your rules, the results of the forecasting process may determine whether or not the request can be submitted.

Users receive an error message when they click Submit on the Absence Request page without first forecasting the absence entitlement balance.

Approval Role

If forecasting is required, specify who can run the forecasting process. Options are: *Manager* and *Not Applicable*.

Forecasting Reqd to Approve (forecasting required to approve)

Select to require that the online forecasting process be run before approving an absence request.

Forecasting Messages

The system can display the message, "Forecasting Completed Successfully" at the end of the forecasting process, or it can display customized messages that you create. You can have a different message display when the forecasting process is successful, generates a warning, or results in an error. You define the criteria for issuing a success, warning, or error message.

Default Message and View Messages

Select to have the system display the default message after a user runs the forecasting process. Click the View Messages link to access the View Messages page to see the default message. There is a default message for successful forecasting and one for system error.

Customized Message

Select to have a customized message display after a user runs the online forecasting process.

Allow Warning and Submit/Approve Warning

Select to enable users to submit absence requests when the forecasting process results in a warning. In the Submit Warning field, specify who can submit requests with warnings. Options are: *Employee*, *Manager*, *Employee and Manager* (default), and *Not Applicable*.

Allow Errors and Submit/Approve Error

Select to enable users to submit absence requests when the forecasting process results in an error. In the Submit Error field, specify who can submit requests with errors. Options are: *Employee*, *Manager*, *Employee and Manager* (default), and *Not Applicable*.

Customizing Forecasting Messages

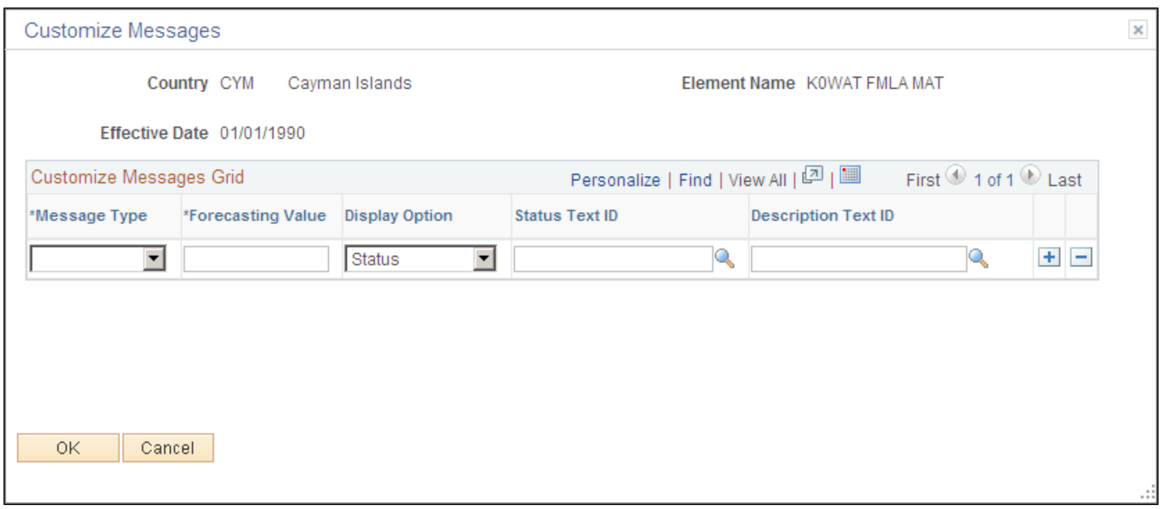
Use the Customize Messages page (GP_ABS_ELIG4_SEC) to customize the messages that are returned by the online forecasting process.

Navigation

Click the Customize Messages link on the Forecasting Messages page.

Image: Customize Messages page

This example illustrates the fields and controls on the Customize Messages page.



Message Type

Select the type of message to define: *Error, Success,* or *Warning*.

Forecasting Value

Enter the value that the Forecasting process (the forecasting formula) will return to trigger the display of this message. You can enter up to 20 alphanumeric characters in this field (the maximum field length for a character element in Absence Management).

Display Option

Specify the type of information in the Text Catalog that is to display after forecasting is complete. Options are: *Status*, *Description* and *Both* (default).

Status Text ID

If you selected *Display Status* or *Both* in the Display Option field, enter the text ID from the HR Text Catalog for the status message.

Description Text ID If you selected *Display Description* or *Both* in the Display Option field, enter the text ID from the HR Text Catalog for the description.

Configurations Page

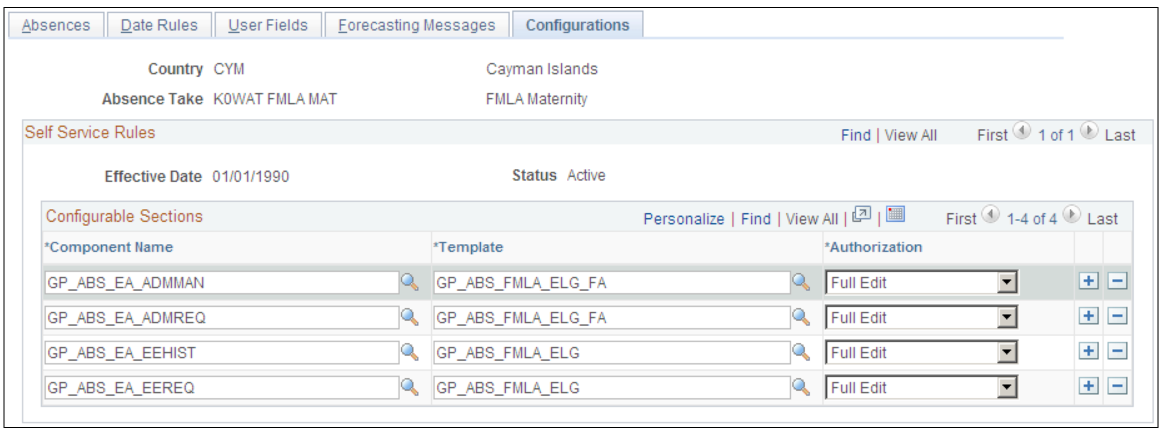
Use the Configurations page (GP_ABS_ELIG5_SS) to link configurable section templates to extended absence components and define access to the templates.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Country Take, Configurations

Image: Configurations page

This example illustrates the fields and controls on the Configurations page.



Component Name Select an extended absence component that will link to a configurable section page to link to the configurable section template.

Template Select a defined configurable section template.

Authorization Select the access mode used by the extended absence request to access the configurable section template. The values are *Full Edit* and *Display.*

In order to display configurable section information for user self-service, link the configurable section templates you created to each of the extended absence components you are using. Then specify the desired type of user access to the displayed configurable section page.

For example, using the information shown in the Configurations page graphic, when a user accesses the GP_ABS_EA_EEREQ extended absence component, using the Cayman Islands FMLA maternity absence take, the GP_ABS_FMLA_ELG template specifies the composition of the displayed configurable section page. The users accessing the configurable section page have full edit access on the displayed page.

Defining Forecasting Rules for Self Service Absence Requests

To define rules for using the self service Forecasting and Balance Inquiry processes, use the Forecasting (GP_ABS_SS_FCST) component.

This topic discusses how to:

- Select entitlement balances to display in forecasting results.
- Select entitlement balances to display in balance inquiry results.

Pages Used to Define Self Service Forecasting Rules

Page Name	***Definition Name***	***Navigation***	***Usage***
Forecasting	GP_ABS_TAKE6	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Forecasting, Forecasting	Specify which forecasting result elements to display in the Forecasting Results grid. Also specify whether to display a customized label from the HR Text Catalog as the description or the element description as defined on the Element Name page (GP_ PIN).
Balance Inquiry	GP_ABS_TAKE7	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Forecasting, Balance Inquiry	Specify which entitlement balances the Balance Inquiry process is to display and whether to display a customized label from the HR Text Catalog as the description or the element description as defined on the Element Name page (GP_ PIN).

Forecasting Page

Use the Forecasting page (GP_ABS_TAKE6) to specify which forecasting result elements to display in the Forecasting Results grid.

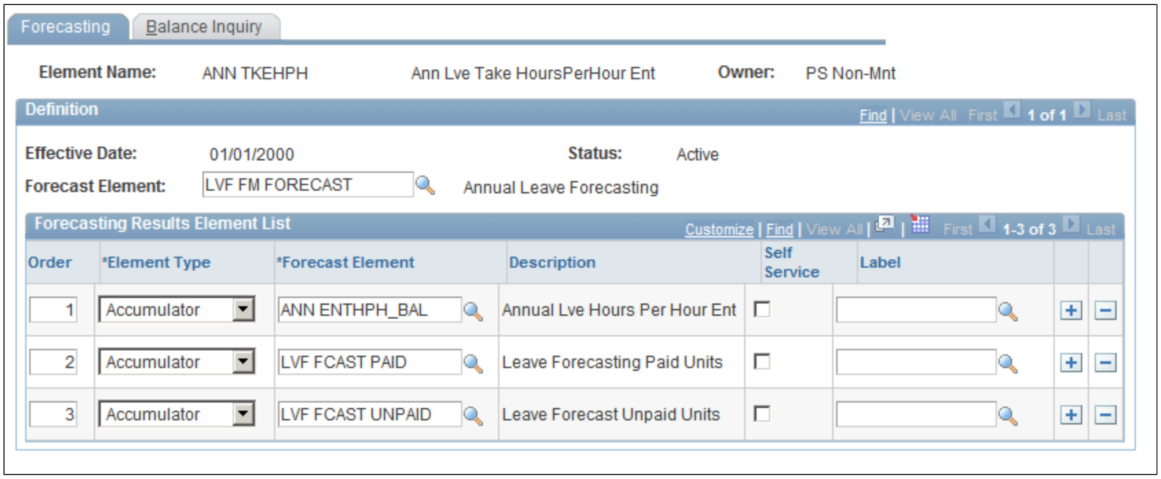
Also specify whether to display a customized label from the HR Text Catalog as the description or the element description as defined on the Element Name page (GP_PIN).

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Forecasting, Forecasting

Image: Forecasting page

This example illustrates the fields and controls on the Forecasting page.



This page displays the forecasting rules defined for a Take element on the Absence Take - Forecasting page. The Forecast Element field at the top of the page shows the formula that the system resolves during the Forecasting process. The Forecasting Results Element List grid shows what appears on the Absence Forecast Results page (in the Absence Event Entry component) after you run the Forecasting process. You can have all or a subset of these results display to self service users after they run the forecasting process.

Note: To enter information on this page, the Allow Forecasting check box must be selected on the Forecasting Messages page, as well as the Forecasting Used check box on the Absence Take definition page.

Self Service	Select to have the forecasting results for this element display to self service users.
Label	Specify the label for the Forecast element that displays in self service. If no label is specified, it will display the element's description.

Related Links

Forecasting Messages Page

Balance Inquiry Page

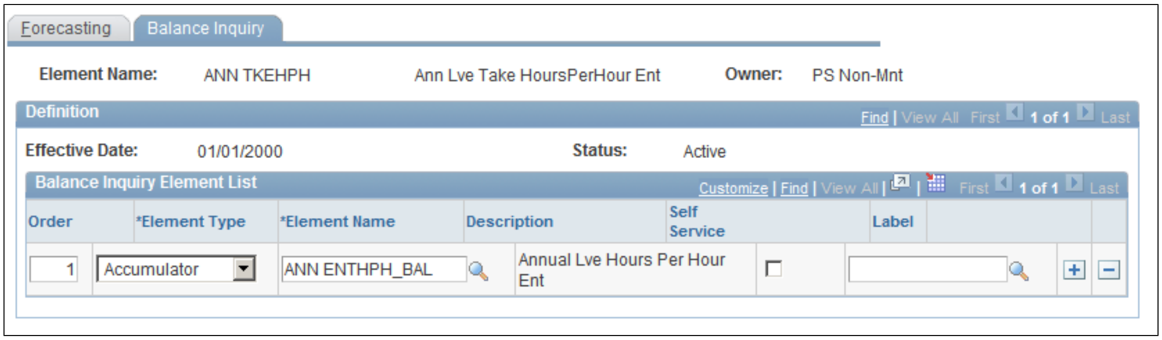
Use the Balance Inquiry page (GP_ABS_TAKE7) to specify which entitlement balances the Balance Inquiry process is to display and whether to display a customized label from the HR Text Catalog as the description or the element description as defined on the Element Name page (GP_PIN).

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Forecasting, Balance Inquiry

Image: Balance Inquiry page

This example illustrates the fields and controls on the Balance Inquiry page.



This page is similar in function to the Forecasting page but applies to rules for the Balance Inquiry process.

Reviewing System Generated Forecasting Error Status Messages

The following table provides a list of system generated error messages that appear when the Forecast Balance process ends in error. Absence and system administrators use this information to manage the absence forecasting functionality when message errors appear.

Note: These messages are formatted differently depending on the component where they appear, either Absence Administrator pages or Absence Self Service pages. Use Absence Administrator pages (Absence Event Entry and Review Absence Balances) if you need additional information to resolve any of these error messages.

Message ID	***Functional***	***Technical***
471 - MSGID-NO-TXN-DATA	No Forecast Transaction Row (GP_TXN_DATA). This row is inserted by push button PeopleCode.	Transaction record is missing. Select on PS_GP_TXN_DATA matching on TXN_ID, TXN_NUM returns no rows. This would be due to a problem in the PeopleCode or with the data input if running GPPOLRUN manually either from DOS or from Animator. Not likely to occur online unless bug in PeopleCode.
472 - MSGID-INVALID-TXN-DATA	Invalid data on the forecast transaction row (GP_TXN_DATA). One or more of the following fields are missing from this record: OPRID, BATCH_RUN_ID, CAL_RUN_ID, EMPLID, or COUNTRY.	Transaction record data is invalid. A row exists on PS_GP_TXN_DATA matching TXN_ID, TXN_NUM but one or more of the other fields is blank (OPRID, BATCH_RUN_ID, CAL_RUN_ID, EMPLID, COUNTRY). Not likely to occur online unless bug in PeopleCode.

Message ID	***Functional***	***Technical***
473 - NO-TXN	No Forecast Transaction Definition (GP_TXN). Please add a Transaction Definition for the TXN_ID and COUNTRY listed. Main Menu > Set Up HRMS > Product Related > Global Payroll & Absence Mgmt > Elements > Absence Forecast Transactions. Transaction ID = 100 for Absence Forecasting and 110 for Balance Forecasting.	Transaction definition is missing. Select on PS_GP_TXN matching TXN_ ID returns no rows. This is a data set up issue. Not likely to occur as the definition is required for the online transaction.
474 - INVALID-TXN	Invalid Forecast Transaction Definition Data (GP_TXN). The Calendar Group ID (the forecast calendar template) is missing. When adding a new Absence Forecast Transaction, please make sure that you are associating the correct Calendar Template. Also make sure the template contains all the calendars and dates that you want to forecast for all the employee/pay groups that you want to make forecasting available to.	Transaction definition is invalid. A row exists on PS_GP_TXN matching TXN_ ID but CAL-RUN-ID-TMPLT is blank. This is a data setup issue. It is also unlikely to occur.
475 - OL-RUNCTL-MISSING	Run Control Missing for Forecast Process (GP_RUNCTL). This is inserted by the push button PeopleCode.	Run Control is missing. Select on PS _GP_RUNCTL matching on OPRID and RUN_CNTL_ID returns no rows. This would be due to a problem in the PeopleCode or with the data input if running GPPOLRUN manually either from DOS or from Animator. Not likely to occur online unless bug in PeopleCode.
476 - INVALID-RUNCTL	Invalid Run Control (GP_RUNCTL). The Calendar Group ID is missing. The Run Control was inserted by push button PeopleCode.	Run Control data is invalid. A row exists on PS_GP_RUNCTL matching OPRID and RUN_CNTL_ID but CAL_RUN_ ID is blank. Not likely to occur online unless bug in PeopleCode.
477 - NO-EVENT	No Absence Events exist to forecast for this employee. This error is not likely to happen in self service because at least one event will exist when forecasting from absence self service.	There are no absence events for this employee. This is indicated if no rows are returned for a SELECT against GP _ABS_EVENT looking for the min (bgn_dt) and max (end_dt) (for non voided events only). This could happen if forecasting and only voided events exist. It wouldn't happen if you forecast after creating or modifying an event.
478 - SQL-ERROR	SQL Error During Absence Forecasting. This type of error is not likely to happen unless there is a conflict in the database. Please contact your system or database administrator.	For each call to PTPSQLRT, there is the potential that an SQL-ERROR could occur for either the Select or the Fetch. This is set in the ZZ000-SQL-ERROR section. This requires system administrator intervention.

Message ID	***Functional***	***Technical***
479 - NO-PAYEE-ERROR	Forecasting Completed Successfully! No Errors were found.	Forecasting Completed Successfully! The forecasting process ended with no errors. In self service a 479 message/ status is also used when you decide to display customized messages instead of the default "Success" message (Country Take setup).
480 - PAYEE-ERROR	Forecasting Completed With Errors! This type of error requires checking for more details in the Forecast Messages tab in Absence Event Entry. There are different possible causes for this error, and therefore you need to verify the detail of each message produced by the error handling modules.	Indicates somewhere in one of the called COBOL modules a payee error was encountered. Select on PS_GPXPYE _SEG_STAT record where CALC_ ACTION='C' and PYE_CALC_STAT in ('00','02','03','04','05'). This requires system administrator intervention.
481 - NO-CAL-RUN-DTL	The Calendar Group ID (Template) does not cover the forecasting period. As a result, there are no calendars to process. Please add calendars to your Calendar Group ID (that is the template) to cover the forecast period.	The online transaction record and run control record are created via the online Peoplecode. Once they are selected and validated, GPPOLRUN determines the forecast period and creates a GPXCAL _RUN_DTL for each calendar to be processed in forecasting. In order to control which calendars to run, only those unfinalized calendars for the employee's pay group from the template whose period begin and end dates fall within the FCST period begin and end date are inserted into GPXCAL _RUN_DTL selecting data from the corresponding "real" GP_CAL_RUN_ DTL for that matching CAL_ID and GP _PAYGROUP. If on a subsequent select of that GPXCAL_RUN_DTL matching on CAL _RUN_ID, no records are selected, then Message #481 - NO CAL RUN DTL is generated. If none are present, that means the template for the employee's pay group does not match up with the forecast period. This could occur if the template includes calendars for several pay groups but the necessary calendar for the pay group of the employee to process this event is missing. For example Pay Group A has Jan-Dec 04 calendars. Pay Group B has Mar-Dec 04 calendars. Employee from pay group B has event in February only. This error would be generated.
482 - INVALID-TXN-DATA-BAL	Invalid data on the forecast transaction row (GP_TXN_DATA). One or more of the following fields are missing from this record, the forecast as of date (FCST_ ASOF_DT), or the take element (PIN_ FCST_TAKE_NUM).	Balance Inquiry only. A row exists on PS _GP_TXN_DATA matching TXN_ID, TXN_NUM but either FCST_ASOF_DT is spaces or PIN_FCST_TAKE_NUM is zero. Not likely to occur online unless bug in PeopleCode.

Message ID	***Functional***	***Technical***
483 - NO-EVENTS-TO-FCST	No Events to Forecast. The Forecast End Date is <= Period End Date of the last finalized absence calendar. The forecast end date is for absence forecasting equal to the maximum event end date. For absence balance forecasting the forecast end date is equal to the "as of date."	Consider all events are processed versus one or more new events entered retroactively. If FCST-END-DT < PRD-END-DT, this could occur if the end date of all the employee's absence events are within a finalized calendar, if an absence event is entered for a calendar period that has already finalized, or if the As of Date of Balance Inquiry is within a finalized calendar. The employee should look at the list of their current balances instead.
484 - ASOF-DT-BEFORE-TEMPLATE	The Calendar Group ID (Template) does not cover the forecasting period. The As of Date must be greater than or equal to the earliest Begin Date of the calendar periods associated with the Calendar Group used as the template for Forecasting. Using the Calendar Group ID component, please add calendars to your template for the period in which you want to forecast.	This could occur if the As of Date of Balance Inquiry is greater than the period end date of the last finalized calendar and is less than the min (period begin date) of the calendars on the template: EVENT-BGN-DT > PRD-END-DT and EVENT-BGN-DT < TMPLT-BGN-DT. This could also occur if the As of Date of Balance Inquiry is less than the min (period begin date) of the calendars on the template: EVENT-BGN-DT < TMPLT-BGN-DT.
485 - NO-TMPLT-CALENDARS	No Calendars were found for the template. Using the Calendar Group ID component, please add calendars to your template for the period in which you want to forecast.	The calendar detail corresponding to the calendars on the template are missing or the dates are missing. This is indicated by a SELECT on a join of GP_CALENDAR, GP_CAL_DTL and GP_CAL_PRD for the CAL_RUN_ID from the run control. This is a data setup issue that requires system administrator intervention.
486 - INVALID-ASOF-DT	Balance Forecast As Of Date falls within an Absence Begin and End Date. Please select an As Of Date Before or After the Absence Event Begin/End Date.	Forecast Balance only. The Forecast Balance As of Date falls in the middle of an existing absence event. The reason this is an issue is that the design for Balance Inquiry includes creating a temporary "dummy" event for begin data/end date = As of Date. This causes issues with the rule that there cannot be two events for the same take on the same day and therefore the current Absence architecture and coding do not support that. A specific SQL against GP_ABS _EVENT looking for this situation is issued in GPPOLRUN.

Message ID	***Functional***	***Technical***
487 - EVENTS-BEFORE-TEMPLATE	The Calendar Group ID (Template) does not cover the forecasting period. The event begin date must be greater than or equal to the earliest Begin Date of the calendar periods associated with the Calendar Group used as the template for Forecasting. Using the Calendar Group ID component, please add calendars to your template for the period in which you want to forecast.	This could occur if the min (bgn_dt) of all the employee's absence events is greater than the period end date of the last finalized calendar and is less than the min (period begin date) of the calendars on the template: EVENT-BGN-DT > PRD-END-DT and EVENT-BGN-DT < TMPLT-BGN-DT. This could also occur if there are NO finalized calendars on the template and the min (bgn_dt) of all the employee's absence events is less than the min (period begin date) of the calendars on the template: EVENT-BGN-DT < TMPLT-BGN-DT.
488 - ASOF-DT-AFTER-TEMPLATE	The Calendar Group ID (Template) does not cover the forecasting period. The As of Date must be less than or equal to the maximum End Date of the calendar periods associated with the Calendar Group used as the template for Forecasting. Using the Calendar Group ID component, please add calendars to your template for the period in which you want to forecast.	This could occur if the As of Date of Balance Inquiry is greater than the max (period end date) of the calendars on the template: FCST-END-DT > TMPLT-END-DT. This could also occur if there are NO finalized calendars on the template and if the As of Date of Balance Inquiry is greater than the max (period end date) of the calendars on the template: EVENT-END-DT > TMPLT-END-DT.
489 - EVENTS-AFTER-TEMPLATE	The Calendar Group ID (Template) does not cover the forecasting period. The event end date must be less than or equal to the maximum End Date of the calendar periods associated with the Calendar Group used as the template for Forecasting. Using the Calendar Group ID component, please add calendars to your template for the period in which you want to forecast.	This could occur if the max (end_dt) of all the employee's absence events is greater than the max (period end date) of the calendars on the template: FCST-END-DT > TMPLT-END-DT. This could also occur if there are NO finalized calendars on the template and the max (end_dt) of all the employee's absence events is greater than the max (period end date) of the calendars on the template: EVENT-END-DT > TMPLT-END-DT.

Message ID	Functional	Technical
490 - EVENT-NOT-FCSTD	No events were forecasted. One possible cause is that the Calendar Group ID (Template) does not cover the forecasting period. As a result, there are no calendars to process. Review and add calendars to your Calendar Group ID (the template) to cover the forecast period. Another possible cause is that the date range entered for forecasting cover periods already processed and finalized. Forecasting only processes from last finalized period going forward.	The conditions detected in GPPOLRUN are "generic" in nature. It can't detect everything without knowing more about the processing that will occur during batch. Therefore it's possible that an event is entered and passes the GPPOLRUN checks and then goes on to batch processing. If for example there are calendars for pay group A for all of 2004 but calendars only for Feb-Dec of 2004 for pay group B, then an event entered for an employee in pay group B for January won't get caught by the GPPOLRUN edits but that event won't get processed because pay group B January calendar was not processed. This is one example where the error #490 comes into play – No events were forecasted. This is different than 477 – No events.

Viewing or Modifying Text on Self Service Absence Pages

You can use the Text Catalog feature to modify field labels, button text, and text that appears elsewhere on the self service absence pages.

Related Links

Viewing Daily Results of the Absence Take Process
"Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Delivered Text Catalog Entries for Absence Management

The step to view delivered text catalog entries for Absence Management are:

- Navigate to the Maintain Text Catalog page. (Set Up HCM, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog)
- Enter *HGA* in the Object owner identifier field.
- Click Search to view the list of text catalogs for Absence Management.

See "Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Chapter 18

Entering and Approving Self Service Absence Requests

Prerequisite for Entering and Approving Self Service Absence Requests

The Country Take component is used to define Country-specific rules that apply to all Take elements for a given country. They control some of the field displays on the self service pages, and determine if online Forecasting and Balance Inquiry processes can be used for any Take elements set up for the country. You can define a different set of self service rules for each country.

For each Take element that you want to make available to self service users, you define an additional set of rules. These rules specify whether partial-day absences are allowed, approval requirements for absence requests, how to display forecasting results, and other usage rules.

It is important to set up the country take component and understand the significance of the values chosen or entered on this component prior to entering values through absence self service.

Related Links

Defining Self Service Absence Rules by Country

Understanding the Absence Request Transactions

Using self service transactions, employees and managers can submit absence requests, forecast absence entitlement balances, and carry out other common tasks using the Self Service pages in Absence Management.

Self service options differ for employees and managers.

Role	***Absence Self Service Options***
Employee	• Add, edit, forecast, submit, save for later and cancel absence request. **Note:** You can only edit, forecast, and cancel absence requests entered using absence self-service. • View absence requests details, with their approval status. • View absence events entered by the Absence Administrator. • View absence events entered in Timesheets. • View absence entitlement balances for the current period. • View absence entitlement balances as of a future date. • View the employee's monthly schedule for past and future months.
Manager	• Perform all employee self service absence functions on behalf of direct reports. • View a list of absence requests for direct reports. • Forecast an absence request in order to approve it (optional). • Approve, deny, or push back absence requests submitted by direct reports. • View a monthly calendar for direct reports.

Related Links

Entering, Updating, and Voiding Absence Events

Managing Employee Self Service Pages

This topic provides an overview of the procedures for accessing and using employee self service absence pages and discusses how to:

- Request absences.
- View the monthly schedule.
- View absence balances.
- View absence request history.
- View absence request details.
- Forecast absence entitlement balances.

- Select a job title.

Self Service Pages Used by Employees to Manage Absence Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Request Absence	GP_ABS_SS_REQUEST	Self Service, Time Reporting, Report Time, Absence Request, Request Absence	Request absence based on the start date of the absence event.
Monthly Schedule	SCH_EE_MONTHLY	Click the View Monthly Schedule link on the Absence Request page.	Employees view their schedule for a one month period for any past or future month.
View Absence Balances	GP_ABS_SS_BALANCES	Self Service, Time Reporting, View Time, Absence Balances, View Absence Balances	This page includes links to pages to request absence, view absence requests, view monthly schedule, and forecast balances.
Absence Request History	GP_ABS_SS_REQHIST	• Self Service, Time Reporting, View Time, Absence Request History, Absence Request History • Click the View Absence Requests History link on the Absence Request page or the View Absence Balances page.	View processed or pending absence events based on the specified date range.
Request Details	GP_ABS_SS_REQSTAT	Click the link for the absence in the Absence Name column on the Absence Request History page.	View details for a specific absence request.
Forecast Balance	GP_ABS_SS_FCST_BAL	Click the Forecast Balance link on the View Absence Balances page.	Run the online forecasting process for future absence entitlement balances based on date, absence type and absence name.
Select Job	HCM_JOB_SELECT	Self Service, Time Reporting, Report Time, Absence Request <any employee self service absence process>	Employees with multiple jobs use this page to select the job for which they want to enter or review a self service absence transaction.

Request Absence Page

Use the Request Absence page (GP_ABS_SS_REQUEST) to request absence based on the start date of the absence event.

Navigation

Self Service, Time Reporting, Report Time, Absence Request, Request Absence

Image: Request Absence page (1 of 2)

This example illustrates the fields and controls on the Request Absence page (1 of 2).

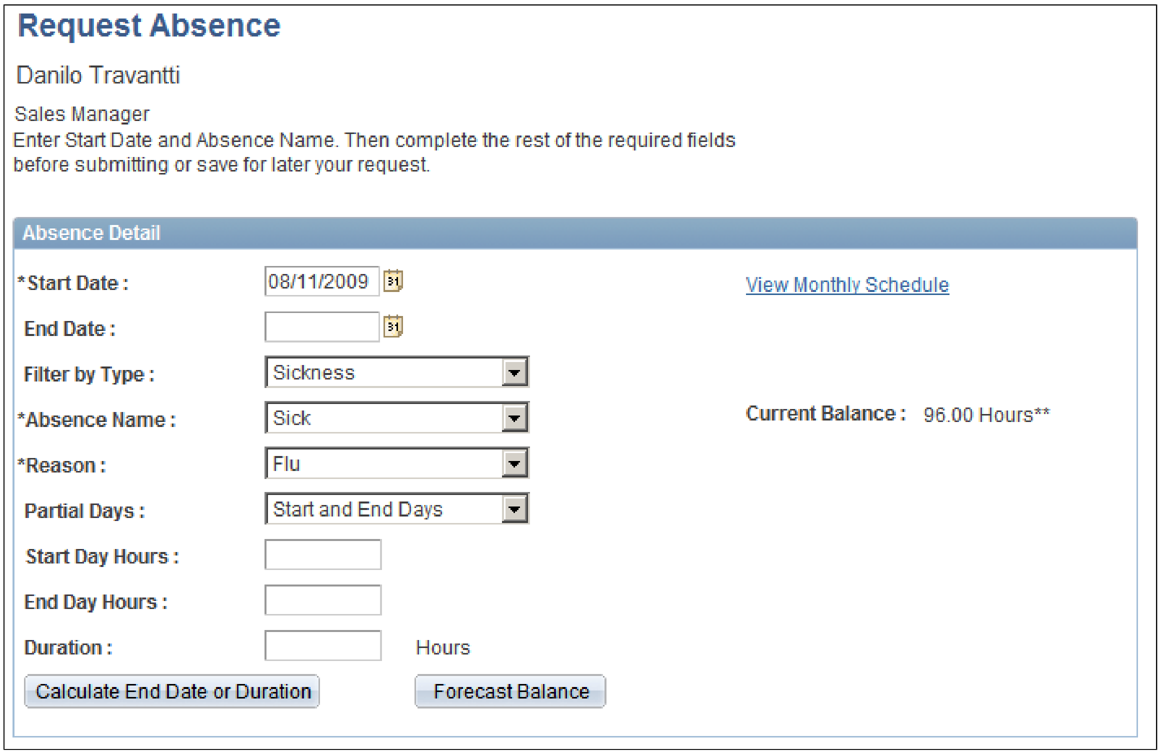
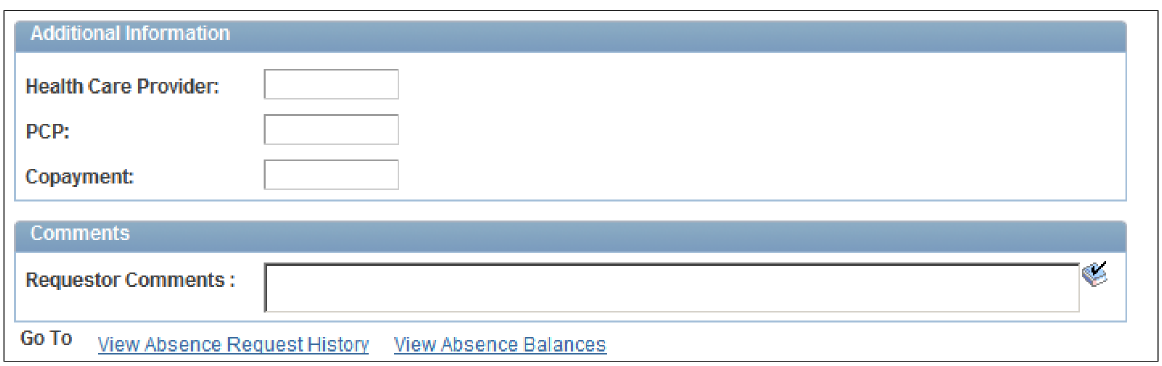


Image: Request Absence page (2 of 2)

This example illustrates the fields and controls on the Request Absence page (2 of 2).



The Request Absence page consists of three group boxes: Absence Detail, Additional Information, and Comments. The available fields in the Additional Information group box depend on how your organization sets up self service for Absence Management.

Absence Detail

Start Date

Select the first day of the absence event. The field option defaults to the current date. If there's a break in the absence, enter each event separately. For example, if you're out sick for two days, return to work for three days, and are out sick again, enter two absence events. If the absence includes a weekend (say, Thursday to Monday), enter one absence event.

End Date

Select the last day of the absence event. If you leave this field empty and the Calculate End Date option on the Country Take (setup) page is selected, the system automatically determines the end date based on the begin date, duration, and partial days options.

See Defining Self Service Absence Rules by Country.

Original Start Date

Select the original start date of the absence event. Enter a date if the absence has legal or payment implications based on the original start date of the absence.

This field is visible when Display Original Begin Date is selected on the Absences page of the Country Take component.

For example, an employee has a leg injury. He reports an absence from January 3, 2005 to January 7, 2005. The employee starts to feel better and returns to work. Later, he has a relapse and has to take two more days of absence starting on January 17, 2005 to January 18, 2005. The original begin date for the second absence should be January 3, 2005. The system can link the two events and treat the event as a single one in terms of eligibility or a minimum waiting period.

Note: Careful consideration is needed when enabling this field in self-service. Incorrect data entered in this field might lead to incorrect eligibility calculations and payment for one or more events.

See Defining Self Service Absence Rules by Country.

Filter by Type

Select the absence type. The selection you make in this field will limit or filter the selections available in the Absence Name field.

Absence Name

Select the absence name from the available options. The options available depend on the selection in the Filter by Type field, the absence takes that are enabled in the Country Take setup, and the elements for which the employee is eligible.

After you select entries in the above fields, the system refreshes the page with additional fields.

Note: If you decide to change the Absence Name previously selected, the system will display a warning that all your existing absence data will be lost.

See Element EligibilityElement Resolution.

Reason

Select a reason from the available options. The reasons available depend on your selections in the previous fields. Absence reasons are linked to the Absence Name (Take) through the Absence Take Type.

See Defining Absence Types and Reasons.

Partial Days

Specify which days of the absence event are partial days.

If the Calculate End Date or Duration option is enabled on the Absence (setup) page, and the Unit Type is *Hours*, the system does consider any partial hours or half-day entries that are entered in this group box when it calculates the end date or duration.

For example, an employee has a work schedule of 8 hours per day from Monday through Friday. The employee reports an absence from Monday, January 8, 2007 through Wednesday, January 10, 2007. Then employee takes a half day off on Monday and full days off for the rest of the absence.

Example 1: The Country Take set up is defined as follows:

- Unit Type = *Hours.*
- Allow Partial Days = Selected.
- Partial Days = *Partial Hours.*

With these settings, to correctly enter the absence data the employee should report:

- Start Date = *January 8, 2007.*
- End Date = *January 10, 2007.*
- Partial Days = *Start Day Only.*
- Start Day Hours = *4.*

Example 2: The Country Take set up is defined as follows:

- Unit Type = *Hours.*
- Allow Partial Days = Selected.
- Partial Days = *Half Days.*

With these settings, to correctly enter the absence data the employee should report:

- Start Date = *January 8, 2007.*
- End Date = *January 10, 2007.*
- Partial Days = *Start Day Only.*
- Start Day is Half Day = Selected.

Note: Data that you enter in the following fields is used in the absence calculation process only if the data is referenced by your absence formulas.

The available options in the Partial Days field when the absence is calculated in days include:

- *All Days*
- *End Day Only*
- *None*
- *Start Day Only*
- *Start and End Days*

Start Day Hours, End Day Hours, and All Day Hours

Enter the number of hours the payee was absent for the first day of the absence, the last day of the absence, or all days of the absence, respectively.

All Days are Half Days, Start Day is Half Day, and End Day is Half Day

Select to specify which days of the absence event are half days.

Important! These fields are not available unless the Country Take enables you to specify partial days on the Request Absence page.

Start Day Start Time, End Day Start Time, and All Days Start Time

Enter the scheduled start time for the specified workday or workdays.

Important! These fields are not available unless you have installed Oracle Workforce Scheduling and you select an option in the Partial Days field.

See "Understanding Integration with Oracle Workforce Scheduling *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Start Day End Time, End Day End Time, and All Days End Time

Enter the scheduled end time for the specified workday or workdays.

Important! These fields are not available unless you have installed Oracle Workforce Scheduling and you select an option in the Partial Days field.

See "Understanding Integration with Oracle Workforce Scheduling *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Duration

Enter Duration by days or hours. You do not have to enter Duration if the Calculate Duration is enabled on the Absence (setup) page). The system calculates the duration of the absence in hours or days when you click the Calculate Duration button.

The behavior of this field depends on the settings on the Absence (setup) page. The value is automatically calculated if the Calculate End Date option is selected.

- If the absence is measured in days or hours, the system automatically calculates the duration when you enter the begin date and end date.
- If you want to calculate the end date based on a duration, then the system calculates the end date when you enter the begin date and duration and you click the Calculate End Date button.

Calculate End Date or Duration

Click this button to have the system calculate the end date of an absence event based on the entries in the Start Date and Duration fields, or to calculate the Duration based on entries in the Start Date and End Date fields.

Note: If you selected to calculate end date and duration in the Country Take — Date Rules page, then you had to indicate which field to recalculate when both fields contain values. Hence if the user entered values for duration and end date and clicks Calculate End Date or Duration button, one of the fields will be recalculated.

Forecast Balance

Click this button to run the online absence forecasting process for the type of absence take selected for this absence request. This button will appear only for those absence names that require forecasting. After the forecasting process is completed, the page will display the *Forecast Returned Value* and *Status* and a link View Forecast Details to access the list of the forecast balance details.

Note: The system does not automatically save your absence request before initiating the Forecasting process. Although the system prompts you to save before leaving the page, it is not necessary to save your forecast information before or after the Forecasting process.

Save for Later

This option allows the employee to save the absence event information for later review and editing, and does not generate workflow for the approvals process.

Submit

This option saves the information and generates the workflow approval process that routes the request to one or more managers whose roles are defined in workflow to enable them to approve, deny, or push back the absence request to the previous approval level with comments. The push back is often used by approvers to suggest absence request revision or to obtain additional information.

Cancel

This option is available only for requests that have been saved for later or that were pushed back from the approver.

Depending on the Country Take setup, when you click Cancel the application either physically deletes the request from request and workflow records, or sets the status of the request to cancelled.

Additional Information

The fields that appear in this group box depend on how Absence Management is configured during the implementation process.

Comments

The Requestor Comments field enables the employee to enter free form text related to the absence request that becomes part of the record and is visible throughout the approval process. Comments display on the Absence Details page.

Monthly Schedule Page

Use the Monthly Schedule page (SCH_EE_MONTHLY) to employees view their schedule for a one month period for any past or future month.

Navigation

Click the View Monthly Schedule link on the Absence Request page.

Image: Monthly Schedule page (part 1 of 2)

This example illustrates the fields and controls on the Monthly Schedule page (part 1 of 2).

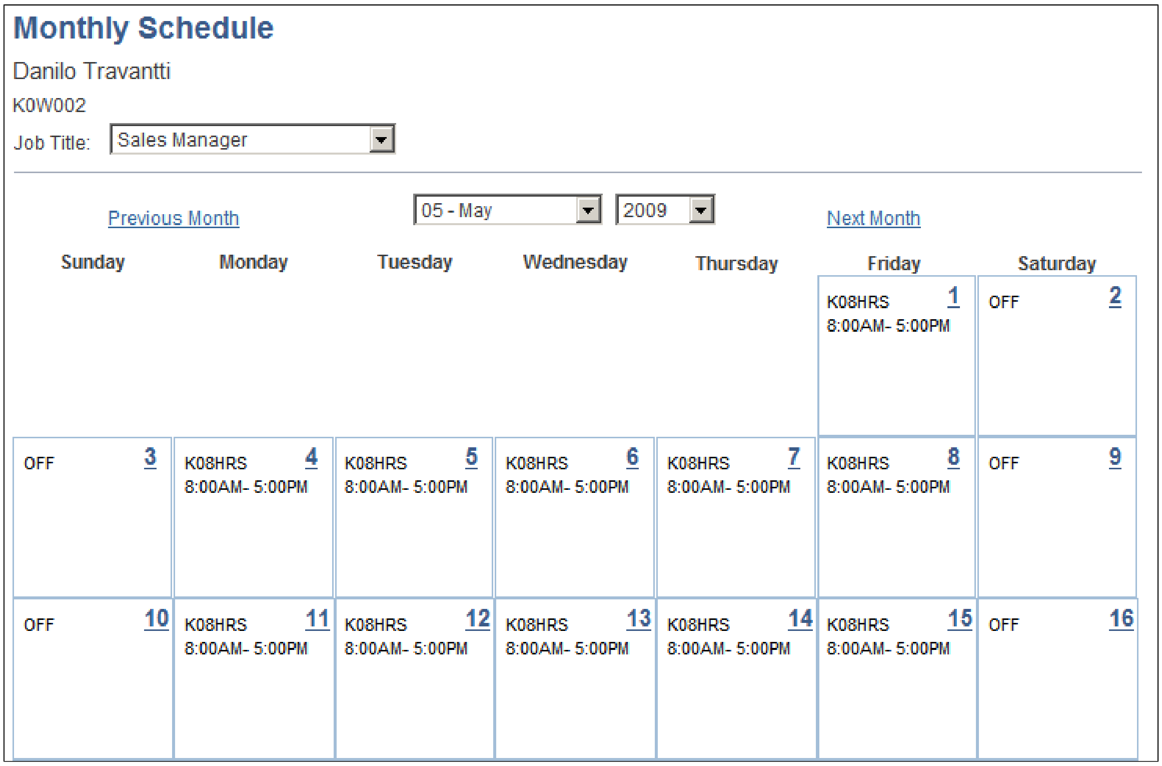
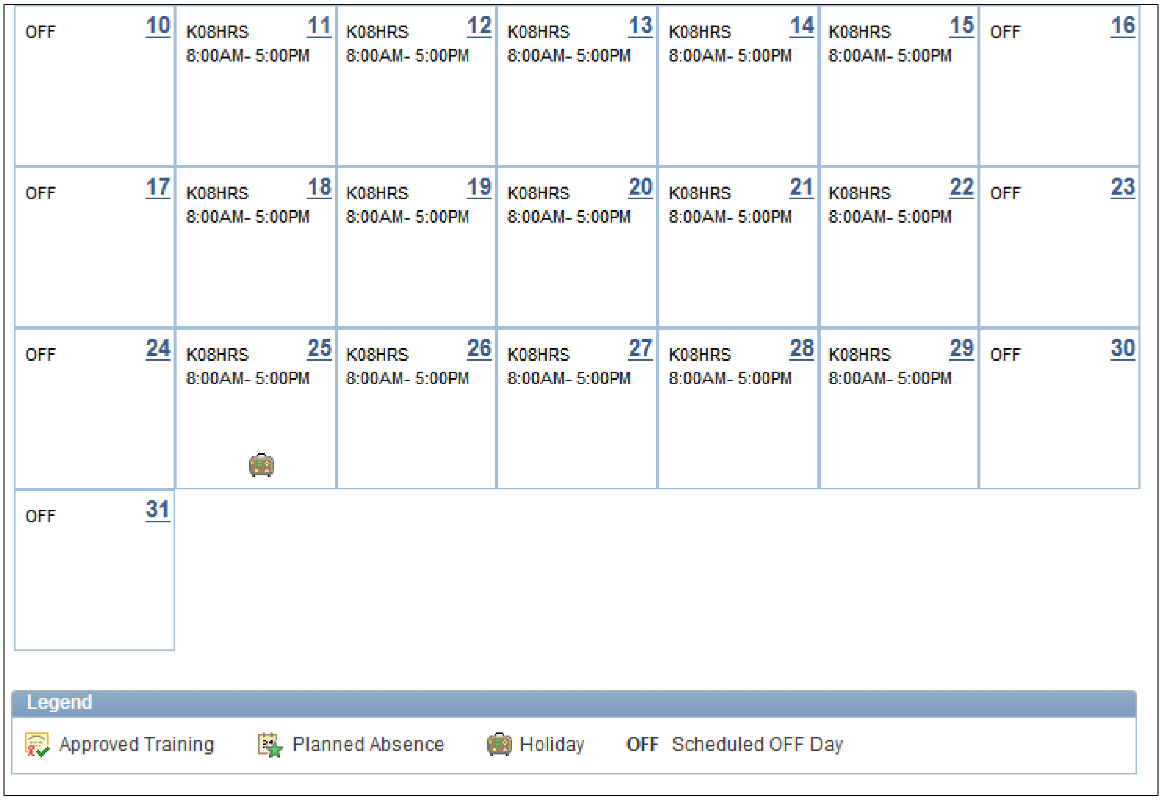


Image: Monthly Schedule page (part 2 of 2)

This example illustrates the fields and controls on the Monthly Schedule page (part 2 of 2).



Employees can view their schedule for one month in the future or past by using the available options in the month and year fields. Click the Previous Month and Next Month buttons to view previous or subsequent months, respectively.

For employees with multiple jobs, the Select Job Title field appears on this page.

See Select Job Page.

View Absence Balances Page

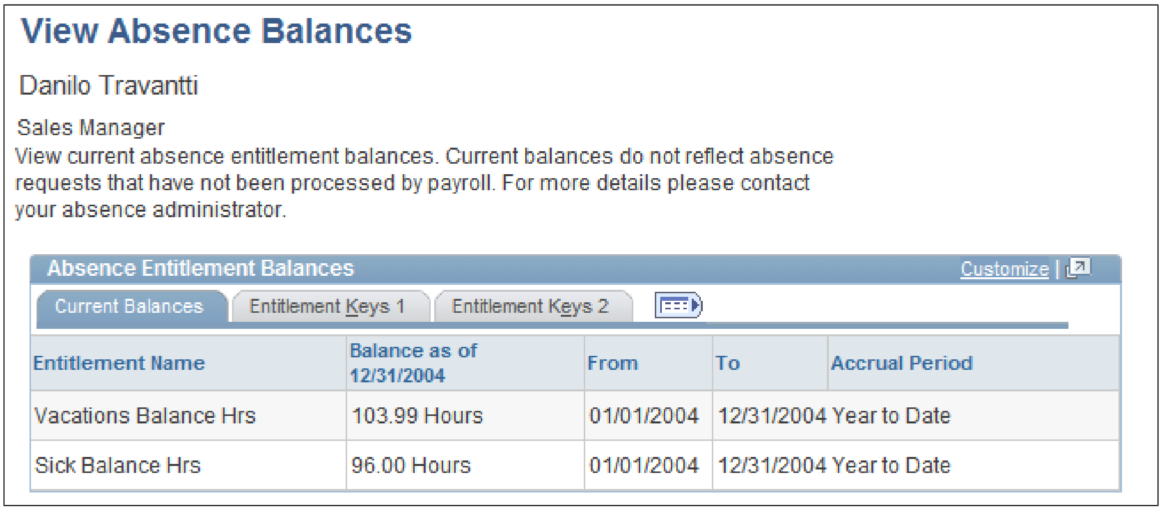
Use the View Absence Balances page (GP_ABS_SS_BALANCES) to this page includes links to pages to request absence, view absence requests, view monthly schedule, and forecast balances.

Navigation

Self Service, Time Reporting, View Time, Absence Balances, View Absence Balances

Image: View Absence Balances page

This example illustrates the fields and controls on the View Absence Balances page.



This page contains the following links:

- Forecast Balance.

  This is a link to the Forecast Balance page.

- Return to Job List.

  This is a link to the Select Job page for employees with multiple jobs.

  See Select Job Page.

Note: If you are integrating with Time and Labor, absence entitlement balances can be viewed on the Timesheet page.

See "Reporting Time *(PeopleSoft HCM 9.2: Time and Labor)*".

Related Links

Request Absence Page
Absence Request History Page
View Absence Balances Page

Absence Request History Page

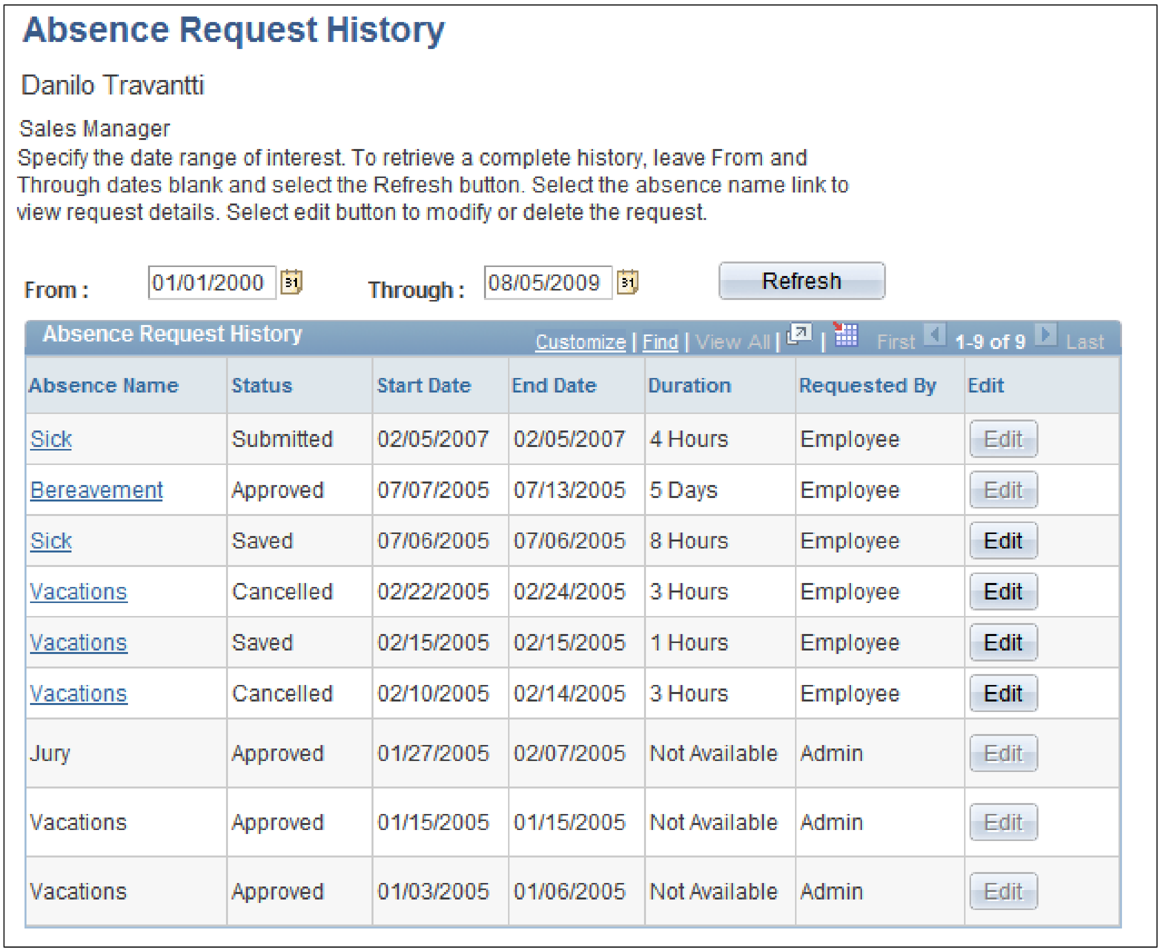
Use the Absence Request History page (GP_ABS_SS_REQHIST) to view processed or pending absence events based on the specified date range.

Navigation

- Self Service, Time Reporting, View Time, Absence Request History, Absence Request History
- Click the View Absence Requests History link on the Absence Request page or the View Absence Balances page.

Image: Absence Request History page

This example illustrates the fields and controls on the Absence Request History page.


Absence Request History

Danilo Travantti

Sales Manager

Specify the date range of interest. To retrieve a complete history, leave From and Through dates blank and select the Refresh button. Select the absence name link to view request details. Select edit button to modify or delete the request.

From : 01/01/2000 Through : 08/05/2009 Refresh

Absence Request History Customize | Find | View All | First 1-9 of 9 Last

Absence Name	Status	Start Date	End Date	Duration	Requested By	Edit
Sick	Submitted	02/05/2007	02/05/2007	4 Hours	Employee	Edit
Bereavement	Approved	07/07/2005	07/13/2005	5 Days	Employee	Edit
Sick	Saved	07/06/2005	07/06/2005	8 Hours	Employee	Edit
Vacations	Cancelled	02/22/2005	02/24/2005	3 Hours	Employee	Edit
Vacations	Saved	02/15/2005	02/15/2005	1 Hours	Employee	Edit
Vacations	Cancelled	02/10/2005	02/14/2005	3 Hours	Employee	Edit
Jury	Approved	01/27/2005	02/07/2005	Not Available	Admin	Edit
Vacations	Approved	01/15/2005	01/15/2005	Not Available	Admin	Edit
Vacations	Approved	01/03/2005	01/06/2005	Not Available	Admin	Edit

This page displays all absence requests for the employee. Absence requests entered by the employee contain a link in the Absence Name column. Absences that are entered by the Absence Administrator through the Absence Event Entry component do not have a link in the Absence Name column, nor a Status and Duration value. The employee can edit absences requests that are saved, but not yet submitted, by clicking the Edit button in the Edit column. The employee also can edit absence requests that have been, cancelled or denied by clicking the Edit button.

Absence requests or any absence entered or modified via Timesheets or by the Absence Administrator using the Absence Event Entry component can not be edited in Absence self-service.

Note: If the absence was requested by the manager as an employee, the Requested By column will display Manager.

From and Through	The user can display absence request that fall within a specified date range by entering dates in the From: and Through: fields.

If the employee enters a date in only the From field, the system displays absence requests that have a Start Date equal to or after the specified date. Alternatively, if the employee enters a date only in the Through: field, the system displays absence requests that have an End Date equal to or prior to the specified date. If no date is entered in either field, the system displays all absence requests for the employee.

The From and Through date range is determined by the Default History Date Range values entered on the History Grid page of the Country component. If the Default History Date Range has not been set up, the system will use the defaults of current date – 90 days for the From date field and current date + 90 days for the Through date field.

See Defining Self Service Absence Rules by Country.

Refresh — Click the Refresh button after entering, changing, or removing dates in the From: and Through: fields.

Edit — This button is available for absence requests with a status of saved, cancelled, or denied. When you click this button the Request Absence page is opened.

See Request Absence Page.

The Absence Request History group box contains Absence Name, Status, Start Date, End Date, Duration, and Requested by. You can sort the rows by any of these criteria by clicking the column heading.

Note: The system calculates and stores duration values for absence requests entered through Absence self-service or Timesheets only. The system does not calculate or store absence duration for absences entered or modified through other online pages such Absence Event Entry or through Component Interface.

Related Links

Entering, Updating, and Voiding Absence Events

Request Details Page

Use the Request Details page (GP_ABS_SS_REQSTAT) to view details for a specific absence request.

Navigation

Click the link for the absence in the Absence Name column on the Absence Request History page.

Image: Request Details page (1 of 2)

This example illustrates the fields and controls on the Request Details page (1 of 2).

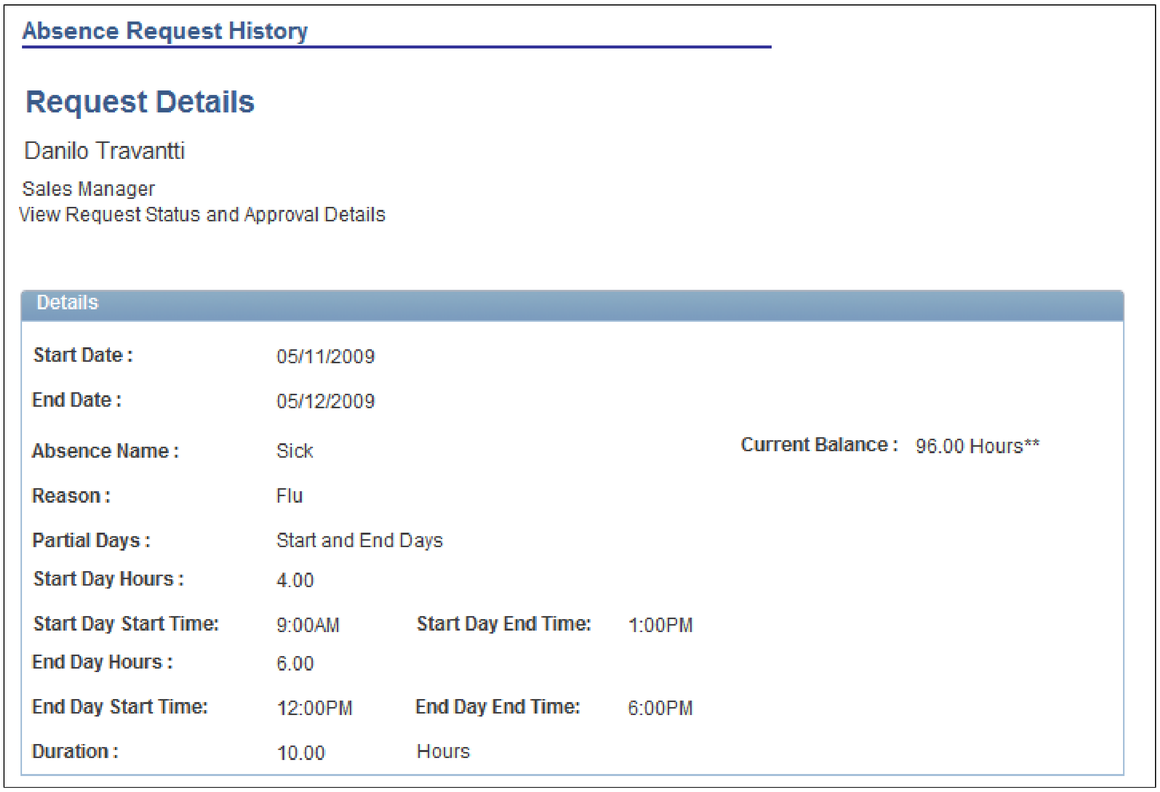
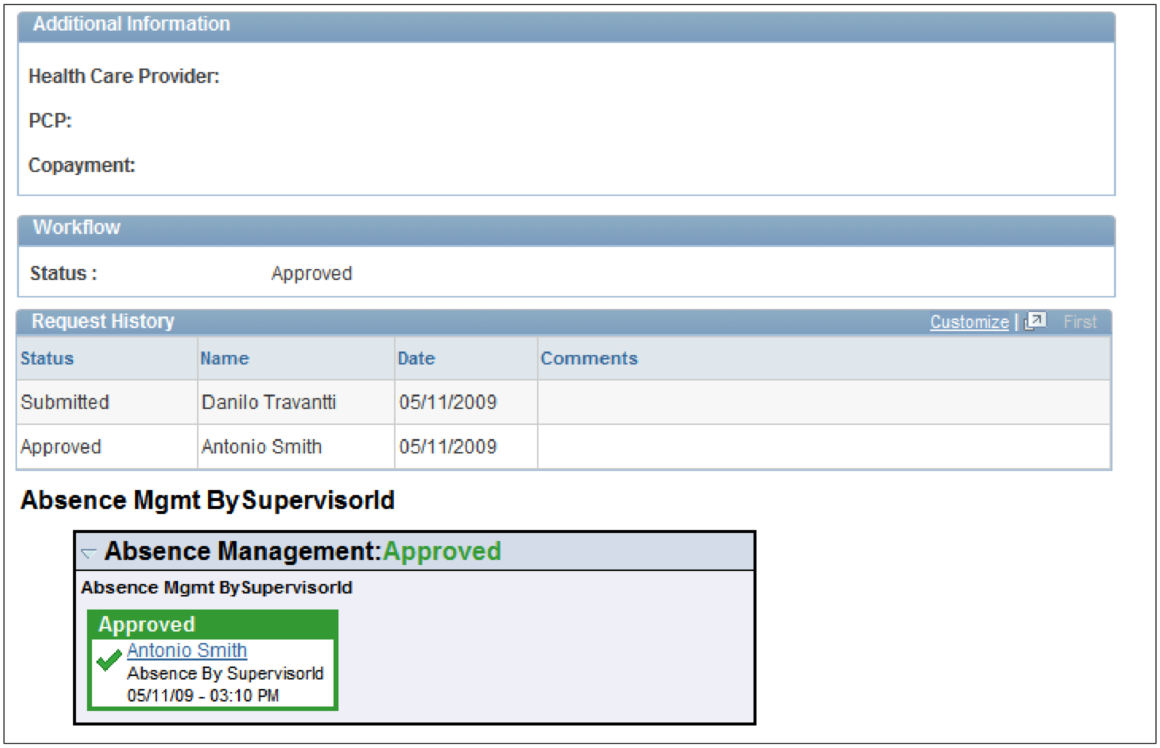


Image: Request Details page (2 of 2)

This example illustrates the fields and controls on the Request Details page (2 of 2).



The page displays information about the selected absence.

Note: If the absence was requested by the manager as an employee, then in the Request History section the employee's name will be displayed in the Name field.

Note: The approval path map and details is only displayed in the Absence Self Service applications. This path and details are not displayed in Timesheets self-service.

Forecast Balance Page

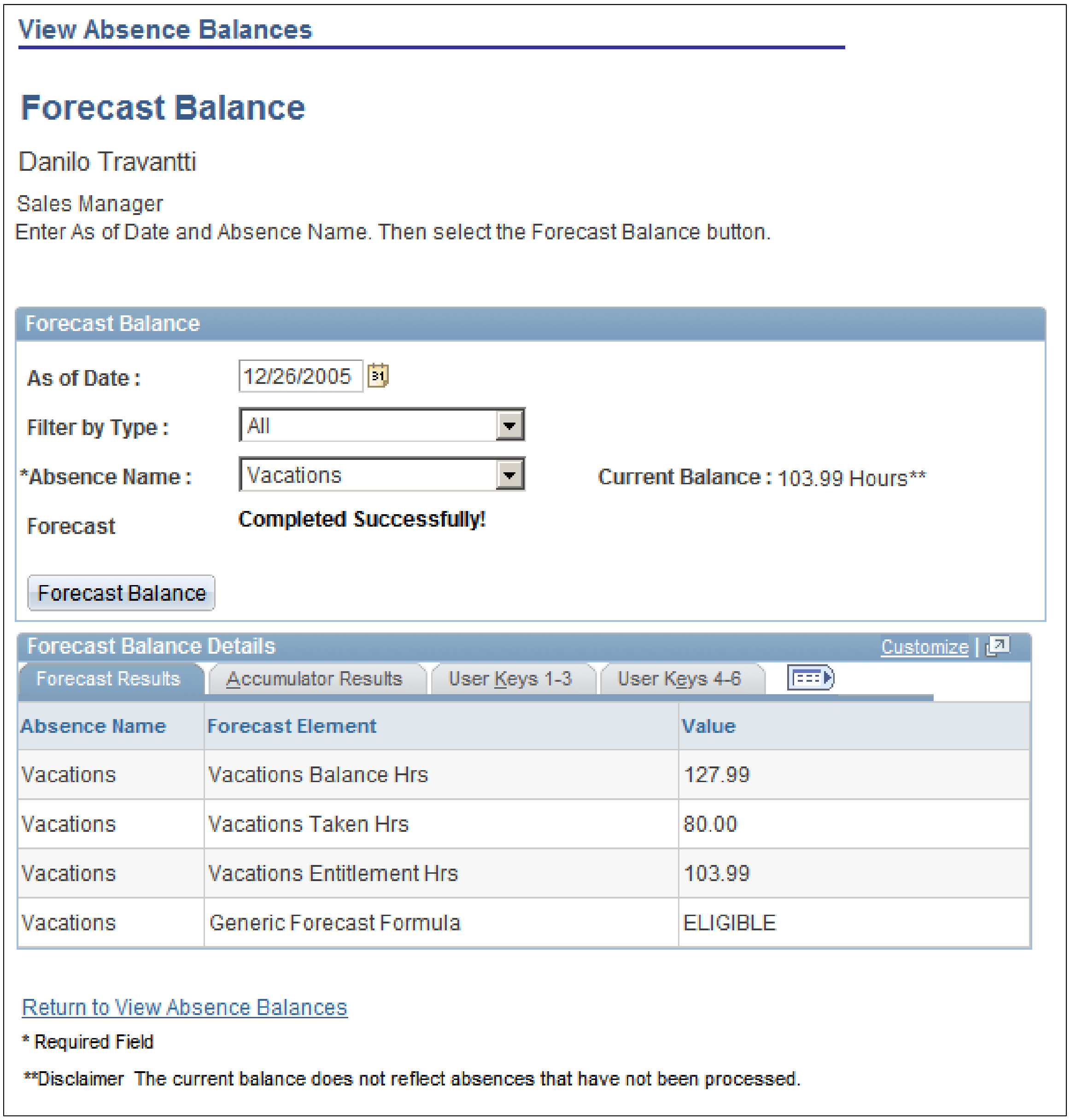
Use the Forecast Balance page (GP_ABS_SS_FCST_BAL) to run the online forecasting process for future absence entitlement balances based on date, absence type and absence name.

Navigation

Click the Forecast Balance link on the View Absence Balances page.

Image: Forecast Balance page

This example illustrates the fields and controls on the Forecast Balance page.



This page enables the employee to run the online absence entitlement balance forecast process, and to view entitlement balances as of a future date, by absence type, and absence name.

As of Date	Enter a future date that the system will use to calculate the balance.
Filter by Type	Select the absence type. The selection you make in this field will limit or filter the selections available in the Absence Name field.
Absence Name	Select the absence name from the available options in the field.

Note: The user must make an entry in this field in order for the system to display the Forecast Balance button.

Forecast Balance

Click to run the online absence balance forecasting process. When the process is completed, the forecasted absence entitlement balances appear in the Forecast Balance Details group box.

Note: The system does not automatically save your absence request before initiating the Forecasting process. Although the system prompts you to save before leaving the page, it is not necessary to save your forecast information before or after the Forecasting process.

Select Job Page

Employees with multiple jobs must select the job for which they are entering or reviewing self service absence transactions. The following page is an example of an employee with multiple jobs that is entering an absence request. A similar page with a modified title appears whenever this employee initiates any absence self service transaction.

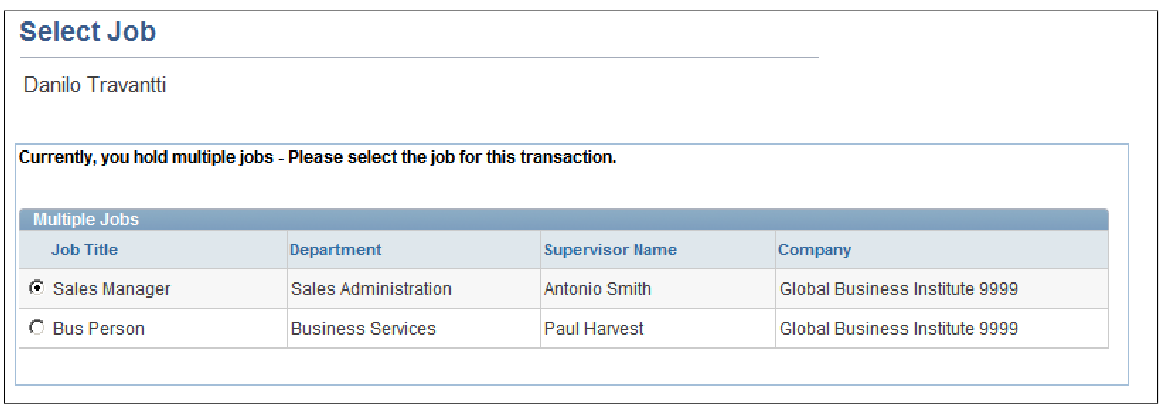
Use the Select Job page (HCM_JOB_SELECT) to employees with multiple jobs use this page to select the job for which they want to enter or review a self service absence transaction.

Navigation

Self Service, Time Reporting, Report Time, Absence Request <any employee self service absence process>

Image: Select Job page for an absence request

This example illustrates the fields and controls on the Select Job page for an absence request.



After the employee selects the job title, the processes are identical to those discussed in the previous sections.

Managing Employee Absences Through Time and Labor Self Service

Employees are able to enter absences and view absence entitlement balances using self service pages in Absence Management. Absence management self service pages are discussed in detail in this documentation.

Note: Absences entered through Time and Labor Timesheets are referred to as Absences or Absence Events. Absences entered through Absence Management are referred to as Absences or Absence Requests.

If you are integrating with Time and Labor you can enter absence events through the Timesheet page. Also, on this page you can view absence entitlement balances to ensure you have enough entitlement balance prior to entering the absence.

The following steps, completed during implementation, enable employees to access the Timesheet page to enter absences or view entitlement balances:

1. Ensure that Absence Management and Time and Labor are selected on the Installation Table.

   See "Setting Up Implementation Defaults *(PeopleSoft HCM 9.2: Application Fundamentals)*".

2. On the Absences page of the Country Take component ensure you have allowed entry in Time and Labor for the absence take elements you want to enter on the Timesheet page.

   See Understanding Self Service Setup Tasks.

3. Complete the required framework setup in Time and Labor in order to access employees via Timesheet.

   See "Understanding the Time Reporting Process *(PeopleSoft HCM 9.2: Time and Labor)*".

The following steps discuss how an employee enters absences and views entitlement balances on the Timesheet page:

1. Access the Timesheet page by navigating to Self Service, Time Reporting, Report Time, Timesheet . Select the Time reporting period to work with.
2. Click the Absence Event - click to view link to add, edit, forecast or submit an absence request. For example to add a absence follow these steps:

   a. Click Add Absence Event to add a new event or Edit to modify an existing event. You can add or edit only one single event at a time

   b. Enter the Start Date and End Date if End Date field has been enabled for the absence. If end date field is left blank and is not calculated using Calculate End Date functionality, then it will be defaulted to Start Date when saving or submitting the event.

      See Defining Self Service Absence Rules by Country.

   c. Select the Absence Name from the available options. Valid values are the ones previously defined in the Country Take configuration page and based on the eligibility of the employee as of Time Reporting Period Start Date.

See Defining Self Service Absence Rules by Country, Element Eligibility, and Element Resolution.

d. If during implementation you have selected to display a reason on the Absences page of the Country Take component, enter the reason for the absence (if required).

e. Click the Details link to access the Absence Request Detail (GP_ABS_SS_REQUEST) page to enter absence details and other information that might be required. Once all details are entered click OK to return to the Timesheet page.

Note: If an absence requires more information than the fields available in the Timesheet Absence grid (Start Date, End Date, Absence Name and Reason) then the system will automatically open the Absence Event Details page.

See Request Absence Page.

f. Optionally, forecast an absence balance before saving and submitting.

g. Save the absence for later or submit the absence for approval. You are able to delete a new absence before it has been saved or submitted, or cancel it after the absence has been saved or submitted.

3. Click the Balances - click to view link to view absence entitlement balances.

Note: The balances reflect the balances as of the last absence run.

Related Links

"Reporting Time *(PeopleSoft HCM 9.2: Time and Labor)*"

Managing Manager Self Service Pages

This topic provides an overview of the procedures for accessing and using manager self service absence pages and discusses how to:

- Request absence on behalf of an employee.
- View employee absence requests.
- View absence balances.
- Approve and deny absence requests.
- Review absence request history.

Self Service Pages Used by Managers to Manage Absence Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Request Absence	HR_DR_ADDL_INFO	Manager Self Service, Time Management, Report Time, Absence Request, Request Absence	Enter a date to use to generate a list of direct reports in which to request absences.
Request Absence	HR_DR_SELECT_EMPS	Click Continue on the Request Absence (HR_DR_ADDL_INFO) page.	View a list of direct reports, select an employee, and enter an absence request on behalf of the employee.
Absence Request History	HR_DR_ADDL_INFO	Manager Self Service, Time Management, View Time, Absence Request History, Absence Request History	Enter a date to use a list of direct reports in which to view absence history.
Absence Request History	HR_DR_SELECT_EMPS	Click Continue on the Absence Request History (HR_DR_ADDL_INFO) page.	Managers use this page to view absence request information for direct and indirect reports.
View Absence Balances	HR_DR_ADDL_INFO	Manager Self Service, Time Management, View Time, Absence Balances, View Absence Balances	Enter a date to generate a list of direct reports in which to view absence balances.
View Absence Balances	HR_DR_SELECT_EMPS	Click Continue on the View Absence Balance (HR_DR_ADDL_INFO) page.	View absence balances for direct reports.
Forecast Balance	GP_ABS_SS_FCST_BAL	Manager Self Service, View Time, Absence Balances Select the employee Name, click the Forecast Balance link on the View Absence Balances page.	View the results of the Absence Forecasting process.
Absence Requests	GP_SS_ABS_APPR	Manager Self Service, Time Management, Approve Time and Exceptions, Absence Requests, Absence Requests	Select the absence request to approve or deny.
Request Details	GP_ABS_SS_REQUEST	Manager Self Service, Time Management, Approve Time and Exceptions, Absence Requests Click the employee Name link for the request on the Absence Requests page.	Used by the manager to approve, deny, or push back an employee absence request to the previous approval level.

Page Name	Definition Name	Navigation	Usage
Absence Request History	GP_ABS_SS_REQHIST	Manager Self Service, Time Management, View Time, Absence Request History, Absence Request History Select the employee Name on the Absence Request History page.	Review the absence request history for an employee for a specified time range of dates.

Request Absence Page

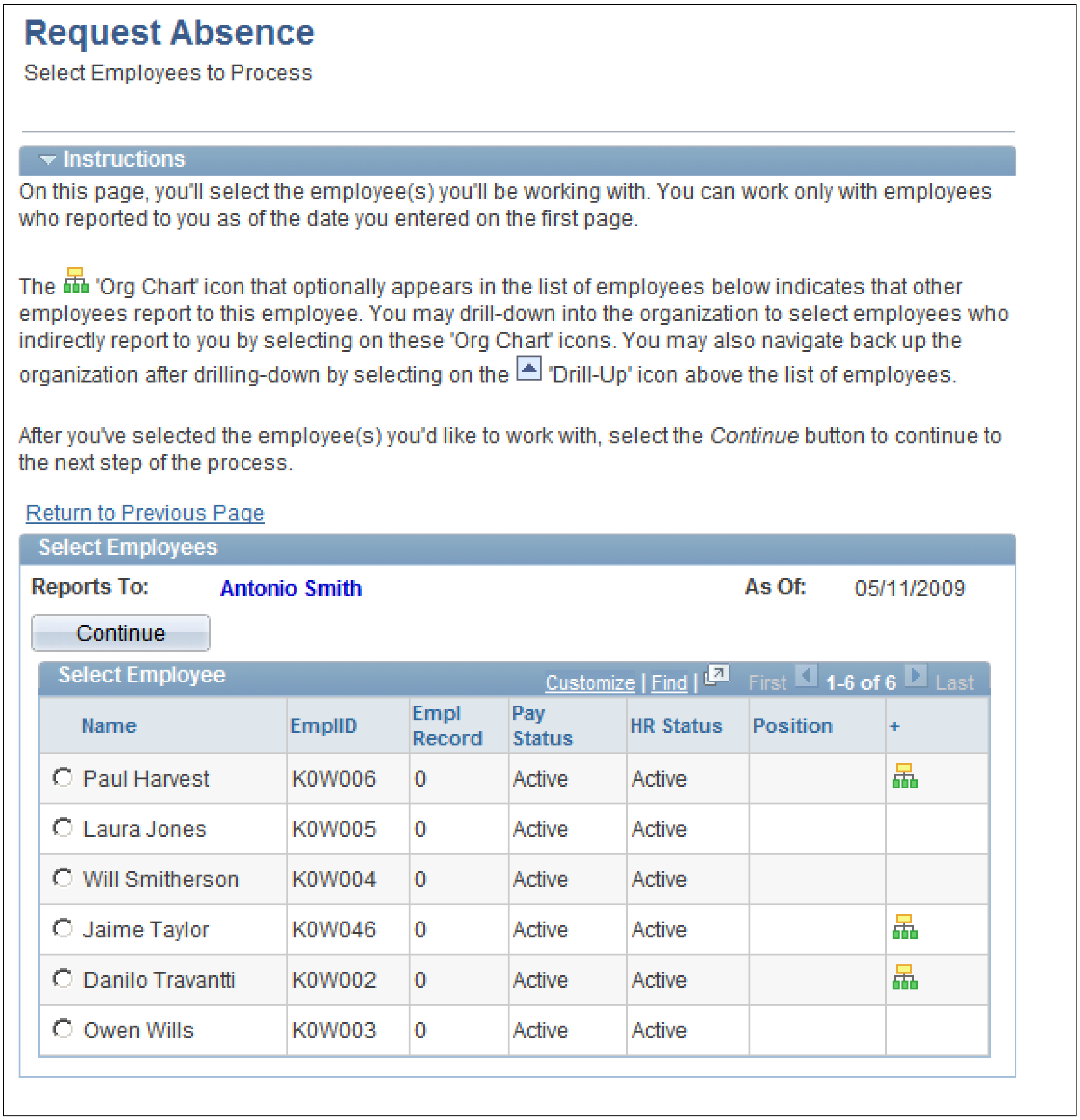
Use the Request Absence page (HR_DR_ADDL_INFO) to enter a date to use to generate a list of direct reports in which to request absences.

Navigation

Manager Self Service, Time Management, Report Time, Absence Request, Request Absence

Image: Request Absence page

This example illustrates the fields and controls on the Request Absence page.



The system displays the Request Absence page for a manager's direct report when the manager clicks the link with that person's name. The system displays a page that is similar to the employee self service Request Absence page.

Access the Request Absence page (click Continue on the Request Absence (HR_DR_ADDL_INFO) page).

Image: Request Absence (part 1 of 2)

This example illustrates the fields and controls on the Request Absence (part 1 of 2).

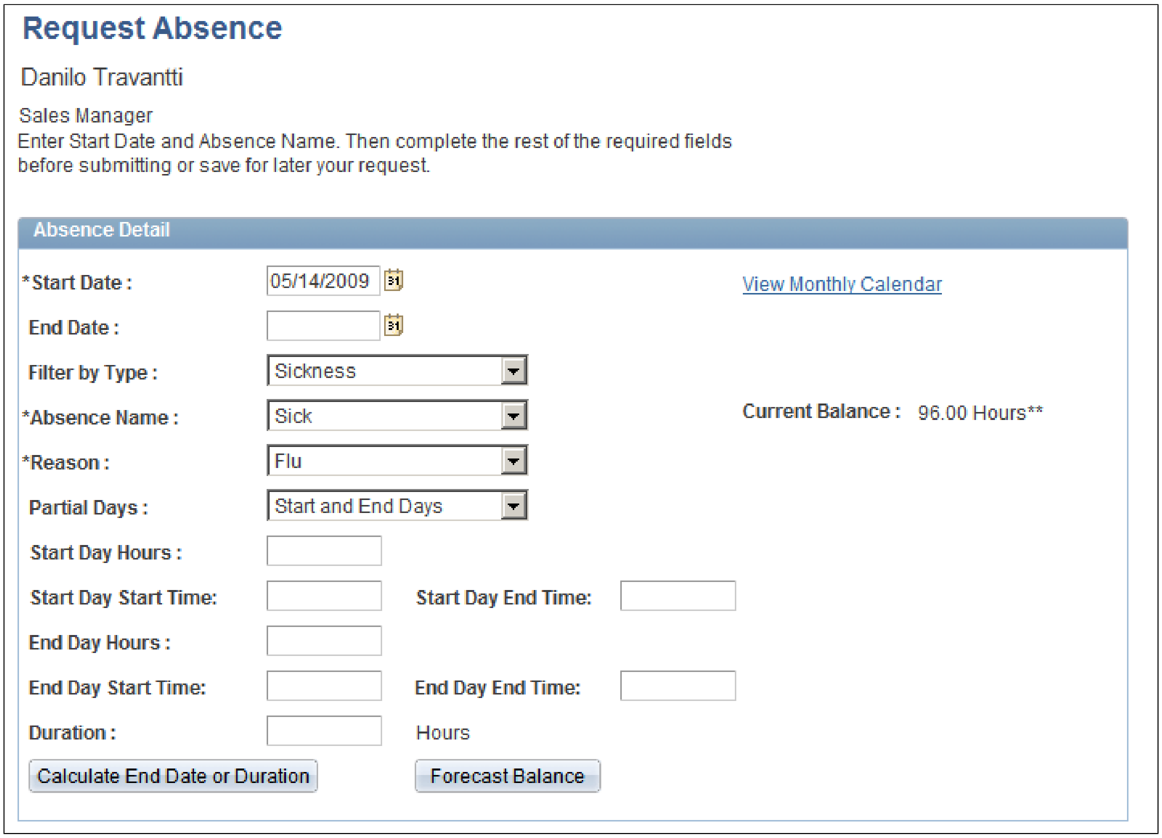
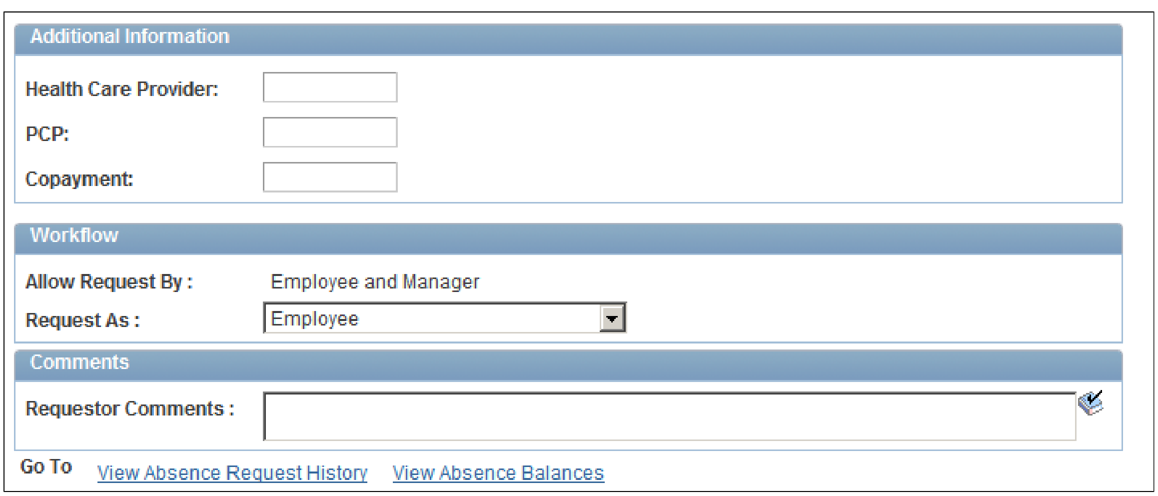


Image: Request Absence (part 2 of 2)

This example illustrates the fields and controls on the Request Absence (part 2 of 2).



The system displays a page that is similar to the employee self service Request Absence page, with the exception that it contains a Workflow section and a Direct Reports link to return to the View Employee Absence Requests page.

Note: When you click on the View Monthly Calendar link, you may receive a Time and Labor calendar error if your installed Time and Labor template does not include the End Date value specified on the Request Absence page.

Workflow

Allow Request By

Indicates that the *Manager* or the *Employee and Manager* can enter the take.

Request As

Determines whether the request is entered as an *Employee* or as a *Manager*.

When the manager requests absences for an employee they can request the time as the employee or the manager. If the manager selects to request the time as the *Employee* the request will be automatically approved, if there are no other approvers in the approval path. The manager will receive an approval confirmation page when clicking Submit. If the manager selects to request the time as the *Manager* the request will be sent to the manager's next level of approval, and therefore the manager will receive a regular Submit confirmation page after clicking Submit.

The Request As available options will be editable if the Country Take setup field Override Request As on the Absences page is selected. Otherwise this field will be grayed out and defaulted from the setup.

Related Links

Request Absence Page

Absence Request History Page

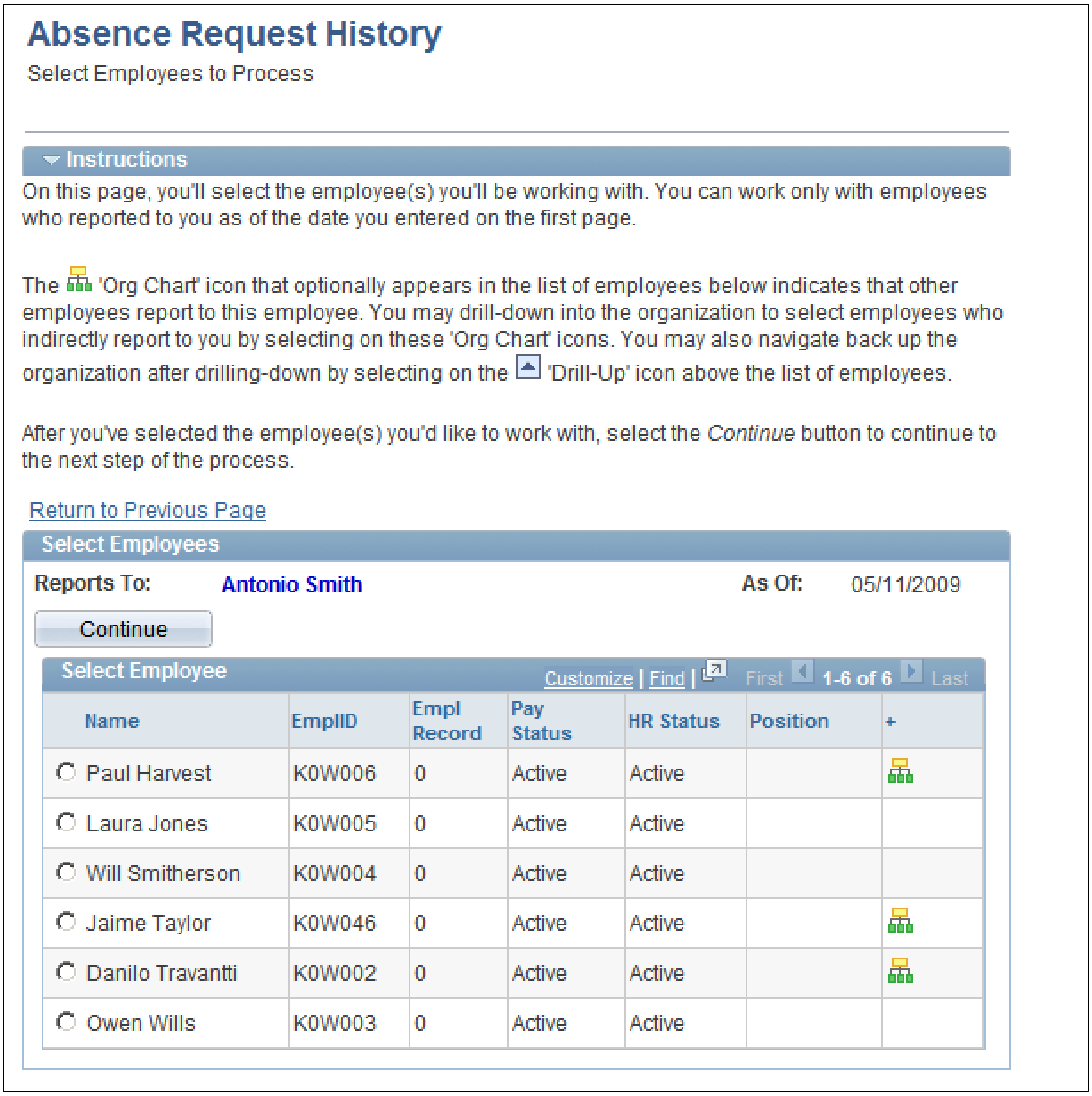
Use the Absence Request History page (HR_DR_ADDL_INFO) to enter a date to use a list of direct reports in which to view absence history.

Navigation

Manager Self Service, Time Management, View Time, Absence Request History, Absence Request History

Image: Absence Request History page

This example illustrates the fields and controls on the Absence Request History page.



The direct reports for the manager are displayed on this page. Click the column titles for Name, EmplID,Pay Status, and HR Status to sort the list by these criteria. The last column may contain an button that indicates the employee has direct reports. Click the button to display a list of individuals that report to that employee. These employees are referred to as the manager's indirect reports.

Click the Continue button to search for direct reports by first name.

As Of:	The system displays the direct reports for the manager as of this date.

The system displays the Absence Request History page for a manager's direct report when the manager selects the person's name. The system displays a page that is identical to the employee self service Absence Request History page, with the exception that it contains a Direct Reports link to return to the Absence Request History page.

Related Links

Absence Request History Page

View Absence Balances Page

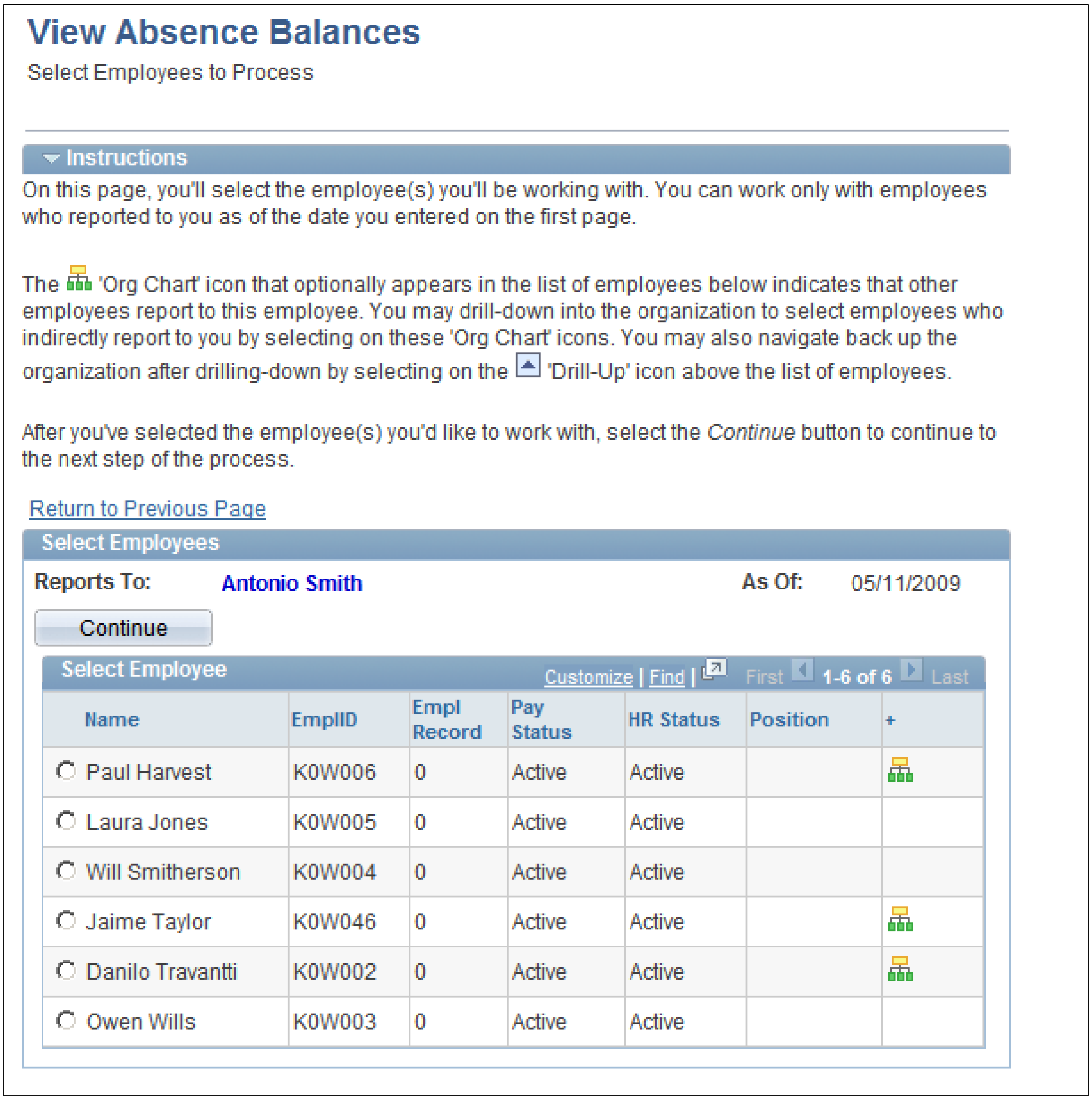
Use the View Absence Balances page (HR_DR_ADDL_INFO) to enter a date to generate a list of direct reports in which to view absence balances.

Navigation

Manager Self Service, Time Management, View Time, Absence Balances, View Absence Balances

Image: View Absence Balances page

This example illustrates the fields and controls on the View Absence Balances page.



This page functions in the same manner as the Absence Request History page. From this page, when the manager selects the employee name the system displays the View Absence Balances page for that employee. This page is identical to the employee self service View Absence Balances page, and includes the Forecast Balances link to enable the manager to forecast absence entitlement balances for a future date for direct reports. The one exception to the similarity of the employee self service page and the manager self service page is that the manager has a Direct Reports link to return to the View Absence Balances—Select Employee page.

Related Links

View Absence Balances Page

Absence Requests Page

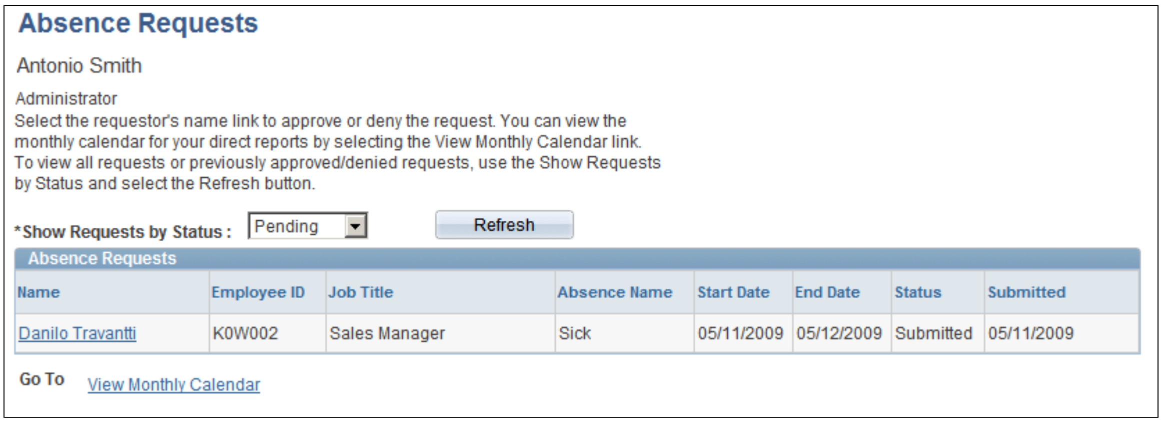
Use the Absence Requests page (GP_SS_ABS_APPR) to select the absence request to approve or deny.

Navigation

Manager Self Service, Time Management, Approve Time and Exceptions, Absence Requests, Absence Requests

Image: Absence Requests page

This example illustrates the fields and controls on the Absence Requests page.



Show Requests by Status

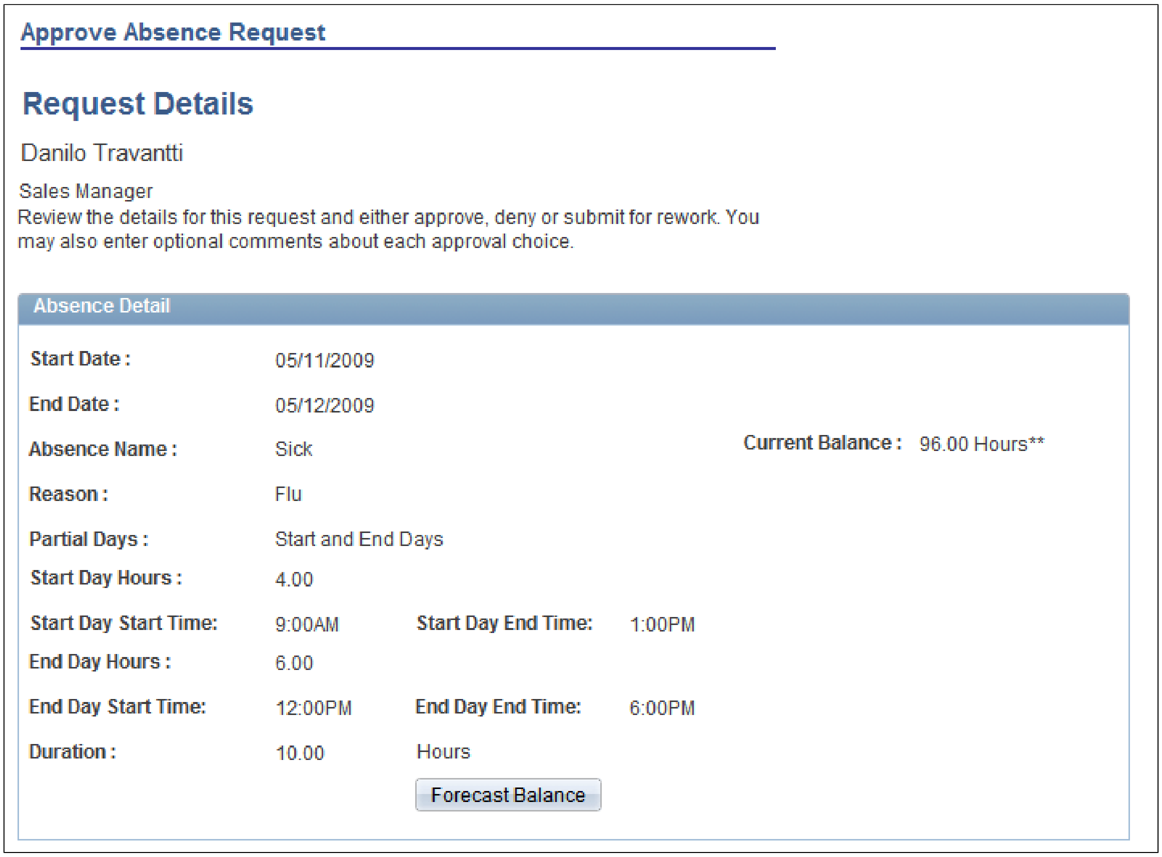
The following options are available in this field:

- *Approved.*
- *Denied*(Displays absence with status Denied and Push Back).
- *Pending (default)* (Displays absence with status Pending and In Approval Process).

After selecting the status, click the Refresh button to display all requests. Click the employee name link to work with the request. The Request Details page appears:

Image: Request Details page (1 of 2)

This example illustrates the fields and controls on the Request Details page (1 of 2).



Approve Absence Request

Request Details

Danilo Travantti

Sales Manager

Review the details for this request and either approve, deny or submit for rework. You may also enter optional comments about each approval choice.

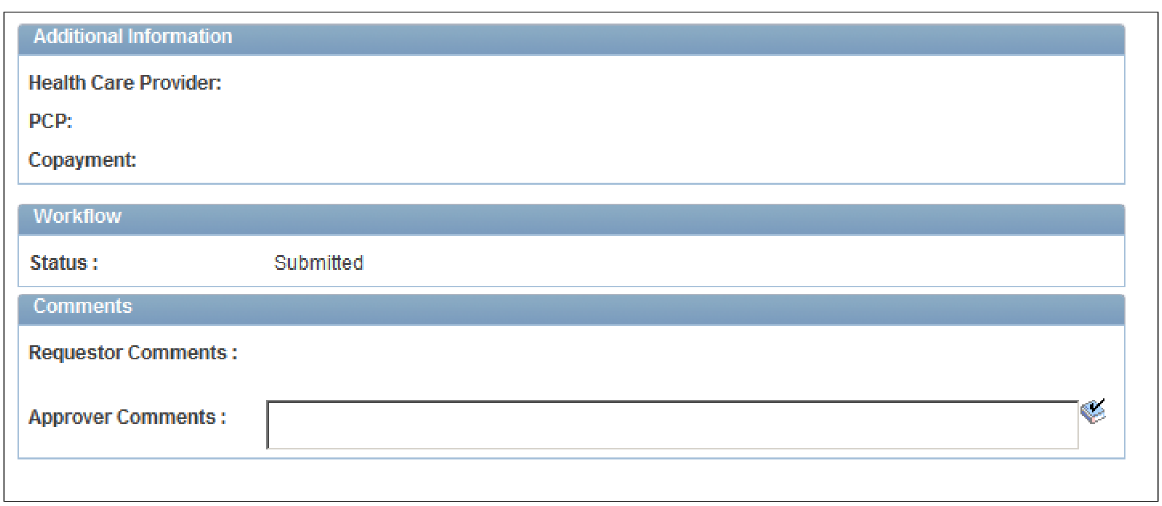
Absence Detail

Start Date :	05/11/2009		
End Date :	05/12/2009		
Absence Name :	Sick	Current Balance :	96.00 Hours**
Reason :	Flu		
Partial Days :	Start and End Days		
Start Day Hours :	4.00		
Start Day Start Time:	9:00AM	Start Day End Time:	1:00PM
End Day Hours :	6.00		
End Day Start Time:	12:00PM	End Day End Time:	6:00PM
Duration :	10.00	Hours	

Forecast Balance

Image: Request Details page (2 of 2)

This example illustrates the fields and controls on the Request Details page (2 of 2).



Additional Information

Health Care Provider:

PCP:

Copayment:

Workflow

Status : Submitted

Comments

Requestor Comments :

Approver Comments :

The manager uses this page to approve, deny, or push back the request to the previous step in the approval process (by clicking the Push Back button). The approver can include suggested changes or other comments by entering information in the Approver Comments field.

After clicking one of these buttons, the approver must confirm the selection on a confirmation page:

Image: Approval Confirmation page

This example illustrates the fields and controls on the Approval Confirmation page.

After clicking the Yes button the system re-displays the Absence Requests page so that the manager can continue to work with other absence requests. Clicking the No button displays the Request Details page.

If the manager clicks the Push Back button, the system displays the Push Back Confirmation page.

Absence Request History Page

Use the Absence Request History page (GP_ABS_SS_REQHIST) to review the absence request history for an employee for a specified time range of dates.

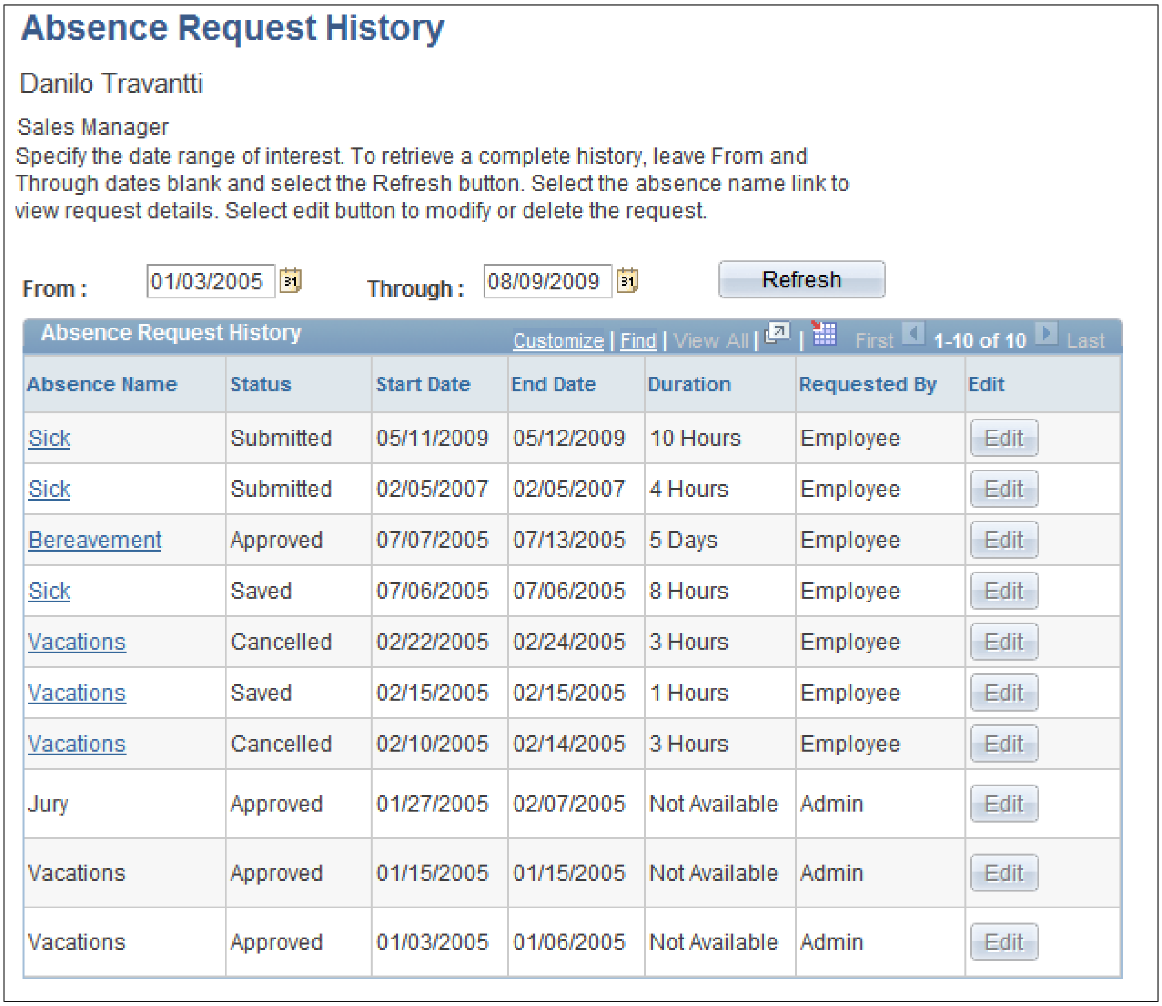
Navigation

Manager Self Service, Time Management, View Time, Absence Request History, Absence Request History

Select the employee Name on the Absence Request History page.

Image: Absence Request History page

This example illustrates the fields and controls on the Absence Request History page.



Absence Request History

Danilo Travantti

Sales Manager

Specify the date range of interest. To retrieve a complete history, leave From and Through dates blank and select the Refresh button. Select the absence name link to view request details. Select edit button to modify or delete the request.

From : 01/03/2005 Through : 08/09/2009 Refresh

Absence Request History Customize | Find | View All | First 1-10 of 10 Last

Absence Name	Status	Start Date	End Date	Duration	Requested By	Edit
Sick	Submitted	05/11/2009	05/12/2009	10 Hours	Employee	Edit
Sick	Submitted	02/05/2007	02/05/2007	4 Hours	Employee	Edit
Bereavement	Approved	07/07/2005	07/13/2005	5 Days	Employee	Edit
Sick	Saved	07/06/2005	07/06/2005	8 Hours	Employee	Edit
Vacations	Cancelled	02/22/2005	02/24/2005	3 Hours	Employee	Edit
Vacations	Saved	02/15/2005	02/15/2005	1 Hours	Employee	Edit
Vacations	Cancelled	02/10/2005	02/14/2005	3 Hours	Employee	Edit
Jury	Approved	01/27/2005	02/07/2005	Not Available	Admin	Edit
Vacations	Approved	01/15/2005	01/15/2005	Not Available	Admin	Edit
Vacations	Approved	01/03/2005	01/06/2005	Not Available	Admin	Edit

The system displays a page that is identical to the employee self service Absence Request History page, with the exception that it contains a Direct Reports link to return to the Absence Request History page.

Clicking the link in the Absence Name column displays the Approval Details page. Links appear only for absence requests that the manager has worked with using the self service pages. Absence requests or any absence entered or modified via Timesheets or by the Absence Administrator using the Event Entry component can not be edited in Absence self-service.

Note: The system calculates and stores duration values for absence requests entered through self-service only. The system does not calculate or store absence duration for absences entered through other online pages such as Absence Event Entry or via Component Interface.

From and Through	The user can display absence request history that falls within a specified date range by entering dates in the From and Through fields. If the manager enters a date in only the From field, the system displays absence requests that have a Start Date equal to or after the specified date. Alternatively, if the manager enters a date only in the Through field, the system displays absence requests that have an End Date equal to or prior to the specified date. If no date is entered in either field, the system displays all absence requests for the employee.

Related Links

Entering, Updating, and Voiding Absence Events

Managing Manager Absences Through Time and Labor Self Service

Managers are able to enter absences and view absence entitlement balances for their employees using self service pages in Absence Management. Absence management manager self service pages are discussed in detail in this documentation.

If you are integrating with Time and Labor managers can enter absence requests for their employees through the Timesheet page. Also, on this page you can view absence entitlement balances to ensure the employee has enough entitlement balance prior to entering the absence.

The following steps, completed during implementation, enable managers to access the Timesheet page to enter absences or view entitlement balances:

1. Ensure that Absence Management and Time and Labor are selected on the Installation Table.

   See "Setting Up Implementation Defaults *(PeopleSoft HCM 9.2: Application Fundamentals)*".

2. On the Absences page of the Country Take component ensure you have allowed entry in Time and Labor for the absence take elements you want to enter on the Timesheet page.

   See Understanding Self Service Setup Tasks.

The following steps discuss how a manager enters absences and views entitlement balances on the Timesheet page:

1. Access the Timesheet page by navigating to Manager Self Service, Time Management, Report Time, Timesheet .
2. Click Get Employees to get a list of all the employees for the manager.
3. Click the employee name that the manager wants to enter absences. This will open the Timesheet page for the employee chosen.
4. Click the Absence Event - click to view link to add, edit, forecast or submit an absence request. For example to add a request:

   a. Click Add Absence Event.

b. Enter the Start Date and End Date for the absence.

c. Select the Absence Name from the available options. Valid values are *Sick* and *Vacations*.

d. If during implementation you have selected to display a reason on the Absences page of the Country Take component, enter the reason for the absence.

e. Click the Details link to access the GP_ABS_SS_REQUEST page to enter absence details. Once all details are entered click OK to return to the Timesheet page.

Note: If an absence requires more information than the fields available in the Timesheet Absence grid (Start Date, End Date, Absence Name and Reason) then the system will automatically open the Absence Event Details page.

See Request Absence Page.

5. Click the Balances - click to view link to view absence entitlement balances.

Note: The balances reflect the balances as of the last absence run.

Related Links

"Reporting Time *(PeopleSoft HCM 9.2: Time and Labor)*"

Entering Absence Requests through Microsoft Outlook

This topic explains how to enter absence requests through an integration with the Microsoft Outlook calendar.

Understanding Absence Request Submission from Microsoft Outlook Calendar

Entering absence requests from the Outlook Calendar is as simple as entering a self-service absence request using PeopleSoft, but without having to log in to the system. With the integration, employees are able to request an absence from within their Outlook calendar and the absence will be automatically updated in PeopleSoft Absence Management. The user is then able to follow the approval process in Outlook.

The delivered integration uses single sign-on to authenticate and personalize the user experience by streamlining the type of absences that an employee is allowed to request and applies any edits according to the employee’s profile and role in the organization. All existing configuration and predefined edits defined in the PeopleSoft self-service configuration are used.

Note: Forecasting is not available when employees enter absence requests using Microsoft Outlook.

Setting Up the Integration between PeopleSoft Absence Management and Microsoft Outlook

There are some simple setup steps required before an employee can enter absence requests through Microsoft Outlook:

- Desktop Integration Setup
- Absence Management Setup
- Microsoft Outlook Setup

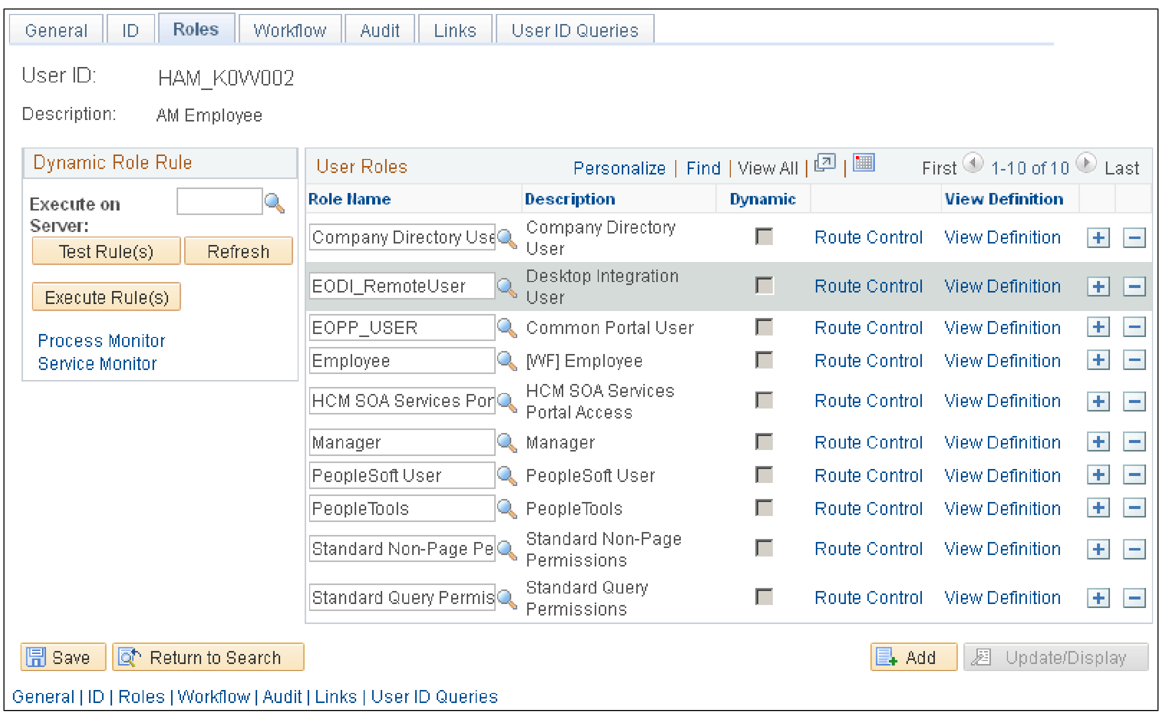
Desktop Integration Setup

The Desktop Integration feature provides seamless integration between Microsoft Outlook and your PeopleSoft Absence management. To enable the submission of absence requests through Microsoft Outlook, you must complete the following Desktop Integration steps:

1. Ensure User IDs of the employees that you want to be able to enter absence requests through Microsoft Outlook include the EODI_RemoteUser role.

   Image: Example of a User ID with the EODI_RemoteUser role

   This example displays the User Profiles - Roles page for a User ID with the EODI_RemoteUser role.



   For more information, see the product documentation for *PeopleTools: Security Administration*.

2. Oracle delivers and maintains the REQUESTABSENCE dynamic display definition. You can configure it to better meet your absence policy requirements.

   For more information, see "Defining Dynamic Displays *(PeopleSoft 9.2: Integration Interfaces)*".

Absence Management Setup

In PeopleSoft Absence Management, you need to define which absence takes can be requested when entering absence requests through Microsoft Outlook. You do this using the Allow in Desktop Integration check box on the Absences page of the Country Take component (GP_ABS_BAL_SS_DEF). See the documentation for the Absences Page.

Microsoft Outlook Setup

To set up Microsoft Outlook to integrate with PeopleSoft Absence Management, you must:

1. Install the Microsoft Outlook Add-in provided by Oracle.

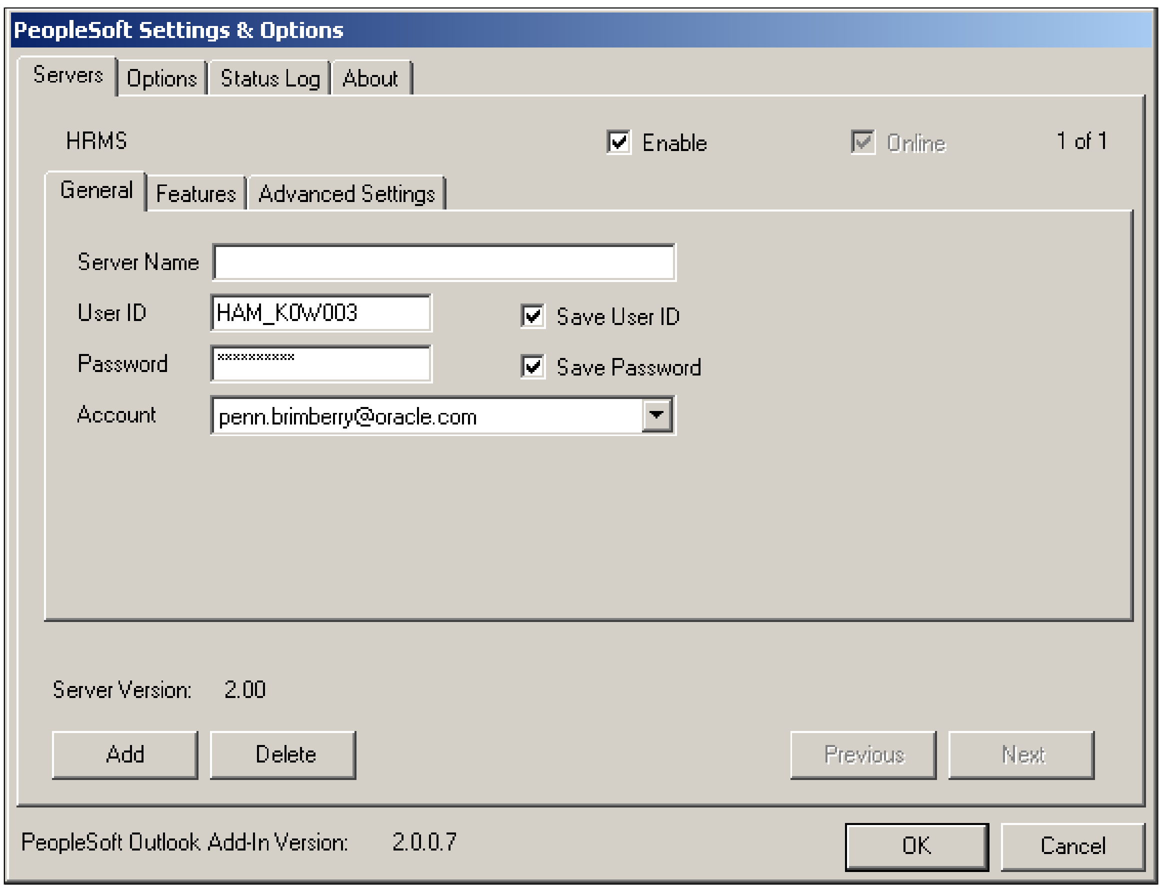
2. Configure your account and server settings in Microsoft Outlook:

   a. Navigate to PeopleSoft, Settings & Options to open the PeopleSoft Settings & Options window.

   b. On the General tab of the Servers tab, enter your account information.

   Image: PeopleSoft Settings & Options - General tab

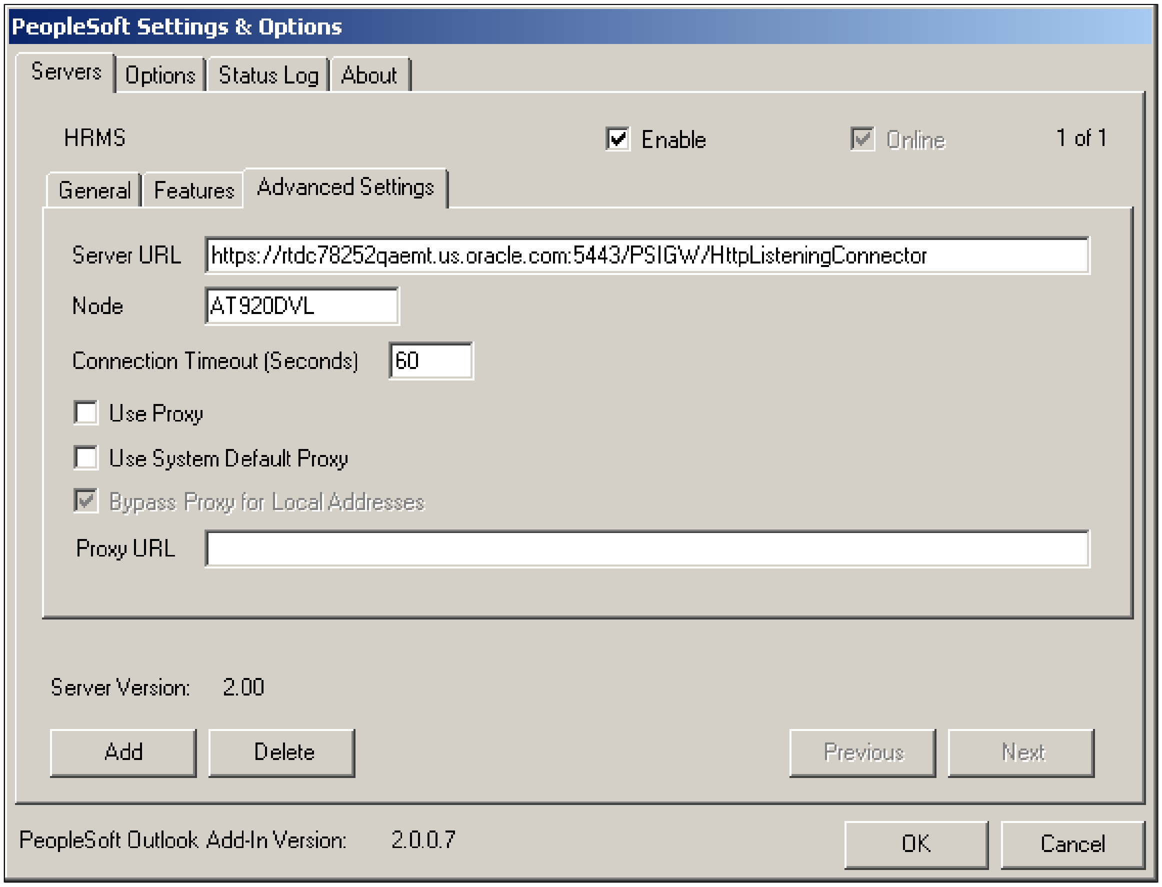
   This example illustrates the fields and controls on the PeopleSoft Settings & Options - General tab.



c. On the Advanced Settings tab of the Servers tab, enter your PeopleSoft Listening Connector URL and node information.

Image: PeopleSoft Settings & Options - Servers: Advanced Settings tab

This example illustrates the fields and controls on the PeopleSoft Settings & Options - Servers: Advanced Settings tab.



Server URL	When entering your PeopleSoft Listening Connector URL information, enter only the string that includes the database and port, for example *rtdc78252qaemt. us.oracle.com:5443*. The system adds *https://* at the beginning and appends */PSIGW/HttpListeningConnector* to the end when you tab out of the field.
Enable	Select this check box once you've completed entering the information on the Advanced Settings tab.
Online	The system selects this check box to indicate a successful connection to the PeopleSoft Absence Management database.

Related Links

"Defining Settings and Options *(PeopleSoft 9.2: Integration Interfaces)*"

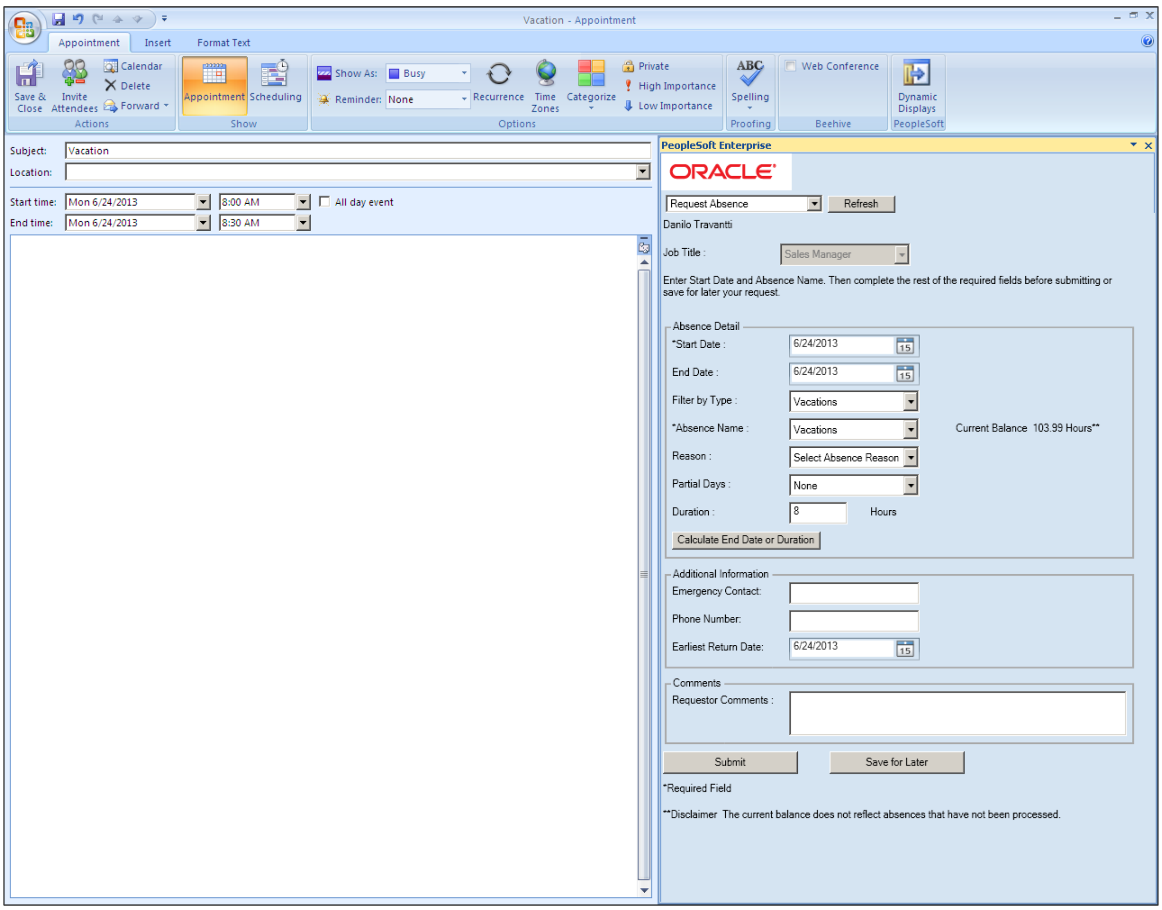
Entering Absence Requests using Microsoft Outlook

To enter an absence request in Microsoft Outlook:

1. Open the Calendar in Microsoft Outlook.
2. Click the New button to open a new event.
3. Click the Dynamic Displays button to open the PeopleSoft dynamic displays pane.
4. In the dynamic displays pane, enter an absence request just as you would using the Request Absences page.

Image: Example of an absence request in Microsoft Outlook

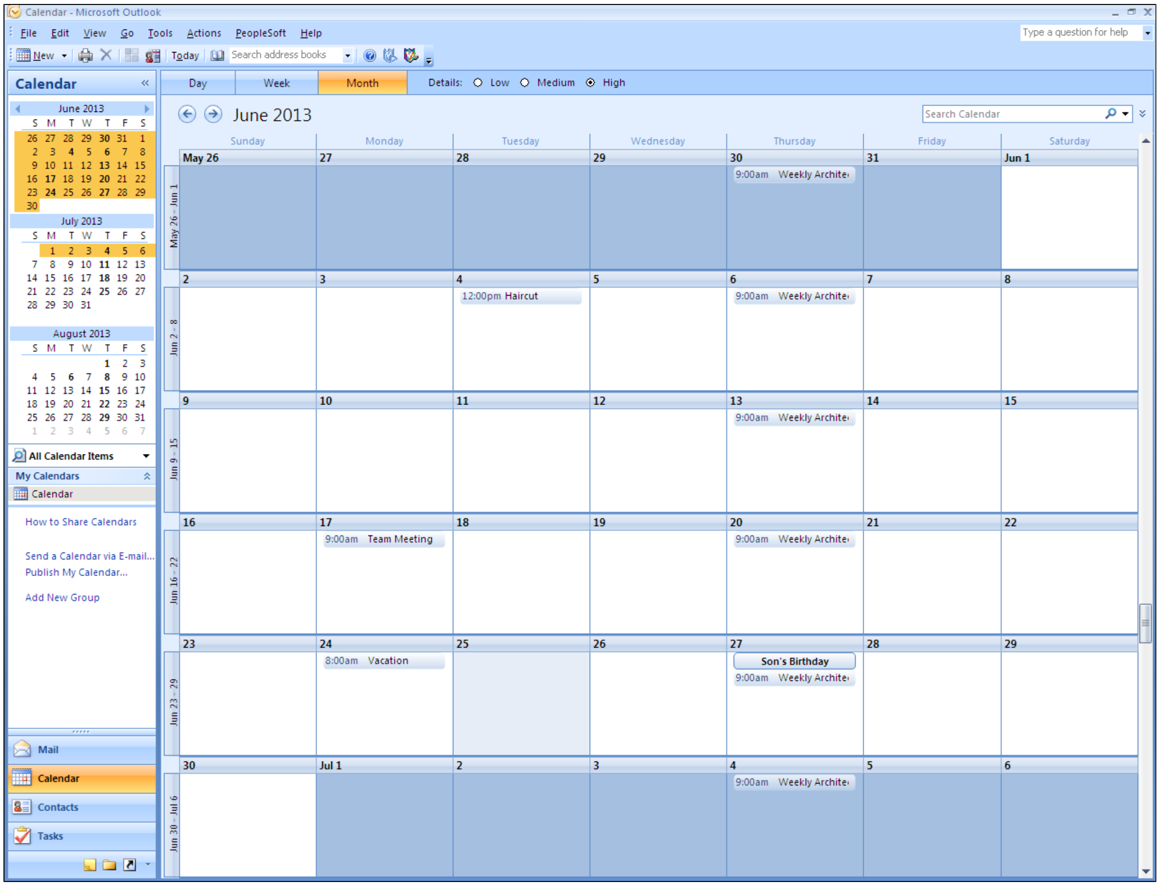
This is an example of an absence request in Microsoft Outlook.



5. Close the submitted absence request and view your Calendar for an entire month.

   Image: Monthly Calendar view in Microsoft Outlook

   This is an example of the monthly calendar view in Microsoft Outlook.

   The integration between Absence Management and Microsoft Outlook enables you to manage professional, personal and absence events all in one single calendar.

Related Links

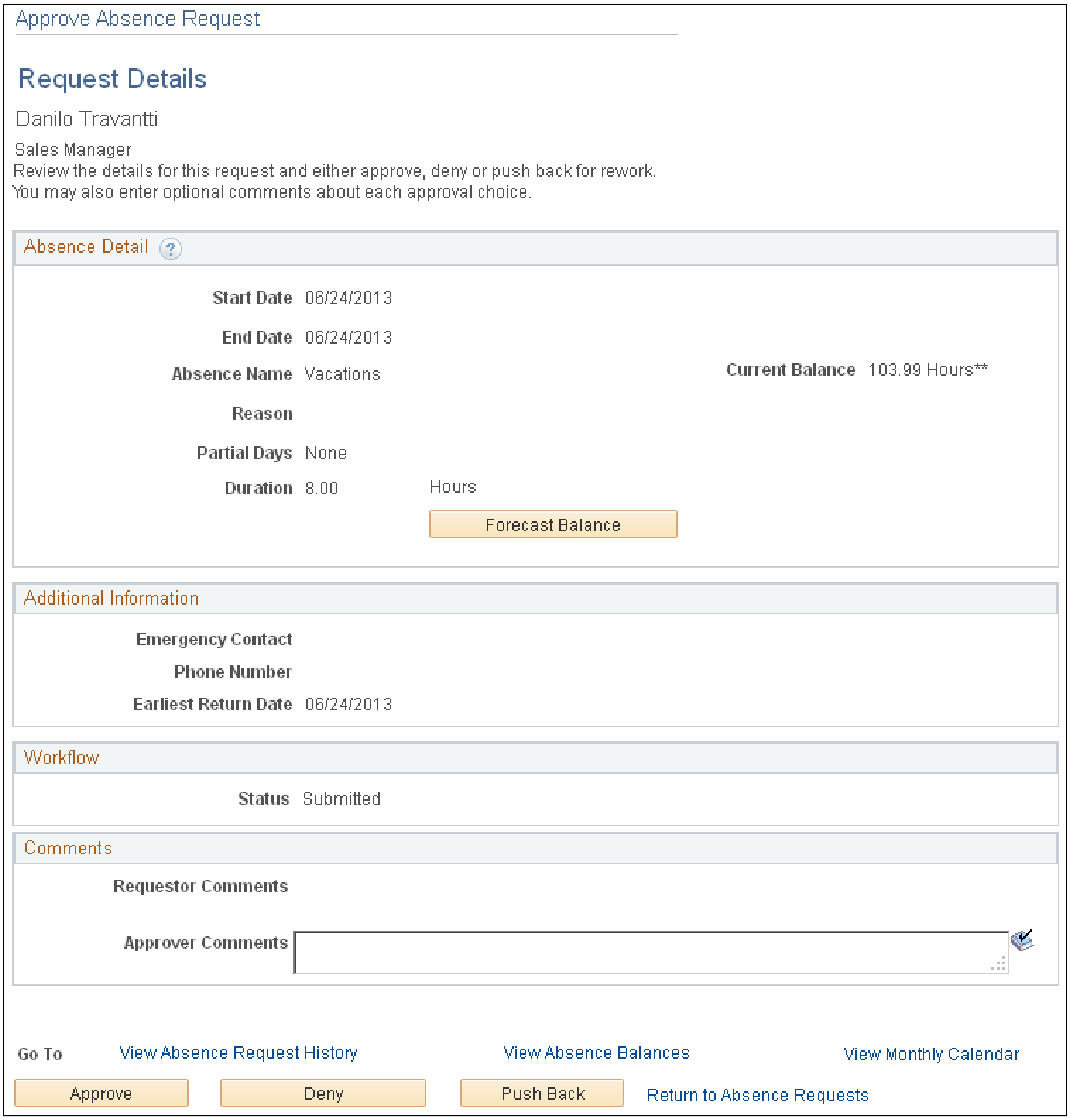
Request Absence Page

Approving Absence Requests Entered through Microsoft Outlook

Managers approve absence requests entered through Microsoft Outlook using the Absence Request manager self-service component just as they would for any other absence request.

Image: Request Details page for an absence request entered through Microsoft Outlook

This example illustrates the Request Details page for an absence request entered through Microsoft Outlook.



The manager uses this page to approve, deny, or push back the request to the previous step in the approval process (by clicking the Push Back button). The approver can include suggested changes or other comments by entering information in the Approver Comments field.

Related Links

Absence Requests Page

Monitoring Absence Requests Entered through Microsoft Outlook

An employee who enters an absence request through Microsoft Outlook can monitor the status of that absence request through Microsoft Outlook without having to log in to PeopleSoft Absence Management directly. To monitor an absence request entered through Microsoft Outlook:

1. Open the Calendar in Microsoft Outlook.

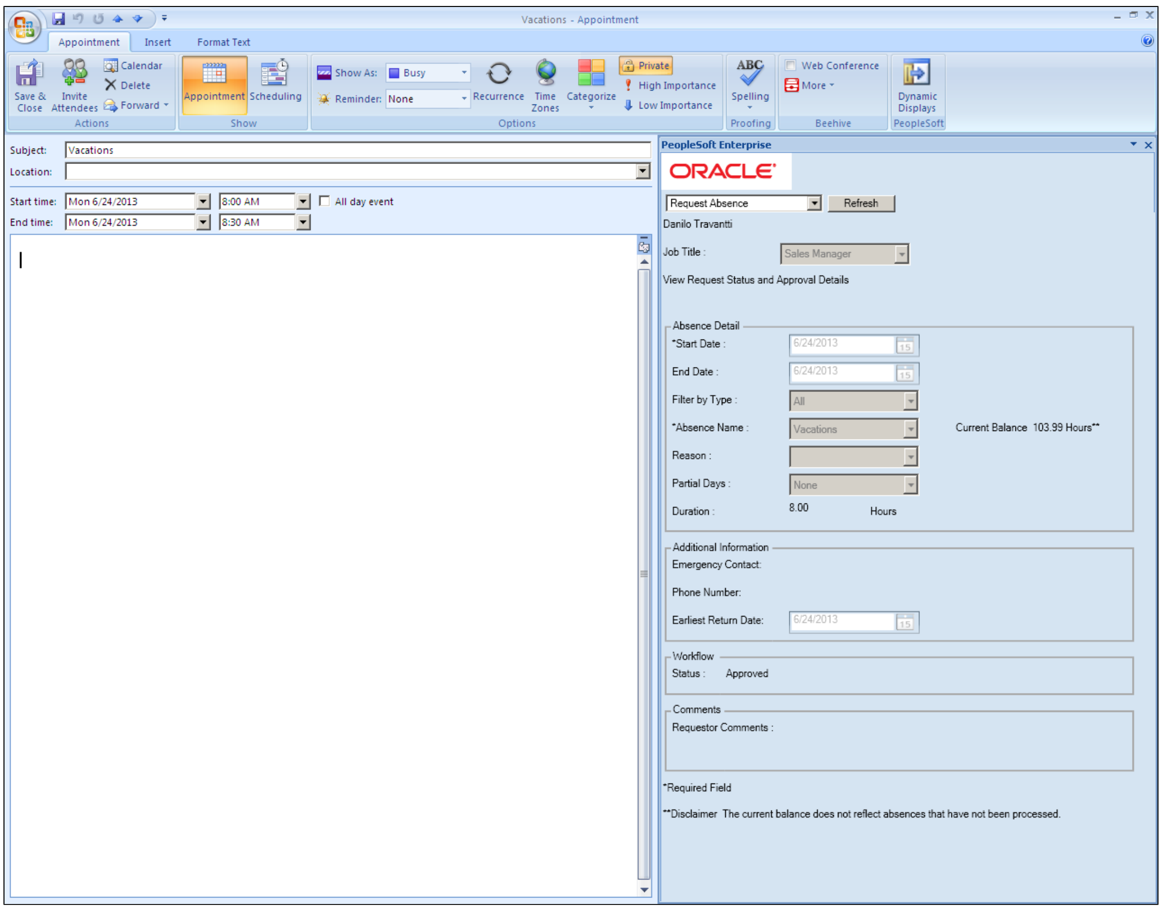
2. Open an absence request that you entered through the Calendar.

3. Click the Dynamic Displays button to open the PeopleSoft dynamic displays pane.

4. View the status of the absence request.

Image: Example of an approved absence request in Microsoft Outlook

This is an example of an approved absence request in Microsoft Outlook.



Chapter 19

Using Approvals with Absence Management

Understanding the Approval Process

Many daily tasks are part of a larger process that involves several steps and people working together. The term workflow refers to this process, which could encompass, for example, the approval of a time-off request. To facilitate this type of multiuser process, PeopleSoft can automatically trigger workflow notifications to inform the next approver in the process of work waiting.

The Approval Framework is the engine that provides capabilities for creating, running, and managing the approval processes. The engine uses a series of database objects combined with application component configuration settings to determine how to process approvals using workflow.

The Approval Framework is a common component that is shared across multiple PeopleSoft applications both within HCM and other product families. Due to the widespread use of this engine, you'll find documentation pertaining to it in various locations:

- *Approval Framework* describes the Approval Framework and application setup in full detail.

  It is the primary source of information for approval workflow.

- The *Application Fundamentals* documentation describes the setup steps and details for the Approval Framework that are specific to the HCM product line.

- Application-specific HCM documentation expands on all of the above texts by providing approval workflow details that relate to specific business processes.

Before implementing, you should read all relevant sources of information to gain a complete understanding of how the pieces fit together.

Related Links

PeopleSoft 9.2: Approval Framework

"Understanding Approvals *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Approval Framework and Absence Management

PeopleSoft Absence Management delivers the AbsenceManagement Process ID. You can add multiple Approval Definition IDs to the Approval Process ID. You can link multiple approval scenarios. One may be self-approved; while another can be one, two or more levels of approvals using approvers in one or in multiple user lists to a single Approval Process ID. This functionality allows you to simplify your approval scenarios and reduce the maintenance to multiple Approval Process IDs.

PeopleSoft Absence Management delivers the following Approval Definition IDs:

- AbsenceMgmtByDeptManager
- AbsenceMgmtByPosMgmt
- AbsenceMgmtByPosnDeptMgr
- AbsenceMgmtByPosnSupervisor
- AbsenceMgmtBySupervisorId
- AbsenceBySupervisorMulti

When the originator of an absence event submits the request, the system checks to see if approvals are being used based on the Administrative Rules defined on the Self Service – Country Take table - Absences page. If no approvals are needed then the Approval Process ID and Approval Definition ID fields on the Absence page will be left blank, or you can setup your own Approval Definition ID to make your events self and auto-approved. If values are entered for these fields the approvals process is initiated.

The first step in the approval process is to identify the first person to approve the transaction. This person is based on the Approval Process definition. If the system identifies this person, the system sends a notification indicating that there is an absence awaiting for approval. The approver has the option to:

- Approve the absence. The system sends a notification to the next person in the approval process, if one is indicated.
- Deny the absence. The system terminates the approval process. The originator of the absence will receive notification indicating the absence has been denied.
- Push back the absence. The originator of the absence will receive a notification indicating the absence needs their attention.

Note: Push Back is a valid action for the approver before the absence has gone through the first approver in the approval path. Once the second or subsequent approver has pushed back the absence, the first approver should deny it instead of pushing back the absence. It is recommended for the first approver to always state the reason in the comment field when denying an absence.

If the system cannot identify the first approver, it moves to step two of the approval process.

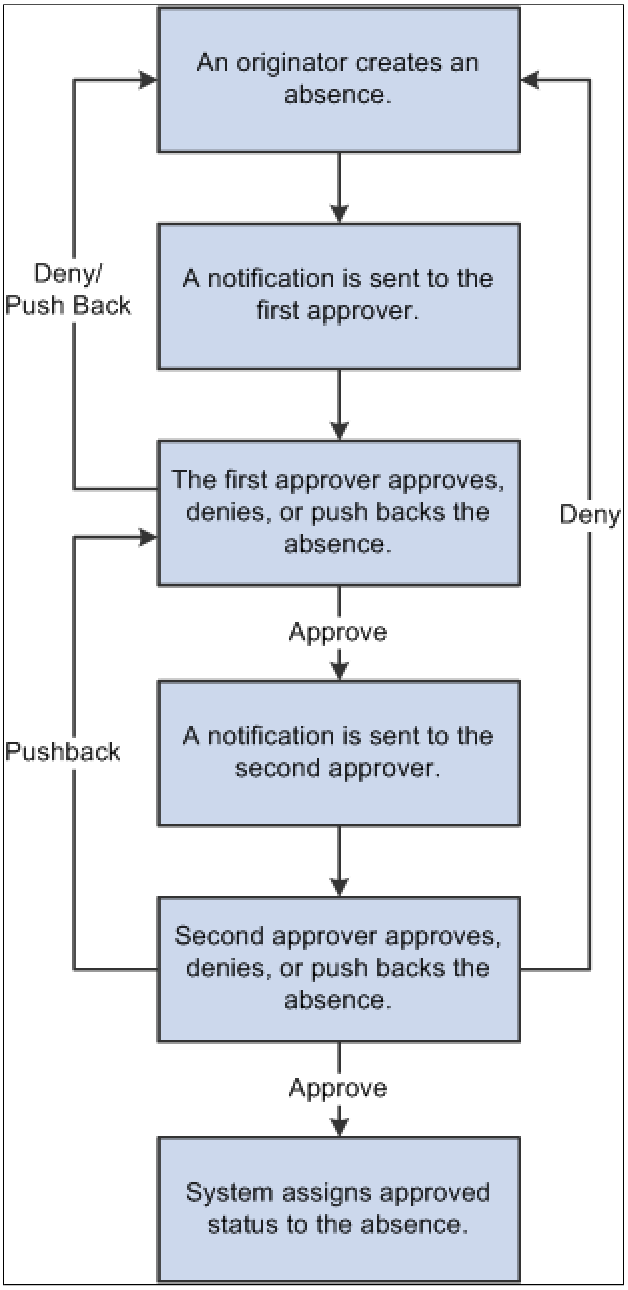
A subsequent step in the approval process (if multiple levels of approvals were defined), is to identify the next person to approve the absence , if one is indicated. If the system identifies the next approver, the system sends a notification to the approver telling them there is an absence needing their approval. The next approver has the option of:

- Approving the absence . The system updates the status of the absence event to approve and ends the approval process.
- Denying the absence . The system ends the approval process. The originator of the absence event will receive notification indicating the absence event has been denied.
- Push back the absence . The system sends a notification to the first approver associated with the absence event and notifies that person that the absence event needs their attention.

If neither approval steps are met, the system automatically submits a notification to the approval administrator telling the administrator there is an absence event requiring their attention.

Image: Absence Request Approval Process Flow

This diagram illustrates the approval process flow.



Note: The only delivered approval process with two levels of approval is the AbsenceManagement approval process ID. The others only have one level of approval. If the delivered approval processes do not meet your organizational needs you can create your own approval process ID, or add more steps to any of the approval definitions IDs that better fits your company policies.

Configuring Approval Transactions

PeopleSoft delivers the following events and email notifications templates for configuring approval transactions for Absence Management:

Event	***Template Name***
On Final Approval	GP_ABS_SS_APPR
Push Back	GP_ABS_SS_WRK
On Final Denial	GP_ABS_SS_DNY
On Error	GP_ABS_SS_ERR
On Process Launch	GP_ABS_SS_SUB
Route for Approver	GP_ABS_SS_APPR_READY
On Terminate	GP_ABS_SS_WRK

Note: These templates are delivered. If modifications are needed refer to the Applications Fundamentals Documentation. The events delivered must not be modified to ensure the correct functioning of the Absence Self Service applications. You might be able to modify this setup if you have a thorough understanding of the Approval Framework, PeopleCode and Absence Self-service.

Related Links

"Configuring Approval Transactions *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Understanding the Approval Process Design

The approval process consists of stages, paths, steps, user lists, and criteria.

- Stages

  Stages are the high level actions that the approval process executes in a specific order. Stages are made up of one or more paths.

  AbsenceMgmtByDeptManager, AbsenceMgmtByPosMgmt, AbsenceMgmtByPosnDeptMgr, AbsenceMgmtByPosnSupervisor, AbsenceMgmtBySupervisorId, and AbsenceBySupervisorMulti use one stage.

- Criteria

  Criteria defines the rules that are used by the approval process to determine if a stage or step is executed.

- Paths

  A path is a sequence of steps.

AbsenceMgmtByDeptManager, AbsenceMgmtByPosMgmt, AbsenceMgmtByPosnDeptMgr, AbsenceMgmtByPosnSupervisor, AbsenceMgmtBySupervisorId, and AbsenceBySupervisorMulti use one path.

- Steps

  A step represents one or more persons assigned to approve or review the absence event. Steps within a path execute in sequence with separate criteria for each step that determines whether or not that step executes.

- User Lists

  User lists identify the people that are to act on an absence event. User lists can be roles, SQL definitions, queries, or application classes.

  AbsenceManagement uses the AbsenceBySupervisorId user list.

  Absence Mgmt ByDeptManager uses the AbsenceByDeptManager user list.

  Absence Mgmt ByPosMgmt uses the AbsenceByPosMgmt user list.

  Absence Mgmt By PosnDeptMgr uses the AbsenceByPosnDeptMgr user list.

  Absence Mgmt ByPosnSupervisor uses the AbsenceByPosnSupervisor user list.

  Absence Mgmt BySupervisorid uses the AbsenceBySupervisorId user list.

  See "Defining Users for Approvals *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Note: To define the approval process, use the Setup Process Definitions (PTAF_PRCS) and the Register Transactions (PTAF_TXN) components.

Chapter 20

Working with Delegations in Absence Management

Understanding Delegation

Absence Management uses delegation to enable one person to authorize another to serve as his or her representative when working with absence transactions. A manager can delegate their tasks of approving time, entering employee time, or entering their own time to another person due to workload or their own absence from the office. An employee can delegate the entering of his or her time to another person while away from the office.

Delegation Terminology

The following terms are important to understanding the delegation feature:

- *Delegation:* The act of giving one's authority to another user.
- *Delegator:* A person that delegates authority to another user.
- *Proxy:* A person granted authority to act on behalf of another user.
- *Delegated Authority:* The rights and privileges that are given from the delegator to the proxy.
- *Delegation Request:* A request from the delegator to the proxy to take on delegated authority.
- *Delegation Period:* The time range in which the delegated authority is in effect.
- *Delegation Administrator:* The system administrator who is responsible for configuring, managing, and maintaining delegated authorities.
- *Revoke:* When a delegator withdraws delegated authority.

Delegation Framework

The delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct report or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy.

Note: To prevent situations of cascading or circular delegation chains, once the delegation framework passes delegated authority over an absence transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The delegation framework only passes authority over transactions from initial delegator to initial proxy.

Related Links

"Understanding Delegation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Reviewing Delivered Absence Management Delegation Set Up

This topic provides an overview of delivered delegation set up for Absence Management and discusses how to:

- Review workflow transactions.
- Review permission lists and roles for delegation.
- Define installation settings.
- Review delegation transactions.

Delivered Delegation Set Up for Absence Management

The delegation framework for Absence Management is delivered with the system. To review this framework:

1. Review delegation transactions for workflow on the Register Workflow Transaction page.
2. Review delegation permission lists and roles through PeopleTools Security components.
3. Define installation settings for delegation on the Delegation Installation Settings page.
4. Review transactions for delegation on the Configure Delegation Transaction page.

Reviewing Workflow Transactions

The PeopleSoft system delivers several transactions that are pre-configured for the Absence Management delegation framework. This table lists the delivered delegation transactions:

Transaction Name	***Transaction Type***	***Description***
GP_ABS_EESS_BAL	Initiate	Delegate initiation of the employee view of absence balances.
GP_ABS_EESS_HIST	Initiate	Delegate initiation of the employee view of absence history.
GP_ABS_EESS_REQ	Initiate	Delegate initiation of the employee request absence.

Transaction Name	Transaction Type	Description
GP_ABS_MGRSS_BAL	Initiate	Delegate initiation of the manager view of absence balances.
GP_ABS_MGRSS_HIST	Initiate	Delegate initiation of the manager view of absence history.
GP_ABS_MGRSS_REQ	Initiate	Delegate initiation of manager request absence.
GP_SS_ABS_APPR_L	Approve	Delegate approval of manager approved absence request.

Use the Approval Workflow Engine (AWE) and Delegation Transactions grid to register self-service transactions that use the AWE framework and delegation framework. The data that you enter into this grid links the transaction name and accompanying tables for HCM self-service transactions to the approval process IDs that you create for these transactions on the Register Transactions page.

Note: Ensure the Approval Process ID is set properly according to the Approval Process ID and Approval Process Definition defined in your Country Take setup. You can have multiple Approval Process IDs defined, yet you can only use one at a time. Associate the appropriate Approval Process ID for the Transaction Name *GP_SS_ABS_APPR_L* in order for delegations on Absence Requests to work correctly. Multiple Approval Definition IDs can be added to an Approval Process ID. You can link multiple approval scenarios. One may be self-approved; while another can be one, two or more levels of approvals using approvers in one or in multiple user lists to a single Approval Process ID. This functionality allows you simplifying your approval scenarios and reduce the maintenance to multiple Approval Process IDs.

Related Links

"Linking Workflow Transactions *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Setting Up Approval Process Definitions *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Reviewing Permission Lists and Roles for Delegation

PeopleSoft HR delivers as system data several permission lists that are required for use of the Delegation framework.

This table describes the delivered absence management roles for the delegation framework:

Role Name	Attached Permission Lists	Description
Delegate Employee Absence Bal	HCCPAMSS09	Enables users to access the component to view employee absence balances for another employee when it is delegated to the user.
Delegate Employee Absence Hist	HCCPAMSS10	Enables users to access the components to view employee absence history and absence request details for another employee when they are delegated to the user.

Role Name	**Attached Permission Lists**	**Description**
Delegate Employee Absence Rqst	HCCPAMSS08	Enables users to access the component to enter an employee absence request for another employee when it is delegated to the user.
Delegate Manager Absence Appr	HCCPAMSS04	Enables users to access the components to approve absences for another managers direct reports when the pages are delegated to the user.
Delegate Manager Absence Bal	HCCPAMSS06	Enables users to access the components to view absence balances for a managers direct reports when the pages are delegated to the user.
Delegate Manager Absence Hist	HCCPAMSS07	Enables users to access the components to view absence history for a managers direct reports when the pages are delegated to the user.
Delegate Manager Absence Rqst	HCCPAMSS05	Enables users to access the components to enter absence requests for a managers direct reports when the pages are delegated to the user.

For more information on setting up permission lists and role security, see*PeopleTools: Security Administration*.

Related Links

"Setting Up Permission Lists and Roles for Delegation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Defining Installation Settings

When using delegations, ensure that your specified hierarchy is in sync with your direct reports access type setup. In addition, your approval process and definition IDs must be associated to your absence. An incorrect setup can lead to incorrect results. For example, if you use the direct report access type and delegation hierarchy by supervisor ID, then ensure that your absence approval process ID is set up by supervisor ID.

Related Links

"Defining Delegation Installation Settings *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Setting Up Access to Direct Reports Data *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Reviewing Delegation Transactions

This table lists the delegation transactions delivered for Absence Management:

Transaction Name	***Transaction Type***	***Role***
Employee Absence Balance	Initiate	Delegate Employee Absence Bal
Employee Absence History	Initiate	Delegate Employee Absence Hist
Employee Absence Request	Initiate	Delegate Employee Absence Rqst
Manager Absence Balance	Initiate	Delegate Manager Absence Bal
Manager Absence History	Initiate	Delegate Manager Absence Hist
Manager Absence Request	Initiate	Delegate Manager Absence Rqst
Manager Absence Approve	Approve	Delegate Manager Absence Appr

Related Links

"Configuring Delegation Transactions *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Adding Delegation Request Through Self Service

This topic provides an overview of delegation through self service and provides an example of delegation in Absence Management.

Steps to Set Up Delegation Through Self Service

A delegator follows these steps to delegate absence requests through self service:

1. Log in to the system.
2. Navigates to the Manage Delegation component.
3. Click the Create Delegation Request hyperlink.
4. If the delegator has multiple jobs, they will have to select the job for which they are delegating the transaction.

   Note: If the person has multiple jobs, they must be active in at least one job throughout the delegation period.

5. Enter From Date and To Date for the delegation request, then click the Next button.
6. Select the transactions to delegate authority, then click the Next button.
7. Review the list and select a proxy. To do this select a person to which authority will be delegated
8. Select the Notify Delegator check box, then click Submit.
9. Clicks OK, then log out.

Related Links

"Working with Self-Service Delegation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Example of Delegating Absence Authority

In this example the manager, Antonio Smith, is going on vacation from August 17, 2009 through August 23. 2009. During this time away from work, Antonio delegates all of his managerial absence authorities to another manager, Paul Harvest.

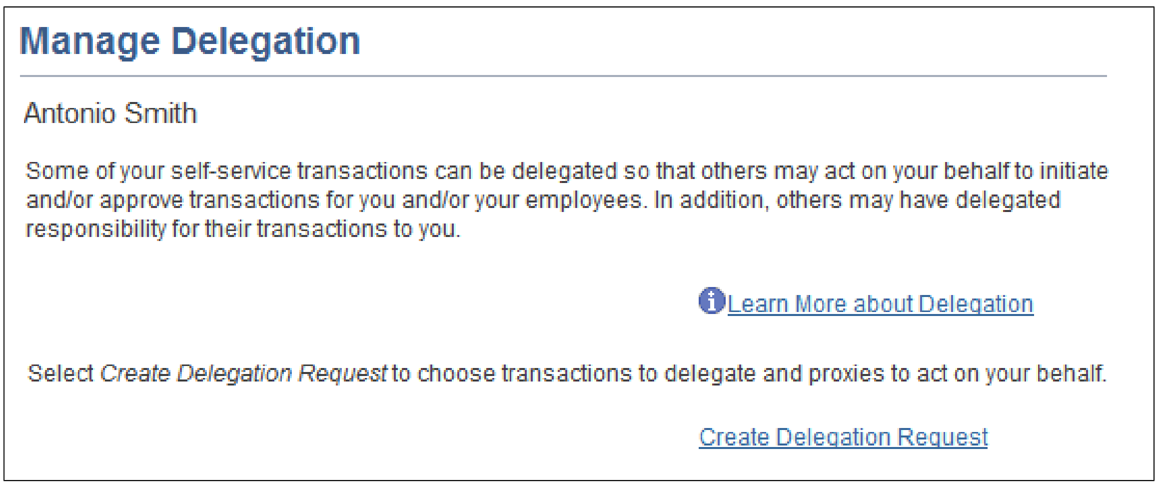
The following illustrations displays the steps taken by Antonio Smith to delegate his absence authority.

Managing Delegations

Antonio navigates to the Manage Delegation page to create the delegation request.

Image: Delegate authority on the Manage Delegation page.

This example illustrates the fields and controls on the Delegate authority on the Manage Delegation page..



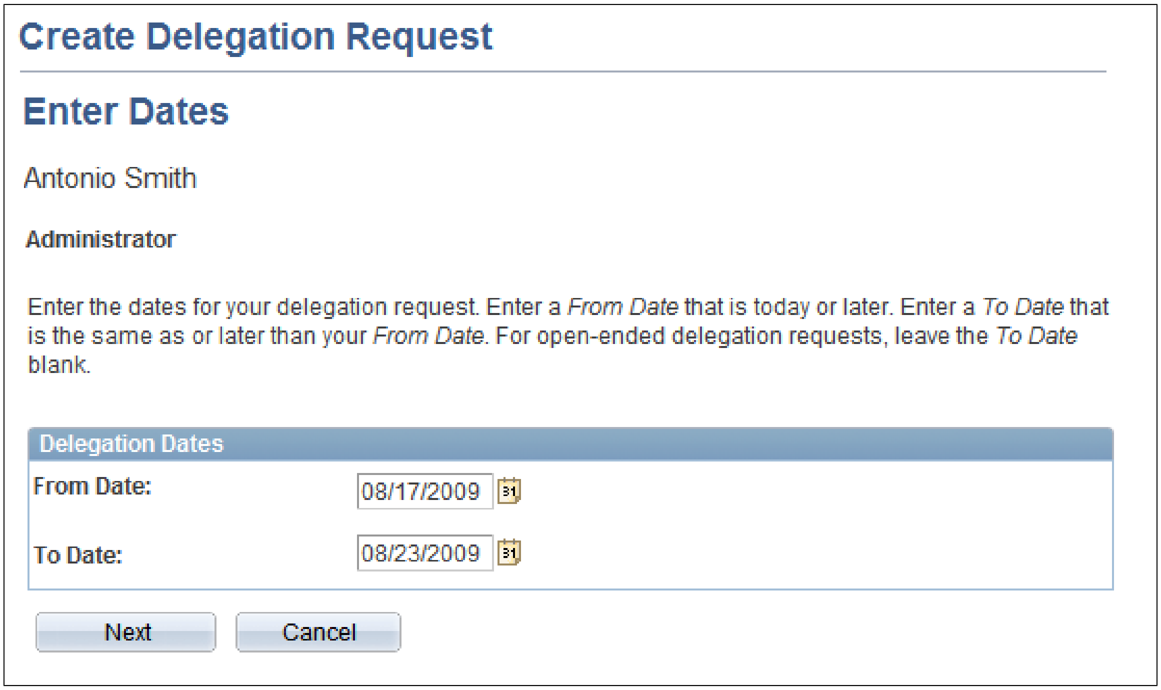
See "Manage Delegation Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Entering Dates for the Delegation Request

Antonio Smith enters the dates he wants to delegate his absence authorities during his time away from work.

Image: Enter the dates for the delegation on the Create Delegation Request – Enter Dates page.

This example illustrates the fields and controls on the Enter the dates for the delegation on the Create Delegation Request – Enter Dates page..



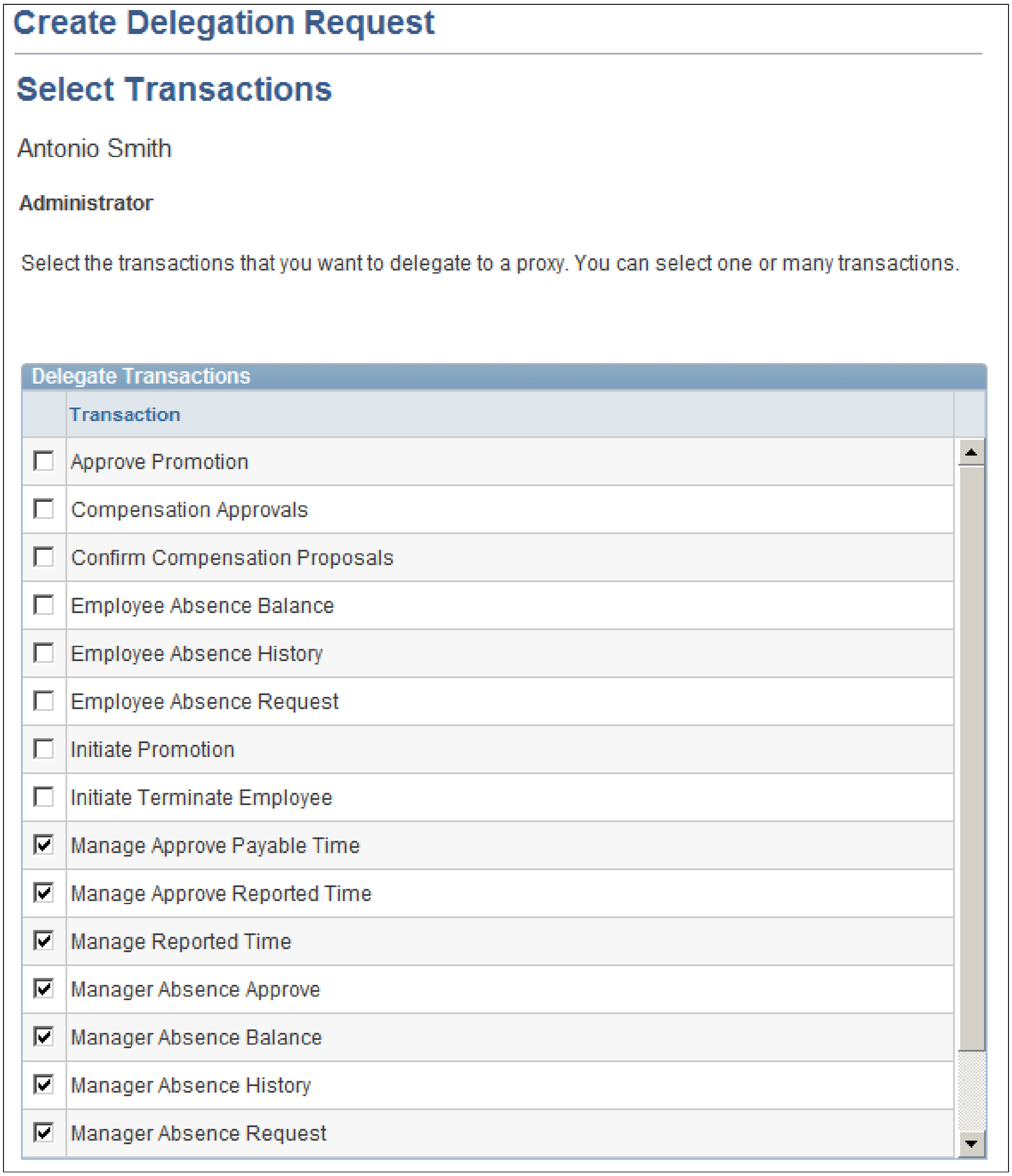
See "Create Delegation Request - Enter Dates Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Selecting Transactions for the Delegation Request

Antonio selects the types of absence transactions in which to delegate authority. He chooses to delegate all his managerial absence transactions, but not his employee absence transactions.

Image: Transactions selected on the Create Delegation Request – Select Transactions page.

This example illustrates the fields and controls on the Transactions selected on the Create Delegation Request – Select Transactions page..



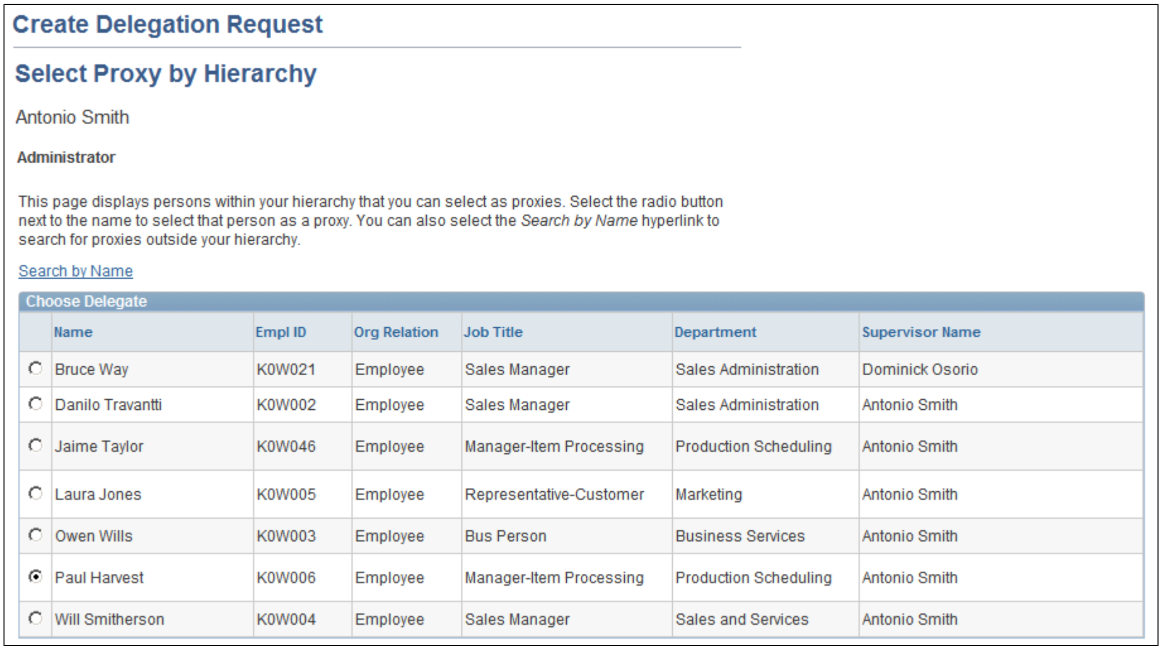
See "Create Delegation Request - Select Transactions Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Selecting Proxy by Hierarchy

Antonio selects Paul Harvest as the person to delegate his absence transactions.

Image: Select the person to delegate authority on the Create Delegation Request – Select Proxy by Hierarchy page.

This example illustrates the fields and controls on the Select the person to delegate authority on the Create Delegation Request – Select Proxy by Hierarchy page..



Create Delegation Request

Select Proxy by Hierarchy

Antonio Smith

Administrator

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the *Search by Name* hyperlink to search for proxies outside your hierarchy.

Search by Name

Choose Delegate

	Name	Empl ID	Org Relation	Job Title	Department	Supervisor Name
○	Bruce Way	K0W021	Employee	Sales Manager	Sales Administration	Dominick Osorio
○	Danilo Travantti	K0W002	Employee	Sales Manager	Sales Administration	Antonio Smith
○	Jaime Taylor	K0W046	Employee	Manager-Item Processing	Production Scheduling	Antonio Smith
○	Laura Jones	K0W005	Employee	Representative-Customer	Marketing	Antonio Smith
○	Owen Wills	K0W003	Employee	Bus Person	Business Services	Antonio Smith
◉	Paul Harvest	K0W006	Employee	Manager-Item Processing	Production Scheduling	Antonio Smith
○	Will Smitherson	K0W004	Employee	Sales Manager	Sales and Services	Antonio Smith

See "Create Delegation Request - Select Proxy by Hierarchy Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Viewing Delegation Detail

Antonio can review the transactions he has selected to delegate to Paul. Depending on whether changes are needed he can submit or cancel the delegation request. If he submits it, the system automatically sends an email notification to the proxy, Paul Harvest, to review and either accept or reject the delegation.

Image: View the delegation detail on the Create Delegation Request – Delegation Detail page.

This example illustrates the fields and controls on the View the delegation detail on the Create Delegation Request – Delegation Detail page..

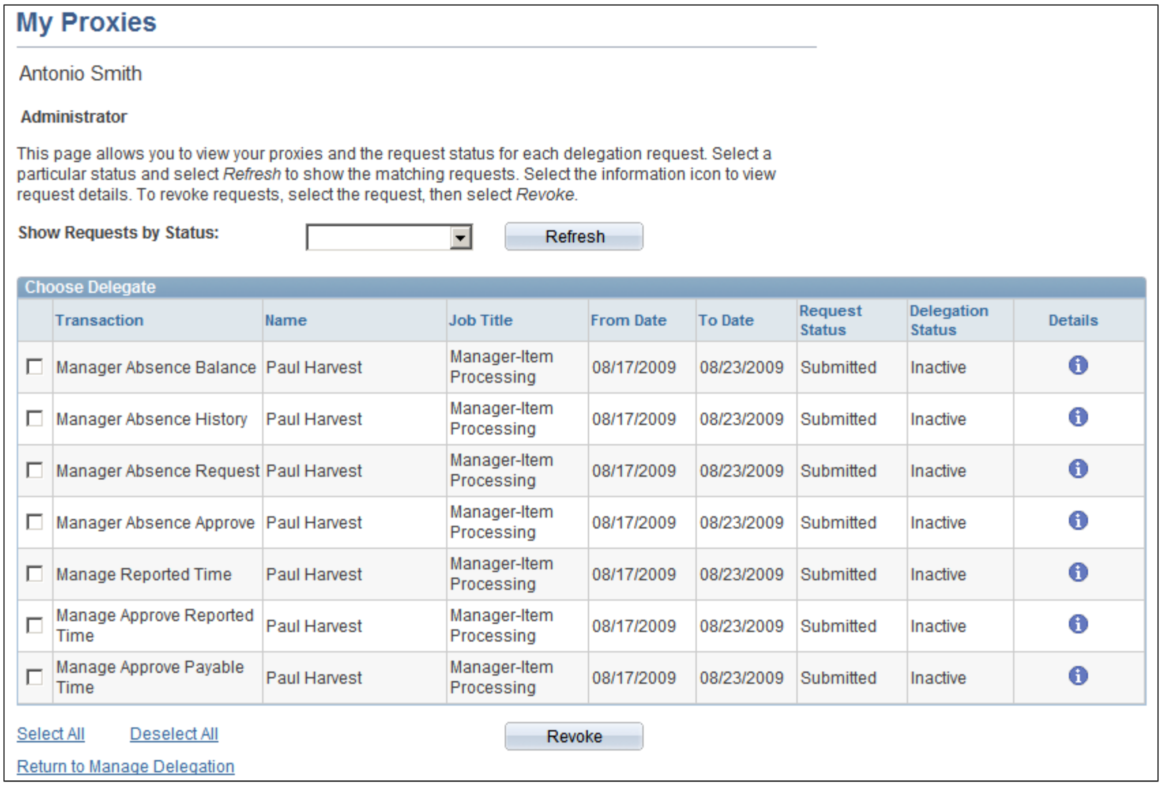
See "Delegation Request Details Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Viewing Proxies

Antonio can view all the proxies and request status for the delegation request. If needed he can revoke any of the transactions he has delegated at any time during the delegation period.

Image: View transactions and proxies on the My Proxies page.

This example illustrates the fields and controls on the View transactions and proxies on the My Proxies page..



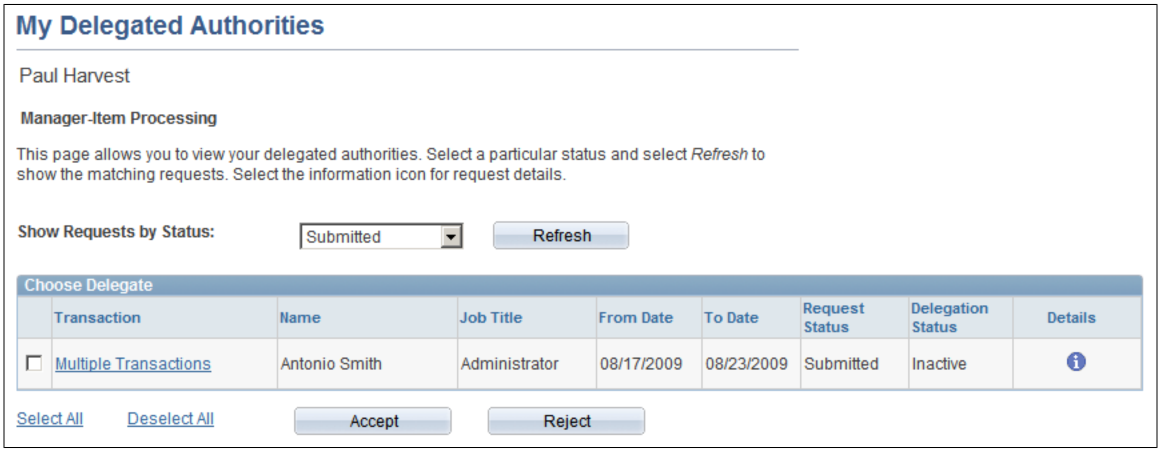
See "My Proxies Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Viewing Delegation Authorities

Once Paul Harvest gets the email notifying him of the delegation request, he accesses the My Delegated Authorities page to accept or reject the request.

Image: View, accept or reject delegated authorities on the My Delegated Authorities page.

This example illustrates the fields and controls on the View, accept or reject delegated authorities on the My Delegated Authorities page..



	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
	Multiple Transactions	Antonio Smith	Administrator	08/17/2009	08/23/2009	Submitted	Inactive	

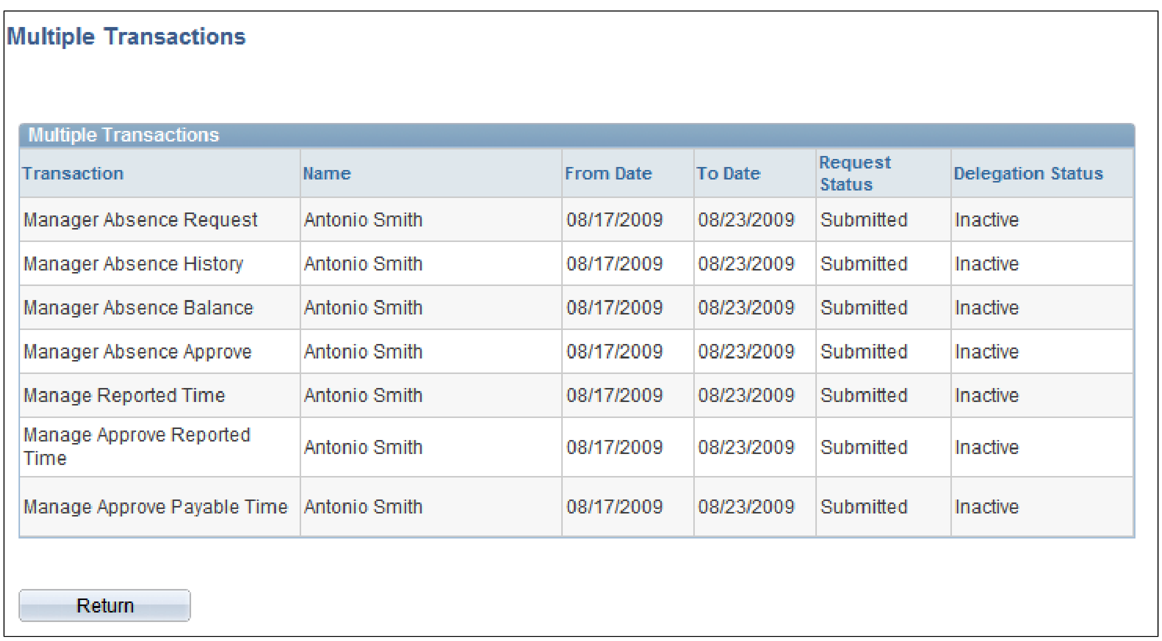
See "My Delegated Authorities Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

Viewing Details for Multiple Transactions

Prior to accepting or rejecting the delegation, Paul can review the transaction delegated to him.

Image: View delegated transactions on the Multiple Transactions page.

This example illustrates the fields and controls on the View delegated transactions on the Multiple Transactions page..



Transaction	Name	From Date	To Date	Request Status	Delegation Status
Manager Absence Request	Antonio Smith	08/17/2009	08/23/2009	Submitted	Inactive
Manager Absence History	Antonio Smith	08/17/2009	08/23/2009	Submitted	Inactive
Manager Absence Balance	Antonio Smith	08/17/2009	08/23/2009	Submitted	Inactive
Manager Absence Approve	Antonio Smith	08/17/2009	08/23/2009	Submitted	Inactive
Manage Reported Time	Antonio Smith	08/17/2009	08/23/2009	Submitted	Inactive
Manage Approve Reported Time	Antonio Smith	08/17/2009	08/23/2009	Submitted	Inactive
Manage Approve Payable Time	Antonio Smith	08/17/2009	08/23/2009	Submitted	Inactive

Delegated Absence Transaction

In this example, Laura Jones is an employee who reports to Antonio Smith. At the time of this absence Antonio Smith has delegated his approval authority to Paul Harvest. When a delegation is active the absence request details will display who is approving the absence request. The Request Details page displays the delegated authority for approval:

Image: Request Details page (1 of 2)

This example illustrates the fields and controls on the Request Details page (1 of 2).

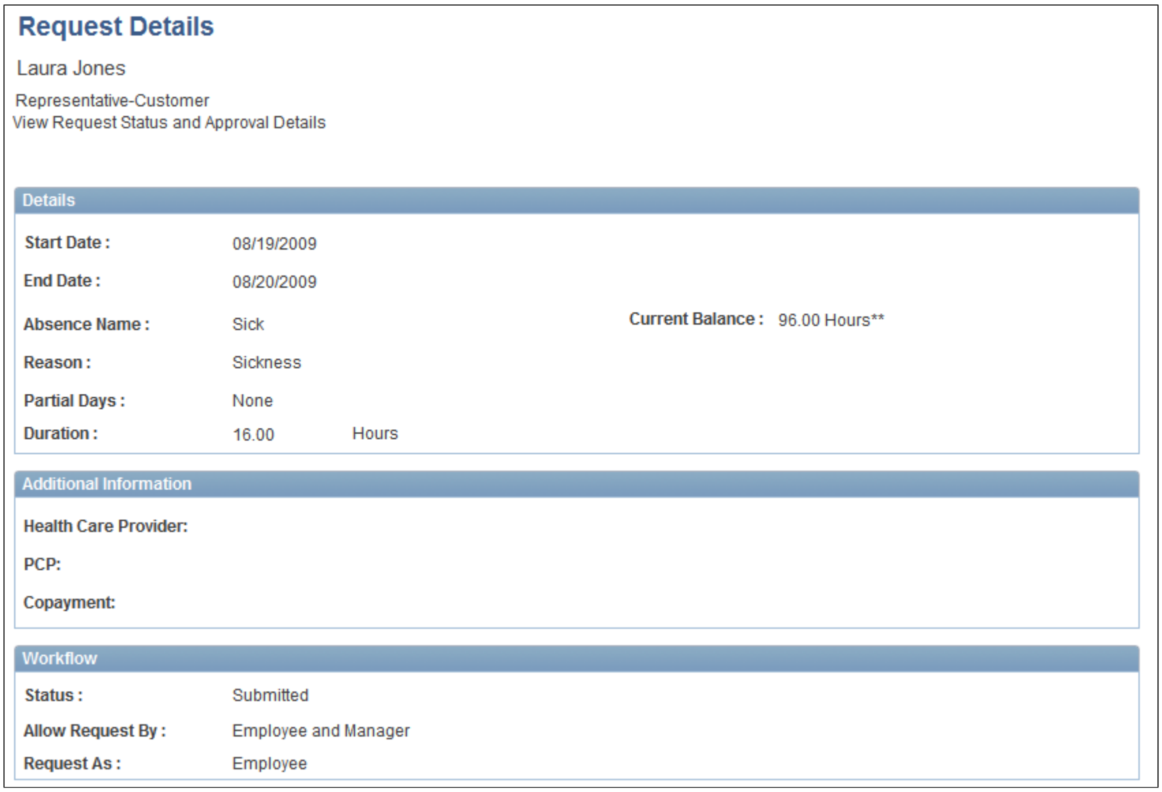
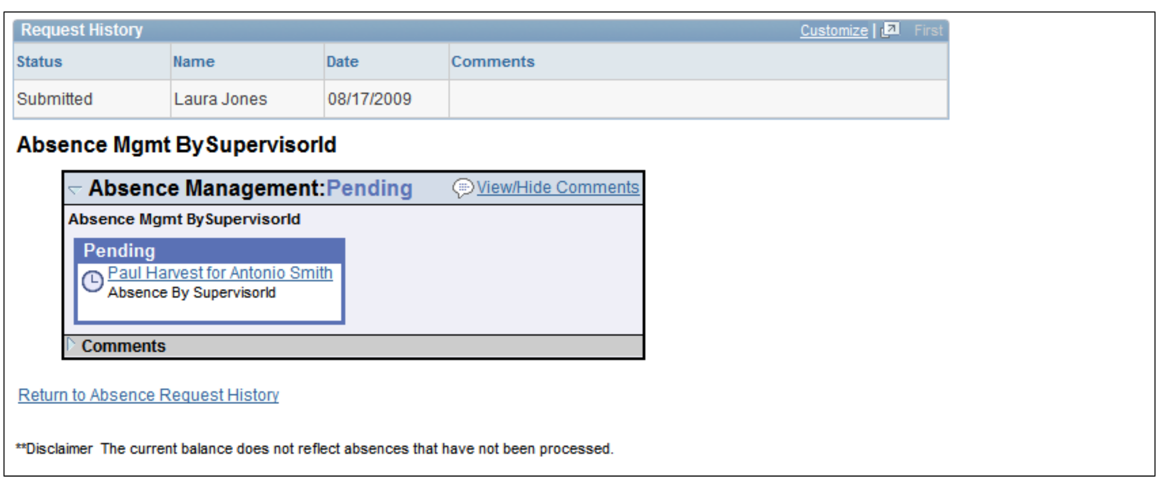


Image: Request Details page (2 of 2)

This example illustrates the fields and controls on the Request Details page (2 of 2).



See Request Absence Page.

Chapter 21

Setting Up Overrides

Understanding Overrides

This section lists common elements used in this documentation and discusses:

- Override levels.
- Overrides available for primary elements.
- Overrides available for supporting elements.
- Begin and end date logic for overrides.
- Element overrides and segmentation.

Use overrides to control the values the system uses to resolve an element for a specified time period. When you run the absence process, the system retrieves the rule definition for the element and applies any override instructions that you've entered.

Common Elements Used for Overrides

Element definition override
Overrides the value of a bracket, date, duration, formula, or variable element that's used in the definition of a primary element (absence take or absence entitlement).

Pay calendar override
Can exclude specific absence elements from a calendar and override the values of associated bracket, date, duration, formula, and variable elements.

Pay entity override and Pay group override
Override the value of a bracket, date, duration, formula, or variable element whenever the element is resolved for a payee who's linked to a specified pay entity or pay group, respectively.

Payee override
Refers to one of four types of payee-specific overrides:

- Assigning or disabling absence element.
- Overriding the definition of an absence element.
- Overriding the value of a variable used by an absence element.
- Overriding the value of a bracket, date, duration, formula, or variable element whenever it's resolved.

Via elements override	Controls whether an element's value can be updated by an array, bracket, date, or formula element.

Override Levels

Before entering instructions to override an element, you must specify allowed types of overrides for that element by selecting the appropriate check boxes in the Override Levels group box on the Element Name page.

When you enable overrides for a supporting element, clear the Always Recalculate check box on the Element Name page. Otherwise the system uses the value of the element according to the element definition, not the override value.

Note: An additional level, payee calendar overrides, exist for supporting elements through the Off-Cycle Requests component. This level is available for off-cycle requests only and does not extend to on-cycle calendars. Before entering supporting element overrides on the Payee Calendar SOVR page, you must select the Payee and the Calendar check boxes in the Override Levels group box on the Element Name page for the supporting element.

Related Links

Understanding Off-Cycle Processing

Overrides Available for Primary Elements

Several override levels enable you to control the value of absence take, and absence entitlement elements, which the system applies in this order:

1. Payee overrides.

   Assign or disable absence elements or override the definition of absence elements.

2. Pay calendar overrides.

3. Via element overrides.

Overrides Available for Supporting Elements

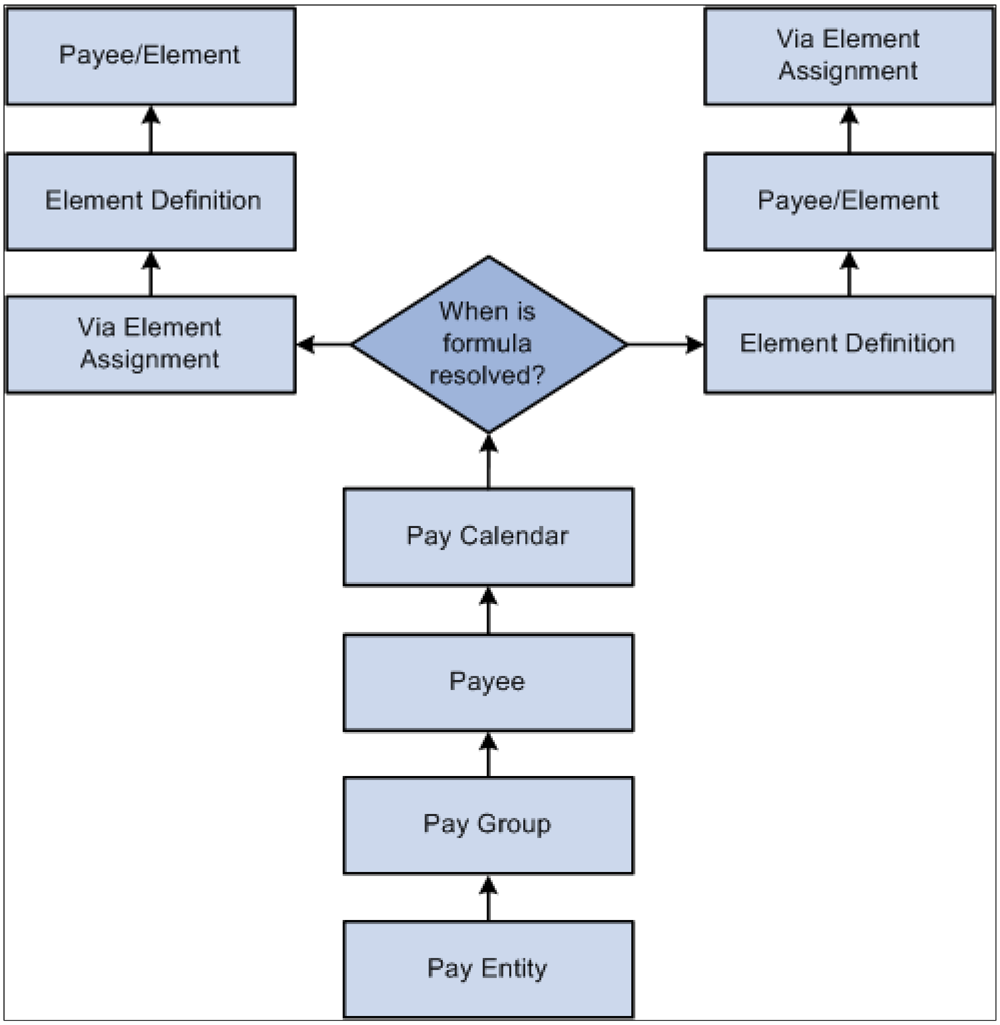
Absence Management offers seven override levels which enable you to control the values of brackets, dates, duration, formulas, and variables:

- Pay entity overrides.
- Pay group overrides.
- Payee overrides: Override the value of a bracket, date, duration, formula, or variable element whenever it's resolved for the payee.
- Payee/Element overrides. Overrides the value of a variable used by a specific entitlement or take assigned to a payee.
- Pay calendar overrides.

- Via element overrides.
- Element definition overrides.

Image: Element Override Hierarchy

This diagram illustrates the sequence in which the system applies overrides when it encounters multiple overrides for a supporting element. It begins with pay entity overrides.



Note: A payee/element override refers to the override of a variable element that's associated with a particular entitlement or take for a payee. Enter such overrides on the Element Detail page, linked to the Payee Assignment By Element and Element Assignment By Payee pages. A payee override is the override of a bracket, date, duration, formula, or variable that's associated with a payee. Enter such overrides on the Payee Supporting Element Overrides page.

Example

VARIABLE1 has the following values:

- 30 according to the rule definition.
- 20 according to a pay entity override.

- 10 according to a pay group override.

In this case, VARIABLE1 resolves to 10, because pay group overrides take precedence over pay entity overrides.

Begin and End Date Logic for Overrides

When entering override instructions, you must specify a begin date.

The begin date tells the system when to start applying the override instructions. The current date is the default.

In most cases, end dates are optional. They specify when the override instructions become inactive. They are required only when you enter multiple rows of instructions for the same element.

The processing rules for begin and end dates vary, depending on the type of override being processed.

Payee Overrides and Segmentation

This topic discusses:

- Payee overrides and segmentation.
- Segmentation caused by payee overrides.
- Proration and segmentation in the case of payee overrides.

Payee Overrides and Segmentation

You can set up your Absence Management system to slice or segment absence periods due to changes in Human Resource or other data, including:

- Changes in job status or title that occur mid period.
- Departmental transfers that occur mid period.
- Changes in compensation rate that occur mid period.

If there is a payee override in a sliced or segmented period, the system applies the override to the different slices/segments based on the segment/slice end dates as well as the override's end date.

The system follows these rules to determine the slices or segments to which to apply an override:

- If an override is to apply to a segment, the end date of the override must equal or be greater (or blank) than the end date of the segment.
- An override can apply to more than one segment if the end date of the override is greater than one segment's end date and greater than or equal to the subsequent segment's end date (or blank).
- If the end date of the override is less than the end date of the segment, the override doesn't apply to that segment.
- Payee overrides must be active as of the segment end date.

Pay entity, pay group, and element definition overrides are unaffected by segmentation. The system retrieves the definition of the element and the override only once every period, regardless of period or element segmentation.

Note: For more information on the rules for applying overrides to slices/segments in a period, see Segmentation and Payee Overrides.

Element Segmentation Caused by Payee Overrides

As noted previously, you can set up your Absence Management system to slice or segment pay periods due to changes in HR or other data. However, you can also configure the system to initiate segmentation and proration directly in response to an override—in the absence of an other data changes. That is, you can configure the system so that overrides are themselves treated as data changes that trigger segmentation. Then, when you assign or override the value of an element, the system slices the assigned element and any other elements included in the segmentation list set based on the begin and end dates of the override.

For example, assume that you set up the system to trigger segmentation when you assign or override entitlement element E1, and that you assign E1 to a payee on the Element Assignment by Payee (GP_ED_PYE) component with begin and end dates of 10 and 20 June respectively (assume a monthly pay period). Based on the assignment/override begin and end dates, the system will slice the element into three segments and process (and prorate) the element in the second slice:

Element	***Slice 1*** ***June 1–10***	***Slice 2*** ***June 11–20***	***Slice 3*** ***June 21–30***
Entitlement = E1 Entitlement Type = Numeric Entitlement Unit = 30	Element not resolved in slice 1.	Resolved amount = 10 (proration factor = .333333333)	Element not resolved in slice 3.

Note: The only type of segmentation that can be triggered by an element assignment or override is *element segmentation*.

To set up the system to trigger segmentation in response to an element assignment:

1. Select the *Active Anytime Within the Segment Period* option on the Countries (GP_COUNTRY) component .

   When you do this, the system processes all element assignments/overrides that fall within a period—even those with end dates that are less than the pay period end date.

   See Countries page.

2. If you want the element you are assigning to be prorated, associate the element with a proration rule on the entitlement definition pages.

   See Absence Entitlements - Rounding/Proration Page.

3. Set up segmentation triggers for the begin and end-dated entitlement and take assignment record (GP_ABS_OVRD), and list the entitlements and takes that should trigger element segmentation when

the assignment *begin* date comes after the pay period begin date, and/or the assignment *end* date comes before the period end date.

Proration and Segmentation in the Case of Payee Level Overrides

Proration of payee level, primary element overrides occurs under the following conditions:

Note: Primary element overrides include entitlements and takes. Supporting element overrides include elements such as variables, formulas, arrays, and brackets.

- When period or element segmentation is triggered by data changes not directly related to an element override or assignment.
    - If there is *period segmentation* in the period to which an entitlement or take assignment applies (that is, all elements are segmented), the system prorates the assigned element based on the segment begin and end dates if the element is defined to be prorated. If not, the entire value of that element is applied to each of the targeted segments.
    - If there is *element segmentation* in the period to which an entitlement or take assignment applies, the assigned element is included in the list of elements to be sliced, and that element is defined to be prorated, the system prorates the element based on the slice dates. If not, the entire value of the element is applied to each of the targeted slices.
- When you configure your system so that primary element overrides or assignments directly trigger element segmentation.

    In this case, the system slices the assigned element (and any elements associated with that element on the list set) based on the begin and end dates of the assignment as long as that element is defined to be prorated. There does not have to be slicing or segmentation for any other reason. If the element is not defined to be prorated, the full value of the element is processed within the slice defined by the assignment begin and end dates.

    Note: You can set up the system to slice an element within a pay period based on the begin and end dates of the overrides assigned to a payee on the Element Assignment by Payee (GP_ED_PYE) and Payee Assignment by Element components (GP_ED_ELEM).

    See Trigger Generation.

Note: Primary element overrides are prorated if the element is defined to be prorated and there is either period segmentation (all elements are segmented), or there is element segmentation and the element being assigned is on the list of elements to be sliced.
In the case of supporting element overrides, the supporting element is prorated if it is a component of an element that is defined to be prorated and that element is segmented/sliced.

Defining Pay Entity Overrides

This topic provides an overview of processing rules for pay entity overrides and discusses how to override the value of elements that are associated with a pay entity.

Page Used to Define Pay Entity Overrides

Page Name	*Definition Name*	*Navigation*	*Usage*
Supporting Element Overrides	GP_PYENT_SOVR	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities, Supporting Element Overrides	Override the value of bracket, date, duration, formula, or variable elements that are associated with a specified pay entity.

Understanding Processing Rules for Pay Entity Overrides

During processing, the system refers to the begin and end dates (if any) and the Definition as of Date that were defined for the element on the Element Name page.

For the override instructions to take effect:

- The begin date must be before or equal to element's Definition as of Date.
- The end date must be greater than or equal to the Definition as of Date.

Example

VARIABLE1 is defined as follows:

- Definition as of Date = Calendar Period Begin Date.
- Value = 100.
- Pay Period = January 01, 2004 − January 31, 2004.

The following pay entity override exists:

- Begin Date = January 16, 2004 (no End Date).
- Value = 200.

Payee 1 has segmentation on January 10, 2004. Payee 2 has no segmentation.

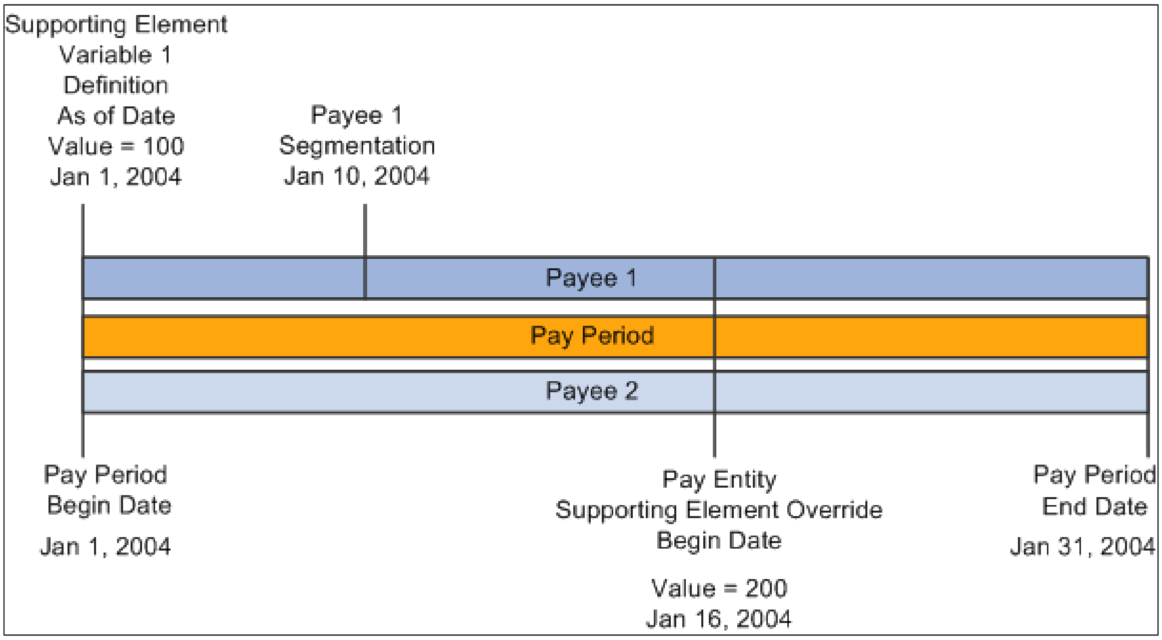
Both payees have the same value for VARIABLE1. Payee 1's segmentation doesn't alter the value of VARIABLE1.

In the diagram, the pay entity supporting element override is *not* applicable to either payee, because it wasn't applicable as of the VARIABLE1 Definition as of Date (Calendar Period Begin Date), resulting in a value of 100 for both payees.

If the Definition as of Date for VARIABLE1 is Pay Period End Date, both payees use the pay entity override value 200.

Image: Processing rules for pay entity overrides example

This graphic shows an example of the processing results for a pay entity override.



Supporting Element Overrides Page

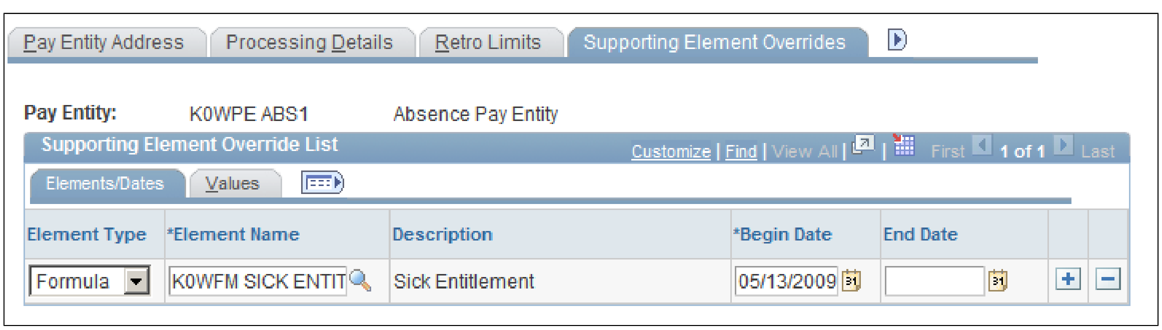
Use the Supporting Element Overrides page (GP_PYENT_SOVR) to override the value of bracket, date, duration, formula, or variable elements that are associated with a specified pay entity.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities, Supporting Element Overrides

Image: Pay Entities - Supporting Element Overrides page

This example illustrates the fields and controls on the Pay Entities - Supporting Element Overrides page.



To define a pay entity override on the Pay Entities - Supporting Element Overrides page:

1. Select the type and name of the supporting element for which you want to enter override instructions.

2. Enter the override begin and end dates.

3. Enter the override value on the Values tab.

Defining Pay Group Overrides

This topic provides an overview of pay group overrides and lists the page used to define pay group override.

Page Used to Define Pay Group Overrides

Page Name	**Definition Name**	**Navigation**	**Usage**
Supporting Element Overrides	GP_PYGRP_SOVR	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups, Supporting Element Overrides	Override the value of bracket, date, duration, formula, or variable elements that are associated with payees in a specified pay group.

Understanding Pay Group Overrides

To override the value of supporting elements that are associated with payees in a specific pay group, you use the Pay Groups - Supporting Elements Override page. This page is similar to the Pay Entities - Supporting Elements Override page, as are the processing rules.

Defining Payee Overrides

This topic provides an overview of payee overrides and processing rules for payee overrides, and discusses how to:

- Override component values, generation control, frequency, and variables for a payee.
- Override supporting element values for payees.

Page Used to Define Payee Overrides

Page Name	**Definition Name**	**Navigation**	**Usage**
Supporting Elements	GP_PAYEE_SOVR	Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Supporting Elements, Supporting Elements	Override the value of a bracket, date, duration, formula, or variable element that's associated with a payee.

Understanding Payee Overrides

Payee overrides enable you to control how an entitlement or take element is resolved for a specific payee.

Using payee overrides, you can:

- Override variable elements used by a specific entitlement/take assigned to a payee.
- Override a variable for *all* elements that use the variable (not just one entitlement or take assigned to a payee).
- Override supporting elements associated with a payee.

Understanding Processing Rules for Payee Overrides

For payee overrides, the system looks at segment end dates (or period dates if there's no segmentation) for a payee to determine if a supporting element override is used. The end date must be greater than or equal to the segment end date in order for it to be processed. Unlike pay entity and pay group, the system doesn't look at the Definition as of Date.

Example: Segmentation and Payee Supporting Element Overrides

Two payees have the same override.

- Payee 1 has no segmentation.
- Payee 2 has segmentation. Segment 1 is January 1–15. Segment 2 is January 16–31.
- The pay period is January 1–31.
- VR1, a variable element, is defined as 50.
- VR1 has a payee-level override of 100 beginning on January 16.

For Payee 1, the value of VR1 is always 100, because there's no segmentation.

For Payee 2, the value of VR1 is 50 for Segment 1 and 100 for Segment 2.

Related Links

Payee Overrides and Segmentation

Overriding Supporting Element Values for Payees

Use the Supporting Elements page (GP_PAYEE_SOVR) to override the value of a bracket, date, duration, formula, or variable element that's associated with a payee. Whenever the system resolves an element for the payee, it uses the override value that you select.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Supporting Elements, Supporting Elements

The Supporting Elements page is similar to the Pay Entities - Supporting Elements Override page, but the processing rules differ.

Related Links

Defining Pay Entity Overrides

Defining Pay Calendar Overrides

When defining a calendar for an absence process, you can enter instructions for two types of overrides. You can:

- Specify any absence elements to exclude from processing for all payees.

  Enter these instructions on the Calendar - Excluded Elements page.

- Override the value of brackets, dates, duration, formulas, and variable elements on the Calendar - Overrides page.

  In this case, begin and end dates aren't used, on the assumption that the override applies to the calendar period.

Related Links

Defining Pay Entity Overrides

Calendars - Supporting Element Overrides Page

Entering Calendar Override Instructions for a Payee

Defining Overrides through Elements

The Update Via Element feature is used to control which elements can be updated by another element. You can update an element by means of another element in four places in the application:

- Arrays (through the Map Retrieved Fields to Variable Elements fields on the Array - Field Map and Keys page).
- Brackets (through the Return Column fields on the Bracket Search Keys/Return Columns page).
- Dates (through the Date Extract fields on the Date Extract page).
- Formulas (through the Assign To columns on the Formula - Field by Field Definition page).

Resolving Overrides in Batch Processing

This topic discusses overrides in batch processing.

The following table describes how overrides to supporting elements are resolved during batch processing.

Program	***Process***
Payee Data Manager	Resolves hierarchy between pay entity, pay group, payee, and calendar supporting element overrides and loads the override with the highest priority into a supporting element override/ value array.

<table>
<tr><th>Program</th><th>Process</th></tr>
<tr><td>PIN Manager</td><td>Checks to see if the supporting element is resolved.

If the element isn’t resolved, the Payee Data Manager looks for a supporting element override.

If a supporting element override exists, the override value is used.
If no supporting element override exists, the PIN resolution program is called.

If the element is resolved, the PIN manager checks the RECALC logic.

If RECALC = NO, the PIN manager returns the previously resolved value.
If RECALC = YES, the system looks for a supporting element override. If none exists, the PIN manager calls the PIN Resolution program to resolve the element.

</td></tr>
<tr><td>Element Assignment</td><td>An array, formula, bracket, or date extract can assign a value to another element. In this case, the element is considered resolved.</td></tr>
<tr><td>Entitlement/Take program</td><td>Applies primary element overrides, then payee/element overrides, as applicable, to a supporting element used by take or entitlement elements.

For each type of override, the program saves and stores the current value of the supporting element before assigning the override value. Say a primary element override and a payee/element override exist for Variable A. The system stores the current value of Variable A (5), retrieves the primary override value (6), stores the current value of Variable 1 (6), retrieves the payee/element override value (3), and so on.

When the override is no longer in force, the saved value of the supporting element is restored—in our example, 5.</td></tr>
</table>

Chapter 22

Managing Element Eligibility and Resolution

Element Eligibility

This topic discusses how the system determines which elements are eligible for resolution.

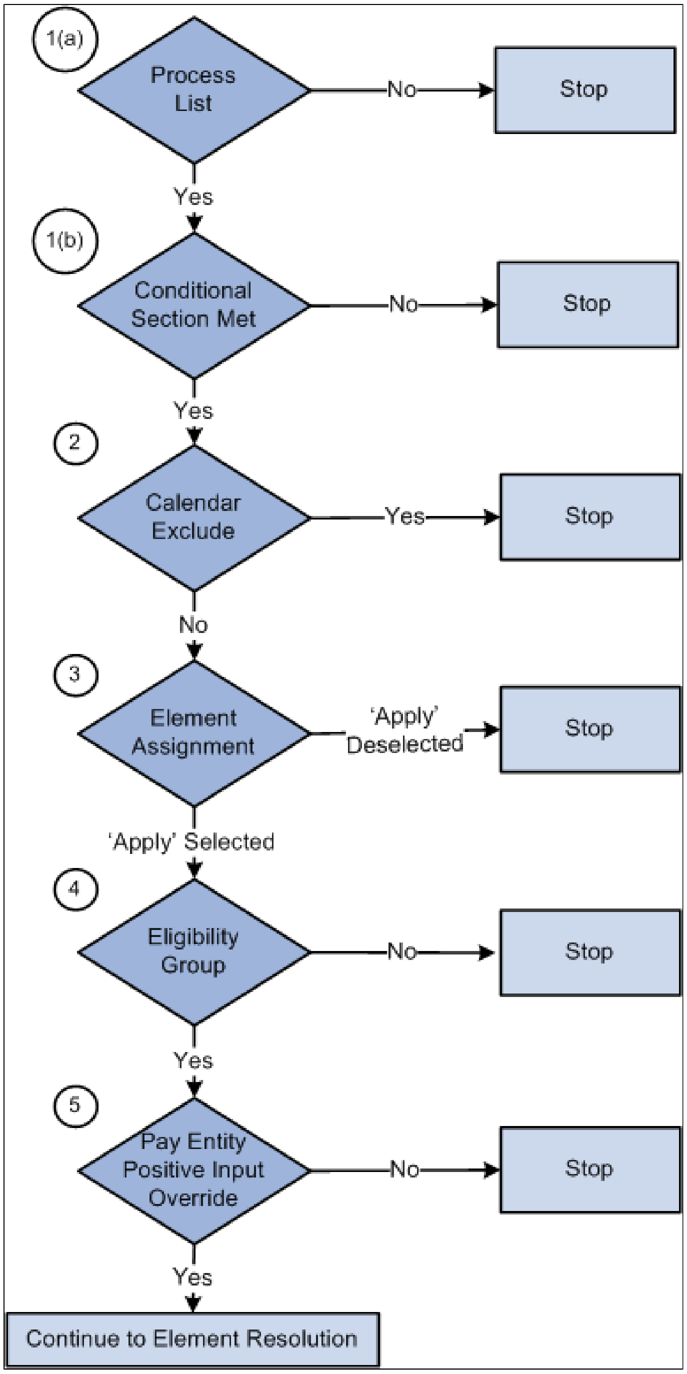
The system determines which absence take, and frequency-based entitlement elements that it encounters on a process list are eligible for resolution, using the eligibility program, which applies eligibility tests.

- If the element passes, the system sets the eligibility switch to Yes and a process switch to Yes. The Process List Manager calls the PIN Manager to resolve the element.

- If the element is ineligible, the process switch is generally set to No and the element isn't resolved.

Image: Element eligibility diagram

This diagram illustrates what the system checks to determine element eligibility.



To determine element eligibility the system checks:

1. Process list.

   The process list provides the first test of eligibility. With the exception of absence-based entitlement, the element must be in a section of the process to be eligible for resolution.

Process lists can specify conditions under which sections are resolved. If a section isn't resolved because the required conditions are not met, no further processing occurs for that section's elements.

2. Calendar exclude.

   The eligibility program checks to see if you've entered instructions to exclude the element from the calendar that's currently being processed. If the element is excluded, the eligibility switch is set to No. The element is not resolved. (If you exclude an element, you can still assign it a value in a formula.)

3. Element Assignment.

   There are two functions of an element assignment. The first is to assign an element to a payee. The second allows you to override the element definition for a payee.

   The system checks for instructions that assign or override the element at the payee level; entered through the Entitlement/Take Assignment page.

   If there is no element assignment the system checks the eligibility group for the element (see step 4).

   If there is an element assignment with the Apply check box selected the system checks the eligibility group (see step 4).

   If there is an element assignment with the Apply check box not selected for an element, the eligibility program sets the process switch to No. The element will fail eligibility even if the element is in the payee's eligibility group. In this way, the user may override the element's eligibility definition.

   Note: When adding an element to an eligibility group, you can specify that the element will only pass eligibility if there is input at the payee level for that element. This applies to both positive input and element assignments. The lack of an element assignment in this case causes the element to fail eligibility (see step 4).

4. Eligibility group.

   Elements are added to an eligibility group and designated as payee level or by eligibility group. (Absence-based entitlement elements do not need to be included in an eligibility group.) Elements designated at the payee level require input at the payee level for that element. This is accomplished through the use of element assignments (noted in step 3 above).

   If there is an element assignment and the Apply check box is selected, and the element is in the payee's eligibility group, the system sets the process and eligibility switches to Yes.

   If there is no element assignment, the system checks if the element is in the payee's eligibility group designated *By Eligibility Group* and sets the process and eligibility switch to Yes. If the element is not in the eligibility group, processing of the element stops.

5. Pay Entity override.

   If you've enabled positive input overrides for the pay entity (on the Pay Entity - Processing Details page), the element is eligible for resolution even though it is not in the payee's eligibility group.

Related Links

Calendars - Excluded Elements Page

Understanding Processing Elements

Element Resolution

This topic provides an overview of element resolution and discusses:

- Definition as of date.
- Begin and end dates.
- Generation control.
- Overrides.
- Recalculate options.

Understanding Element Resolution

There are many factors that affect the resolution of an element that meets the eligibility criteria. In general, there's an element resolution program for each element type.

Definition as of Date

All effective-dated elements contain a Definition As Of Date field, which tells the system which effective-dated row to use when retrieving an element definition. You provide the Definition As Of Date information on the Element Name page. If, for example, you select *Calendar Period Begin Date*, the system retrieves the element definition that was in effect as of the calendar period's first day.

Related Links

Understanding the Process of Selecting Definition As Of Dates

Begin and End Dates

Begin and end dates are used with override instructions, specifying the period during which an override applies. Processing rules for begin and end dates vary, depending on the type of override that's being processed.

Related Links

Begin and End Date Logic for Overrides

Generation Control

Generation control enables you to further control whether an absence entitlement, or entitlement adjustment is processed for a payee. You define the criteria under which elements should be resolved. Criteria can be based on HR status, run type, segment status, and other parameters.

For each parameter, you select whether the entries exclude or include the element during batch processing. Each payee must pass all generation control conditions for the element to be processed.

Related Links

Defining Generation Control Elements

Overrides

You can override a value or an element definition at various levels. For example, you can override primary elements (entitlements and takes), at the payee level and exclude an element from the process list for all payees, by using the calendar exclude feature.

You can not allow payee level overrides for an element by clearing the Payee check box on the Element Name page, Override Levels group box.

If there are several levels of overrides for an element, the system follows a hierarchy during processing.

Related Links

Understanding Overrides

Recalculate Options

The Always Recalculate option on the Element Name page, and the Recalculate option on the section component determine the recalculation options.

If you select Always Recalculate on the Element Name page, the system recalculates the element whenever it encounters it in the calculation process. So when you're updating a formula and recalculating or resolving it, the system uses the previously resolved value of the element if this check box is cleared. Always Recalculate applies only to the period that's being resolved.

Note: The Recalculate setting on a section applies only to the element on that section, not to the entire element resolution chain. In other words, it does not apply to the elements used by the parent element.

PIN Manager Logic

When the PIN Manager is called to resolve an element, it:

1. Checks to see whether the element has already been resolved for the current time frame (segment or slice).

2. If the element isn't resolved, it calls the appropriate element resolution program to resolve it.

3. If the element is resolved, the system checks the recalculation logic.

Recalculation Logic

The recalculation logic is as follows:

1. The system reads the Always Recalculate check box on the Element Name page.

   If the check box is selected, the appropriate element resolution program is called; if it isn't, the system takes the next step.

2. If the PIN Manager was called from the process list, the PIN Manager reads the Recalculate check box from the section of the current element.

   If the check box is selected, the appropriate element resolution program is called. If the check box isn't selected, the PIN Manager returns the previously resolved value for the element. The element isn't recalculated.

Example 1

You assign a value of 10 to variable V1 in formula F1 and use V1 in a different formula, F2. If V1 has Always Recalculate selected, the following occurs:

When the formula program calls the PIN Manager to get the V1 value, it determines that V1 is resolved. Because Always Recalculate is selected, the PIN Manager calls the variable element resolution program to resolve the element. V1 is resolved to whatever the definition contains. The value assigned to V1 from F1 is lost.

If you clear the Always Recalculate check box for V1, the value assigned to V1 from the formula isn't lost. The PIN Manager, called from F2 to resolve V1, determines that V1 is resolved. Additionally, it determines that Always Recalculate isn't selected and returns the previously resolved value to the formula program.

Dates, arrays, and brackets can assign values to variables. For proper calculation, you must consider recalculation logic.

Example 2

In this example, the Always Recalculate check box must be selected. During resolution of a count element, daily processing occurs. The PIN Manager is called to resolve the formula, which isn't used elsewhere, once each day. The formula is resolved for the first day. On the second day, the first-day value is used, unless Always Recalculate is selected for the formula.

Related Links

Understanding Retroactive Processing

Chapter 23

Processing Absences

Understanding Absence Processing

This topic discusses:

- The absence entitlement process.
- The absence take process.
- Absence processing features.
- Absences and segmentation.
- Absences and retroactive processing.
- Preparing to run the entitlement or take process.
- Absence processing preparations.
- Absence processing sequence.
- Absence processing phases and options.

The Absence Entitlement Process

This process updates frequency-based entitlements for payees and makes entitlement available. For example, if entitlement is granted monthly, you run the entitlement process once a month, even if you run weekly payrolls. You do not run this process for per-absence entitlements because they are updated by the Take process. You can run the entitlement process before or after the take process.

The Absence Take Process

During this process, the system looks at each daily record and determines the amount of time that should be paid or unpaid, according to your absence rules. It converts paid and unpaid units to positive input and adjusts entitlement balances. The take process creates daily data and uses system elements in daily data. These two aspects of the take process are discussed below:

Daily Data

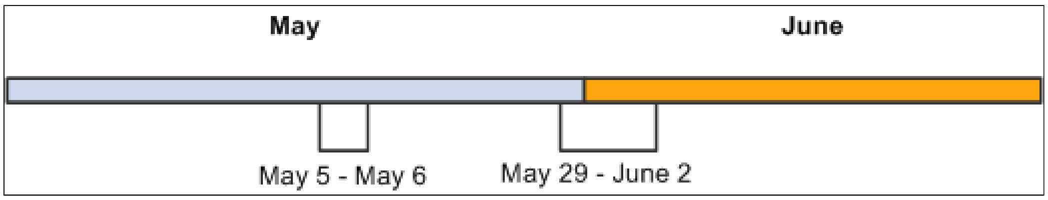
When you run the take process, one of the first things the program does is *expand* each absence event in the process list that occurred for a payee during the absence processing period (or current segment, if the processing period is segmented). Expanding the event means that the system creates a detailed row of data for each day of the absence in the GP_RSLT_ABS record. We call these rows *daily data*.

The take process expands each event that includes a date in the current segment. It creates a row for each day of the absence event, including days that fall outside the processing period. The system also populates the work schedule and holiday schedule system elements for the day before and after the absence, if the payee was not absent on those days. If the payee was absent the day before or the day after the reported absence, other absence-related system elements can be populated, depending on your rules.

For example, assume that the processing period is May 1 to 31, and there is no segmentation. If the payee is absent from May 5 to May 6 and again from May 29 to June 2, the take process creates two rows of daily data for the first absence and five rows for the second absence.

Image: Daily data is created for each day of an absence event

This graphic illustrates how daily data is created for each day of an absence event.



Even though the system creates a row of daily data for each day of an absence event, this does not mean that each day is processed. The entire event is expanded so that the system has all the information it needs to accurately evaluate each absent day. Only those days that occurred during the processing period are processed. Using the above example, the system would process the following absent days: May 5, 6, 29, 30, and 31.

Sources of Daily Data

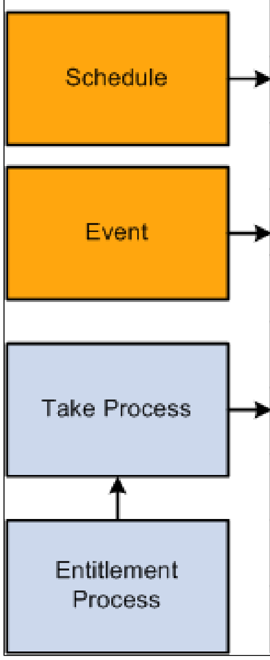
Data that populates the daily data row initially comes from two sources:

- The payee's work and holiday schedules, which provide the day of the week, scheduled hours, and holiday type.

- The absence event, which provides the absence take, begin and end dates, partial days absent, if applicable, and other information.

Image: Sources of daily data

The following graphic illustrates the sources of daily data.



Daily Data	May 5	May 6
Scheduled Hours	8	8
Day of week	Monday	Tuesday
Holiday Type	Standard	Standard
First day of absence	Y	N
Last day of absence	N	Y
Hours absent, if less than scheduled hours	0	4
Beginning entitlement balance	2	1
Day count	1	1
Units that should be paid	1	1
Units that satisfy the wait period	0	0

The take process also contributes to the daily data. When it applies the absence rules—defined by your absence elements—to the event and schedule data, it derives a set of results that populates the daily data. The results include the beginning entitlement balance, absent units, paid and unpaid units, ending balance, and other information.

The *day formula,* which you create and assign to your take rule, is what drives the results. This formula interprets each day of the absence and returns the number of units that the absent day represents; for example, four hours or one day. Once the system knows the absence *day count,* it can compare the count to the entitlement balance, determine whether a wait period or any other requirements for payment have been met and determine whether any part of the absent day should be paid. It can also calculate the ending entitlement balance.

The Role of System Elements in Daily Data

Much of the daily absence data is stored by system elements—a collection of predefined elements.

- Using System Elements in Formulas.

  When you define a take element, you identify the day count formula that the system will use to calculate the number of units that the payee was absent for the day being processed. The formula makes use of any information that is stored in the daily data, including—in some cases—data from the day before or after the day that is being evaluated. For example, three system elements store a payee's scheduled hours:

- SCHED_HRS captures the number of hours that the payee was scheduled to work for the day that is being evaluated.
- SCHED_HRS_DB captures the number of hours that the payee was scheduled to work the day before.
- SCHED_HRS_DA captures the number of hours that the payee was scheduled to work the day after.

You might create a day count formula that uses the prior or next day's values in its calculations. Or you might create a day count formula that uses the value of the SCHED_HRS element to calculate the day count.

Depending on what absence features you want to use, you might need to create other formulas. Any of these formulas can make use of the daily data that is captured by the system elements.

- Using User-Defined Fields.

User-defined system elements enable you to capture and use absence data that is specific to your organization. Data that is entered into these fields is stored by system elements and added to the Daily Data records during the Take process. As is true of all system elements, the data captured by these elements can be used by any absence formula. Each of the following pages includes a set of user-defined fields:

- Absence Event Entry
- Take Calculation
- Shift

Absence Processing Features

This topic discusses:

- Process lists.
- Iterative processing for preliminary absence runs.
- Stream processing.
- Group lists.
- Troubleshooting tools.

Process Lists

Once you've finished setting up your absence system, you're ready to run an absence process. Whether you're running the process for absence take or absence entitlement, the steps are the same. Your process list and calendar definitions determine who and what gets processed. Useful features of process lists include:

- The absence period can be the same as or different from the pay period. For example, January absences can be paid in January or February. You specify the target calendar pay for each absence process.

- You can run the entitlement and take processes together or separately.
- More than one take process can target the same pay calendar. For example, vacations taken in January and sick time taken in February can be paid in February. To accomplish this, create two absence process lists, one for vacations and another for sick time, and attach each process list to a separate absence calendar. On each absence calendar, select the pay calendar as the target calendar.
- The system can process absence takes according to their sequence on the process list or in chronological order. To process absences in chronological order, you include take elements in an absence take section of a process list.

Iterative Processing for Preliminary Absence Runs

Iterative processing enables you to process complex, preliminary absence runs quickly with minimal demands on system resources. You launch an Identify phase that flags each payee that meets the selection criteria for your absence run, then launch a Calculate phase that computes absence take or entitlement, as applicable, for all *identified* payees. After reviewing the results and making the necessary corrections, you rerun the Calculate phase for payees that have had changes since the last run.

Stream Processing

Stream processing is an optional feature that you can use to reduce processing time. You divide payees into subsets, based on their employee IDs, so that the system can perform calculations for multiple sets of payees at the same time.

Group Lists

Group lists are user-defined subsets of the payee population that are scheduled for processing. This feature enables absence administrators to work concurrently with different sets of payees in the same pay group.

Troubleshooting Tools

When you run absence calculations, you can generate an element resolution chain that shows, by payee, how and in what order each element was resolved. This chain also shows how long it took to resolve each element on the process list. Significant system resources are needed to produce an element resolution chain, so we recommend that you use this feature for problem solving only.

Related Links

Creating Process Streams

Creating Group Lists

Viewing an Element Resolution Chain

Absences and Segmentation

When you run the take process, the system assigns an instance number to each event, based on the following rules:

- If Multiple Instances is selected on the Absence Take - Calculation page, the system assigns a separate instance number to each like event that falls within the same absence period.

- If Multiple Instances is not selected, the system assigns the same instance number to all like events that fall within the same absence period.

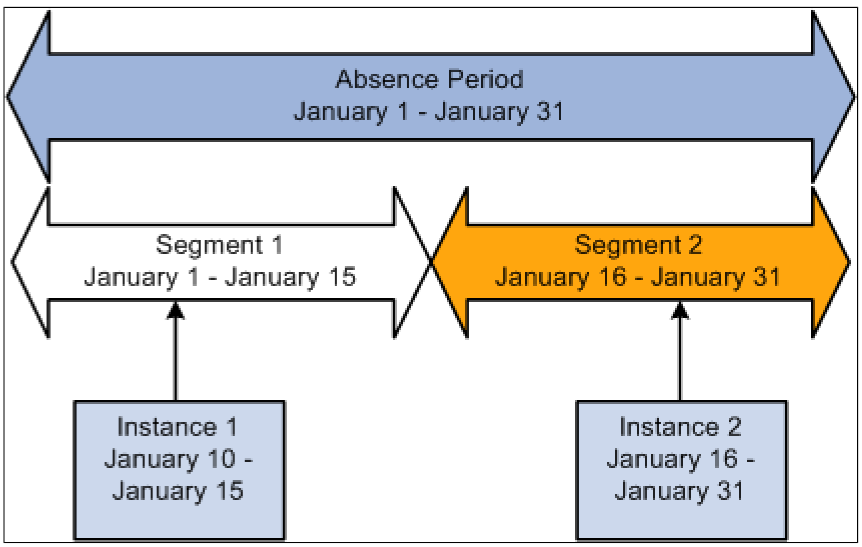
  When the absence element that is associated with the take element is segmented, the take process creates multiple instances, regardless of whether you selected Multiple Instances. Multiple instances are also created if the percent defined for the take element changes. (Percent is defined on the Generate Positive Input Member List on the Absence Take - Day Formula page.)

Example

Payee A is absent from January 10 to 17. The absence element is segmented as shown below. The event is divided into the two instances.

Image: Events divided into multiple instances because of segmentation

This graphic illustrates how the system divides an event into multiple instances due to segmentation.



Absences and Retroactive Processing

This section describes how absences work with retroactive processing.

- Setting Up Triggers for Absence Events.

  Triggers are the mechanism that Absence Management uses to detect changes to data that result in some type of system action. We recommend that you create retro and iterative triggers so that the system recognizes the online changes that users make to absence events through the Absence Event Entry page (the GP_ABS_EVENT record). Then iterative or retro processing is triggered whenever you add, delete, or update events.

- Retro Processing Method.

  Retro processing of absence calendars is carried out using the corrective retro method. Retro processing creates a new version of the generated positive input results and new versions of the daily absence data (GP_RSLT_ABS). For example, if an absence event occurs from 1 to 5 January (when it was originally processed), the event is represented by five rows of data in the daily record, each named Version1. If you change the end date to 7 January, 7 rows appear in Version 2 of the results.

Preparing to Run the Entitlement or Take Process

Following are the steps to prepare for running the entitlement and take processes:

1. Create one or more absence process lists to define the absence take elements or frequency-based entitlement elements that are to be resolved during processing.

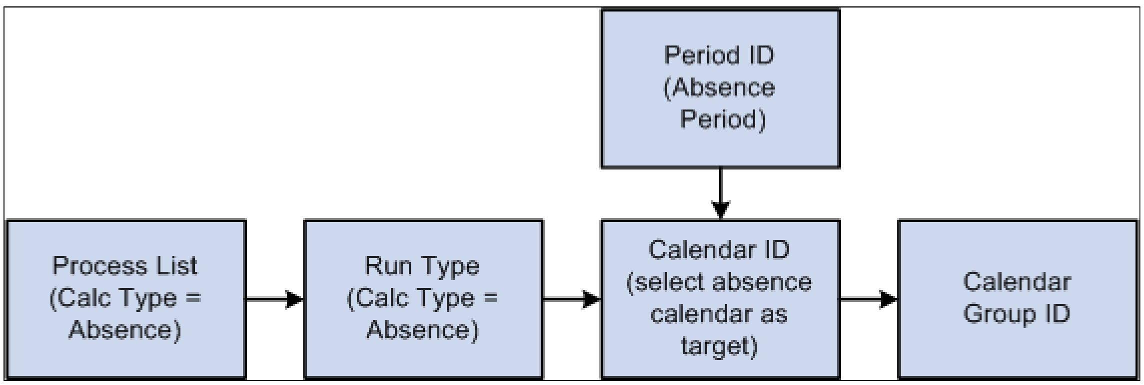
2. Associate the process list with a run type.

3. Create a calendar for the absence processing period.

4. Attach the calendar to a calendar group ID.

Image: Preparing for absence processes

This diagram illustrates the steps to prepare for running the entitlement and take processes.



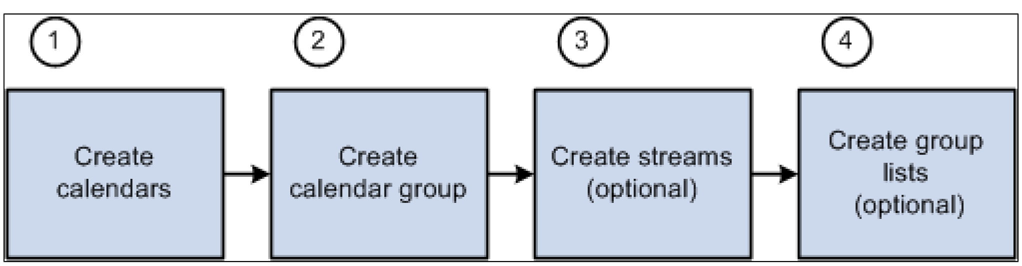
Typically, you create process lists and attach them to run types when you implement Absence Management. Then perform the remaining tasks on a regular basis.

After defining the Calendar Run ID, you're ready to start the process. Complete the Run Control page and use PeopleSoft Process Scheduler to start the process.

Absence Processing Preparations

Image: Steps to prepare for absence processing

This illustration shows the steps to prepare for absence processing.



Here are the steps to prepare for absence processing:

1. (Required) Create calendars.

   Calendars tell the system which pay group, run type, process list, and calendar period to process. You define pay groups, run types, and process lists during system implementation. You can define calendar periods during implementation or when you set up your calendars.

Important! You should not edit fields on the Calendar Period, Calendar, or Calendar Group ID pages after you initiate processing (other than to add payees to the Calendar, if you selected the Listed Payees option). To make changes to those pages, you must cancel the absence run.

2. (Required) Create the calendar group ID.

   The calendar group ID identifies the set of calendars to run together and the sequence in which to process the calendars. If you want to use stream processing, you must indicate that when setting up the calendar group ID.

3. (Optional) Create streams.

   To use stream processing, identify the range of employee IDs for each stream. Stream set up is a one time process that may require the assistance of a database administrator.

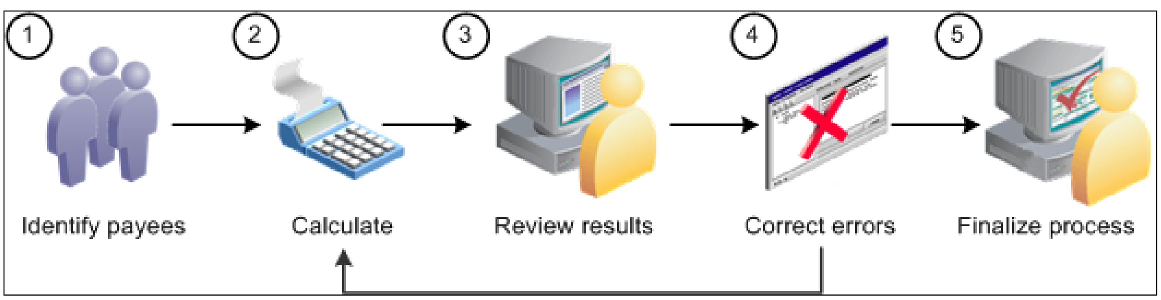
4. (Optional) Create group lists.

   To use the group list feature, clerks who run the absence process select the payees for each group list. (Group lists are tied to user IDs.)

Absence Processing Sequence

Image: Absence processing sequence

This illustration shows the absence processing steps.



Here are the steps for processing absences (use the Payroll/Absence Run Control page for steps 1, 2, and 5):

1. Identify payees (Identify phase).

   The absence cycle begins when you run a process that identifies all payees that are to be processed.

2. Perform calculations (Calculate phase).

   This phase computes each payee's absence take or entitlement units for an absence run.

3. Review results.

   If the system encounters problems during the Calculate phase—for example, invalid element definitions or payee eligibility problems—it places the payee in error. You can use various pages to review summary results, errors, and warning messages.

4. Correct any errors and recalculate.

To correct errors, you may need to update the Positive Input pages or make changes to the data in other applications that are integrated with Absence Management, such as HR or Time and Labor. You can then run the Calculate phase again to process only the payees that need to be recalculated.

5. Finalize the run.

   When you're satisfied with the processing results, run the Finalize phase to close the calendar group ID.

Absence Processing Phases and Options

This section explains in detail some of the steps in absence processing.

Identifying Payees

You begin an absence run by selecting the Identify phase on the Payroll/Absence Run Control page. The Identify phase loops through each calendar that is linked to the calendar group ID and finds all the payees that belong to the pay group that you identified when setting up the calendars. It then identifies the subset of payees that meet the payee selection criteria on the calendars.

You run the Identify phase once per calendar group ID (or once for each stream, if you're using stream processing). Later, if you add new hires, remove terminated payees, enter positive input, or make other changes that affect payee eligibility, the system detects the changes by looking for iterative triggers when you run the Calculate phase. (You must define iterative triggers for the types of changes to the Job record that you want the system to detect.)

For example, after running the Identify phase, you add five new hires to the pay group. As each new hire is added, the system creates a trigger. When you run the Calculate phase, the system sees the triggers for the new hires and includes them in the population of payees to be processed.

A calendar group ID is considered *open* from the time that you launch the Identify phase until you run the Finalize phase.

Calculating Payees

Once you identify payees, you can perform absence take or entitlement calculations. The system calculates one payee at a time, calendar by calendar. If a calendar that is associated with a payee is segmented, the system calculates absences each segment before calculating the payee's absences in the next calendar. After the system has calculated a payee's absences across all calendars, it continues to the next payee.

Usually you run the Calculate phase several times for the same calendar group ID, first for the entire population of payees that you selected during the Identify phase and then for payees with changes or errors. With each iteration, you identify which payees you want to calculate by selecting one of these options:

- Calculate

  This is the Calculate option that you'll select most often. It instructs the system to identify all payees with iterative triggers, including new hires and transfers, payees placed in error during a previous calculation, and those for whom you've manually entered processing instructions using the process indicator.

- Recalculate All

  Occasionally, you might need to recalculate every payee that is associated with a calendar group ID, stream, or group list. The Recalculate All option instructs the system to delete existing calculations and calculate each payee again without identifying the payees; that is, without trying to determine whether each payee still meets the payee selection criteria.

Freezing and Unfreezing Calculations

If your organization is like most, you have a short window of time between the day that you start running the absence process and your cutoff date. At some point, you might want to stop processing payees with iterative triggers (for example, those with salary adjustments) and concentrate on correcting errors so that you can finalize your absence run. To do this, you instruct the system to freeze calculations for the population that you specify. The Calculate phase ignores any subsequent online changes that you make to payees during the pay run and any positive input that you enter later for these payees. (The system keeps the triggers in case the payee is unfrozen later.) However, if you run the Recalculate All option after payees are frozen, the payees are recalculated.

You can freeze or unfreeze all payees that are in the current process stream, group list, or calendar group ID by selecting the Freeze option on the Payroll/Absence Run Control page or you can freeze selected payees on the Payee Status page.

To freeze calculations for a payee, the following conditions must be met:

- Each absence that is associated with the payee (for all segments of all calendars) must have a calculation status of *Payment Calculated*. If you freeze or unfreeze one segment for a payee, all of the payee’s segments for the calendar become frozen or unfrozen.
- The selection status cannot be *Suspended by User, Suspended by System,* or *Cancelled.*.

Suspending Active Payees

When submitting processing instructions, you have the option to automatically suspend all active payees under certain circumstances so that you can process a special run, such as a one time adjustment for a small group of payees. The Suspend Active option on the run control page controls this feature. For on-cycle processing, this option is available when you run the Identify or Calculate phase (including Recalculate All). For off-cycle processing, this option is selected automatically and cannot be changed.

When the Suspend Active option is activated, the system does the following when it processes each payee:

- Checks to see if the payee is associated with another open *on-cycle* calendar group.

  When this condition is true, the system checks the payee's calculation status in that calendar group:

  - If the status is Identified, the system suspends the payee from that run, so that the payee can be immediately identified and calculated in the new run.
  - If the calculation status is Frozen, the system suspends the payee in the new run that you're submitting.

- Checks to see if the payee is associated with another open *off-cycle* calendar group.

When this condition is true, the system suspends the payee in the calendar group that you just submitted.

Related Links

Status Codes and Process Indicators

Status Codes and Process Indicators

Status codes and process indicators play an important role in absence processing. Status codes help you monitor and interpret the processing results; process indicators enable you to manually enter processing instructions for specific payees. This section focuses on how the codes are created and how to interpret them.

Status Codes

The system creates two sets of status codes as it identifies each payee for processing:

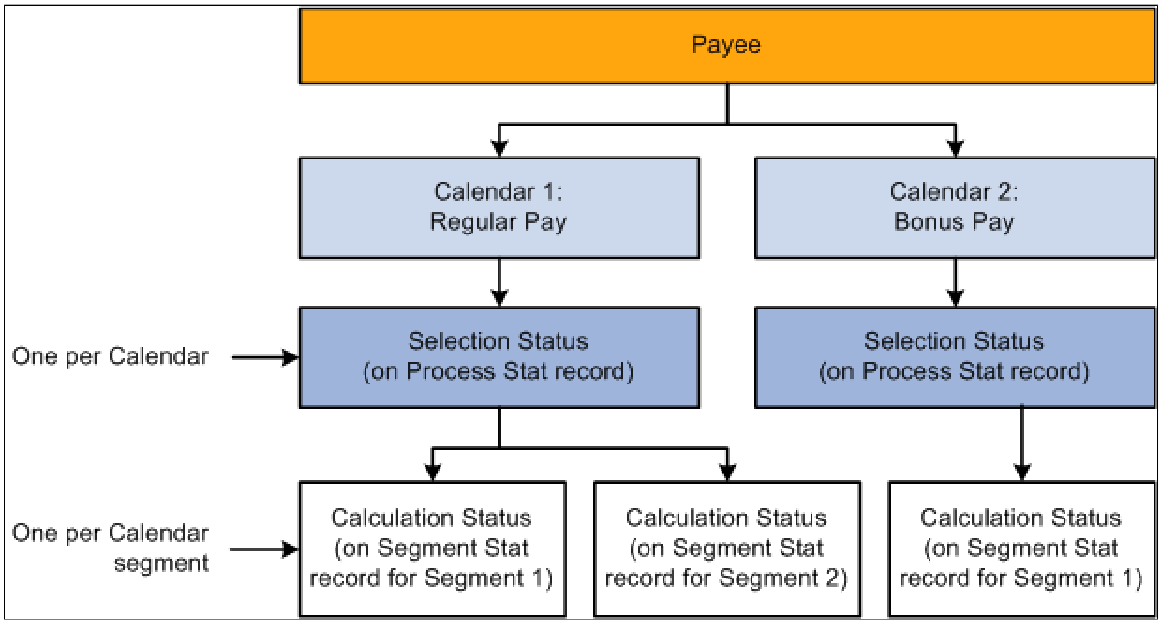
- One *selection status* code for each payee for each calendar, which it stores on the Process Stat (process status) record. During the first run of the Identify phase, each payee’s selection status is set to Active or Inactive to explain why the payee was identified for processing. With each iteration of the Calculate phase, the system updates the status to explain why the payee was included in or excluded from processing.

  The system keeps a record of excluded payees only if they were *suspended* or *canceled.* If the payee simply no longer qualifies for selection (for example, the payee is assigned to a different pay group), the system does not record this, and the payee's process and status records are deleted.

- One *calculation status* code for each payee, per calendar segment, which is stored on the Segment Stat record. If a calendar has no period segmentation, a payee has one calculation status. Calculation status tells you the most recent action that has been completed for the segment, for example, identified, calculated, or frozen. Before you run the Calculate phase for the first time, the status code for each identified payee is *Identified*.

Image: Status codes created when payees are identified for processing

This diagram illustrates the status codes created by the system when payees are identified for processing.



Process Indicators

Sometimes you might need to cancel a payee from an absence run; temporarily suspend a payee from processing; freeze, unfreeze a payee; or take some other action at the payee level. You do this by entering a process indicator that tells the system what action to take during the next iteration of processing. For example, if the selection status for payee A is *Active,* and you need to cancel that payee from the absence run, set the payee's process indicator to *Cancel*. The next time you run the Calculate phase, the system deletes all calculation results for payee A and changes payee A's selection status to *Cancelled.* You update the process indicator on the Payee Status component.

Important! Changing a process indicator updates all of a payee's segments that are in the same calendar group ID.

Status Code and Process Indicator Definitions

The tables below list the status codes and process indicators. Selection status (one per payee per calendar) and calculation status (one per calendar segment) are system-maintained; the process indicator is user-maintained.

Selection Status	***Definition***
Active	Payee was active for at least one day within the calendar.
Inactive	Payee was not active within the calendar, but was selected because of positive input, a retroactive trigger, or a forwarded adjustment.

Selection Status	***Definition***
Cancelled	You manually canceled the payee from the calendar run. The system doesn't reselect the payee for the current calendar run or a retroactive run.
Suspended by User	You manually suspended the payee from the calendar run. The next time you run Calculate, the system tries to reidentify the payee and recalculate the net pay.
Suspended by System	The payee is linked to another open calendar group ID. (A payee can be selected for only one unfinalized calendar group ID at a time.)

Calculation Status	***Definition***
Identified	Segment has been identified for calculation but has not been calculated.
Calculation Successful	Segment has been calculated.
Frozen For Further Calc	Segment is not subject to further calculations unless you unfreeze it or run the Recalculate All phase.
Finalized	The calendar run has been finalized. You can no longer make changes.
Calculation Error	An error occurred during calculation.
Calculation Error — Bypassed	The system did not attempt to calculate the payee because of an error.
Calculation Error — By Rule	An error was produced because of a condition that you defined through a message element.
Deleted by Process	Segment has been deleted by the process.
Has No Payment	Note: This calculation status is not applicable to Absence Management.

Process Indicator	***Definition***
Normal	This initial setting appears after each calculation. It indicates that there are no special processing instructions for this payee.

Process Indicator	***Definition***
Cancel	The payee will be canceled from the absence process during the next iteration of the Calculate phase. The selection status will be changed to Canceled. The payee will not be identified again unless you change the indicator to Uncancel before finalizing the absence run.
Recalculate	All calculations that are associated with the payee's jobs (employee ID and employee record number combination) will be rerun the next time you run the Calculate phase. This is similar to the Recalculate All option on the Payroll/Absence Run Control page, but it applies only to payees that you select.
Suspend	The payee will be withheld from processing the next time you run the Calculate phase. The selection status will be changed to *Suspended by,* and all calculation results will be deleted. During subsequent calculations, the system will try to reidentify and recalculate the payee (until it succeeds or you cancel the payee). You do not need to take any action.
Uncancel	The system will change the selection status from *Canceled* to *Active, Inactive,* or whichever selection status is appropriate and will try to reidentify and recalculate the payee the next time the Calculate phase runs.
Freeze	The payee is not subject to recalculation unless you select Recalculate All or Un-freeze on the Payroll/Absence Run Control page or the Payee Status page.
Unfreeze	Reverses a payee's freeze status.

Related Links

Viewing Payee Status and Updating a Payee's Processing Instructions

Entering Processing Instructions

When you're ready to begin a payroll or absence run, create a run control ID and enter your processing instructions:

1. Access the Payroll/Absence Run Control page.
2. Indicate which payees you want to process (options vary by processing phase).
3. Select the phase of processing to execute (always select the Identify phase the first time). To initiate processing for a calendar group, the calendar group must first be identified.
4. To produce an element resolution chain or generate performance statistics, select the appropriate option.

5. Select the language to use for the Log File.

6. Click the Run button.

Note: The Description and Process Name (as they appear on the Process Scheduler page) are GP & AM Payroll Job, GP_PAYE. The same name applies to absence and pay runs.

Because processing is iterative, you return to the Payroll/Absence Run Control page several times throughout the calendar group processing cycle to update your instructions. For example, after the Calculate phase runs, you'll want to check the results, make corrections, access the Payroll/Absence Run Control page again (using the same run control ID), and enter instructions for the next phase of processing. Repeat this process as often as necessary until you're ready to finalize the run. The system deletes the run control record each time a processing phase is completed.

If a pay run is aborted, you can correct the problem, use the Restart Information link on the run control page to view the restart information, and resume where processing left off. You don't have to start the pay run at the beginning. It is very important to continue using the same run control that was sued when the process was aborted. The information needed for the system to start up where it left off is stored on the run control. A new run control should *not* be used.

In this topic, we discuss how to:

- Enter processing instructions for payroll, absence, and entitlement processes.
- View information about an aborted run and restart the process.

Pages Used to Enter Processing Instructions and Define Run Control Parameters

Page Name	***Definition Name***	***Navigation***	***Usage***
Calculate Absence and Payroll	GP_RUNCTL	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Calculate Absence and Payroll, Calculate Absence and Payroll	Enter processing instructions for a payroll process, an absence take process, or an absence entitlement process. This page is used to run both on-cycle and off-cycle payrolls.
Restart Information	GP_RUNCTL_SEC	Click the Restart Information link on the Calculate Absence and Payroll page.	View information about an aborted run, including where the system resumes processing after you fix the problem and resubmit the process.
Debug and Tuning Options	GP_RUNCTL_DBUG_SEC	Click the Debug and Tuning Options link on the Calculate Absence and Payroll page.	Generate statistics to improve the performance of the pay run and determine whether the absence and payroll calculation process updates the data in the Processing Monitor.

See the product documentation for

PeopleTools: PeopleSoft Process Scheduler

Calculate Absence and Payroll Page

Use the Calculate Absence and Payroll page (GP_RUNCTL) to enter processing instructions for a payroll process, an absence take process, or an absence entitlement process.

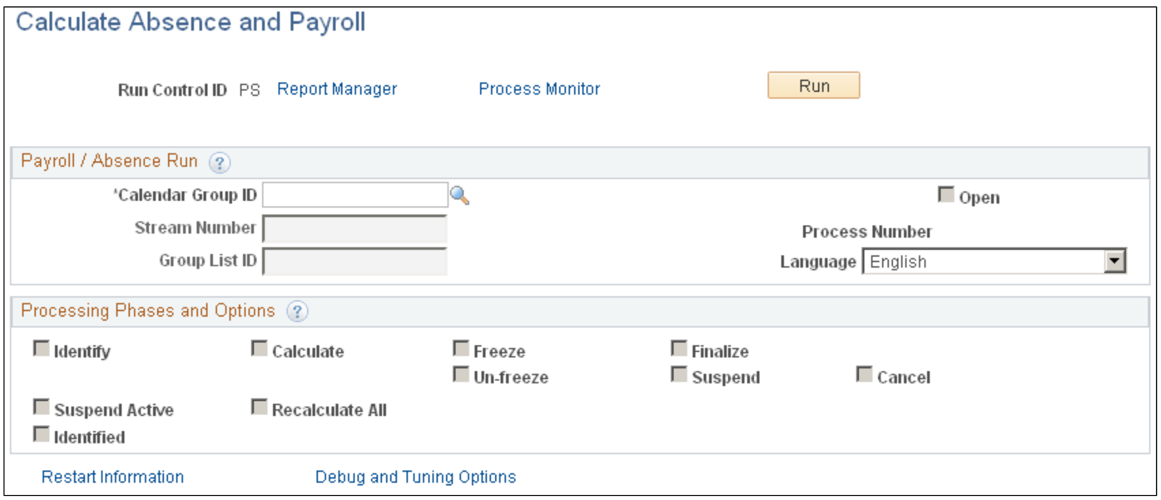
This page is used to run both on-cycle and off-cycle payrolls.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Calculate Absence and Payroll, Calculate Absence and Payroll

Image: Calculate Absence and Payroll page

This example illustrates the fields and controls on the Calculate Absence and Payroll page.



Payroll/Absence Run

Calendar Group ID

Select the ID for the set of calendars to process. (The prompt table excludes calendar group IDs that have been finalized.)

Open

This is an attribute of the calendar group. The field is stored on the calendar group table. When the calendar group is initially identified, it is considered open, and the check box is selected. Once it is finalized, it will no longer be open, and the check box will be deselected.

Stream Number

If you selected the stream processing option on the Calendar Group ID page, the Stream Number field is available. The following conditions apply:

- If you select Identify (as the processing phase), you must enter the stream number to process.

- If you select Calculate, Un-freeze, or Freeze, enter the stream number here or complete the Group List ID field (if you have run the Identify phase for all streams).

Group List ID

To calculate, freeze, or unfreeze only payees in a particular group list, enter the group list ID. You can process only group lists that you created with your user ID.

Language

Select the language the system uses to display the Log File (which helps the system administrator determine whether a run completes successfully). The default is the Preference Language that is defined for the user.

See "Creating Process Streams *(PeopleSoft HCM 9.2: Global Payroll)*".

Processing Phases and Options

Select the processing phase to run. You can run some phases together, such as Identify and Calculate. Sometimes selecting one option makes other options unavailable.

Identify

Select the first time you run the process. It instructs the system to identify all payees (associated with the calendar group ID, or selected stream, if applicable) that meet the payee selection criteria that is defined on the calendar pages that are linked to the calendar group ID. Otherwise, you can run the Identify phase with the Calculate phase.

Once you run the Identify phase, you cannot select this check box again for the same calendar group ID or stream, unless you cancel the entire run. With iterative processing, the system adds and removes payees based on changes that you make to the data, so you don't have to run the Identify process more than once. This is accomplished by the use of iterative triggers. Payees with iterative triggers are reidentified and recalculated when you run the calculate phase.

Calculate

Select when you are ready to calculate the payroll or absence units for an absence run. You can run the Calculate phase after or at the same time as the Identify phase. The first time you run Calculate, the system calculates every payee that is flagged by the Identify phase.

For each subsequent run of the Calculate phase, you define the subset of payees that you want to process or reprocess by selecting the appropriate check boxes:

Select the Calculate check box to reidentify payees and recalculate:

- Payees that were placed in error during a previous calculation.
- Payees that were placed in suspend status.

- Payees for whom you manually set the process indicator to *Recalculate* or *Uncancel.*
- Payees with iterative triggers, unless they are frozen.

Select both Calculate and Recalculate All to recalculate the entire population of payees that have already been calculated, including frozen payees. The system reidentifies only payees with iterative triggers.

Freeze

Select to freeze payees that have been calculated. (Payees with *Identified* status are not frozen.) The system freezes all calculations for the selected population. When you run the Calculate phase for this payee again, the system ignores iterative triggers and positive input that were added while the payee was frozen. (If you select the Recalculate All option, however, the system processes the triggers and positive input.)

Finalize

Select to close the payroll or absence cycle for the entire calendar group ID. Once you finalize the run, no more calculations are possible.

The Finalize phase must be run by itself.

Un-freeze

Select to lift the freeze for payees that were frozen. During the batch process, the system resets the calculation status to *Calculated.* In subsequent runs of the Calculate phase, the system again performs calculations for these payees as needed (the system does not automatically perform calculations for these payees again unless there is a reason, such as a recalculation instruction or an iterative trigger.)

Suspend

Select to pull payees from an open payroll run. Suspended payees are given an iterative trigger with a status of unprocessed. You can then include these payees in another run, like an off-cycle or bonus run, before finalizing the open payroll run. Once you return to the open pay run, the system reidentifies and recalculates the suspended payees. Suspended payees do not lose their associated retroactivity.

Cancel

Select to invalidate the entire pay run (as if the calendar group had never been run). The system deletes all calculations for payees, restores all data to prior values, and deletes all status indicators.

Select this check box after you run the Identify or Calculate phase. If this check box is selected, no other options are available. You cannot cancel a run after payments are finalized.

The Cancel phase must be run by itself.

Suspend Active

This check box specifies whether to suspend payees from other open calendar groups so that they can be processed in this run. (A payee can only be identified in one open calendar group ID at a time.)

For on-cycle processing, the check box is available when you select the *Identify* or *Calculate* option. It is deselected, by default.

For off-cycle processing, the check box is always selected and you cannot change the setting.

Recalculate All

If you select this check box, also select Calculate. The system deletes the calculation results for all payees from prior runs, including frozen payees, and sets the status indicators to their original values. It then recalculates (but does not reidentify) every payee that has already been calculated.

This option is appropriate if you've modified records that are used during processing and that do not create iterative triggers—for example, if you've changed an element's definition.

Warning! Recalculating all payees can place a heavy load on system resources. We suggest that you select Recalculate All only when you suspect that calculations are wrong for a large number of payees because of bad data, an erroneous element definition, or some other problem with far-reaching consequences.

Identified

Selected if the Identify phase has been run for all streams. Once all streams are identified, you can use group lists for other phases of processing.

Restart Information

If a fatal error, such as a database error, occurs during processing, the processing stops and an error message appears. Click to access the Restart Information page, where you can see where the process stopped and where it will resume after you address the problem. After correcting the error, restart the process. Usually you don't need to cancel the run.

Debug and Tuning Options

Click to access the Debug and Tuning Options page, where you can generate statistics to improve the performance of the pay run and determine whether the process updates the data in the Processing Monitor.

Related Links

"Creating Process Streams *(PeopleSoft HCM 9.2: Global Payroll)*"
"Finalizing a Payroll or Absence Run *(PeopleSoft HCM 9.2: Global Payroll)*"
"Canceling a Payroll or Absence Run *(PeopleSoft HCM 9.2: Global Payroll)*"
"Viewing an Element Resolution Chain *(PeopleSoft HCM 9.2: Global Payroll)*"

Restart Information Page

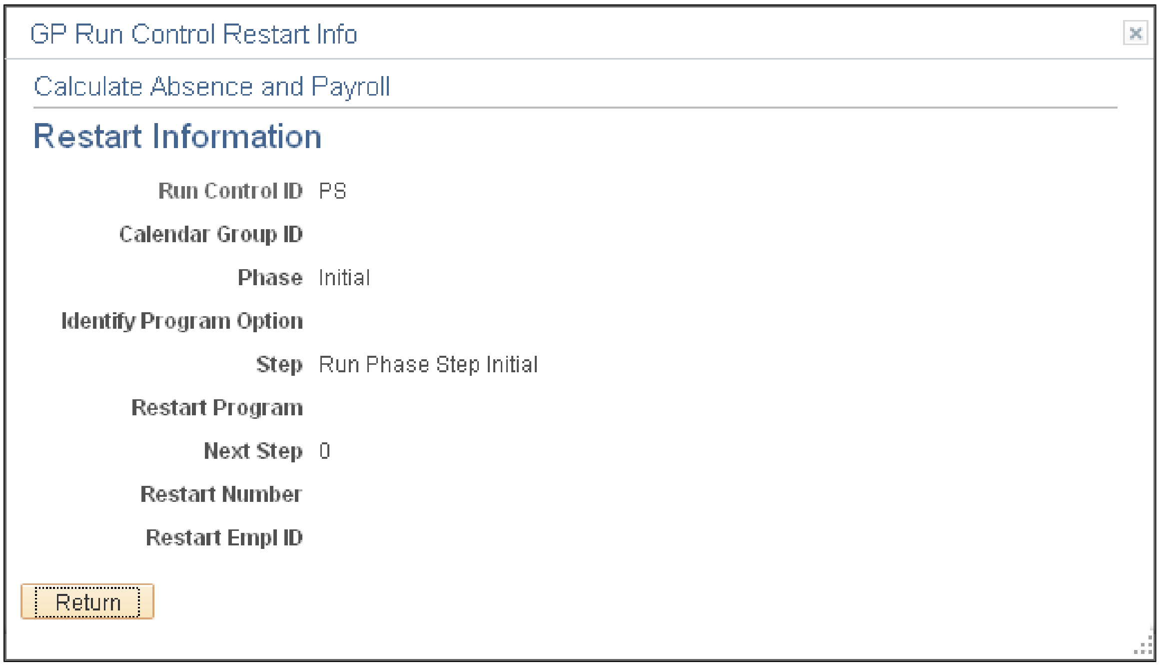
Use the Restart Information page (GP_RUNCTL_SEC) to view information about an aborted run, including where the system resumes processing after you fix the problem and resubmit the process.

Navigation

Click the Restart Information link on the Calculate Absence and Payroll page.

Image: Restart Information page

This example illustrates the fields and controls on the Restart Information page.



Phase, Identify Program Option, and Step	These fields identify where processing stopped, if the program made a commit during processing. Run Phase displays *Initial, Iterative, Cancel, Identify, Calculate, Finalize, Complete.*
Restart Program, Next Step, and Restart Number	These fields contain information only if the process was aborted during the Identify phase.
Restart EmplID	If the failure occurred during the Calculate phase, this field displays the employee ID number of the first payee that is to be calculated when you restart the process. **Note:** When you restart the Calculate phase for a group list, the system uses the definition of the group list as of the restart time.

Debug and Tuning Options Page

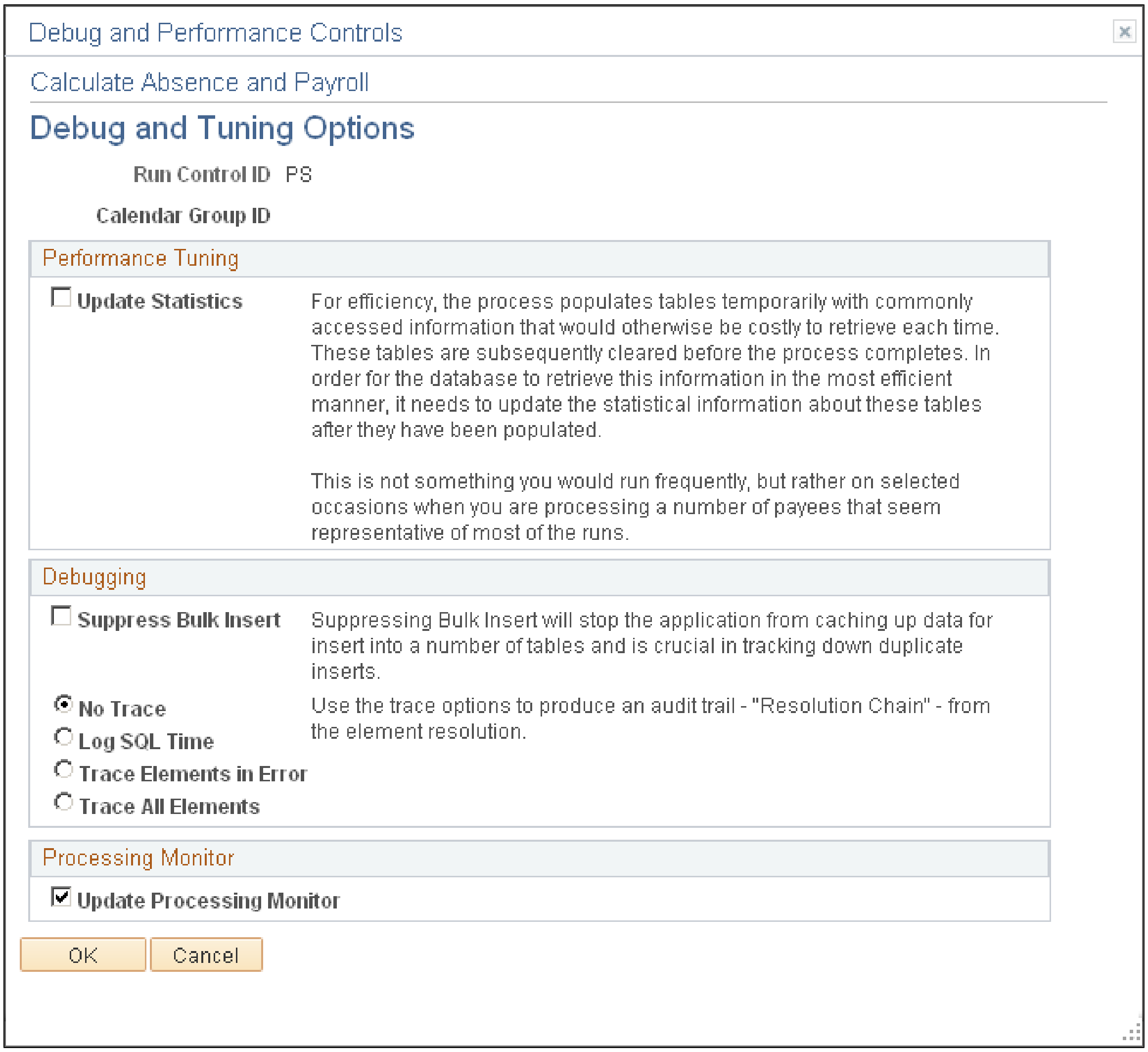
Use the Debug and Tuning Options page (GP_RUNCTL_DBUG_SEC) to generate statistics to improve the performance of the pay run and to determine whether the absence and payroll calculation process updates the data in the Processing Monitor.

Navigation

Click the Debug and Tuning Options link on the Calculate Absence and Payroll page.

Image: Debug and Tuning Options page

This example illustrates the fields and controls on the Debug and Tuning Options page.



Performance Tuning

Update Statistics

The system leaves temporary tables populated until the end of calendar processing, either through finalization or cancellation, rather than emptying them during the batch payroll process as soon as they are used. This simplifies the process of obtaining accurate statistics from these tables, which in turn enhances performance. The optimum time to update statistics on these tables is when the system has calculated a calendar and that calendar remains open. Updating statistics when all calendars are closed is not recommended because the temporary tables are empty at that point in the process.

The Update Statistics check box enables you to update some of the most important temporary tables during batch processing.

Debugging

Suppress Bulk Insert

Select to prevent the application from caching up data for insert into a number of tables. If you receive a SQL error (such as duplicate insert) while inserting duplicate results into a results table, select this check box and run the process again. Doing so enables the system to display the EMPLID that is causing the error along with the SQL error message.

Several trace options are available during the Calculate phase. These options enable you to request an element resolution chain—a file with detailed results of the Calculate phase—for payees that will be calculated during the next run.

Note: If you are calculating a large number of payees, selecting Log SQL Time, Trace Elements in Error, or Trace All Elements can degrade system performance. We recommend that you use these options for troubleshooting only. (These options require the same level of system resources.)

No Trace

Select if you don't want to produce an element resolution chain.

Log SQL Time

Select to have the Log File report each time the Payee Data Manager program opens cursors (SELECT statements that return more than one row) for the Job table, Job Dates table, Person Organization table, and the Person Organization Instance table during batch processing. This information can be useful for performance tuning.

Trace Elements in Error

Select to produce an element resolution chain that includes only those payees in error.

Trace All Elements

Select to produce an element resolution chain that shows how all elements were resolved for the calculated payees. You can determine the intermediate value of every element and the order in which the elements were resolved.

Processing Monitor

Update Processing Monitor

Select to update the data in the Processing Monitor during absence and payroll calculation batch processing.

By default, this check box is selected. Deselect the check box to turn off the Processing Monitor update portion of the batch process if you want to disable the feature entirely, or just for a selected phase of the calculation process.

For example, if you are running the Identify phase by itself, you don’t need to update the Processing Monitor at the same time. Likewise, if you are performing an iterative calculation for a small subset of payees, it may not be necessary to update the Processing Monitor.

Note: You can also use the Update Processing Monitor Data page to update Processing Monitor data for a specific calendar group.

Related Links

Configuring the Processing Monitor

Update Processing Monitor Data page

Creating Group Lists

A group list defines a subset of payees that you can process at the same time. Group lists are linked to user IDs. You can process any group list that you create. You can use group lists with the Calculate, Freeze, and Unfreeze phases of processing after you run the Identify phase for the calendar group. Groups lists and streams are mutually exclusive: if you select a group list for processing, you cannot also select a stream number, and vice versa.

Following are some key characteristics of group membership:

- You can update the members of a group list at any time. The system uses the current definition of the group list.
- The system ignores payees in a group list that are not associated with the absence calendars that are being processed.
- You can include a payee in more than one group list; however, we recommend that you do not.

  If users start concurrent processes for the same calendar group, but with different group lists that include the same members, the second process stops soon after it begins. This enables the user to remove duplicate payees from the group list.

Warning! If you run the Calculate phase by group list only, the system doesn't detect changes to the payees that are added or removed from a calendar after the initial Identify phase. To process overlooked payees, run the Calculate phase for the entire population (without group lists) before finalizing the run.

Page Used to Create a Group List

Page Name	***Definition Name***	***Navigation***	***Usage***
Group Lists	GP_GRP_LIST	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Payee Groups, Group Lists, Group Lists	Create, edit, and view subsets of payees that you can process during an absence run.

Group Lists Page

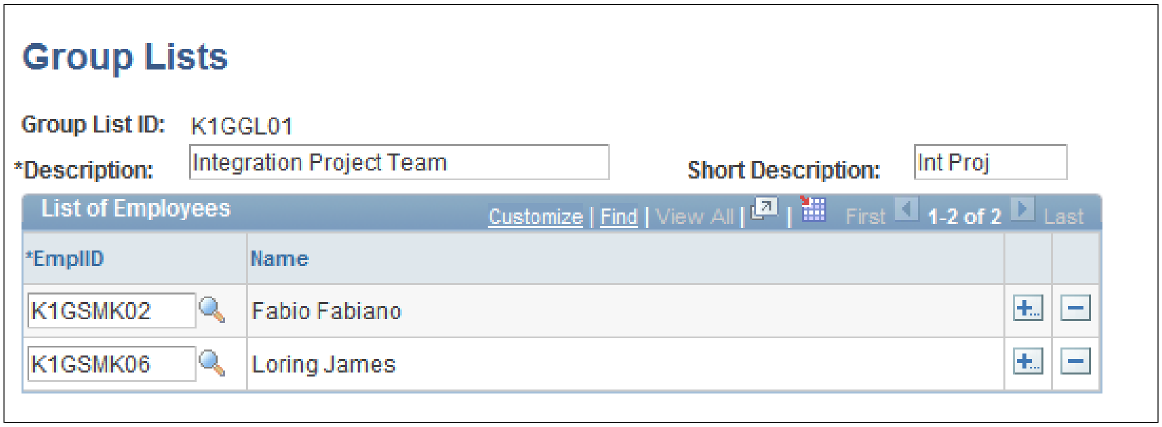
Use the Group Lists page (GP_GRP_LIST) to create, edit, and view subsets of payees that you can process during an absence run.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Payee Groups, Group Lists, Group Lists

Image: Group Lists page

This example illustrates the fields and controls on the Group Lists page.



EmplID Select the EmplID for each person to include in the group.

Note: You can view or edit only groups that are created with your user ID.

Creating Process Streams

This topic provides an overview of stream processing, lists prerequisites, and discusses creating streams.

Page Used to Create Streams

Page Name	***Definition Name***	***Navigation***	***Usage***
Streams	GP_STREAM	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Payee Groups, Streams, Streams	Set up a processing stream. Before you can use stream processing, you must partition tables in the database.

Understanding Stream Processing

Stream processing is an optional feature that provides added flexibility to absence processing. You can divide payees into subsets, or *streams,* based on employee ID, and run calculations for either of the following:

- Only those payees in the stream that you select.
- Two or more streams at the same time.

By starting more than one stream at a time, you shorten the processing time significantly—the system processes the streams simultaneously, rather than going through a single, extended run. Using streams can also help control the sequence of each run and establish break points, to commit the results of your absence run to the database.

You must process each stream before you can finalize the calendar group ID. The Cancel and Finalize phases are not stream-oriented because they affect all payees that are processed with the same calendar group ID.

Prerequisites

Stream processing requires preliminary steps. Perform steps 1 and 2 once. Perform steps 3 and 4 each time that you use stream processing while running absences.

To prepare for stream processing:

1. Create the streams.
2. Partition tables in the database.

   A database administrator needs to partition tables, using employee ID as the key.
3. When creating calendars, select the Stream Processing check box on the Calendar Group ID page.
4. Select the streams to process through the Calculate Absence and Payroll page.

   To process several streams at once:

   a. Select the processing options for the first stream.

   b. Using a different Run Control ID, enter the instructions for the next stream.

   c. Repeat step (4b) for each stream.

      You can run the streams all at once or at different times.

Streams Page

Use the Streams page (GP_STREAM) to set up a processing stream.

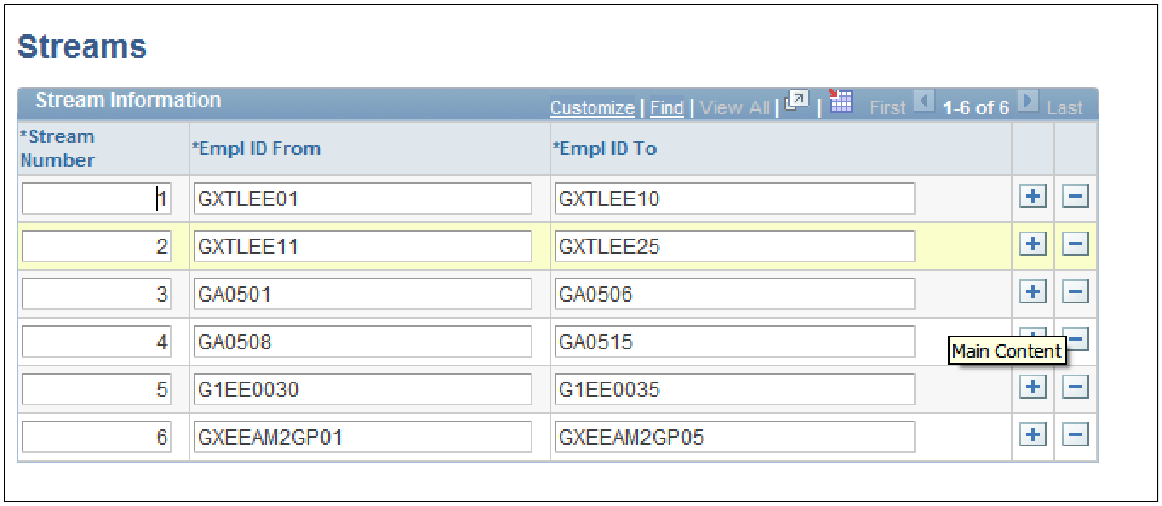
Before you can use stream processing, you must partition tables in the database.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Payee Groups, Streams, Streams

Image: Streams page

This example illustrates the fields and controls on the Streams page.



Enter a stream number and the EmplIDs of the first and last payees to include in the stream.

Note: You cannot include the same EmplID in more than one stream.

Chapter 24

Viewing and Finalizing Absence Results

Common Elements Used to View and Finalize Absence Results

Calculate Action

The following values appear in this field:

Calculate: The segment has been calculated.

Calculate and Replace: The segment was originally calculated and later an off-cycle correction, with a correction type of replacement, is selected.

Reverse: The segment was calculated originally, but during the recalculation period, the payee was no longer eligible for selection, and the segment was reversed. For example, assume that a payee was originally in Pay Group A but moved to Pay Group B. A retroactive change is made to switch the payee to Pay Group B. *Reversal* segments are created for the Pay Group A calendar during the retroactivity, to *reverse* the previous calculation.

EmplID From (employee ID from) and EmplID To (employee ID to)

Enter the employee IDs of the first and last payees in the range (on inquiry pages) or to be included in the processing stream.

Paid and Unpaid

The portions of the day count that are paid and unpaid.

Revision Number and Version Number

Together, these fields indicate whether an amount was recalculated due to retroactivity and (if so) which retroactive method was applied:

When the retro method is corrective, the version number increments by 1; the Revision Number stays at 1.

The original set of output results for a calendar calculation is Version 1, Revision 1.

Segment Number

The number that is associated with the segment. The value *1* appears if the calendar is not segmented.

Viewing Absence Processing Results

After running the Calculate phase, you can view the results. Processing results appear on the components listed below. We suggest that you view the pages in the order shown.

Results Pages	***Purpose***
Log File	Enables the system administrator to determine whether the COBOL process was executed successfully.
Processing Statistics	Provides processing statistics for the run, including the number of payees that are in error. View by calendar or calendar group.
Payee Iterative List	Lists those payees for whom the system has performed interactive calculations.
Payee Messages	Shows error messages and warnings.
Payee Status	Enables you to view the calculation status of payees and to enter processing instructions for individual payees.
Results by Calendar Group ID	Shows a payee's calculated absence results, accumulators, and supporting elements for each calendar that is associated with the calendar group ID that you select. You also see calculations by calendar segments, positive input, and retroactive calculations.
Results by Calendar	These pages display the same information as the Results by Calendar Group pages, but only for the calendar that you select. You can view the results of a calendar that has been used in different Calendar Groups. For example, if retroactivity causes a calendar to be run more than once, you can access the results of the original run, plus the results of each retroactive run.
Element Resolution Chain	Shows how each element was resolved.

These pages can also be a helpful resource after the Finalize phase. All information remains available after you finalize a run except for Payee Messages and Iterative Triggers. Canceling an entire absence run deletes all results.

Viewing the Log File

This topic discusses viewing the Log File generated by an absence process.

The Log File gives the system administrator basic information about the run and whether it was completed successfully. The language in which this file is produced is determined by the user ID of the person who enters the processing instructions on the Calculate Absence and Payroll page.

Example 1: Log File for Successfully Completed Run

The database name and the processing options that you selected on the Calculate Absence and Payroll page appear at the top of the file:

```
Process started        :                 13:27:09


Connecting to Database                   GP830DVL

  with User ID         :                 PSGP

  and Batch Run ID     :                 1


Calendar Group ID                        K0CRUSA 199910

  Stream Number        :                 00

  Group List ID        :

  Identify Option      :                 No

  Calculation Option   :                 Y

  -   Trace Option     :                 A

  -   Recalculate All  :                 N

  Unfreeze Option      :                 N

  Freeze Option        :                 N

  Finalize Option      :                 N

  Cancel Option        :                 N
```

The Checkpoint Interval and Progress Interval that you selected on the Installation Settings page appear in the next section of the Log File.

```
Checkpoint / Restart

  CheckPoint Interval  :                 1000

  Progress Interval    :                 0500
```

Information about the run phase follows. You can see some of the same information when you select the Restart Information link on the Payroll/Absence Run Control page.

```
Run Phase            :                 1
  Cancel Pgm Option    :
  Identify Pgm Option  :
  Next Program         :
  Next Step            :                 0000
  Next Number          :                 00
  Next Employee ID     :

Processing Payee Range
  First Employee ID    :                 B-BARET100
  Last Employee ID     :                 ZP007
```


A timestamp message appears at the beginning and end of each processing phase. The timestamps represent application server machine time, not database time.

```
Initial Phase started  :                 13:27:12


  Looking for T&L feed

  COMMIT TAKEN


Initial Phase ended    :                 13:27:12


Iterative Phase started:                 13:27:12


  COMMIT TAKEN


Iterative Phase ended  :                 13:27:12


Cancel    Phase started:                 13:27:12


  Canceling Selectively for Recalculation

  Total number of Segments processed   :          0

  COMMIT TAKEN


Cancel    Phase ended  :                 13:27:14


Identify  Phase started:                 13:27:14


  Iterative screening for new Payees


  Total number of Payees identified    :         10

  Total number of Segments identified  :         20

  COMMIT TAKEN


Identify  Phase ended  :                 13:27:17


Calculate Phase started:                 13:27:18


  Looking for T&L feed

  COMMIT TAKEN
```

Example 2: Log File for Run That Is Terminated by an Error

The database name and the processing options that you selected on the Payroll/Absence Run Control page appear at the top of the file:

```
Process started         :                11:06:34


Connecting to Database                   GP830TS1

  with User ID          :                PS

  and Batch Run ID      :                GGTEST


Calendar Group ID                        GXHCRUSA 199910

  Stream Number         :                00

  Group List ID         :

  Identify Option       :                N

  Calculation Option    :                Y

  -   Trace Option      :                N

  -   Recalculate All   :                Y

  Unfreeze Option       :                N

  Freeze Option         :                N

  Finalize Option       :                N

  Cancel Option         :                N


Checkpoint / Restart

  CheckPoint Interval   :                1000

  Progress Interval     :                0500

  Run Phase             :                1

  Cancel Pgm Option     :

  Identify Pgm Option   :

  Next Program          :

  Next Step             :                0000

  Next Number           :                00

  Next Employee ID      :


Processing Payee Range

  First Employee ID     :                B-BARET100

  Last Employee ID      :                Z9060


Initial Phase started   :                11:06:38
```

The actual error message appears on the next line.

```
 Error Message   : [Microsoft][ODBC SQL Server Driver]String data, right truncation⇒
 (SQLSTATE 01004) 0

Application Program Failed

 In Pgm Section  : GPPDPDM1: RD000

Application Program Failed

 In Pgm Section  : GPPDPDM0: XA000-GET-NEXT-SEGMENT

Application Program Failed

 In Pgm Section  : GPPSERVC: XP000-CALL-PMT-DATA-MGR

Application Program Failed

 In Pgm Section  : GPPDPRUN: JA000-CALL-SERVICE


Process ended          :                 11:06:48

The process terminated with ERRORS.
```

Related Links

Understanding Batch Processing Errors

Viewing Processing Statistics

This topic discusses viewing processing statistics for an absence process.

The Processing Statistics component displays high-level processing results:

- The number of payees that are identified, in error, calculated, or finalized.
- The number of active, inactive, canceled, and suspended payees.

Pages Used to View Processing Statistics

Page Name	***Definition Name***	***Navigation***	***Usage***
By Calendar Group	GP_CALRUN_STAT1	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Processing Statistics, By Calendar Group	View processing statistics for the absence run by calendar group. First, run the Identify phase.
By Calendar	GP_CALRUN_STAT2	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Processing Statistics, By Calendar	View processing statistics for the absence run by calendar.

By Calendar Group Page

Use the By Calendar Group page (GP_CALRUN_STAT1) to view processing statistics for the absence run by calendar group.

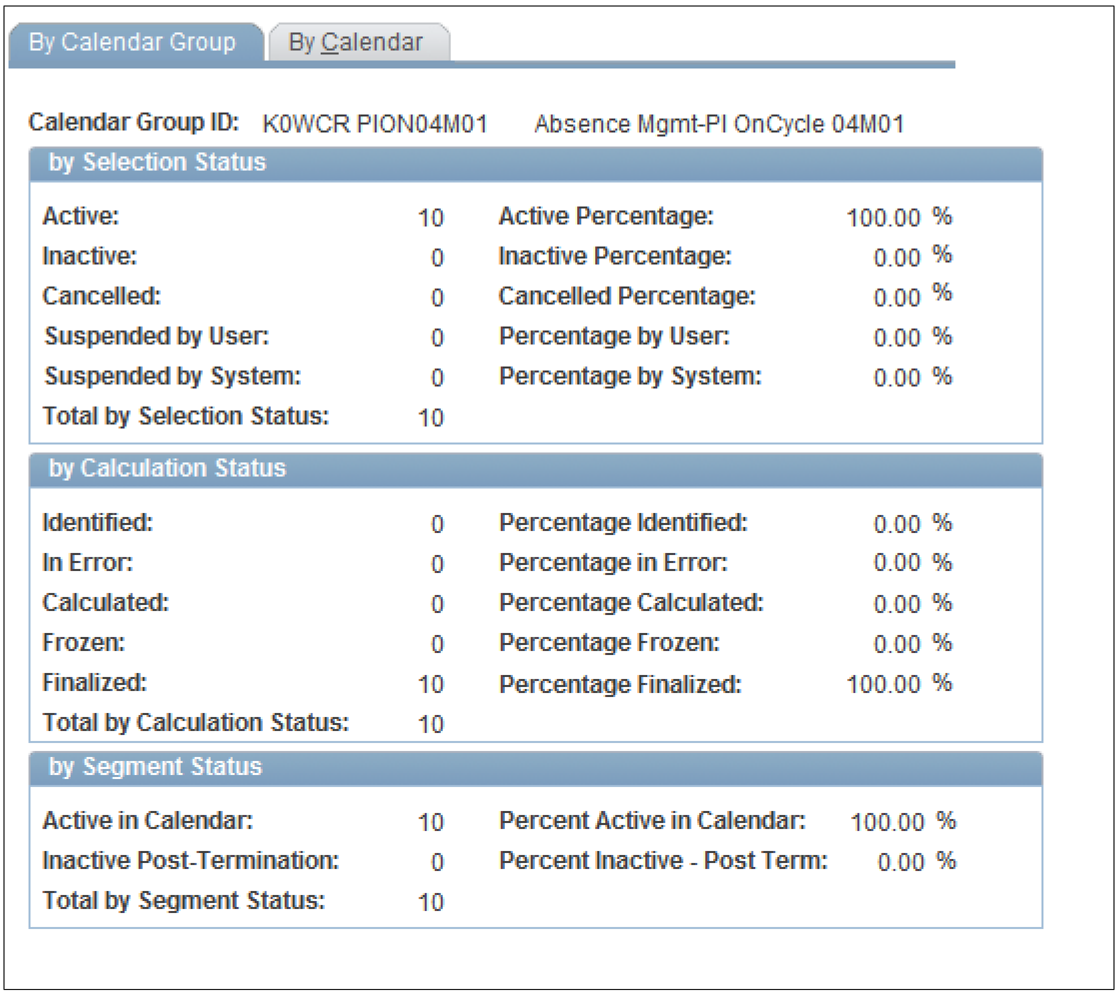
First, run the Identify phase.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Processing Statistics, By Calendar Group

Image: Processing Statistics - By Calendar Group page

This example illustrates the fields and controls on the Processing Statistics - By Calendar Group page.



by Selection Status

Active	Payees that were identified for processing because they were active for at least one day within the calendar period. Excludes payees with the selection status *Cancelled* or *Suspended*.

Inactive	Payees that were identified for processing because they were inactive but had positive input, a retroactive trigger, or forwarded adjustment.
Cancelled	Payees that you manually cancelled from the calendar group ID on the Payee Status page.
Suspended by User	Payees that you manually suspended from the calendar group ID through the Payee Status page or the Calculate Absence and Payroll page.
Suspended by System	Payees that the system suspended because the payee was also identified in another open calendar group ID.

by Calculation Status

This group box displays the number of payees with calculation statuses, followed by the percentage that each number represents.

by Segment Status

This group box displays the number of active and inactive payees, followed by the percentage that each number represents.

Active in Calendar	Payees that were identified because they were active for at least one day within the calendar period.
Inactive Post-Termination	Payees that are being paid for a period of time when they were inactive (such as a sales commission paid to a person that has left the company) or for a forwarding retro situation where there is a mismatch on the payment keys.

Related Links

Understanding Retroactive Processing

By Calendar Page

Use the By Calendar page (GP_CALRUN_STAT2) to view processing statistics for the absence run by calendar.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Processing Statistics, By Calendar

The fields on the By Calendar page are the same as those on the By Calendar Group page, but they reflect the results for an individual calendar.

To view statistics for the next or previous calendar that is associated with this calendar group ID, click the scroll arrows on the Calendar Statistics title bar.

Related Links

Understanding Batch Processing Errors

Viewing Payee Iterative Lists

The payee iterative list provides an inquiry page that enables users to see who was processed during the last iterative calculation and why. Users can define whom the list includes: a single payee, payees that were recalculated, or an entire calendar group. Each batch process automatically creates a payee iterative list of those payees affected by the batch run.

The Payee Iterative List is deleted when you run the Finalize process.

Page Used to View Payee Iterative Lists

Page Name	***Definition Name***	***Navigation***	***Usage***
Payee Iterative List	GP_PYE_ITER_LST	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Payee Iterative List	View a list of employees that were processed in any manner during a batch process.

Payee Iterative List Page

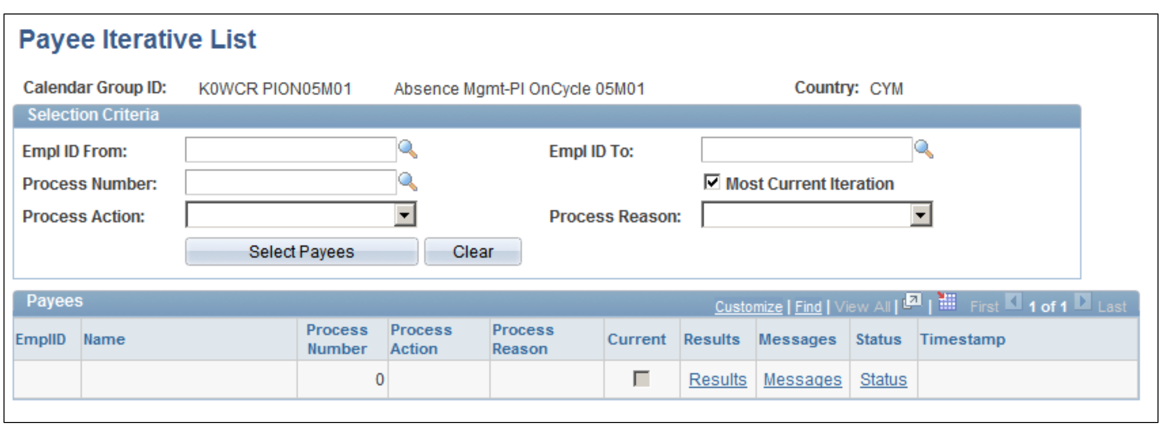
Use the Payee Iterative List page (GP_PYE_ITER_LST) to view a list of employees that were processed in any manner during a batch process.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Payee Iterative List

Image: Payee Iterative List page

This example illustrates the fields and controls on the Payee Iterative List page.



Calendar Group ID	This list is available until the process is finalized for the Calendar Group, at which time the payee iterative list is deleted.
Process Number	The process number has an associated operator ID, run control, timestamp, and group list ID.
Most Current Iteration	Select to return only the payees processed in the last calendar group run.
Process Action	The process action represents the high level reason for inclusion. They are *Added, Calculated, Status Change, Not Calculated,* and *Removed*
Process Reason	Select a Process Reason to limit your search. Available options are: *Cancelled – By User, Error in Processing, Frozen – Run Control, Initial Calculation, Initial Identify, Iterative Trigger, Previously in Error, ReCalc – By User, ReCalc All – Run Control, Suspended – By User, Suspended – By System, Time and Labor Feed, Uncancelled – By User, Unfrozen – By Run,* and *Unsuspended – By System.* **Note:** If you run the *Initial Identify* and a calculation at the same time, the Action/Reason displayed is Calculated/Initial Identify.
Select Payees	Runs the search according to the specifications that you selected in the Selection Criteria group box.
Name	Displays the resulting EmplIDs.
Current	The system displays a *Y* if the viewed entry is the most current.
Results	Select to launch the Results by Calendar Group in a new browser window.
Messages	Select to launch the Payee Message page in a new browser window.
Status	Select to launch the Payee Status page in a new browser window.
Timestamp	Displays when the run control was saved.

Viewing Payee Messages

Payee messages report errors and warnings that are generated during the Calculate phase. The system displays messages that are defined by PeopleSoft in the Message Catalog and any unique messages that you created using formula elements. You specify the population of payees for whom you want to review messages.

The message log is erased when you run the Finalize process.

This topic discusses how to:

- View errors and warnings that are generated for the calendar group ID during the Identify or Calculate phase.
- View detailed information for a selected message.

Important! Error messages require resolution; you cannot finalize an absence run with errors.

Pages Used to View Payee Messages

Page Name	***Definition Name***	***Navigation***	***Usage***
Payee Messages	GP_MESSAGE_LOG	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Payee Messages, Payee Messages	View errors and warnings generated for the calendar group ID during the Identify or Calculate phase.
Batch Message Details	GP_MESSAGE_SP	Click the Details link on the Payee Messages page.	View detailed information for a selected message.

Payee Messages Page

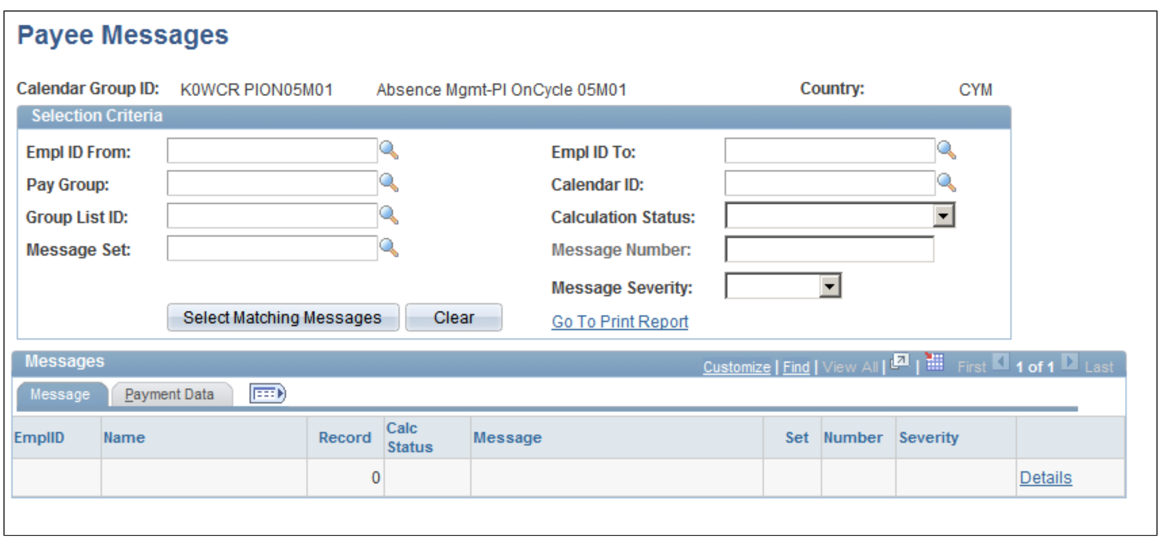
Use the Payee Messages page (GP_MESSAGE_LOG) to view errors and warnings generated for the calendar group ID during the Identify or Calculate phase.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Payee Messages, Payee Messages

Image: Payee Messages page

This example illustrates the fields and controls on the Payee Messages page.



To view payee messages:

1. Enter the criteria for screening messages in the Selection Criteria group box. (optional)

If you select a group list ID, messages for payees that currently belong to the group display. If you enter no selection criteria, messages for all payees in the calendar group display.

2. Click Select Matching Messages to display the results of your search.

Message

Message	Messages appear in the language that is associated with the user's language preference. Messages that have not been translated appear in the base language that is defined for Absence Management.
Set and Number	Associated set number and message number from the Message Catalog. (Message Set 17005 is the core batch message set; each country has a separate set number for messages from their country-specific batch processes.) If the message number is less than 300, the text only appears in the Cobol log file. Those with numbers greater than 300 appear online.
Details	Click to access the Batch Message Detail page to see the full text of the message, an explanation, and the name of the Absence Management program and program section that generated the message.

Payment Data

This tab displays the calendar ID, pay group, and segment associated with the warning or error message.

Related Links

Status Codes and Process Indicators

Viewing Payee Status and Updating a Payee's Processing Instructions

This topic discusses how to review payee status and processing instructions.

Important! Changing a process indicator updates the process indicator for *every* calendar that is associated with the payee for a particular calendar group ID.

Page Used to View Payee Status and Update a Payee's Processing Instructions

Page Name	*Definition Name*	*Navigation*	*Usage*
Payee Status	GP_PAYEE_STATUS	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Payee Status, Payee Status	View payees by process indicator, calculation status, or other criteria and specify the action that the system is to take.

Related Links

Status Codes and Process Indicators

Payee Status Page

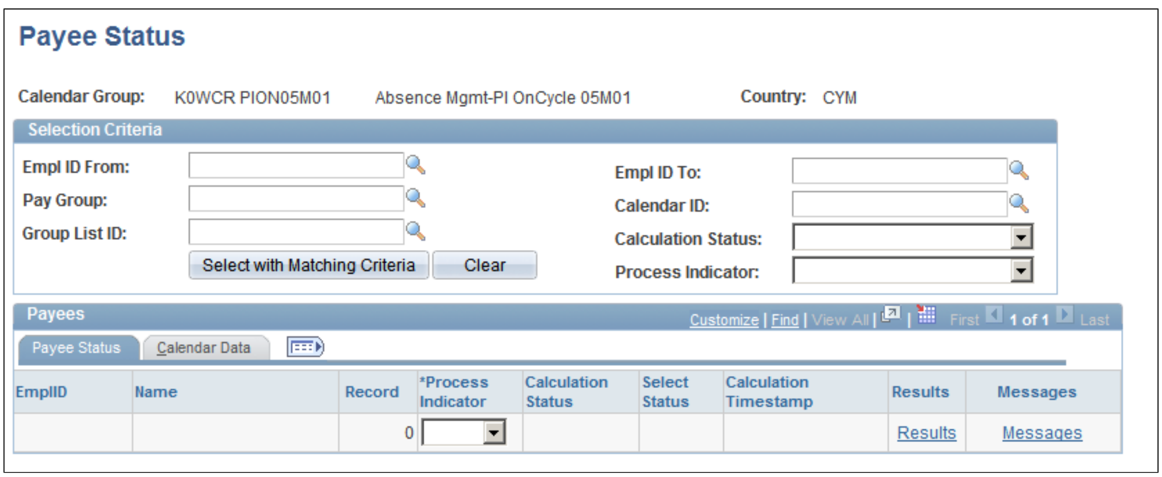
Use the Payee Status page (GP_PAYEE_STATUS) to view payees by process indicator, calculation status, or other criteria and specify the action that the system is to take.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Payee Status, Payee Status

Image: Payee Status page

This example illustrates the fields and controls on the Payee Status page.



To review payee status:

1. In the Selection Criteria group box, specify which payees to review (optional).

   For example, to see all payees that will be suspended from the next run, select *Suspend* in the Process Indicator field.

2. Click the Select with Matching Criteria button to display the results of your search.

To enter processing instructions for a payee:

1. In the Selection Criteria group box, specify the payees for which you want to enter instructions.
2. On the Payee Status tab, select the applicable process indicator.

Payee Status

The system displays the results of your search. Each segment, including retroactive segments, is listed on a separate line.

Process Indicator

Select the action for the system to take. Some actions take effect instantly; others take effect the next time you run the batch process for the population that the payee is in. The selection status that's associated with the payee and the absence calculation status determine what actions you can select. (You cannot change process indicators after a run is finalized.)

All process indicators apply to all absences for a payee. You can see a payee's list of absences in the Results by Calendar component. If a payee has two process indicators because of two jobs, and you change the value of one process indicator to *Cancel,* the second process indicator is also set to *Cancel,* and the payee isn't paid. Options are:

Cancel: The next time you run Calculate, the payee's results (and segment status record) are deleted. The selection status is *Cancel*. The payee remains in *Cancel* status, unless you later change the status to *Uncancel.*

Freeze: Allowed only when the calculation status is *Payment Calculated.* Immediately updates the status to *Frozen* and causes future runs of the Calculate phase to ignore unprocessed positive input or other changes that have been entered since the payee was last calculated (for this calendar period). Applies to all segments for the payee.

Normal.

Re-Calc (recalculate): Use only when the calculation status is *Payment Calculated or Frozen.* The next time you run Calculate, the payee will be recalculated.

Suspend: The next time you run the batch process, the payee's results (and segment status record) are deleted. The selection status is set to *Suspended by User*. The payee is reidentified for inclusion in the absence run.

Uncancel: Use only if the selection status is *Cancelled.*

Unfreeze: Allowed only when the calculation status is *Frozen.* This action immediately changes the calculation status to *Payment Calculated.* The next time the Calculate phase is run for this payee, the system processes unprocessed changes (iterative triggers). Applies to all segments for the payee.

Results Click to access the Results by Calendar Group page to view segmentation , accumulator, and supporting element information.

Messages Click to access the Payee Messages page to view errors and warnings generated for the calendar group ID.

Calendar Data

This tab identifies the segment for which the absence was generated, the pay entity associated with the calendar, and the run type (absence).

Viewing Results by Calendar

Each time you run the Calculate phase, you can use the Results by Calendar pages to display payee information.

This topic discusses how to:

- View segmentation information for a payee.
- View detailed information about a segment.
- View absences for a calendar.
- View accumulators for a calendar.
- View supporting elements by calendar.

You can review the results of a calendar each time it's run. For example, if retroactivity causes the February 2000 calendar to be recalculated in March, April, and May, you can quickly view the results for each calendar run on the Results by Calendar page. Click the scroll arrows to view each set of results for the calendar.

Pages Used to View Results by Calendar

Page Name	***Definition Name***	***Navigation***	***Usage***
Calendar Results	GP_RSLT_CAL_SEG	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar, Calendar Results	View segmentation information for a payee. Page includes links to other pages that display positive input, absence, and retroactive results.
Result Segment Detail	GP_RSLT_SEG_SP	Click the Segment Detail link on the Results by Calendar page.	View more information about a segment's process and segment statuses.

Page Name	**Definition Name**	**Navigation**	**Usage**
Earnings and Deductions	GP_RSLT_CAL_ED	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar, Earnings and Deductions	This page is not applicable to Absence Management. No information appears on this page. This page will display only if Global Payroll Core is selected on the Installation Table.
Accumulators	GP_RSLT_CAL_ACUM	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar, Accumulators	View accumulator amounts.
Supporting Elements	GP_RSLT_CAL_PIN	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar, Supporting Elements	View information for each supporting element that was used to calculate absence results.
Retro Calculation Deltas	GP_RSLT_CAL_DLTA	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar, Calendar Results • Click the Retro Calculation Deltas link on the Calendar Results page.	This page is not applicable to Absence Management. No information will appear on this page.

Related Links

Viewing Results by Calendar Group

Calendar Results Page

Use the Results by Calendar - Calendar Results page (GP_RSLT_CAL_SEG) to view segmentation information for a payee.

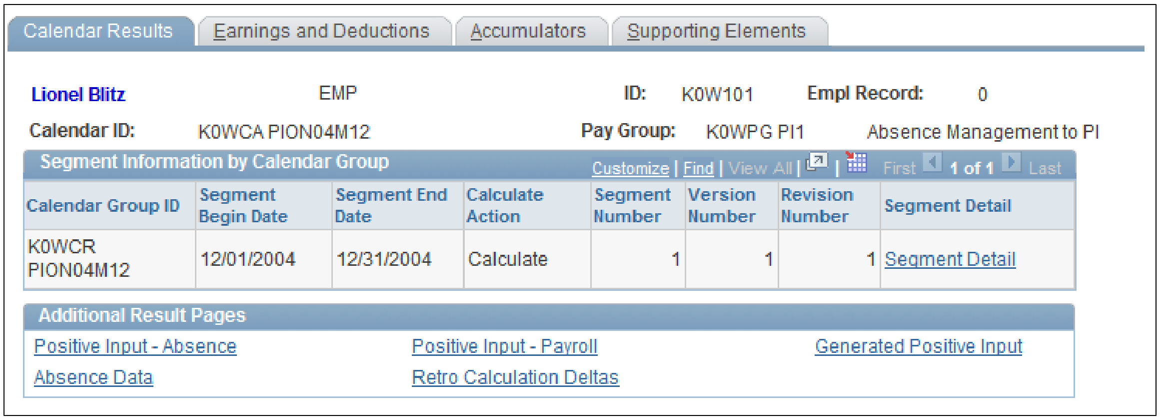
Page includes links to other pages that display positive input, absence, and retroactive results.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar, Calendar Results

Image: Calendar Results page

This example illustrates the fields and controls on the Calendar Results page.



Segment Detail Click to display the Result Segment Detail page.

Results by Calendar - Result Segment Detail Page

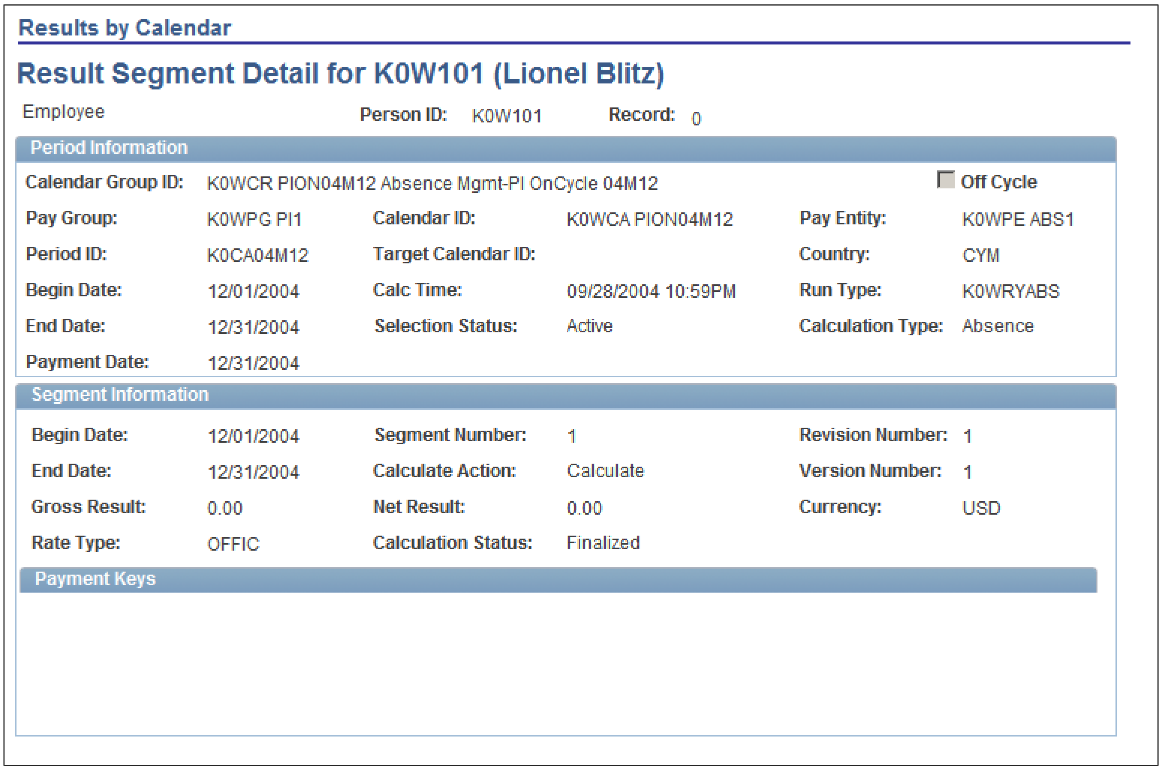
Use the Results by Calendar - Result Segment Detail page (GP_RSLT_SEG_SP) to view more information about a segment's process and segment statuses.

Navigation

Click the Segment Detail link on the Results by Calendar page.

Image: Result Segment Detail page

This example illustrates the fields and controls on the Result Segment Detail page.



Period Information

Period ID

The ID for the time period that is covered by the calendar.

Begin Date and End Date

The begin and end dates that are associated with the Process Stat record. The dates match the calendar begin and end dates.

Target Calendar ID

The target calendar that you selected when defining the calendar for this calendar run.

Calc Time (calculation time)

The last time that calculations were run for this payee.

Segment Information

Rate Type

The exchange rate type associated with the payment. (You define the exchange rate type on the Pay Group Name page and can override it by payee.)

Calculation Status

Values are:

Active in Segment: Payee was active for at least one day during the calendar segment.

	Inactive in Segment: Payee was not active during that time period.
Transaction Type	Appears for off-cycle results. Values are *Correction* and *Advance.*

Payment Keys

This group box displays any payment keys that have been defined for the payee's pay entity.

Related Links

Status Codes and Process Indicators

Processing Details Page

Results by Calendar - Accumulators Page

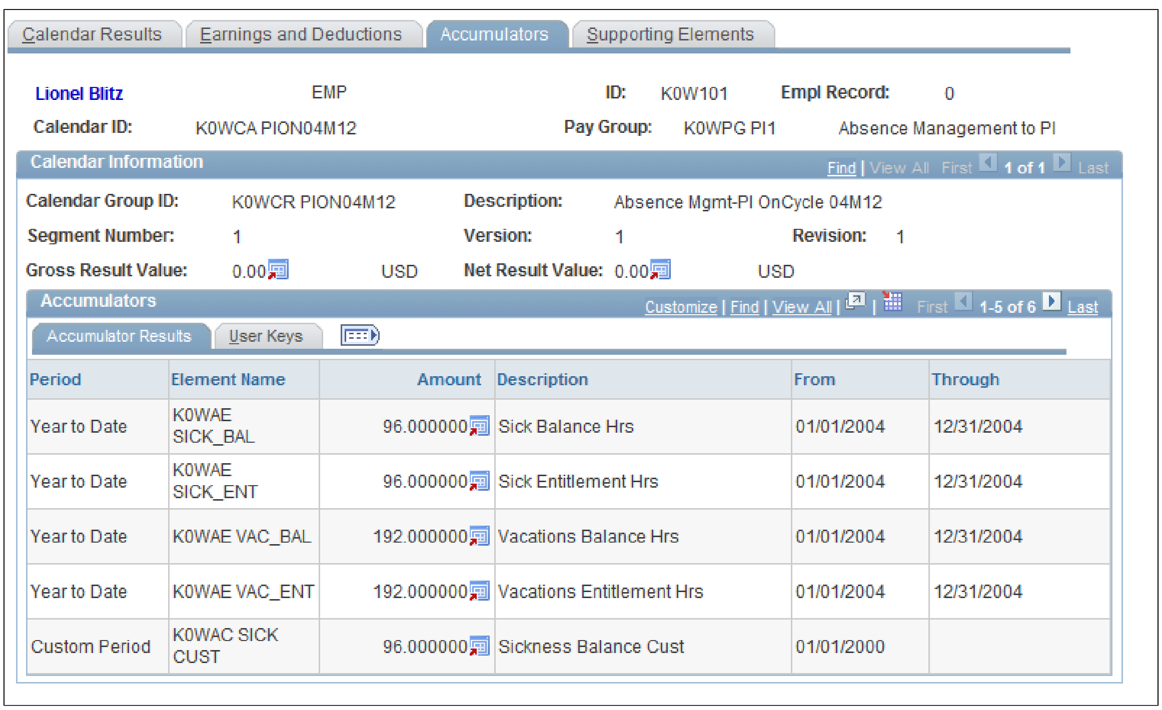
Use the Results by Calendar - Accumulators page (GP_RSLT_CAL_ACUM) to view accumulator amounts.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar, Accumulators

Image: Results by Calendar - Accumulators page

This example illustrates the fields and controls on the Results by Calendar - Accumulators page.



Accumulator Results

Period The period of time tracked by the accumulator.

User Keys

This tab displays the system element or variable element that is associated with the user keys for each accumulator.

Results by Calendar - Supporting Elements Page

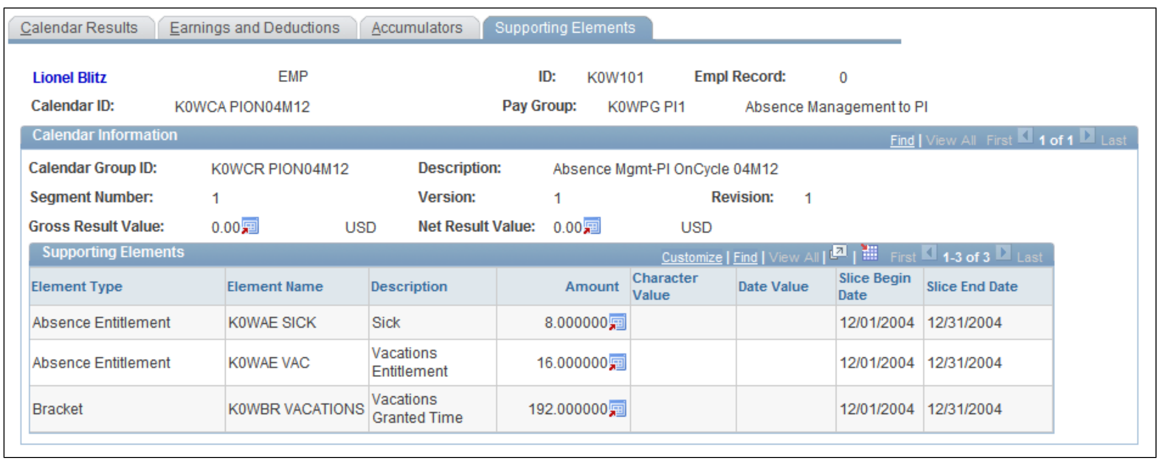
Use the Results by Calendar - Supporting Elements page (GP_RSLT_CAL_PIN) to view information for each supporting element that was used to calculate absence results.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar, Supporting Elements

Image: Results by Calendar - Supporting Elements page

This example illustrates the fields and controls on the Results by Calendar - Supporting Elements page.



The type of value that the supporting element resolved to determines the column that it is listed under Amount, Character Value, or Date Value.

Slice Begin Date and Slice End Date The begin and end dates of the slice in which the supporting element was resolved.

Viewing Positive Input Results

This topic discusses how to:

- View positive input from the Absence Take process.
- View all positive input processed for a payee.

- View system-generated positive input by calendar.
- View supporting element information.

Pages Used to View Positive Input Results

Page Name	***Definition Name***	***Navigation***	***Usage***
Positive Input - Absence	GP_RSLT_CAL_AE	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar, Calendar Results Click the Positive Input - Absence link on the Calendar Results page. • Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar Group, Calendar Group Results Click the Positive Input - Absence link on the Calendar Group Results page.	Displays balance adjustments made to frequency-based entitlement elements that are processed for the absence calendar.
Positive Input - Payroll	GP_RSLT_CAL_PI	• Click the Positive Input - Payroll link on the Calendar Results page. • Click the Positive Input - Payroll link on the Calendar Group Results page.	This page is not applicable to Absence Management. No information will appear on this page.
Positive Input - Other Data (Note: This page is not applicable to Absence Management)	GP_RSLT_PI_COMP_SP	Click the Other Data button on the Positive Input - Payroll page.	This page is not applicable to Absence Management. No information will appear on this page.
Positive Input - Supporting Element Overrides	GP_RSLT_PI_SOVR_SP	Click the Override button on the Positive Input - Payroll page.	View detailed user instructions on the Positive Input - Supporting Elements page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Generated Positive Input	GP_RSLT_CAL_GPI GP_RSLT_RUN_GPI	• Click the Generated Positive Input link on the Calendar Results page. • Click the Generated Positive Input link on the Calendar Group Results page.	View resolved and unresolved positive input that was created for another calendar from a generated positive input section of the process list or the absence take process.
Results by Calendar - Positive Input - Details	GP_RSLT_GPICOMP_SP	Click the Other Data button on the Generated Positive Input page.	Displays detailed information for a system-generated instance of positive input.
Generated Positive Input - Supporting Element Overrides	GP_RSLT_GPISOVR_SP	Click the Override button on the Generated Positive Input page.	Displays information for supporting elements that are associated with a system-generated instance of positive input.

Positive Input - Absence Page

Use the Positive Input - Absence page (GP_RSLT_CAL_AE) to displays balance adjustments made to frequency-based entitlement elements that are processed for the absence calendar.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar, Calendar Results

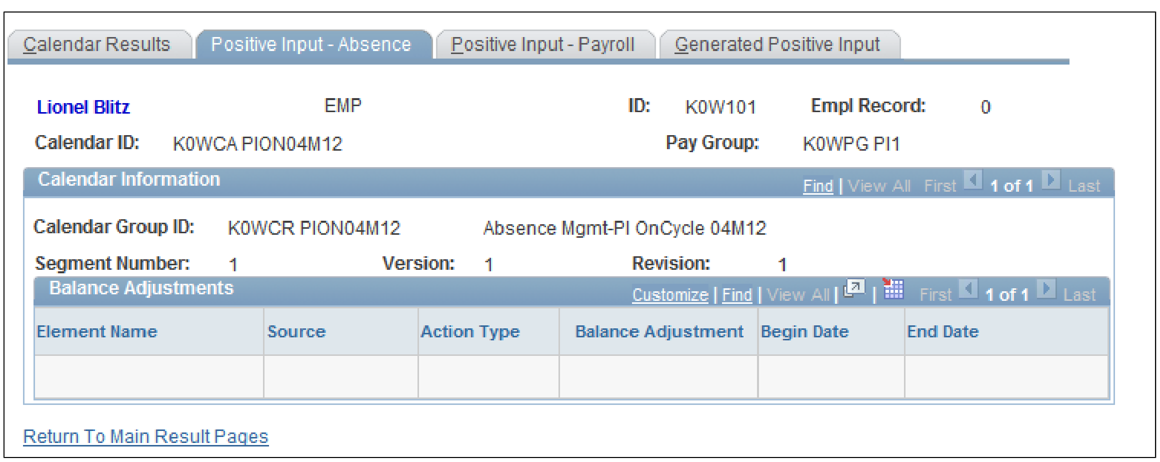
  Click the Positive Input - Absence link on the Calendar Results page.

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar Group, Calendar Group Results

  Click the Positive Input - Absence link on the Calendar Group Results page.

Image: Positive Input - Absence page

This example illustrates the fields and controls on the Positive Input - Absence page.



Source — *Absence* means that the instance of positive input was created by the Absence Take process.

Balance Adjustment — The number of units by which the entitlement balance for this absence take element is being adjusted, if applicable.

Begin Date and End Date — The first day and last day of the absence event.

Generated Positive Input Page

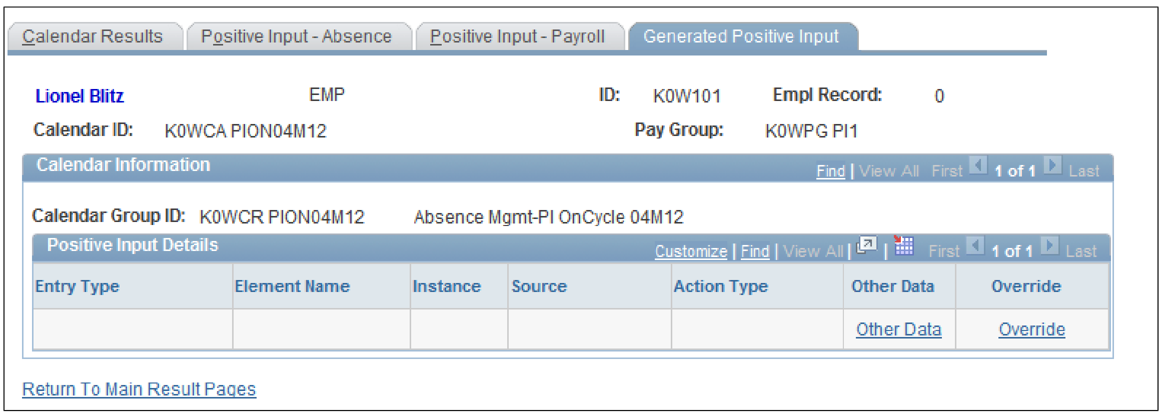
Use the Generated Positive Input page (GP_RSLT_CAL_GPI) to view resolved and unresolved positive input that was created for another calendar from a generated positive input section of the process list or the absence take process.

Navigation

- Click the Generated Positive Input link on the Calendar Results page.
- Click the Generated Positive Input link on the Calendar Group Results page.

Image: Generated Positive Input page

This example illustrates the fields and controls on the Generated Positive Input page.



Other Data — Click to display the Other Data page to view detailed information about the instance of positive input.

Override — Click to display the Supporting Element Overrides page to view information for supporting elements that are associated with the generated instance.

Generated Positive Input - Supporting Element Overrides Page

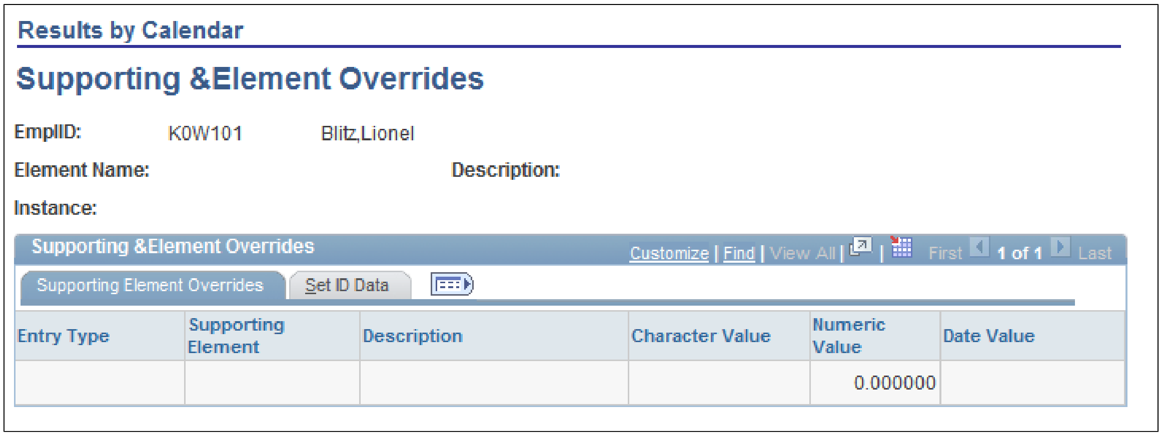
Use the Generated Positive Input - Supporting Element Overrides page (GP_RSLT_GPISOVR_SP) to displays information for supporting elements that are associated with a system-generated instance of positive input.

Navigation

Click the Override button on the Generated Positive Input page.

Image: Results by Calendar - Supporting Element Overrides page

This example illustrates the fields and controls on the Results by Calendar - Supporting Element Overrides page.



SETID Data

This tab displays the SetID associated with the supporting element override.

Related Links

Understanding Overrides

Viewing Daily Results of the Absence Take Process

This topic discusses how to:

- View the daily results of the absence process.
- View information about the payee’s entitlement balance.
- View hours that a payee was absent.
- View values from the user defined fields.
- View values from the Cfg1 – Cfg4 scheduling fields.
- View values from Cfg1 – Cfg4 fields (alternate work schedule in effect).

Pages Used to View Daily Results of the Absence Take Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Absence Data	GP_RSLT_CAL_ABS GP_RSLT_RUN_ABS	• Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar, Calendar Results Click the Absence Data link on the Calendar Results page. • Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar Group, Calendar Group Results Click the Absence Data link on the Calendar Group Results page.	View the daily results of the Absence Take process, including the day count, paid and unpaid day count, ending entitlement balance, forecast value, absence type, and reason.
Absence Balance Data	GP_ABS_EXPLAIN_SP	Click the Balance Detail link on the Absence Detail tab of the Absence Data page.	View detailed information about the payee's entitlement balance.
Absence Begin/End Data	GP_ABS_BGN_END_SP	Click the Begin/End link on the Begin/End tab of the Absence Data page.	View the hours that a payee was absent, if less than a full day. This page shows the first date of the absence and the original begin date, if this absence is linked to a previous absence.
Configurable Fields	GP_ABS_CONFIG_SP	Click the Configuration Fields link on the Schedule Data and Config Details tab of the Absence Data page.	View values that were entered in the User Defined fields when the absence was reported and the User Defined values that are associated with the take element.
Work Schedule Data	GP_ABS_WS_SP	Click the Work Schedule link on the Schedule Data and Config Fields tab of the Absence Data page.	View values that were entered in the Sch Cfg1…4 fields (Shifts page) that apply to the absence date. Also view values for the Sch Cfg fields that are associated with the Workday override schedule selected on the Daily Work Schedule Override page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Alternate Work Schedule Data	GP_ABS_ALT_WS_SP	Click the Alternate Work Schedule link on the Schedule Data and Config Fields tab of the Absence Data page.	View values that were entered in the Sch Cfg1…4 fields (Shifts page or Daily Work Schedule Override page) that apply to the absence date. Applicable only if an alternate work schedule was in effect on the absence day.

Absence Data Page

Use the Absence Data page (GP_RSLT_CAL_ABS) to view the daily results of the Absence Take process, including the day count, paid and unpaid day count, ending entitlement balance, forecast value, absence type, and reason.

Navigation

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar, Calendar Results

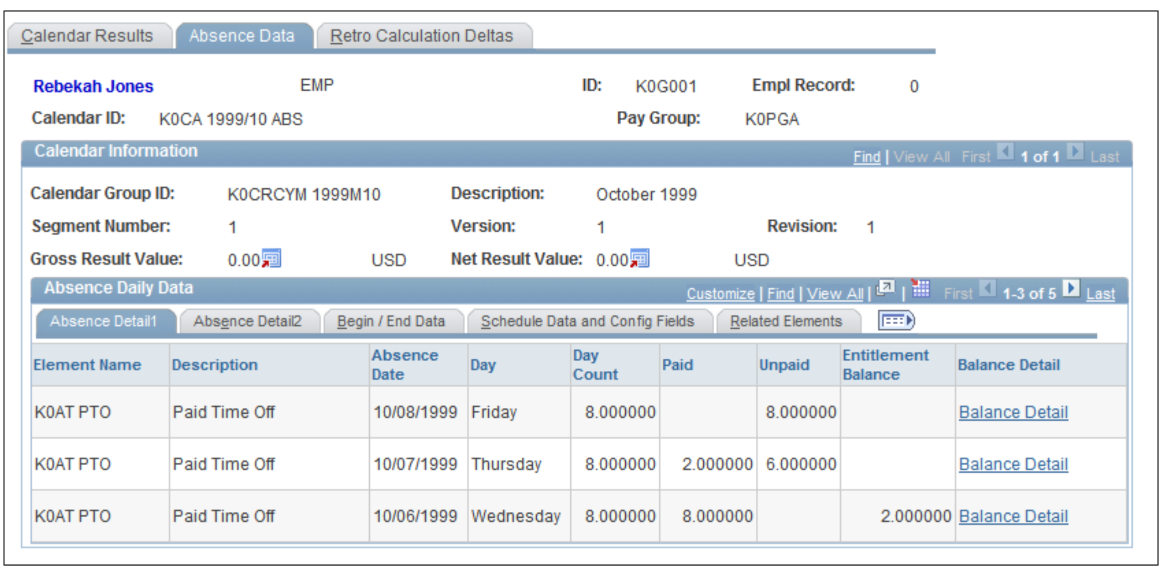
  Click the Absence Data link on the Calendar Results page.

- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar Group, Calendar Group Results

  Click the Absence Data link on the Calendar Group Results page.

Image: Absence Data page

This example illustrates the fields and controls on the Absence Data page.



Day Count	Displays the result of the Day Formula for the absence take element.

Entitlement Balance Displays the number of paid absence days to which the payee is entitled after taking this absence into account.

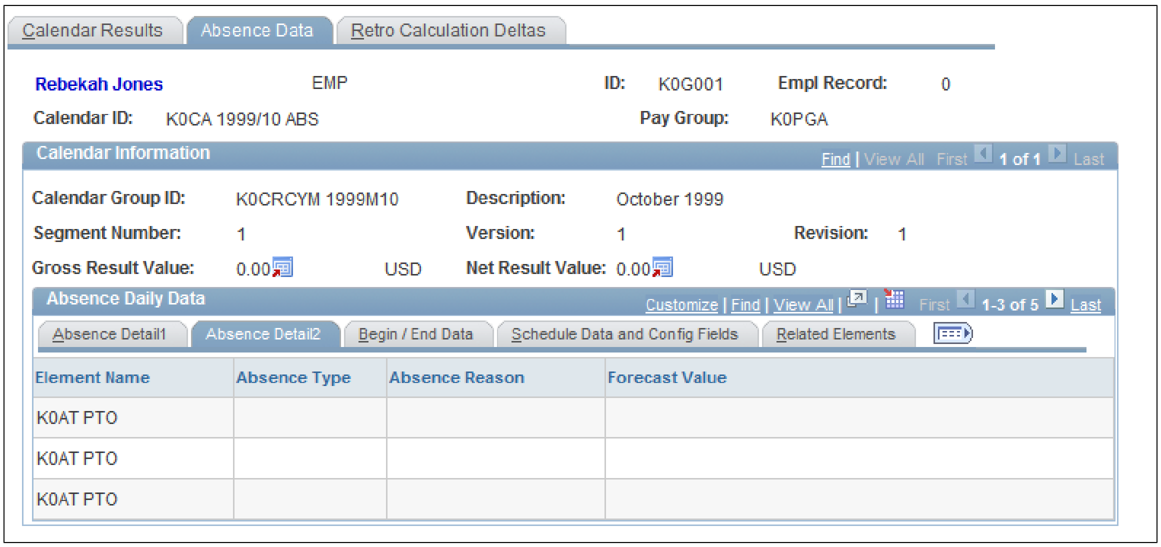
Balance Detail Click to open the Absence Balance Data page to view additional information about the absence.

Absence Detail2

Access the Absence Detail2 tab.

Image: Absence Data page: Absence Detail2 tab

This example illustrates the fields and controls on the Absence Data page: Absence Detail2 tab.



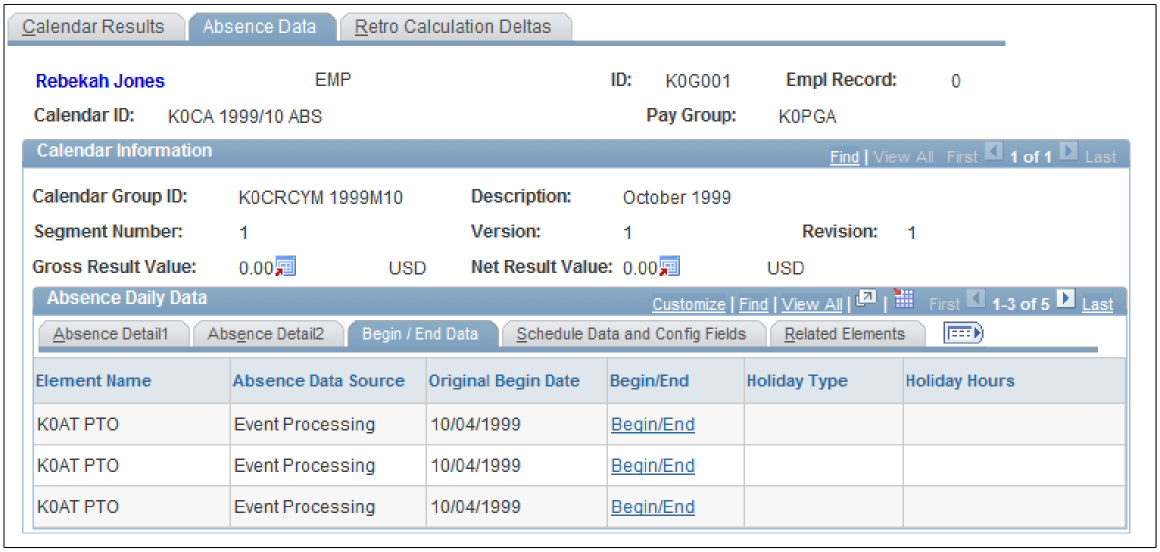
The Forecast Value field displays the forecast value for the last day of the absence event.

Begin/End Data

Access the Begin/End Data tab.

Image: Absence Data page: Begin/End Data tab

This example illustrates the fields and controls on the Absence Data page: Begin/End Data tab.



Absence Data Source

Displays the absence process that generated the absence event:

Take Processing: The row was created when a negative entitlement balance was redirected to another take element (according to instructions on the Absence Take - Negative Balance page) or when the “mapped to” feature (defined on the Absence Take - Day Formula page) resulted in the creation of a second absence event.

Event Processing: The row was created when the absence event was expanded into daily rows during the Absence Take process.

Original Begin Date

If this is a linked absence, the original begin date from the Absence Event Entry page appears.

Begin/End

Click to view the Begin/End Data tab to view information about partial-day absences.

Holiday Type

If the absence occurred on a holiday, the type of holiday is identified: *BRG* (bridge), *CAN* (Canadian), *HIGH, LOW, STD* (standard), *USA* (USA public), and *VERY* (very high).

Holiday Hours

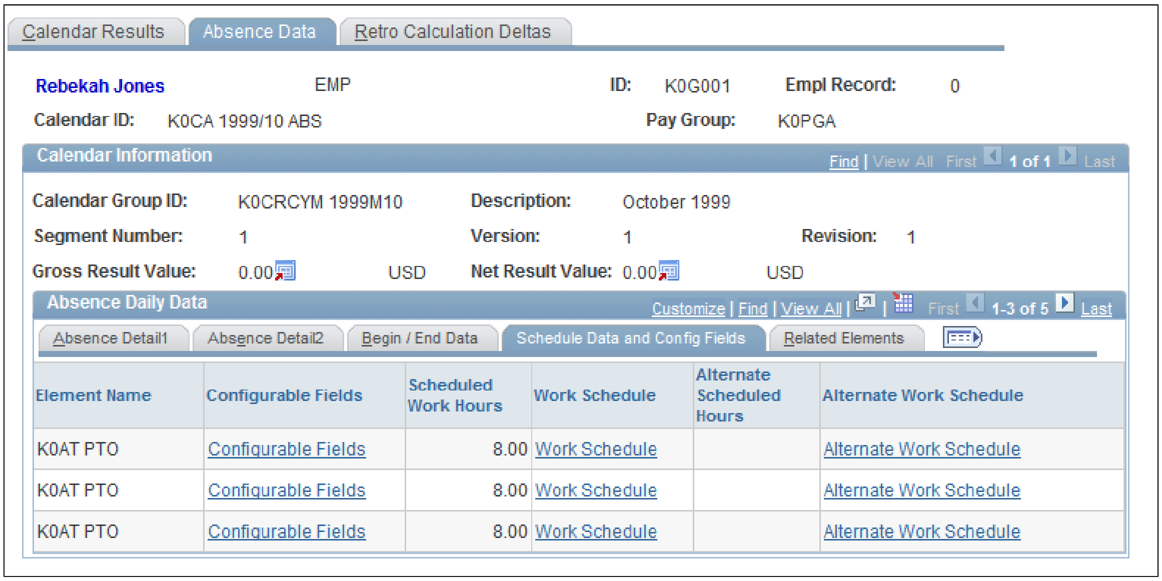
Displays the number of hours from the Holiday schedule.

Schedule Data and Config Fields (schedule data and configuration fields) Tab

Access the Schedule Data and Config Fields tab.

Image: Absence Data page: Schedule Data and Config Fields tab

This example illustrates the fields and controls on the Absence Data page: Schedule Data and Config Fields tab.



Configurable Fields Click to access the Configurable Fields page to view information from the User Defined fields that are associated with the absence event and absence take element.

Scheduled Work Hours Displays the number of hours that the payee was scheduled to work on the absence date.

Work Schedule Click to access the Absence Configurable Data page to view the payee's Work Day ID, data that is contained in the User Defined fields, and information about schedule overrides.

Alternate Scheduled Hours Number of hours that the payee was scheduled to work, according to the payee's alternate work schedule, on the absence date.

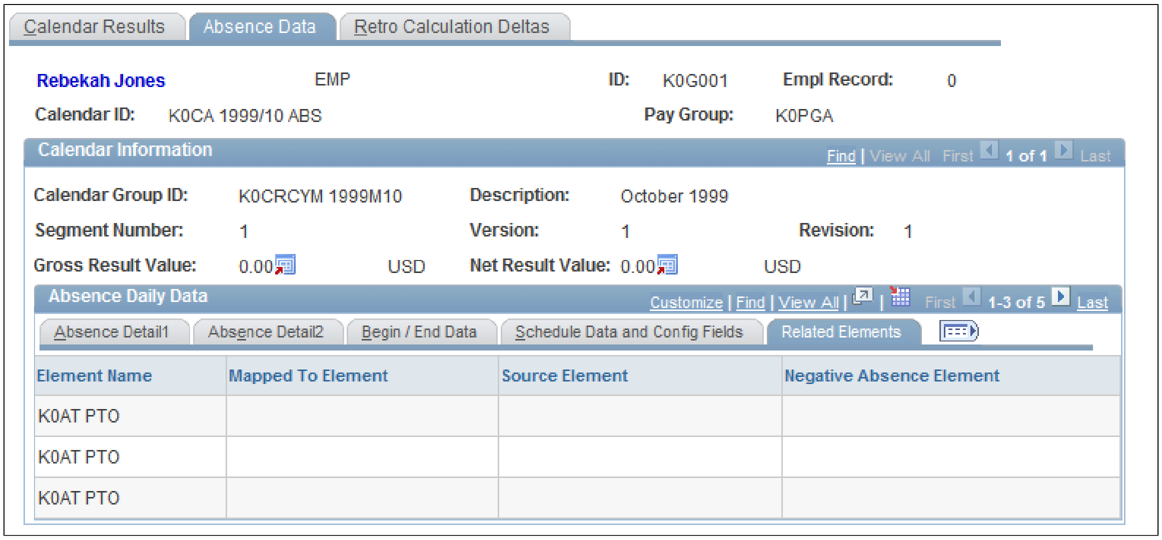
Alternate Work Schedule Click to access the Alternate Work Schedule Data page to view the payee's Work Day ID, data that is contained in the User Defined fields, and information about schedule overrides for the alternate work schedule.

Related Elements

Access the Related Elements tab.

Image: Absence Data page: Related Elements tab

This example illustrates the fields and controls on the Absence Data page: Related Elements tab.



Mapped to Element

If the absence take element that is associated with the payee's absence is mapped to another take element (through the Take - Day Formula page), the name of the absence take element for which the system will generate a matching absence event appears.

Source Element

Displays the absence take element that triggered generation of a second absence event.

Negative Absence Element

If the event resulted in a negative entitlement balance, and you selected *Take with Other Absence* for this take element (on the Absence Take - Negative Balance page), the name of the specified take element appears.

Absence Balance Data Page

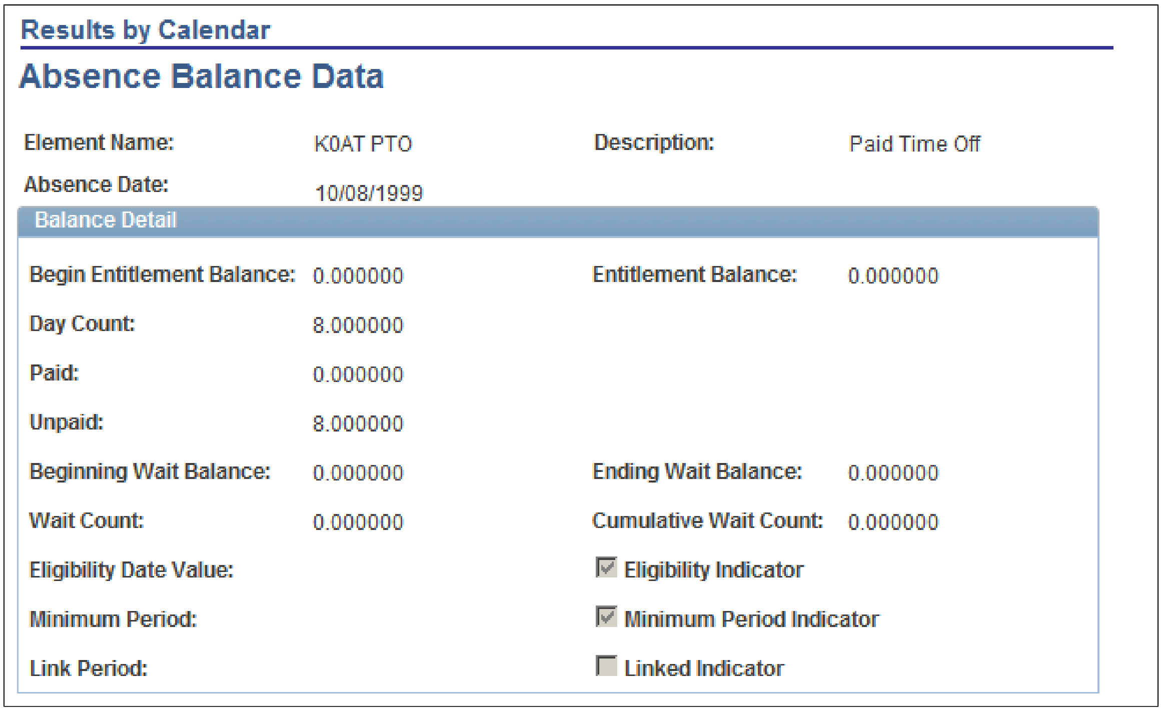
Use the Absence Balance Data page (GP_ABS_EXPLAIN_SP) to view detailed information about the payee's entitlement balance.

Navigation

Click the Balance Detail link on the Absence Detail tab of the Absence Data page.

Image: Absence Balance Data page

This example illustrates the fields and controls on the Absence Balance Data page.



Begin Entitlement Balance and Entitlement Balance

Displays the number of paid absence days to which the payee was entitled before and after taking this absence into account.

Day Count

Displays the calculated Day Count.

Beginning Wait Balance

If this absence is subject to a wait per absence rule, this field displays the remaining number of days that the payee must be absent before the current absence date can be paid. It does not count the current absence date.

Ending Wait Balance

Displays the waiting period balance after the current absence date is taken into account.

Wait Count

Displays the result of the Wait Count formula.

Cumulative Wait Count

Displays the wait units that are associated with the current absence event.

Eligibility Date Value

If the absence is subject to an eligibility period, the date that the payee becomes eligible to take a paid absence appears. Absences that are taken on or after this date can be applied against the entitlement balance. Days before this date are unpaid.

Eligibility Indicator

Selected if the eligibility date has been reached.

Minimum Period

If this absence is subject to a minimum period rule, this field displays the minimum number of calendar days that the payee must be absent before he or she can be paid for the entire absence.

Minimum Period Indicator

Selected if the minimum absence period for this absence has been met.

Link Period

This field applies only if the absence is subject to a linked absence rule. It displays the number of days (or other units) that can elapse between this absence and a related absence for the current absence date to be treated as a linked absence. Linked absences can share the same entitlement and wait period.

Linked Indicator

Selected if this absence event is linked to another absence event.

Absence Begin/End Data Page

Use the Absence Begin/End Data page (GP_ABS_BGN_END_SP) to view the hours that a payee was absent, if less than a full day.

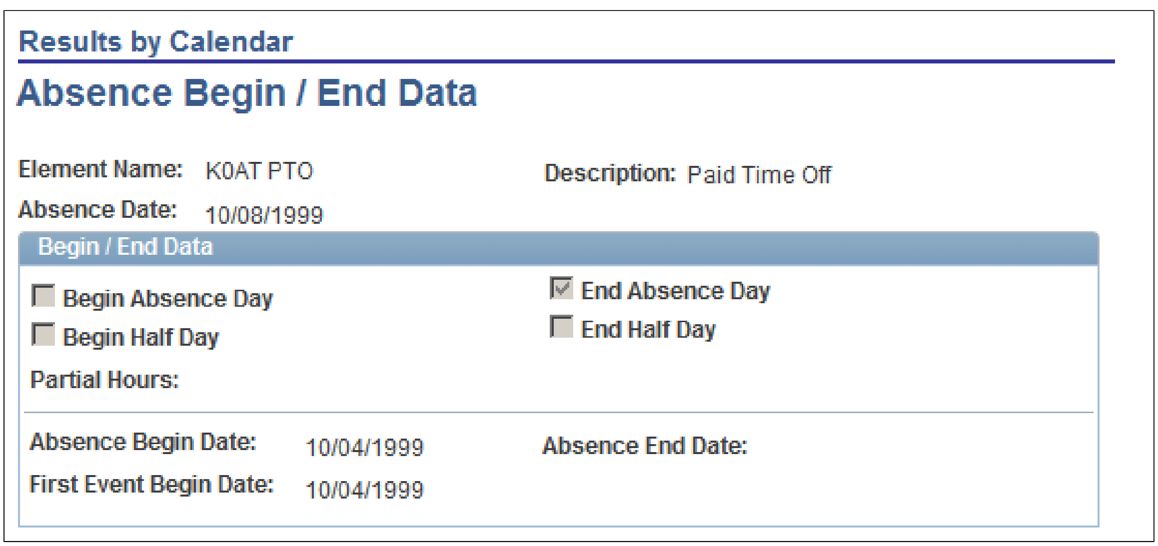
This page shows the first date of the absence and the original begin date, if this absence is linked to a previous absence.

Navigation

Click the Begin/End link on the Begin/End tab of the Absence Data page.

Image: Absence Begin/End Data page

This example illustrates the fields and controls on the Absence Begin/End Data page.



Element Name

Displays the name of the absence take element.

Partial Hours

Displays the hours that the payee was absent, if the payee was absent only part of the day.

First Event Begin Date	Displays the date that was entered in the Original Begin Date field on the Absence Event Entry Detail page.

Configurable Fields Page

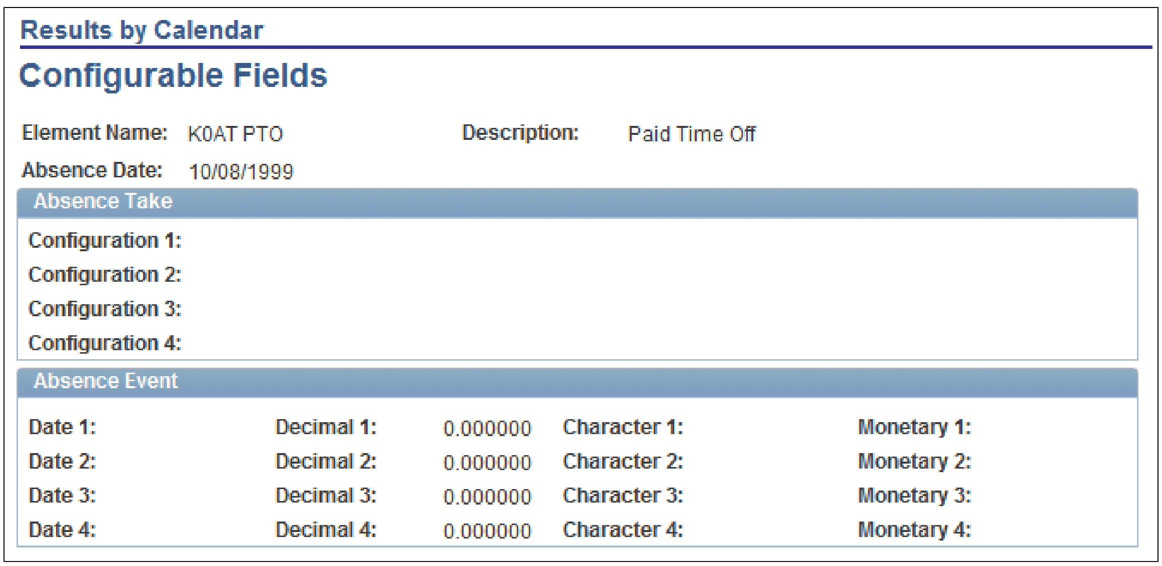
Use the Configurable Fields page (GP_ABS_CONFIG_SP) to view values that were entered in the User Defined fields when the absence was reported and the User Defined values that are associated with the take element.

Navigation

Click the Configuration Fields link on the Schedule Data and Config Details tab of the Absence Data page.

Image: Configurable Fields page

This example illustrates the fields and controls on the Configurable Fields page.



Absence Take

Configuration 1, Configuration 2, Configuration 3 and Configuration 4	These fields display information that was entered in the Used Defined fields on the Absence Take - Calculation page.

Absence Event

These fields display information that a user entered into the User Defined fields on the Absence Event Entry Detail page.

Work Schedule Data Page

Use the Work Schedule Data page (GP_ABS_WS_SP) to view values that were entered in the Sch Cfg1… 4 fields (Shifts page) that apply to the absence date.

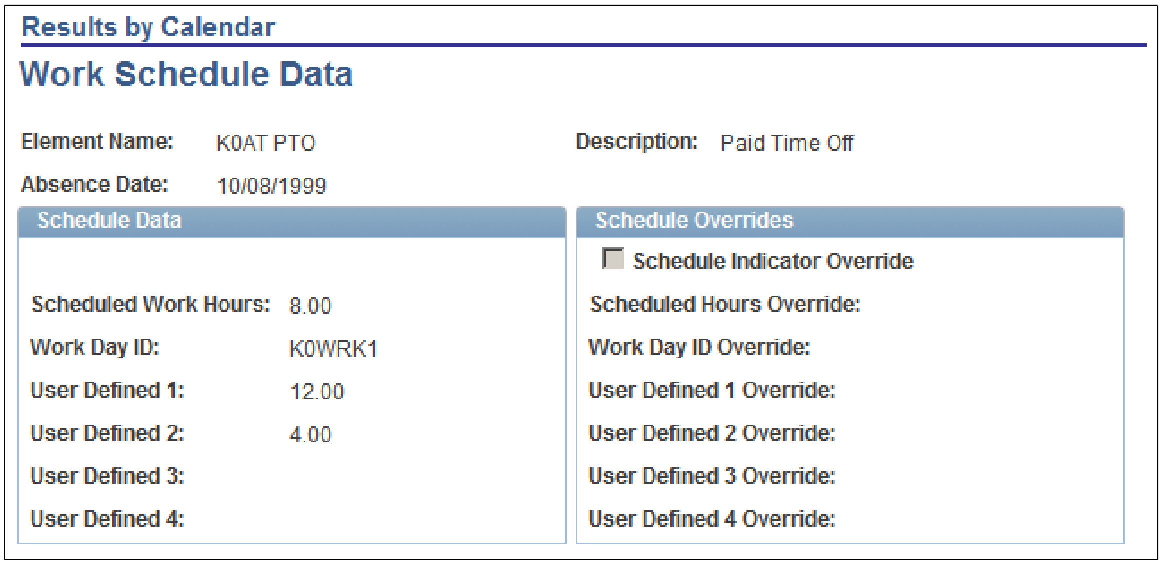
Also view values for the Sch Cfg fields that are associated with the Workday override schedule selected on the Daily Work Schedule Override page.

Navigation

Click the Work Schedule link on the Schedule Data and Config Fields tab of the Absence Data page.

Image: Work Schedule Data page

This example illustrates the fields and controls on the Work Schedule Data page.



Schedule Data

Scheduled Work Hours

Displays the number of hours the payee was scheduled to work on the absence date. The hours come from the Schedule Hours field on the Shift page.

Work Day ID

Displays the Work Day ID for the work pattern assigned to the payee. Word Day IDs are assigned to all members of a pay group via the Pay Group page and can be overridden for a payee on the Assign Schedules (Details) page.

User Defined 1 – 4

Displays the data that was entered in the Sch Cfg 1 – Cfg4 fields on the Shifts page for this shift.

Schedule Overrides

Schedule Indicator Override

Selected if an override was entered for the payee on the Override Scheduled Workday page.

Scheduled Hours Override

Displays the scheduled hours that are associated with the Workday override that was entered on the Override Scheduled Workday page.

Work Day ID Override Displays the Work Day ID that was selected as an override on the Override Scheduled Workday page.

User Defined 1 – 4 Override Displays the values of the Sch Cfg fields that are associated with the Workday override schedule selected on the Override Scheduled Workday page.

Alternate Work Schedule Data Page

Use the Alternate Work Schedule Data page (GP_ABS_ALT_WS_SP) to view values that were entered in the Sch Cfg1…4 fields (Shifts page or Daily Work Schedule Override page) that apply to the absence date.

Applicable only if an alternate work schedule was in effect on the absence day.

Navigation

Click the Alternate Work Schedule link on the Schedule Data and Config Fields tab of the Absence Data page.

The fields on this page are the same as those on the Configurable Fields page, but they apply to the alternate work schedule.

Viewing Results by Calendar Group

This topic discusses viewing results by calendar group. You can also view results by calendar.

Pages Used to View Results by Calendar Group

Page Name	***Definition Name***	***Navigation***	***Usage***
Calendar Group Results	GP_RSLT_RUN_SEG	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar Group, Results by Calendar Group, Calendar Group Results	View the processing statistics for an entire calendar group. This component displays the same information as the Results by Calendar component, except that it is for a calendar group rather than an individual calendar. Page includes links to other pages that display positive input, absence, and retroactive processing results.
Result Segment Detail	GP_RSLT_SEG_SP	• Click the Segment Detail link on the Calendar Results page. • Click the Segment Detail link on the Calendar Group Results page.	View more information about a segment's process and segment statuses.

Page Name	Definition Name	Navigation	Usage
Results by Calendar Group - Earnings and Deductions	GP_RSLT_RUN_ED	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar Group, Earnings and Deductions	This page is not applicable to Absence Management. No information will appear on this page.
Results by Calendar Group - Element Resolution Details	GP_RSLT_RES_SEC	Click the Resolution Details link on the Results by Calendar Group - Earnings and Deductions page.	This page is not applicable to Absence Management. No information will appear on this page.
Results by Calendar Group - Accumulators	GP_RSLT_RUN_ACUM	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Results by Calendar Group, Accumulators	View accumulator amounts.
Results by Calendar Group - Supporting Elements	GP_RSLT_RUN_PIN	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Results by Calendar Group, Supporting Elements	View information for each supporting element that was used to calculate entitlements and takes.

Related Links

Viewing Results by Calendar

Configuring the Processing Monitor

This topic provides an overview, lists prerequisites, and discusses how to configure the processing monitor.

Pages Used to Configure the Processing Monitor

Page Name	Definition Name	Navigation	Usage
Monitor Configuration	GP_CS_INSTALL	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Monitor Configuration	Configure the Processing Monitor.

Understanding the Processing Monitor

The Processing Monitor component provides a comprehensive set of processing statistics along with graphical representations of those statistics. The statistical information displayed on this page includes:

- Counts by selection, calculation, and segment status. This information is further broken down by the Absence and Payroll calculation types.
- Summarized gross pay and net pay results for payroll calculations.
- Summarized accumulator results for absence calculations.

The Processing Monitor presents this information by calendar group and by individual calendar.

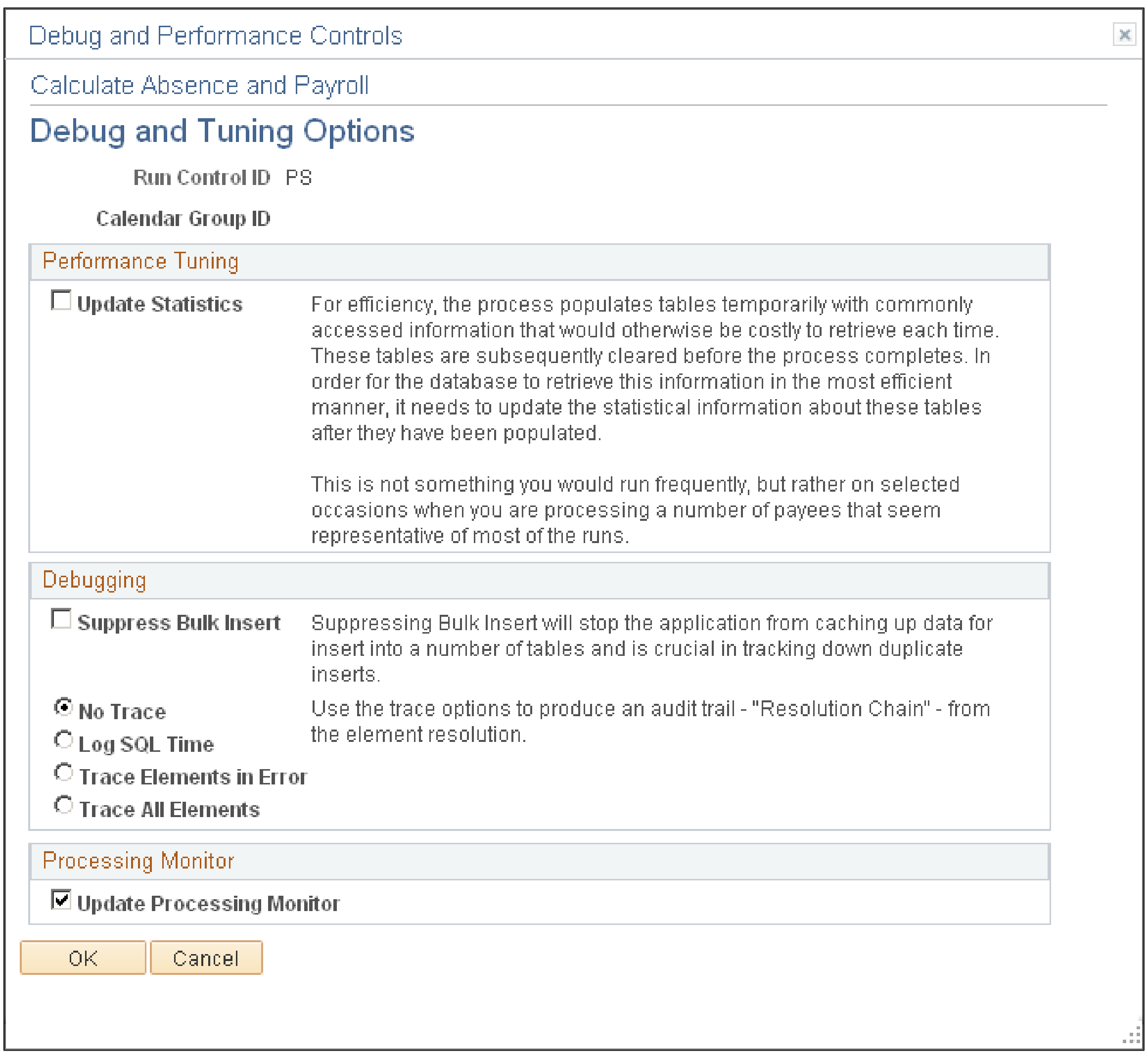
Note: You cannot use the Processing Monitor to review processing statistics for off-cycle calendars.

Updating Processing Monitor Data

The system updates the data presented in the Processing Monitor during absence and payroll calculation batch processing. You can disable the portion of the batch process that updates the Processing Monitor by deselecting the Update Processing Monitor check box on the Debug and Tuning Options page.

Image: Debug and Tuning Options page

This is an example of the Debug and Tuning Options page.



You can also update Processing Monitor data for a specific calendar group using the Update Processing Monitor Data page.

Related Links

Debug and Tuning Options Page

Update Processing Monitor Data page

Prerequisites for Processing Monitor Configuration

To include absence accumulator information in the Summary portion of the Processing Monitor, you must:

1. Create element groups. The element groups you create determine which absence accumulators the system displays in the Summary portion of the Processing Monitor. When defining element groups for the Processing Monitor, follow these guidelines:

   - On the Element Group Members page *(PeopleSoft HCM 9.2: Global Payroll)*, select *Applications* in the Element Group Use field.
   - When adding members on the Element Group Members page, make sure to select only members with an Element Type of *Accumulator*.

     Note: Segment accumulators are the type of accumulators supported by the Processing Monitor feature.

   - On the Element Group Members page, the sort order you enter in the Application Default Sort Seq (application default sort sequence) column determines the order in which each element link appears, from left to right, for each element group in the Summary portion of the Processing Monitor.
   - Make sure that the description for each element group members is unique.
   - Do not add more than four accumulators to an element group.
   - Ensure that all of the accumulators that you add to the element groups are included in a section of your process list.

2. Create an application using the Define Application page *(PeopleSoft HCM 9.2: Global Payroll)*. An application is required to create an element list set.

3. Use the Define List Set page *(PeopleSoft HCM 9.2: Global Payroll)* to create an element list set that contains the element groups you created to use with the Processing Monitor.

   Note: Do not add more than four element groups to the element list set.

Note: It is not necessary to create an element list to view gross and net pay using the Processing Monitor.

Related Links

"Setting Up Sections *(PeopleSoft HCM 9.2: Global Payroll)*"

"Setting Up Process Lists *(PeopleSoft HCM 9.2: Global Payroll)*"

Monitor Configuration Page

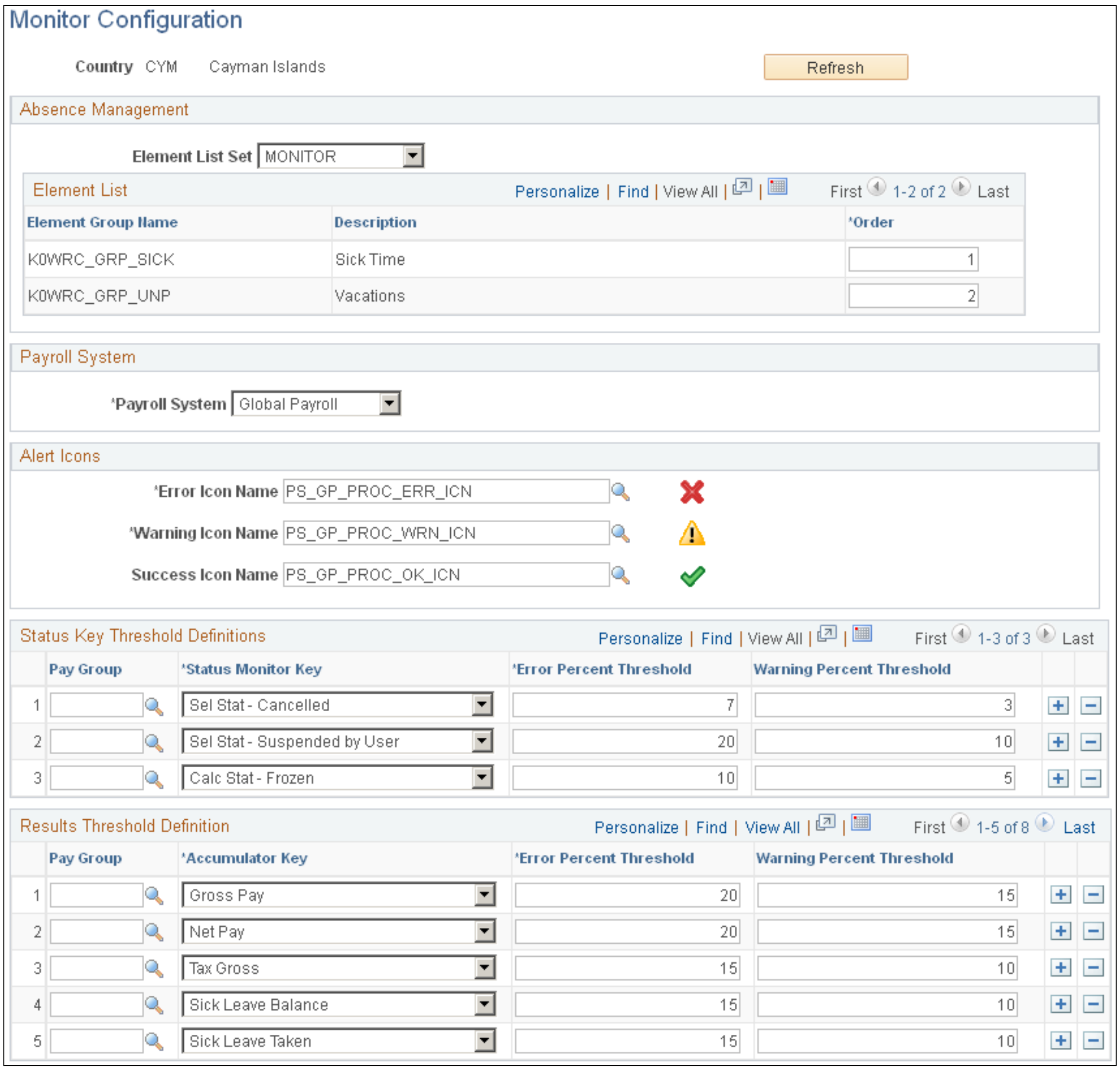
Use the Monitor Configuration page (GP_CS_INSTALL) to configure the Processing Monitor.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Monitor Configuration

Image: Monitor Configuration page

This example illustrates the fields and controls on the Monitor Configuration page.



Refresh

Whenever you make a change to the list set selected in the Element List Set field or to any of the element groups it includes, you must click the Refresh button on this page to update the Monitor Configuration page. When you click this button, the system removes any obsolete values from both the Element List and Results Threshold Definition grids and refreshes the page. In addition, it resets the sort order of the Element List grid.

Note: If you install a new language for your system after setting up the processing monitor configuration, you must access the Monitor Configuration page and click Save to make the configuration apply to the new language.

Absence Management

Element List Set

Select the element list set that determines which absence accumulators are displayed in the Summary portion of the Processing Monitor for absence calculations. The system displays the element groups associated with the element list set in the Element List grid.

This field is not required. If you leave it blank, the Summary portion of Processing Monitor doesn't display any absence information.

Note: The element list set that you select must contain no more than four element groups. If you select an element list that contains more than four element groups, you will receive an error.

Element Group Name

Lists the name of each element group associated with the selected element list set.

Description

Lists the description of each element group associated with the selected element list set. These descriptions appear on the tabs in the Summary portion of the Processing Monitor for absence calculations.

Order

Enter a number for each element group. This determines the order in which the tabs appear in the Summary portion of the Processing Monitor for absence calculations.

Payroll System and Retro Definitions

Payroll System

Select which type of payroll system you are using. Values are:

- *Global Payroll:* Select if PeopleSoft Global Payroll is your payroll system.
- *Other:* Select if you use a payroll system other than PeopleSoft Global Payroll.

Note: If you select *Other*, you will not be able to view gross and net pay calculation results using the Processing Monitor.

Alert Icons

Error Icon Name

Enter the name of the icon that the system displays in the Alerts Icon columns of the Processing Monitor when an error is generated. By default this field is populated with the delivered error icon, PS_GP_PROC_ERR_ICN

Warning Icon Name

Enter the name of the icon that the system displays in the Alerts Icon columns of the Processing Monitor when a warning is generated. By default this field is populated with the delivered warning icon, PS_GP_PROC_WRN_ICN

Success Icon Name

Enter the name of the icon that the system displays in the Alerts Icon columns of the Processing Monitor for successful payroll or absence calculations. By default this field is populated with the delivered success icon, PS_GP_PROC_OK_ICN

Status Key Threshold Definitions

Use this grid to define the thresholds that trigger the system to display errors and warnings in the Counts sections of the Processing Monitor.

Pay Group

Define the pay group to which the status key threshold definition applies. If you leave this field blank, the status key threshold definition applies to all pay groups.

Status Monitor Key

Select the type of status to which the threshold definition applies.

Error Percent Threshold

Enter a percentage. When the percentage of calculations with the status defined in the Status Monitor Key field is equal to or greater than the number you enter in this field, the system displays the Error icon in the Alert column for that status in the Counts portion of the Processing Monitor.

Warning Percent Threshold

Enter a percentage. When the percentage of calculations with the status defined in the Status Monitor Key field is equal to or greater than the number you enter in this field, the system displays the Warning icon in the Alert column for that status in the Counts portion of the Processing Monitor.

Results Threshold Definitions

Use this grid to define the thresholds that trigger the system to display errors and warnings in the Summary section of the Processing Monitor.

Pay Group

Define the pay group to which the results threshold definition applies. If you leave this field blank, the results threshold definition applies to all pay groups.

Accumulator Key

Select the accumulator to which the threshold definition applies. The valid values are *Gross Pay, Net Pay,* and the accumulators associated with the value you selected in the Element List Set field.

Error Percent Threshold

Enter a percentage. For the accumulator defined in the Accumulator Key field, when the value of the Percent Difference column in the Summary portion of the Processing Monitor is equal to or greater than the number you enter in this field, the system displays the Error icon in the Alerts Icon column.

Warning Percent Threshold

Enter a percentage. For the accumulator defined in the Accumulator Key field, when the value of the Percent Difference column in the Summary portion of the Processing Monitor is equal to or greater than the number you enter in this field, but less than the number in the Error Percent Threshold field, the system displays the Warning icon in the Alerts Icon column.

Using the Processing Monitor

This topic provides an overview of the Processing Monitor and discusses how to:

- Update Processing Monitor data.
- View the processing monitor.

Pages Used to Use the Processing Monitor

Page Name	*Definition Name*	*Navigation*	*Usage*
Update Processing Monitor Data	GP_CS_POP_RCNTL	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Update Processing Monitor Data	Update Processing Monitor data for a calendar group.
Processing Monitor - By Calendar Group	GP_CS_STAT1	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Processing Monitor	View detailed processing statistics for calendar groups.
Processing Monitor - By Calendar	GP_CS_STAT2	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Processing Monitor, By Calendar	View detailed processing statistics for calendars.

Understanding the Processing Monitor

The Processing Monitor component provides a comprehensive set of processing statistics along with graphical representations of those statistics. The statistical information displayed on this page includes:

- Counts by selection, calculation, and segment status. This information is further broken down by the Absence and Payroll calculation types.
- Summarized gross pay and net pay results for payroll calculations.
- Summarized accumulator results for absence calculations.

The Processing Monitor presents this information by calendar group and by individual calendar.

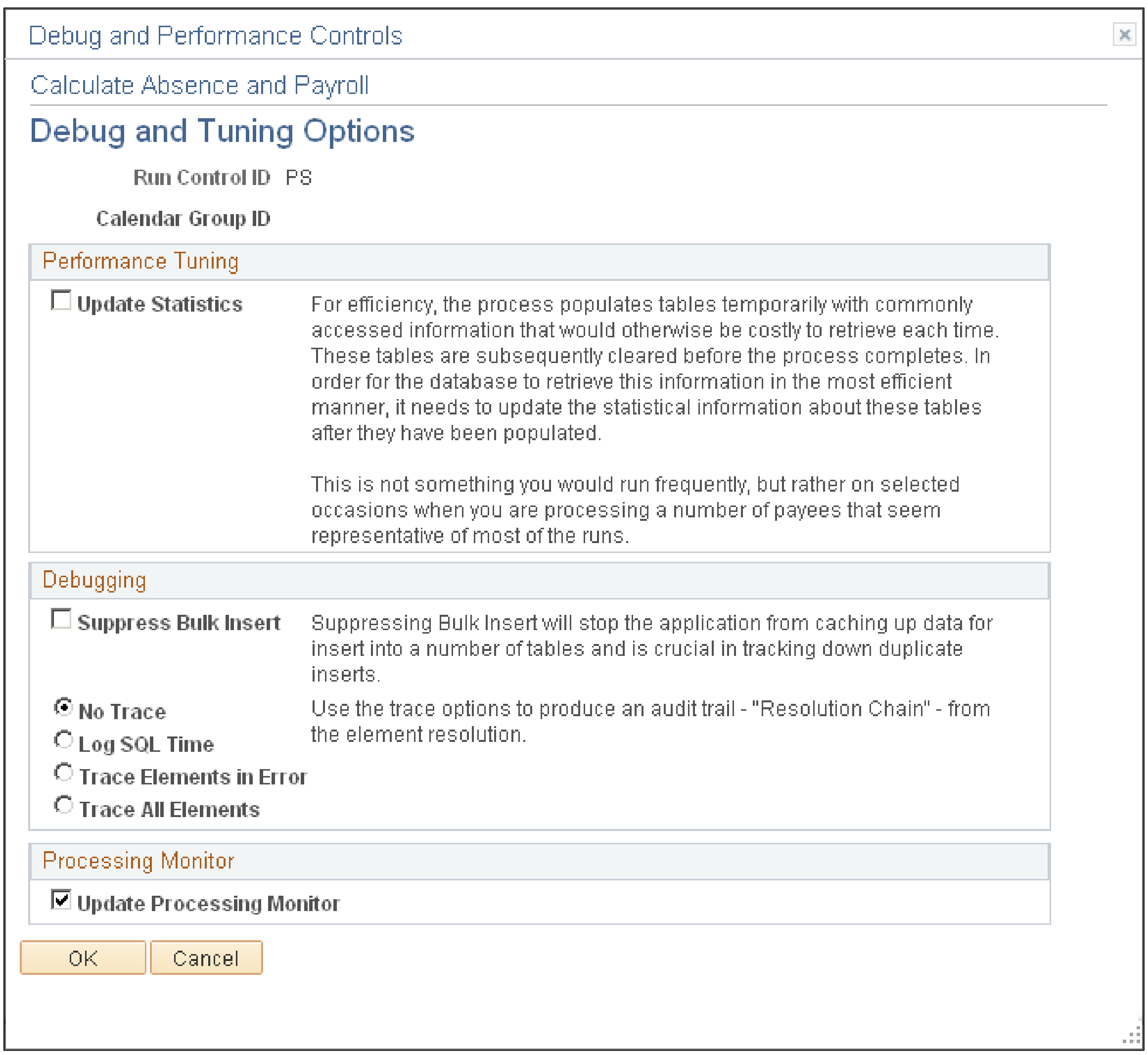
Note: You cannot use the Processing Monitor to review processing statistics for off-cycle calendars.

Updating Processing Monitor Data

The system updates the data presented in the Processing Monitor during absence and payroll calculation batch processing. You can disable the portion of the batch process that updates the Processing Monitor by deselecting the Update Processing Monitor check box on the Debug and Tuning Options page.

Image: Debug and Tuning Options page

This is an example of the Debug and Tuning Options page.



You can also update Processing Monitor data for a specific calendar group using the Update Processing Monitor Data page.

Related Links

Debug and Tuning Options Page

Update Processing Monitor Data page

Update Processing Monitor Data page

Use the Update Processing Monitor Data page (GP_CS_POP_RCNTL) to update Processing Monitor data for a calendar group.

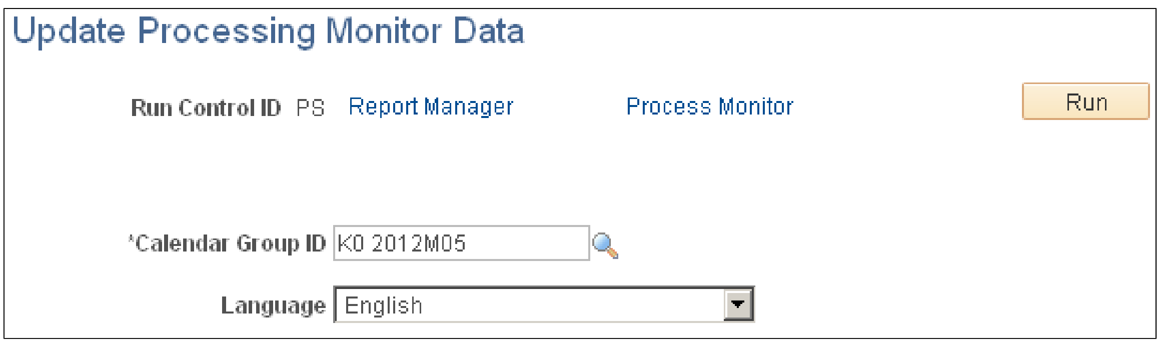
Note: This is a secondary process for updating Processing Monitor data. Typically, the system updates Processing Monitor data during absence and payroll calculation batch processing.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Update Processing Monitor Data

Image: Update Processing Monitor Data page

This example illustrates the fields and controls on the Update Processing Monitor Data page.



Select a Calendar Group ID and click the Run button. The Update Processing Monitor Data (GP_CS_POP_ST) application engine program updates the Processing Monitor data for the selected calendar group.

Note: If you update the Processing Monitor as part of the absence and payroll calculation batch process, you do not need to update it using the Update Processing Monitor Data process. For more information, see the documentation for the Debug and Tuning Options page.

Processing Monitor - By Calendar Group Page

Use the Processing Monitor - By Calendar Group page (GP_CS_STAT1) to view detailed processing statistics for calendar groups.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Processing Monitor

Image: Processing Monitor - By Calendar Group (1 of 2)

This example illustrates the fields and controls on the Processing Monitor - By Calendar Group page (1 of 2).

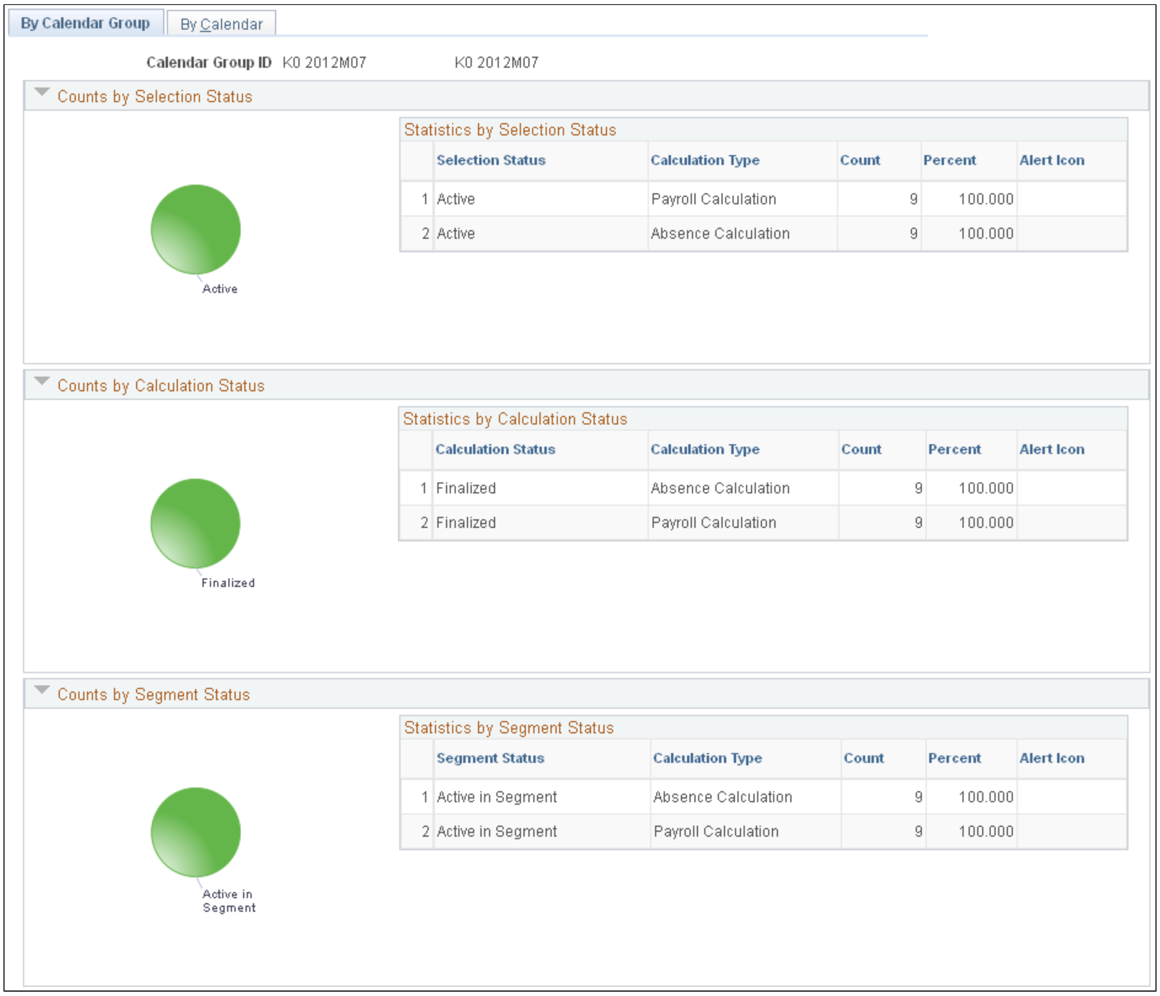
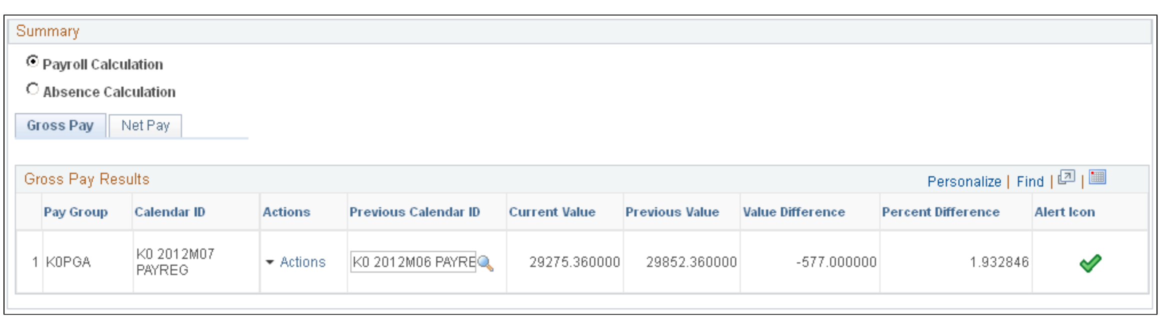


Image: Processing Monitor - By Calendar Group (2 of 2)

This example illustrates the fields and controls on the Processing Monitor - By Calendar Group page (2 of 2).



Note: The Processing Monitor displays results from the first version (V1) and revision (R1) in the case of retroactive processing.
For more information on retroactive processing, see "Understanding General Rules of Retroactive Processing *(PeopleSoft HCM 9.2: Global Payroll)*".

Counts by Selection Status

This section of the page includes a Statistics by Selection Status grid that presents processing statistics organized by Selection Status and Calculation Type. For each combination of selection status and calculation type that exists, the grid displays a row that includes a Count, a Percent, and an Alert if applicable.

To the left of the Statistics by Selection Status grid, the Counts by Selection Status section includes a pie chart that provides a graphical representation of the processing statistics presented in the grid.

Counts by Calculation Status

This section of the page includes a Statistics by Calculation Status grid that presents processing statistics organized by Calculation Status and Calculation Type. For each combination of calculation status and calculation type that exists, the grid displays a row that includes a Count, a Percent, and an Alert if applicable.

To the left of the Statistics by Calculation Status grid, the Counts by Calculation Status section includes a pie chart that provides a graphical representation of the processing statistics presented in the grid.

Counts by Segment Status

This section of the page includes a Statistics by Segment Status grid that presents processing statistics organized by Segment Status and Calculation Type. For each combination of segment status and calculation type that exists, the grid displays a row that includes a Count, a Percent, and an Alert if applicable.

To the left of the Statistics by Calculation Status grid, the Counts by Calculation Status section includes a pie chart that provides a graphical representation of the processing statistics presented in the grid.

Note: For the Counts by Selection Status, Counts by Calculation Status, and Counts by Segment Status sections, you determine what triggers this page to display alert icons by defining status key threshold definitions on the Monitor Configuration page.

Summary

This section displays a summary of payroll and absence calculation results.

Note: The Payroll Calculation and Absence Calculation options appear in this section only if you select a value in the Element List Set field of the Monitor Configuration page. If no element list set is selected, this section displays only payroll calculation results. Additionally, if you select *Other* as the Payroll System on the Monitor Configuration page, this section does not display any payroll calculation results.

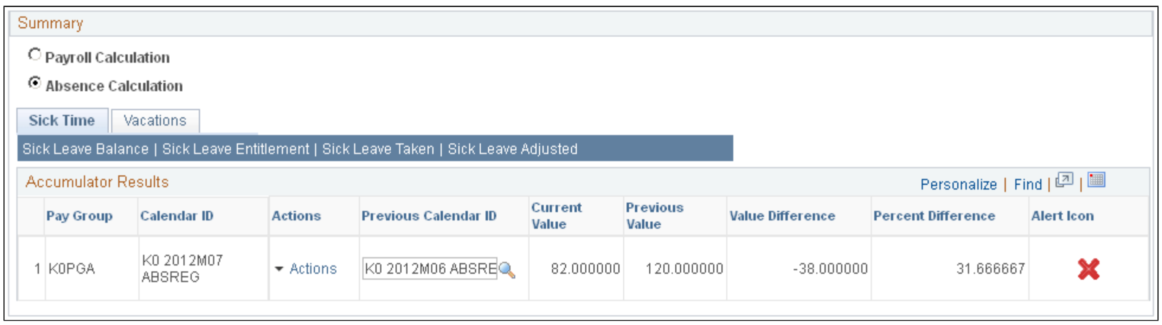
Payroll Calculation	Select this option to display a summary of payroll calculation results in the Summary section of the page. When you select this option, the page displays two tabs of payroll calculations results: Gross Pay and Net Pay.

Absence Calculation

Select this option to display a summary of absence calculation results in the Summary section of the page. When you select this option, the page displays a tab for each element group associated with the element list set that you selected on the Monitor Configuration page. For each element group tab, the system displays a link for each absence accumulator that is a member of that element group.

Image: Calendar Group Summary for Absence Calculation Data

This example illustrates the Summary section of the Processing Monitor - By Calendar Group page with the Absence Calculation option selected.



For gross pay, net pay, and each absence accumulator, the grid displays a row for each pay group.

Actions

Click to access links to additional information for the row. Available actions are:

- *View Administrator Results:* Select to access the Summary page of the Administrator Results component for a specific payee.
- *View Calendar Group Results:* Select to access the Calendar Group Results page for a specific payee.
- *View Payee Status:* Select to access the Payee Status page.
- *View Payee Iterative List:* Select to access the Payee Iterative List page.
- *View Payee Messages:* Select to access the Payee Messages page.
- *View Department ID Analysis:* Select to access the View Department ID Analysis pivot grid.

Previous Calendar ID

Select the previous calendar to which you want to compare your current results. By default, the system populates this field with the calendar that immediately precedes the current calendar. Only finalized calendars associated with the respective pay group are available to select in this field.

Current Value

Displays the current calendar's value for gross pay, net pay, or an absence accumulator.

Previous Value

Displays the previous calendar's value for gross pay, net pay, or an absence accumulator.

Value Difference

Displays the difference between the current value and previous value for gross pay, net pay, or an absence accumulator.

Percent Difference

Displays the percentage of difference between the current value and previous value for gross pay, net pay, or an absence accumulator.

Alert Icon

Displays the appropriate alert icon based on the value of the Percent Difference field.

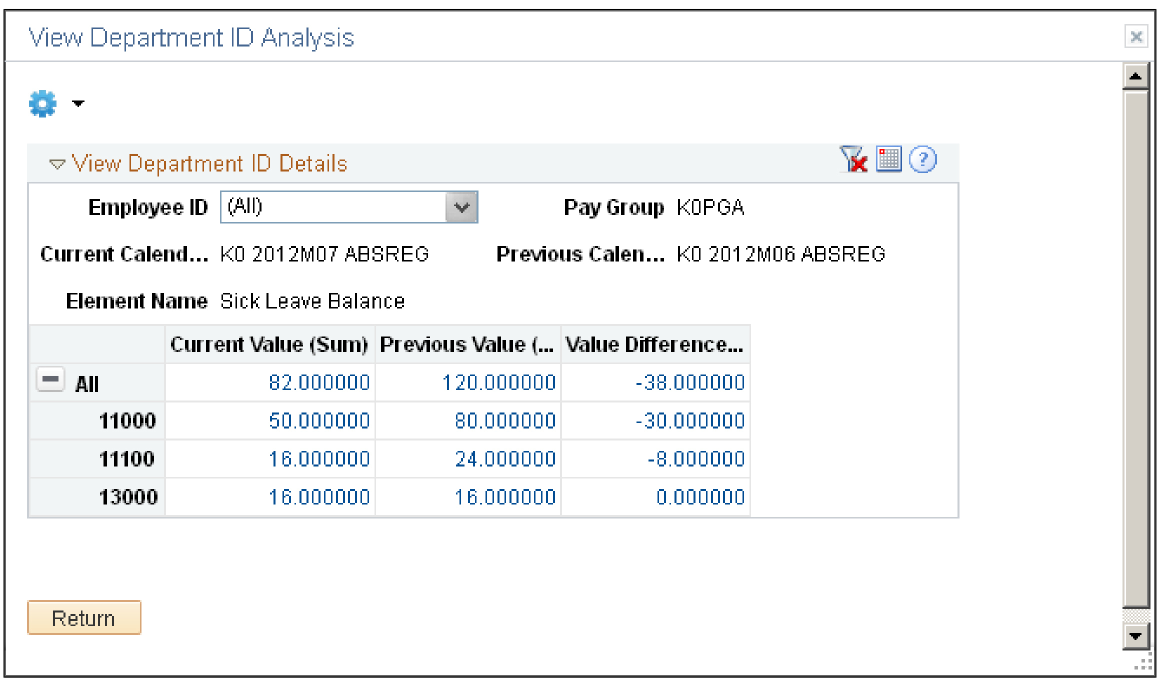
Note: You determine which icons correspond to which percentages of difference by defining results threshold definitions on the Monitor Configuration page.

Department ID Analysis Pivot Grid

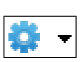
When you click the Action link in the Summary portion of the Processing Monitor, select *View Department ID Analysis* to access the View Department ID Analysis pivot grid.

Image: View Department ID Analysis page

This example illustrates the fields and controls on the View Department ID Analysis page.



When fully expanded, this pivot grid shows the current value and value difference for the gross pay, net pay, or absence accumulator for each department associated with a specific pay group and calendar ID.

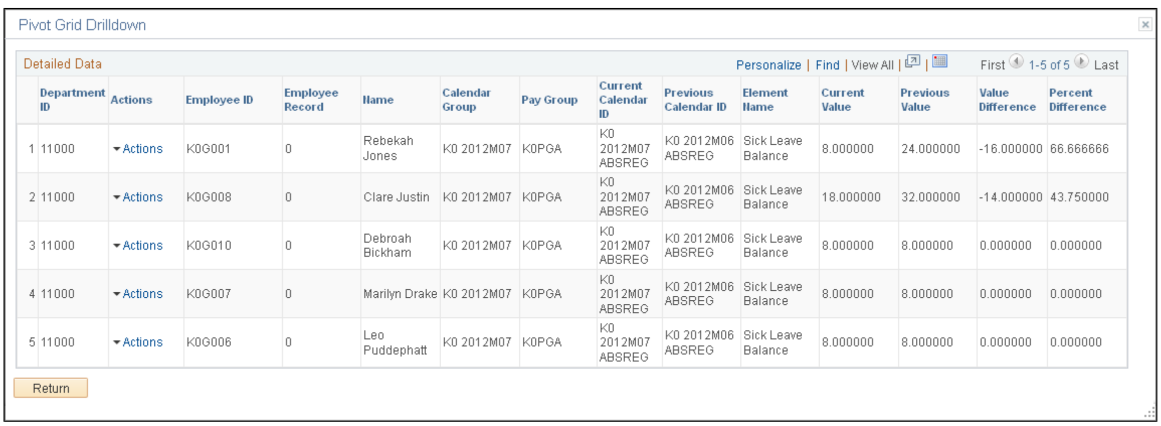


Click the Options Menu button and select *Prompts* to select a different previous period for the department ID analysis.

Employee ID	Select the employees for which you want to filter the department details. You can click and drag this field to the column listing the departments to view the Current Value and Value Difference by employee for each department.
Current Value	Displays the current value for gross pay, net pay, or an absence accumulator. You can click on a link in this column to access the Pivot Grid Drilldown page where you can view payee-specific details.
Previous Value	Displays the previous value for gross pay, net pay, or an absence accumulator. You can click on a link in this column to access the Pivot Grid Drilldown page where you can view payee-specific details.
Value Difference	Displays the value difference for gross pay, net pay, or an absence accumulator. You can click on a link in this column to access the Pivot Grid Drilldown page where you can view payee-specific details.

Image: Pivot Grid Drilldown page

This example illustrates the fields and controls on the Pivot Grid Drilldown page.


Pivot Grid Drilldown

Detailed Data — Personalize | Find | View All | First 1-5 of 5 Last

	Department ID	Actions	Employee ID	Employee Record	Name	Calendar Group	Pay Group	Current Calendar ID	Previous Calendar ID	Element Name	Current Value	Previous Value	Value Difference	Percent Difference
1	11000	Actions	K0G001	0	Rebekah Jones	K0 2012M07	K0PGA	K0 2012M07 ABSREG	K0 2012M06 ABSREG	Sick Leave Balance	8.000000	24.000000	-16.000000	66.666666
2	11000	Actions	K0G008	0	Clare Justin	K0 2012M07	K0PGA	K0 2012M07 ABSREG	K0 2012M06 ABSREG	Sick Leave Balance	18.000000	32.000000	-14.000000	43.750000
3	11000	Actions	K0G010	0	Debroah Bickham	K0 2012M07	K0PGA	K0 2012M07 ABSREG	K0 2012M06 ABSREG	Sick Leave Balance	8.000000	8.000000	0.000000	0.000000
4	11000	Actions	K0G007	0	Marilyn Drake	K0 2012M07	K0PGA	K0 2012M07 ABSREG	K0 2012M06 ABSREG	Sick Leave Balance	8.000000	8.000000	0.000000	0.000000
5	11000	Actions	K0G006	0	Leo Puddephatt	K0 2012M07	K0PGA	K0 2012M07 ABSREG	K0 2012M06 ABSREG	Sick Leave Balance	8.000000	8.000000	0.000000	0.000000

Return

Actions	Click to access the View Employee Results link that you can use to access the Results by Calendar - Calendar Results page for the employee.

For more information on pivot grids, see the product documentation for *PeopleTools: PeopleSoft Pivot Grid*.

Processing Monitor - By Calendar Page

Use the Processing Monitor - By Calendar page (GP_CS_STAT2) to view detailed processing statistics for calendars.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Processing Monitor, By Calendar

Image: Processing Monitor - By Calendar (1 of 2)

This example illustrates the fields and controls on the Processing Monitor - By Calendar (1 of 2).

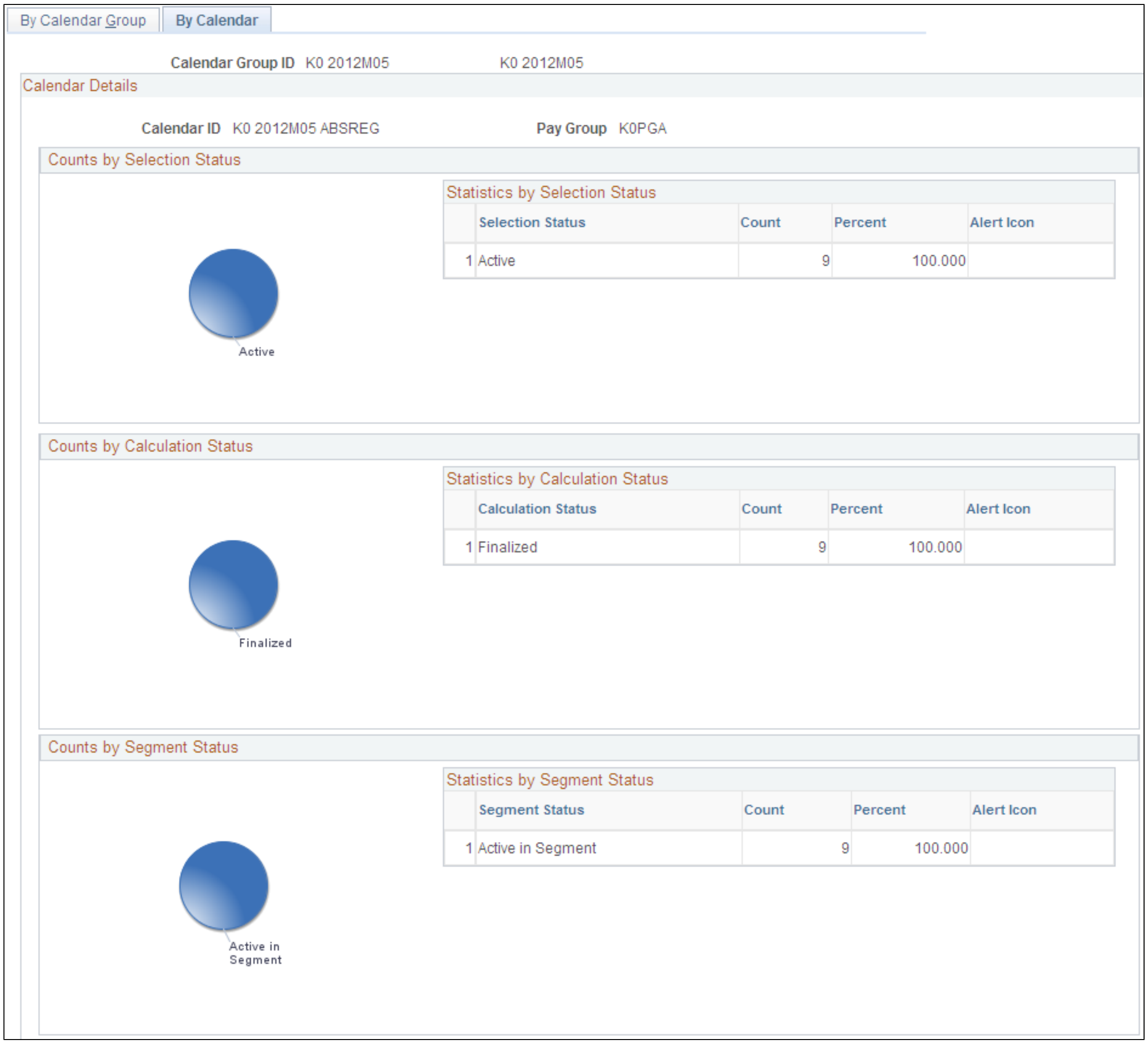
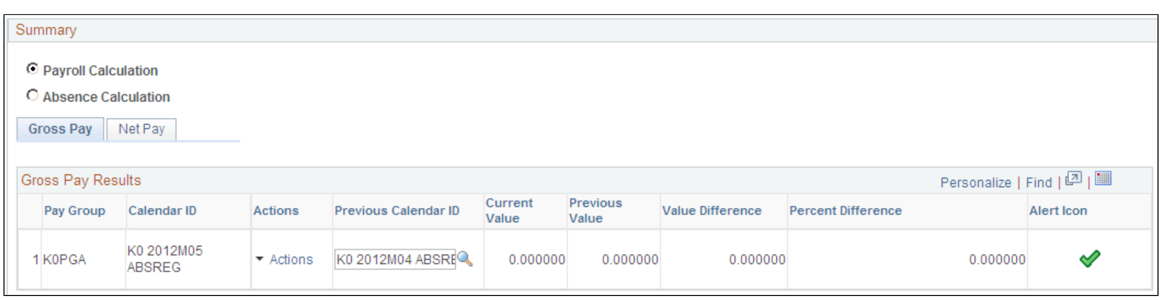


Image: Processing Monitor - By Calendar (2 of 2)

This example illustrates the fields and controls on the Processing Monitor - By Calendar (2 of 2).



The fields on this page are identical to those on the Processing Monitor - By Calendar Group page.

Defining Administrator Absence Results

This topic discusses setting up administrator results.

Page Used to Define Administrator Absence Results

Page Name	***Definition Name***	***Navigation***	***Usage***
Define Administrator Results	GP_RSLT_ADM_SETUP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Define Administrator Results, Define Administrator Results	Set up country options and link a list set to a PeopleSoft role for the Payee Detail group box on the Summary page.

Prerequisites

List sets maintain the framework for Administrator Absence Results. A list set and application definition are delivered as system data. This definition is used to assign attributes to list sets and element groups. List sets are used to determine which elements appear on the page (through element groups defined for the set). These attributes will control the Administrator Absence Results component and the information displayed in the component. Therefore, you can set up many different list sets for different types of views of the data.

List sets provide the ability to address the following requirements:

- Determine which inquiry pages should be available or hidden.
- Specify which list set should appear in an list set area on a page.
- Either accept the defaulted title or override it.
- Specify lists of elements such as absences, accumulators, and supporting elements.
- Define a set of elements to be viewed in the inquiry pages.
- Compose attributes of the elements to be viewed.

See Understanding Applications and List Sets.

Also, you have to determine what elements can be viewed by someone in a particular PeopleSoft role, such as an Absence Administrator or a Benefits Administrator. For example, your Absence Administrator may be able to view all elements, while your Benefits Administrator may only have access to the benefit elements.

See *PeopleTools 8.52: Security Administration, Setting Up Roles*

Define Administrator Results Page

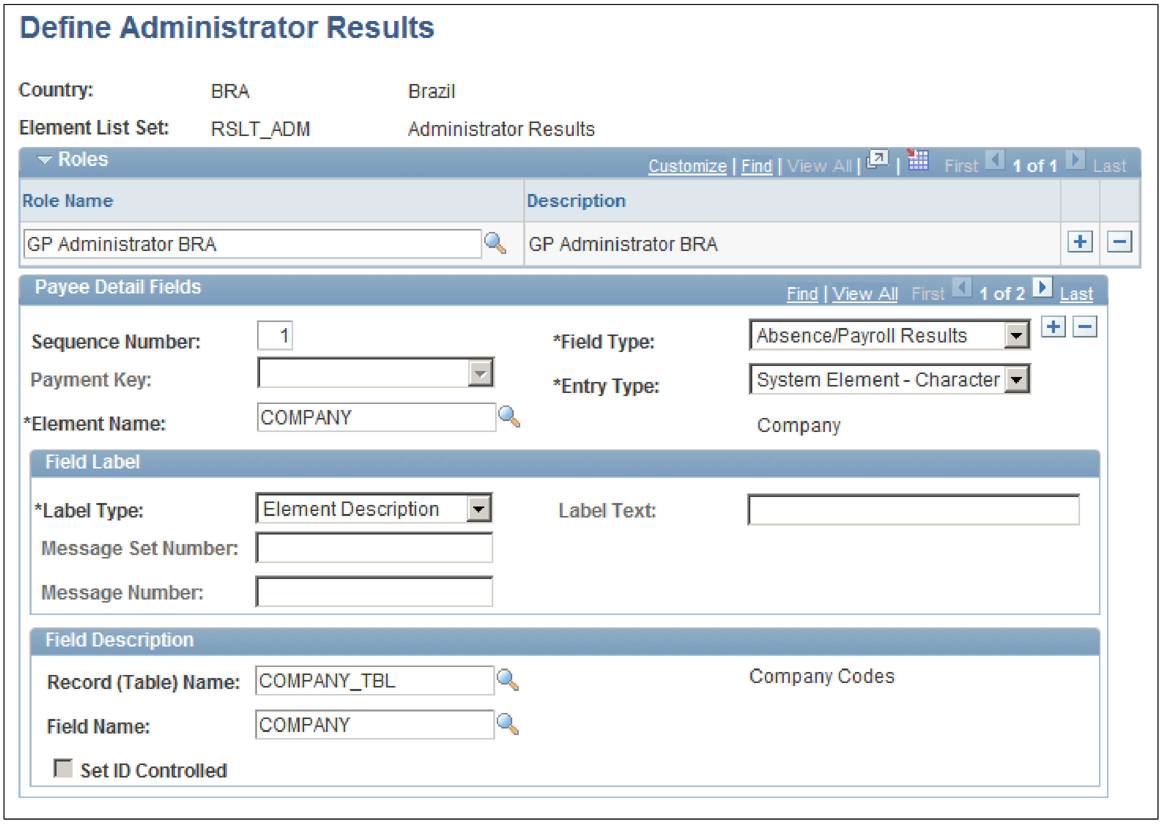
Use the Define Administrator Results page (GP_RSLT_ADM_SETUP) to set up country options and link a list set to a PeopleSoft role for the Payee Detail group box on the Summary page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Define Administrator Results, Define Administrator Results

Image: Define Administrator Results page

This example illustrates the fields and controls on the Define Administrator Results page.



Roles

Enter the role name you want associated with the list set.

See *PeopleTools 8.52: Security Administration, Setting Up Roles*

Payee Detail Fields

Field Type	Enter the field type for the value you want displayed in the Payee Details section of the Summary page. Valid values are *Payment Key* and *Absence/Payroll Results*.
Payment Key	If *Payment Key* is selected for the Field Type enter payment key number you want displayed.
Entry Type	If *Absence/Payroll Results* is selected for the Field Type enter the entry type. Values are *System Element – Character* and *Variable – Character*.

Element Name If *Absence/Payroll Results* is selected for the Field Type enter the element name for the entry type selected.

Field Label

Label Type Select a label for the Field Type selected. Different fields will be able to be edited based on the Label Type selected.

If the Field Type is *Payment Key*, the valid values are *Message Catalog* or *Text*.

If the Field Type is *Absence/Payroll Results*, the valid values are *Element Description*, *Element Name*, *Message Catalog*, or *Text*.

Label Text If the Label Type selected is *Text* enter the text you want to use for the label. This will display on the Summary page – Payee Details group box.

Message Set Number If the Label Type selected is *Message Catalog* select the message set number to be displayed on the Summary page – Payee Details group box.

Message Number If the Label Type selected is *Message Catalog* select the message number to be displayed on the Summary page – Payee Details group box.

Field Description

The fields in this section are used to retrieve the description of a field from the record indicated.

Record (Table) Name Enter the name of the record to retrieve a field description from if you want the field description on the Summary page – Payee Details group box.

Field Name Enter the field name which has the description that you want displayed on the Summary page – Payee Details group box. Only character fields are allowed.

SetID Controlled If the record selected is controlled by a SetID, the field will automatically be selected.

Viewing Administrator Absence Results

This topic provides an overview of administrator absence results and discusses how to:

- View summary information
- View supporting elements
- View accumulators

- View absences

Pages Used to View Administrator Absence Results

Page Name	***Definition Name***	***Navigation***	***Usage***
Summary	GP_RSLT_ADM_SUMM	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Administrator Results, Summary	View payee information by segment.
Administrator Results - Supporting Elements	GP_RSLT_ADM_SOVR	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Administrator Results, Supporting Elements	View information about supporting elements used to calculate entitlements and takes for a payee.
Administrator Results - Earnings and Deductions (Note: This page is not applicable to Absence Management)	GP_RSLT_ADM_ED	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Administrator Results, Earnings and Deductions	This page does not apply to Absence Management. No information will appear on this page.
Administrator Results - Accumulators	GP_RSLT_ADM_ACUM	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Administrator Results, Accumulators	View accumulator amounts.
Administrator Results - Absences	GP_RSLT_ADM_ABS	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/ Payroll Info, Administrator Results, Absences	View absence daily data, generated positive input, and accumulators that are processed for the absence calendar.

Understanding Administrator Absence Results

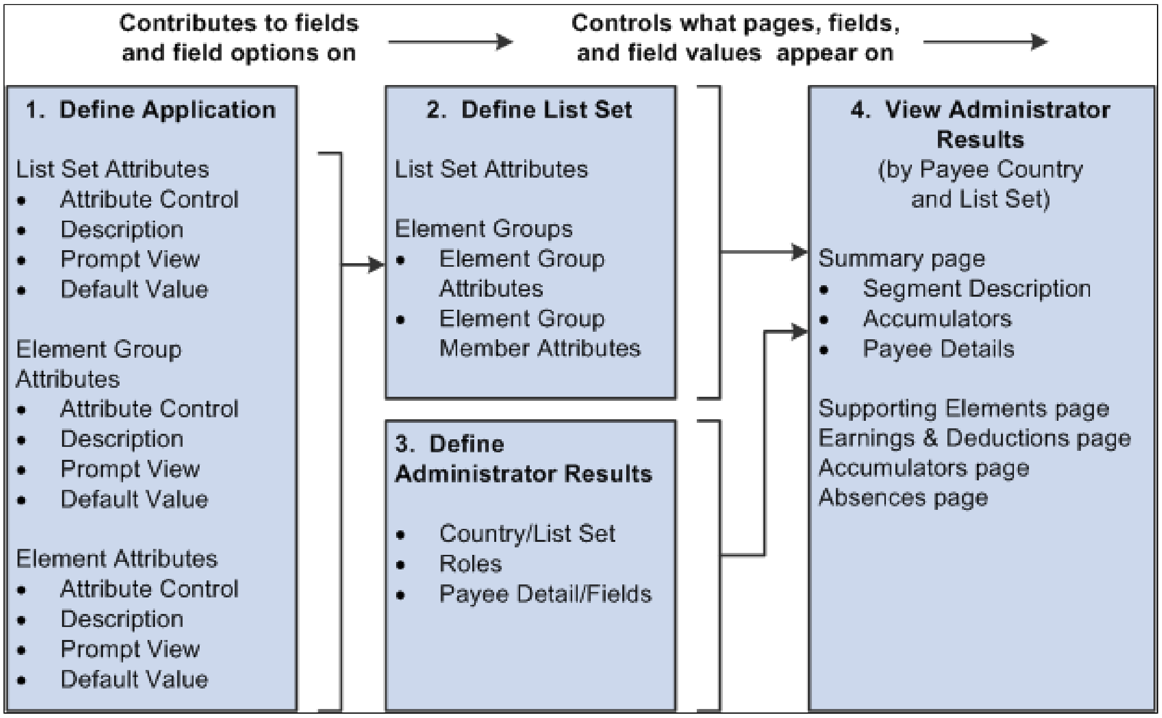
Administrator Absence Results inquiry pages are used for viewing absence results configured by the user. They provide the ability to view the following types of information after absences have been calculated:

- Summary information detailing payee and segment information.
- Supporting elements used in the absence calculation such as variables and accumulators.
- Accumulators.
- Absences.

  Application definitions, list sets, and role-based settings on the Define Administrator Results component all contribute to the appearance of the Administrator Results component. For example, the settings in the List Set Attributes group box on the Define List Set page control what pages of the component appear. This is just one of many ways that list sets contribute to the appearance of the Administrator Results component.

Image: Configuring the appearance of the Administrator Results component

This diagram presents an overview of this relationship.



Note: PeopleSoft delivers an application of RSLT_ADM with a country of *ALL*, designed to work in conjunction with the Administrator Results component. You should not modify this delivered application. Link this application with a list set of your choosing, and use it to control the appearance of the Administrator Results component.

Summary Page

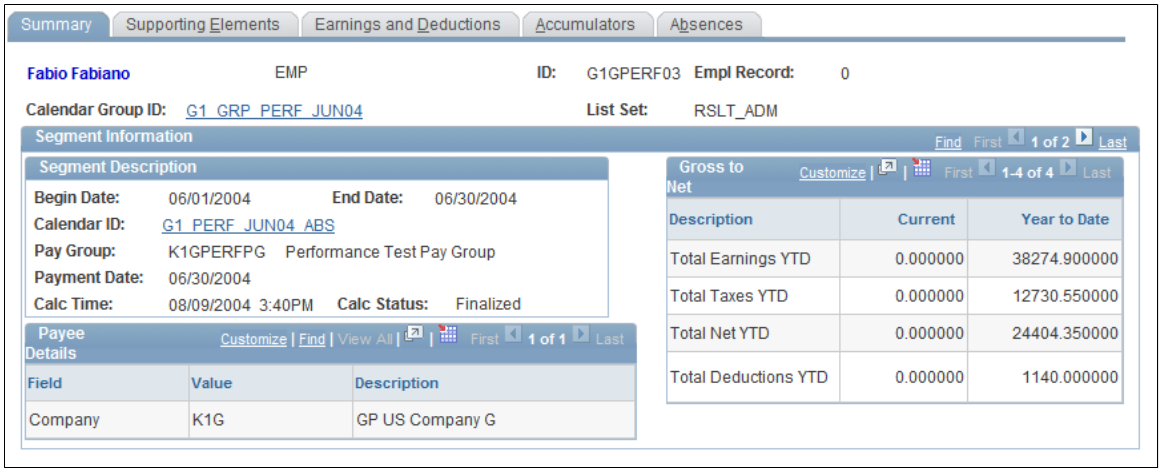
Use the Summary page (GP_RSLT_ADM_SUMM) to view payee information by segment.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Administrator Results, Summary

Image: Summary page

This example illustrates the fields and controls on the Summary page.



Note: The appearance of this page is controlled by List Sets and Role based security. Depending on a user's role, and the user's role association with a given list set, different values will appear.

See Understanding Applications and List Sets.

See *PeopleTools: Security Administration*.

Segment Description

This area displays information pertaining to the payee's segment, regardless of list set setting. The segment begin date, segment end date, calendar, pay group, currency, calculation date and time, and the calculation status are displayed in this group box.

Payee Details

This area displays information that is stored in the absence result tables that relate to a payee's segment. The title and contents of this area are configured by country and are specified through the Payee Detail Fields group box settings on the Define Administrator Results page.

If segmentation occurs the value displayed will be that of the last slice.

Accumulators

This area displays segment and year to date accumulators that relate to a payee's segment. The title and content of this area are configured by country and are specified in an list set from an list set.

Administrator Results - Supporting Elements Page

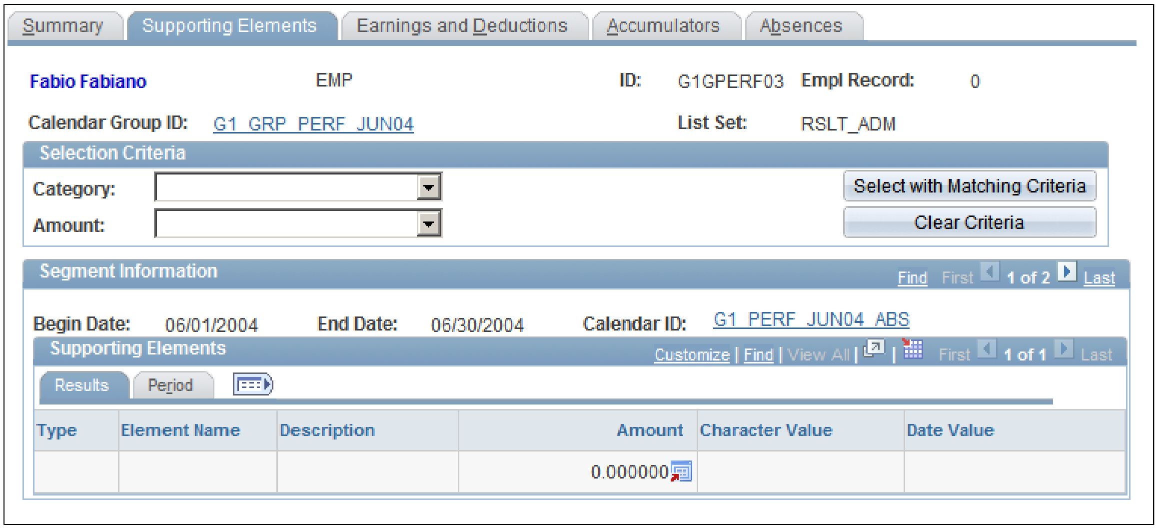
Use the Administrator Results - Supporting Elements page (GP_RSLT_ADM_SOVR) to view information about supporting elements used to calculate entitlements and takes for a payee.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Administrator Results, Supporting Elements

Image: Supporting Elements page

This example illustrates the fields and controls on the Supporting Elements page.



This page displays supporting elements that have been defined in an list set.

Selection Criteria

This group box is available on most of the inquiry pages. Unless selection criteria is entered, all elements applicable in the list set defined in the setup will be displayed. Any selection criterion entered will filter the elements on the current inquiry page but it does not filter the information on any of the other inquiry pages.

If multiple criteria are entered, elements must match all criteria specified in order to be displayed.

Category

Select the name of the category of elements to filter. These categories are from the Category table.

See Defining Industries and Categories.

Amounts

Select the type of amount you want to display. Choices are *Negative Amounts* and *Positive Amounts*. Leave the Amount field blank to return all amounts.

Note: Zero amounts will only display when you select no amount in the Amount field, as these are neither positive nor negative.

Administrator Results - Accumulators Page

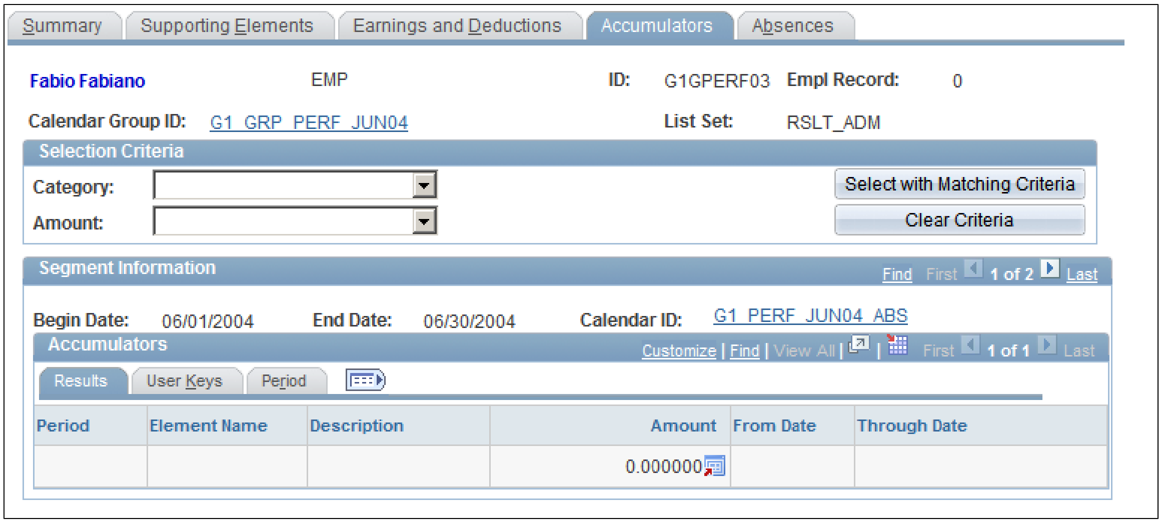
Use the Administrator Results - Accumulators page (GP_RSLT_ADM_ACUM) to view accumulator amounts.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Administrator Results, Accumulators

Image: Accumulators page

This example illustrates the fields and controls on the Accumulators page.



This page displays accumulators that have been defined in a list set.

Administrator Results - Absences Page

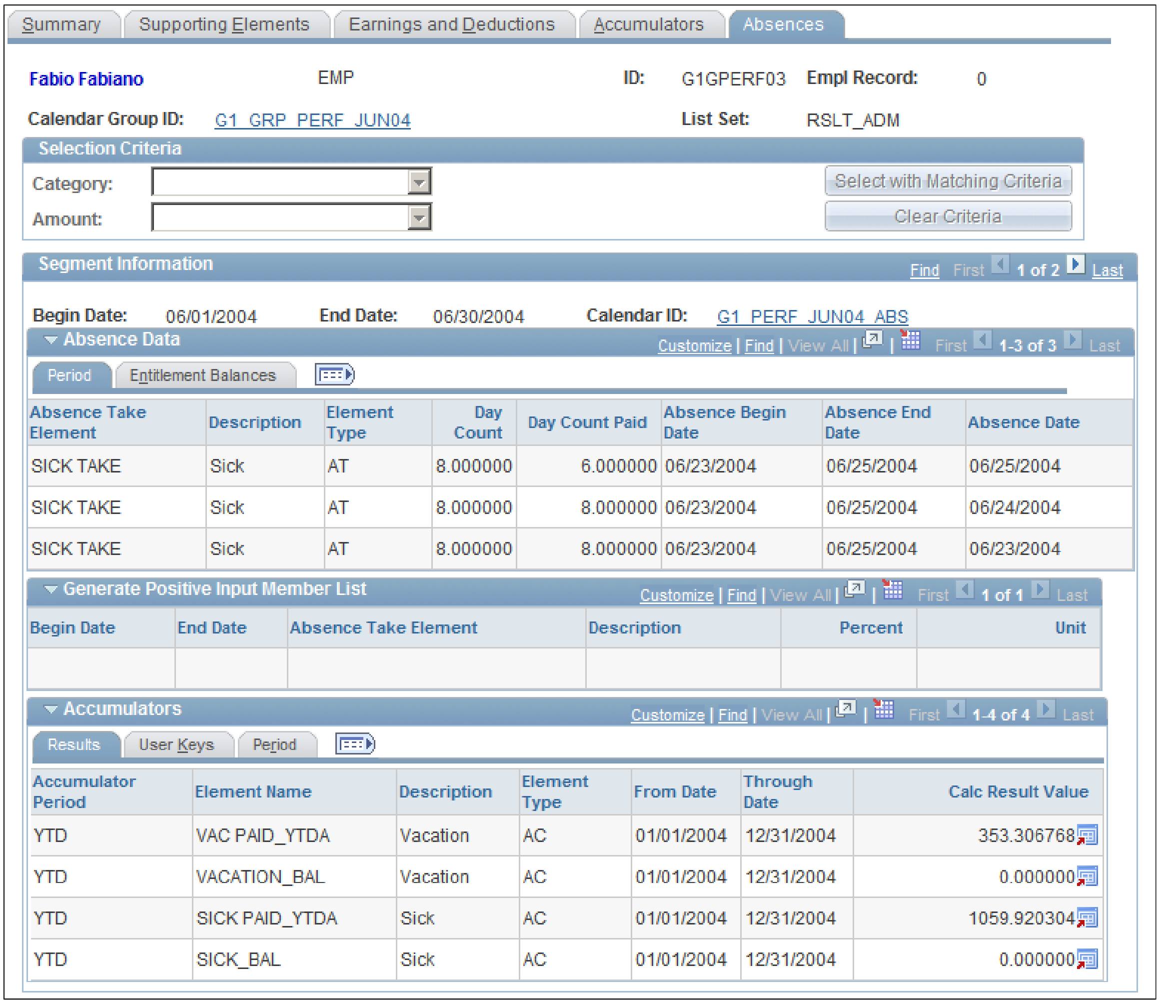
Use the Administrator Results - Absences page (GP_RSLT_ADM_ABS) to view absence daily data, generated positive input, and accumulators that are processed for the absence calendar.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Administrator Results, Absences

Image: Absences page

This example illustrates the fields and controls on the Absences page.


Summary | Supporting Elements | Earnings and Deductions | Accumulators | Absences

Fabio Fabiano EMP ID: G1GPERF03 Empl Record: 0

Calendar Group ID: G1_GRP_PERF_JUN04 List Set: RSLT_ADM

Selection Criteria

Category:

Amount:

Select with Matching Criteria

Clear Criteria

Segment Information Find First 1 of 2 Last

Begin Date: 06/01/2004 End Date: 06/30/2004 Calendar ID: G1_PERF_JUN04_ABS

Absence Data Customize | Find | View All | First 1-3 of 3 Last

Period | Entitlement Balances

Absence Take Element	Description	Element Type	Day Count	Day Count Paid	Absence Begin Date	Absence End Date	Absence Date
SICK TAKE	Sick	AT	8.000000	6.000000	06/23/2004	06/25/2004	06/25/2004
SICK TAKE	Sick	AT	8.000000	8.000000	06/23/2004	06/25/2004	06/24/2004
SICK TAKE	Sick	AT	8.000000	8.000000	06/23/2004	06/25/2004	06/23/2004

Generate Positive Input Member List Customize | Find | View All | First 1 of 1 Last

Begin Date	End Date	Absence Take Element	Description	Percent	Unit

Accumulators Customize | Find | View All | First 1-4 of 4 Last

Results | User Keys | Period

Accumulator Period	Element Name	Description	Element Type	From Date	Through Date	Calc Result Value
YTD	VAC PAID_YTDA	Vacation	AC	01/01/2004	12/31/2004	353.306768
YTD	VACATION_BAL	Vacation	AC	01/01/2004	12/31/2004	0.000000
YTD	SICK PAID_YTDA	Sick	AC	01/01/2004	12/31/2004	1059.920304
YTD	SICK_BAL	Sick	AC	01/01/2004	12/31/2004	0.000000

This page displays three list set areas that display absence information. These lists areas include absence daily data, generated positive input, and accumulators. Each element displayed is defined in an list set.

Viewing an Element Resolution Chain

When you run absence calculations, you can generate an element resolution chain that shows, by payee, how and in what order each element was resolved and how long it took to resolve each element on the process list. This can be helpful if your absences are taking a long time to calculate, and you're doing some performance tuning on your rule definitions. Because significant system resources are required to produce an element resolution chain, we recommend that you use this feature for problem solving only.

This topic discusses how to:

- View resolved elements.
- View the order in which the elements were resolved.

Pages Used to View the Element Resolution Chain

Page Name	***Definition Name***	***Navigation***	***Usage***
Element Resolution Chain	GP_AUDIT_CHAIN	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Element Resolution Chain, Element Resolution Chain	View elements that were resolved for a payee during processing. Select *Trace All Elements* or *Trace Elements in Error* on the Payroll/Absence Run Control page.
Detail Audit Chain	GP_AUDIT_DTL_SEC	Click the link of the element name to view the Detail Audit Chain for that element.	View the order in which each element was resolved and the numeric, character, or date value to which the element resolved.

Element Resolution Chain Page

Use the Element Resolution Chain page (GP_AUDIT_CHAIN) to view elements that were resolved for a payee during processing.

Select Trace All Elements or Trace Elements in Error on the Payroll/Absence Run Control page.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Review Absence/Payroll Info, Element Resolution Chain, Element Resolution Chain

Begin Date and End Date Displays the begin and end dates of the calendar in which the element was processed.

Element Name Click to access the Detail Audit Chain page where you can view the order in which the element resolved.

Resolution Time

Seconds The number of seconds taken to resolve the element. An asterisk (*) indicates that resolution took less than one second.

Invalid Trace Selected if the system could not trace the element's resolution, due to a programming error, a corrupted table, or other problem.

Slice Dates

Displays the begin date and end date of the slice in which the element resolved.

Additional Info

Pointer Value — Displays the PIN number to which the pointer element identified in the Name field resolved. Applies only to elements with a field format of *Pointer*.

Adjustment — Displays the amount of the calculated adjustment for the element, such as a retroactive adjustment. Applies only to elements with a field format of *Decimal* or *Monetary*.

Calculation Raw Value — Displays the amount before rounding if the element was rounded during processing. Applies only to elements with a field format of *Decimal* or *Monetary*.

Related Links

Understanding Data Retrieval Elements

Detail Audit Chain Page

Use the Detail Audit Chain page (GP_AUDIT_DTL_SEC) to view the order in which each element was resolved and the numeric, character, or date value to which the element resolved.

Navigation

Click the link of the element name to view the Detail Audit Chain for that element.

The Order field shows the order of resolution.

Correcting Batch Processing and Data Entry Errors

This topic provides an overview of batch processing errors and messages, and discusses how to generate the Payee Message report.

Page Used to Create the Payee Messages Report

Page Name	***Definition Name***	***Navigation***	***Usage***
Payroll Messages	GP_GPSQR04_PNL	Global Payroll & Absence Management, Absence and Payroll Processing, Reports, Payroll Messages, Payroll Messages	Run the Messages Report (GP000004) SQR process to identify payees who may need further editing to make it through finalization of the payroll.

Understanding Batch Processing Errors

When an error occurs during batch processing, the system assigns one of the following calculation statuses to the absence:

- Error

The error occurred as the amount was being calculated. For example, the batch process could not find an appropriate effective-dated row for an element definition.

- Bypassed

  The system did not attempt to calculate the payee because of an error. For example, the system could not find the payee's job row.

- Error - User

  An error condition defined by your organization was met. For example, a formula element that generates an error message when a payee's results reach a specified maximum amount.

Each time you run the Calculate phase, you can review the Processing Statistics page for the number of calculations in error. You can also review the Payee Messages page for warnings or messages generated for each error. After fixing problems that caused errors, run the Calculate phase again. The system tries to recalculate the payee.

While the inquiry pages provide the level of detail that you need to resolve most errors, sometimes you might need more help. If you're having problems resolving errors for a few payees, you can generate an element resolution chain for only those people.

To generate a resolution chain:

1. On the Payee Status page, set the process indicator to *Recalculate*.
2. On the Calculate Absence and Payroll page, select the Calculate check box and select *Trace Elements in Error* as the Trace option.
3. Start the job.

Important! You cannot finalize an absence run with errors. If you can't resolve all errors before completing the absence run, cancel the absences that are in error and process them later in a supplemental run.

Understanding Batch Processing Messages

Batch messages in Absence Management fall into two categories:

- Messages 1 to 300.

  Informational messages and messages that identify process terminating errors. These messages appear in the process log and inform you of the progress of the process or report critical errors that cause the process to terminate.

- Messages 301 and higher.

  Warnings and errors of lesser severity that allow processing to continue even though they might set one or more segments (payments) in error for the payee that is identified on the Payee Messages page.

  With a few exceptions, these messages report problems that caused the resolution of an element or a segment to be bypassed, and identify the affected payee. You can view these messages on the Payee Messages page.

These two categories of batch processing error messages apply to the delivered Message Set 17005 and to any Message Sets creates by the customer.

Message Set number 17005 is the core application batch for Absence Management. Some of the key messages in that set are described below.

You can review batch processing messages on the Payee Messages page, or through the Payee Message Report. This report provides the ability to identify payees who may need further editing to make it through finalization of the absence run. It provides the same selection logic as is available online.

Message Number	***Message / Explanation***

3	Internal array overflow occurred for array %1 defined in copybook %2 with a max array count of %3
	
	COBOL does not offer an efficient way to dynamically allocate space for data, so we must define a predetermined number of rows in all arrays into which we read data. This message is issued when the process retrieves more data from the database than it can fit into the program's storage. The message identifies what storage area is exceeded, in what copy book the area is defined, and the limit of the area.
	
	To proceed, you must have a system administrator or system programmer expand the area to a reasonable number, recompile the Absence Management COBOL application, and rerun your process.
	
	Sample message:
	
	`GPPDPDM1: XB000`
	
	`Internal array overflow occurred for array %1`
	`defined in copybook %2 with a max array count of`
	`%3`
	`L-PMT-DATA`
	`GPCDPDM.CBL`
	`20`
	
	Sample Resolution: Go to the copybook in question, where you will find the setup shown below.
	
	`05  L-PMT-COUNT           PIC 9999 VALUE 0   COMP.`
	`    88  L-PMT-COUNT-MAX VALUE 50.`
	
	`05  L-PREV-PMT-PTR        PIC 9999 VALUE 0   COMP.`
	`05  L-ORIG-PMT-COUNT      PIC 9999 VALUE 0   COMP.`
	`05  L-PMT-DATA OCCURS 50 INDEXED BY`
	`PMT-IDX.`
	
	Increase the number in the OCCURS clause and the VALUE for L-PMT-COUNT-MAX, keeping the two numbers in sync. This array contains one row for each segment that is being processed for a payee in a calendar group. It includes a single history row and any retro segments, as well as the number of segments in the current period for all employee record numbers that are being processed (if the payee has multiple jobs).

Message Number	***Message / Explanation***
301	Element %1 of parent element %2 on process List %3 is not found in %4. (PIN number %5) This error is issued by an element resolution program when the program cannot find an entry for the element in one of the key attribute arrays (UPINT or UPINA). It identifies the element component, its parent (%2), and the process list being processed (%3). It tells you that it could not find the entry in UPINT or in UPINA (%4) and what the PIN number of the element is (%5). This error can occur if the parent is set up to use an element that is defined as specific to a country other than the country for which the current calendar group is running. Resolution: Inspect the parent element (or the sections of the process list, if the element reported in error is directly on the process list). Modify the element dependencies or remove the element from the process list, as appropriate. Also see messages 314 and 315.
302	The definition for element %1 (parent element %2, process list element %3) is inactive as of %4 On the Payee Messages page, the %n placeholders are substituted for the element names. The message is issued if the process encounters a request to resolve an element that was set to inactive on or before the date on which it resolution was requested (%4). The parent element (%2) is the element that is directly dependent on this element. The process list element (%3) shows the element on the process list that is dependent on both the element in error and its parent. In more complex setups, there may be multiple layers of elements between the parent and the element on the process list. If the error occurs for the process list entry itself, all three will show the same element name. Resolution: Review the definition of the element in error and assess whether the element should be inactivated. If so, modify the definition of the parent element to no longer depend on this element for resolution. If the element in error is directly on the process list (that is, in a section of a process list), remove it from that section.
314	Element %1 has an invalid PIN (%2). Valid range is 1 through %3. PIN not loaded This message is issued as elements or element rule definitions are loaded. It identifies an element with a PIN number that is outside the valid range of PIN numbers (1 through 300, 000). The upward limit is the array size of the UPINT array in GPCUPINT. Resolution: If the PIN number (%2) is 0, something is wrong with the setup of one of your rules. A PIN number that is greater than 300,000 indicates that your rule set is getting large. Consult your system administrator or application developer to expand the UPINT array.

Message Number	***Message / Explanation***
315	Element %1 (PIN %2) - and data for the element - not loaded into the process. (N/A for country: %3) This message is issued during the loading of elements or element rule definitions. It differs from message 314 in that the PIN number is valid, but the element for which the process is attempting to load data is specific to a country that is different from the country that is associated with your current process (%3). Resolution: Review your rule setup, focusing on any modifications or additions to the rules that have been made since the last successful run.

Payroll Messages Page

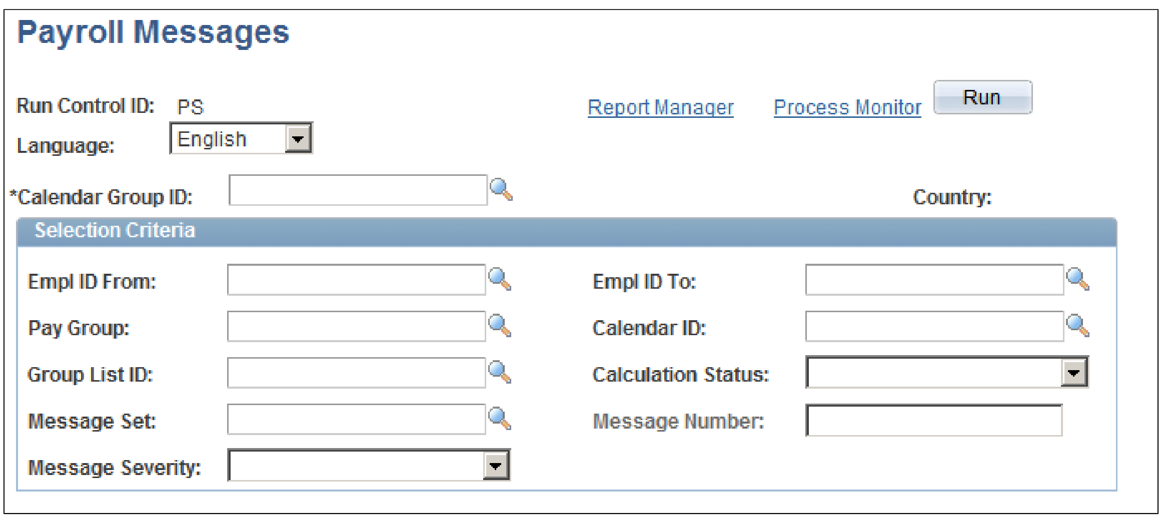
Use the Payroll Messages page (GP_GPSQR04_PNL) to run the Messages Report (GP000004) SQR process to identify payees who may need further editing to make it through finalization of the payroll.

Navigation

Global Payroll & Absence Management, Absence and Payroll Processing, Reports, Payroll Messages, Payroll Messages

Image: Payroll Messages page

This example illustrates the fields and controls on the Payroll Messages page.



Calendar Group ID The calendar group to process.

EmplID From and EmplID To Range of payees to process. Do not enter an EmplID To value without also entering and EmplID From value.

Pay Group The pay group to process.

Calendar ID The calendar to process.

Group List ID Payees currently assigned to the group list ID will be processed.

Calculation Status Calculation status to process.

Message Set A specific message set can be selected, and the system will report only those messages in Absence Management.

Message Number This field is available if you select a message set. Enter any valid message number.

Message Severity Select *Error* or *Warning* to exclude informational messages and process terminating errors (message numbers under 300) from the report.

Finalizing an Absence Run

When you finalize an absence run, no further changes can be made. Only after you finalize a run can the calendars in a calendar group be picked up for retroactive processing in subsequent runs of other calendar groups.

You finalize an entire run at the end of a absence cycle, after you've resolved all errors and made all adjustments. When you run the Finalize phase, the system:

- Sets the calculation status of each absence to Finalize.
- Deletes all warnings, error messages, element resolution chains, processed retro triggers, and iterative triggers, including unprocessed, iterative triggers. (Positive input, segmentation triggers, and unprocessed retro triggers are not deleted.)
- Inserts a timestamp that you can view on the Calendar Group page.
- Marks the calendar group ID Finalized and clears the Open indicator.

Important! The Finalize phase cannot be reversed.

To finalize an absence run:

1. Ensure that the following requirements are met.

   The batch process aborts if any of the following conditions are not met. To see which conditions were not met, check the Log File.

Requirement	***Where to Check***
No absences are in Error or Identified status.	Processing Statistics pages for the calendar group ID.
No payees are Suspended by User or Suspended by System.	Processing Statistics pages for the calendar group ID.
All streams have been calculated, if stream processing is activated for the calendar group.	Processing Statistics pages. If you are unsure of the stream numbers, check the Stream Setup page.
All process indicators are set to Normal.	Payee Status page.

Because the system deletes all iterative triggers, you may want to look at the Review Iterative Triggers page to see if there are unprocessed triggers that you need to address in a separate run.

2. Access the Calculate Absence and Payroll page for the same run control ID and select the Finalize check box.

3. Review the Processing Statistic pages for the calendar group ID and make sure that the *Finalized* and *Totals* figures match.

Canceling an Absence Run

This topic discusses how to:

- Cancel an entire absence run.
- Cancel an individual payee.

You can cancel an entire absence run (the entire calendar group ID) or you can cancel individual payees from a calendar group ID. For each canceled payee, the system deletes all calculations, sets the selection status to *Cancelled,* and deletes the Calculation status. It also deletes all error messages, warnings, and audit records, if you requested an element resolution chain.

Canceled payees are ignored during future iterations of processing, including retroactive runs, unless you manually *uncancel* them or run the Identify phase again—if you've canceled an entire run.

Canceling an Entire Absence Run

You rarely need to cancel an entire absence run. However, if you discover a problem that affects most or all payees, canceling the run may be the most efficient way to address the problem. For example, if you attach the wrong process list to a calendar or if you add calendars to the calendar group ID in the wrong order, it might be quicker to cancel the run, make the corrections, and run the Identify step again than to correct each payee individually.

To cancel a pay run, you select the Cancel check box on the Calculate Absence and Payroll page.

Canceling Individual Payees

To cancel an individual payee, set the process indicator for the payee to *Cancel.*

Uncanceling a payee creates an iterative trigger during the next processing run. During the next iteration of the Calculate phase, the system deletes and reidentifies the payee. If the identification process determines that the payee still meets the selection criteria, that payee is included in the run. Otherwise, the payee is canceled again.

Processing Special Situations

This topic discusses how to:

- Process payees in two open calendar groups.

- Run off-cycle calendar runs.

Processing Payees in Two Open Calendar Groups

If a payee is on more than one open calendar run, the payee is selected and processed in the first calendar group ID in which that payee is picked up. When the system processes the second calendar group ID, it puts the payee in an error status. To process that payee in the second calendar group ID, do one of the following:

- Finalize the first calendar group ID and then run the second calendar group ID.
- Suspend the payee in the first calendar group ID and recalculate the first calendar group ID (to invoke the suspend action). Rerun and finalize the second calendar group ID. Recalculate the first calendar group ID. This might be appropriate, for example, if the payee changes pay groups mid-period and the calendars for the previous and current pay groups are linked to different calendar group.

Running Off-Cycle Calendar Runs

Sometimes you need to run off-cycle absence calculations. For example, you may need to run absence calculations soon after a payee has been terminated. Instructions for performing off-cycle processing are covered elsewhere in this book.

Related Links

Understanding Off-Cycle Processing

Reporting Absence Data

This topic discusses how to:

- Create a results report.
- Create a summary report.

Page Used to Report Absence Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Absence Results Register	GP_GPSQR01_PNL	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports, Absence Results Register	Create a report containing individual results of a absence calculations.

Creating a Results Report

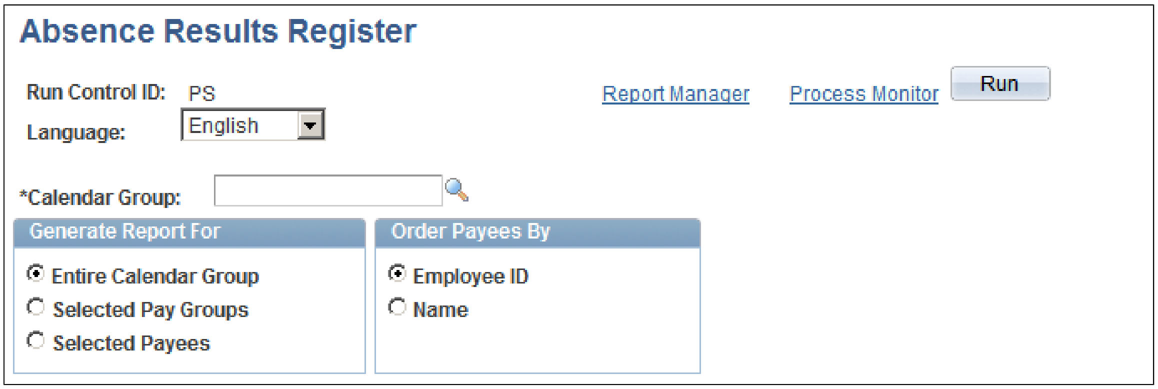
Use the Absence Results Register page (GP_GPSQR01_PNL) to create a report containing individual results of a absence calculations.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports, Absence Results Register

Image: Absence Results Register page

This example illustrates the fields and controls on the Absence Results Register page.



Language

Determines the language that is used during translations and the formatting for dates and numbers.

Calendar Group

Select the calendar group ID of the absence run for which you want to generate a report.

Generate Report For

Select the result set for this report. The options are:

- Entire Calendar Group
- Selected pay groups
- Selected Payees

Order Payees By

Select to sort payees by employee ID or name.

Chapter 25

Transferring Leave Time

Understanding Leave Transfers

A leave transfer program enables employees to donate their accrued leave hours to other employees, who have exhausted their own leave due to a qualifying emergency.

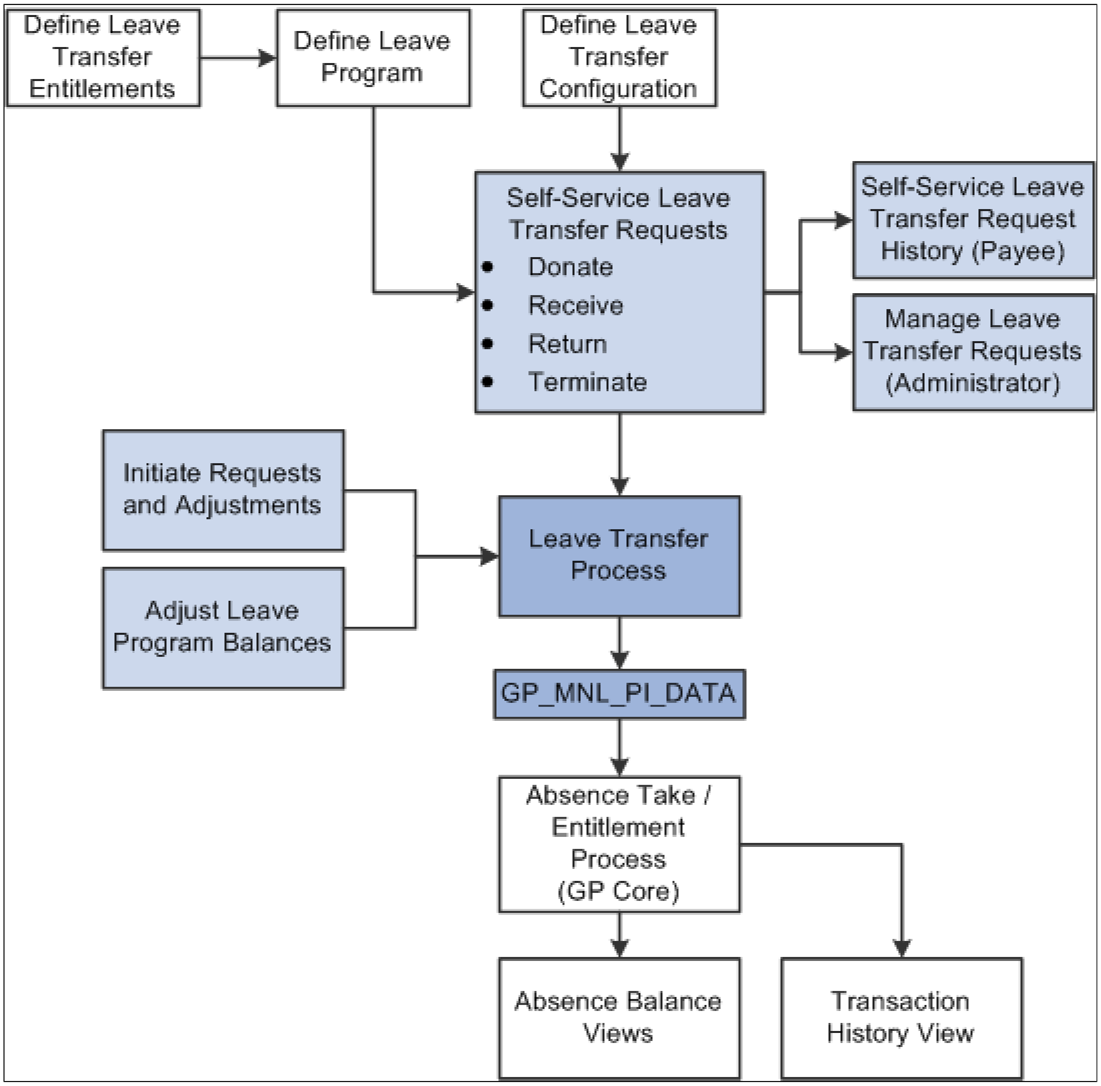
Managing leave transfer request programs consists of four major functions:

- Program definition and page configurations.
- Employee self service requests to donate leave, request leave, terminate participation, return unused leave, and view a request history.
- Administrative actions that define program recipients, manage and approve employee self-service requests, adjust program bank balances, initiate payee requests and adjustments, and view transaction histories.

- The Leave Transfer Process (GP_ABSLVDNPI) Application Engine program processes all of the employee and administrator requests and inserts input data for Global Payroll core processing.

Image: Leave Transfer Request Process

This diagram illustrates the process flow and relationship of the pages used to configure and manage the leave transfer request process.



Defining Leave Transfer Entitlements

This topic discusses how to:

- Define new leave transfer entitlements
- Modify originating entitlement accumulators

Defining New Leave Transfer Entitlements

In order to set up a leave donation program in PeopleSoft Absence Management, you must define at least two frequency-based entitlements: a donate entitlement and a receive entitlement. Use a numeric entitlement type for each of these entitlements and set the leave transfer entitlement as well as the corresponding auto-assigned accumulators to either increase or decrease the units of the respective originating entitlement as necessary.

Many programs consider all donations from a donor irrevocable. However, if your leave transfer program enables participants to return unused leave time back to the program or donor you must also create a return entitlement.

You must create a leave transfer entitlement for each originating, or eligible to be donated, entitlement. For example, if your leave transfer program enables donors to contribute time from both sick leave and vacation time, you must define donate entitlements, receive entitlements, and, if applicable, return entitlements for both sick leave and vacation time.

Each of the leave transfer entitlements you create uses

- An Entitlement type of *Numeric*
- A Balance accumulator using the *BAL* suffix
- A Unit Adjustment component using the *UNAD* suffix.

Each leave transfer entitlement uses auto-assigned accumulators shown in the following tables:

- For the Donate entitlement:

Element Name	***Element Type***	***Accumulator Sign***	***Contribution***
Donate Entitlement Units	Absence Entitlement	Add	100%
Donate_UNAD	Auto-assign	Add	100%

- For the Receive entitlement:

Element Name	***Element Type***	***Accumulator Sign***	***Contribution***
Receive Entitlement Units	Absence Entitlement	Add	100%
Receive_UNAD	Auto-assign	Add	100%

- for the Return entitlement:

Element Name	***Element Type***	***Accumulator Sign***	***Contribution***
Return Entitlement Units	Absence Entitlement	Add	100%
Return_UNAD	Auto-assign	Add	100%

In addition, depending on your current business rules, you must add the leave transfer entitlements to the appropriate existing absence element group, with the Eligibility Assignment of *By Eligibility Group*, or to a new element group created specifically for these entitlements. If you create a new element group, it must also be added to the appropriate eligibility group.

Modifying Originating Entitlement Accumulators

After leave transfer entitlements have been defined, the Balance accumulator of the eligible originating entitlement must be modified to include the new leave transfer entitlements, as shown in the following example:

The user has a leave donation program that allows employees to donate from their accrued vacation leave. There are three entitlements involved in this scenario:

- *Vacation* is the eligible originating entitlement.
- *Donate* is the new donation leave transfer entitlement.
- *Receive* is the new entitlement for receiving leave donations.

In addition, the two new leave transfer entitlements have new corresponding accumulators.

In order for the leave transfer program to work properly, you must add the following element members to the Vacation entitlement Balance accumulator:

Element Name	***Element Type***	***Accumulator Sign***	***Contribution***
Donate Entitlement Units	Absence Entitl	Subtract	100%
Donate_UNAD	Auto-assign	Subtract	100%
Receive Entitlement Units	Absence Entitl	Add	100%
Receive_UNAD	Auto-assign	Add	100%

Setting Up Leave Transfers

This topic discusses how to:

- Define leave transfer programs
- Define leave program entitlements
- Define leave program board members
- Configure leave transfers
- Specify leave transfer recipients

Pages Used to Set Up Leave Transfers

Page Name	*Definition Name*	*Navigation*	*Usage*
Leave Program Definition	GP_ABS_LVDN_PRG1	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Leave Program Definition	Define the parameters for a leave transfer program.
Leave Program Entitlement	GP_ABS_LVDN_PRG2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Leave Program Definition, Leave Program Entitlements	Use this page to define the entitlement parameters for a leave transfer program
Leave Program Board Members	GP_ABS_LVDN_PRG3	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Leave Program Definition, Leave Program Members	Use this page to define the board members of a leave transfer program
Leave Transfer Configuration	GP_ABS_LVDN_CFG	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Leave Transfer Configuration	Used this page to define whether or not to display agreement and compliance confirmation as well as which, if any, leave reasons can be selected when submitting requests to receive leave.
Leave Transfer Recipients	GP_ABS_LVDN_RCP	Global Payroll & Absence Mgmt, Payee Data, Leave Donations, Leave Transfer Recipients	Use this page to specify the eligible recipients for a leave transfer program.

Leave Program Definition Page

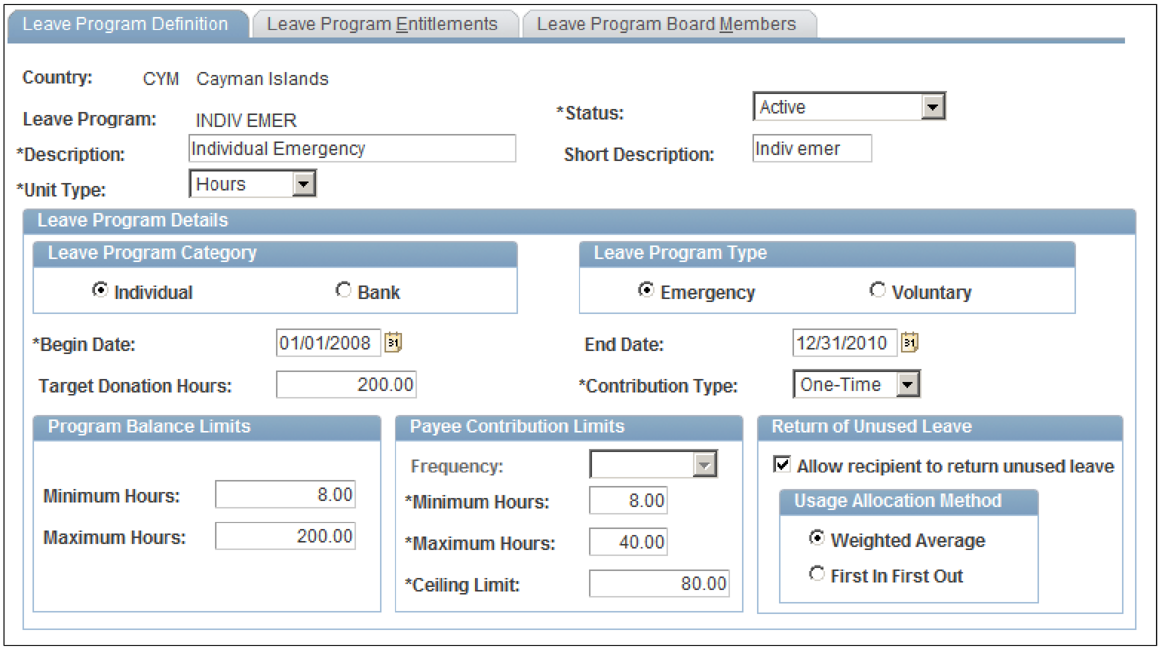
Use the Leave Program Definition page (GP_ABS_LVDN_PRG1) to define the parameters for a leave transfer program.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Leave Program Definition

Image: Leave Program Definition page

This example illustrates the fields and controls on the Leave Program Definition page.



Leave Program

Displays the name of the leave transfer program.

Unit Type

Select the time units for the leave transfer program, either hours or days.

Leave Program Category

Indicate how hours contributed to the leave transfer program are allocated.

- Select Individual to enable contributors to specify a recipient for the contributed hours.
- Select Bank when the contributed hours for this program are held in a single pool of hours.

Leave Program Type

Specify whether the leave transfer program is ongoing or has been created for a specific event.

- Select Emergency if the leave transfer program is established to respond to a specific emergency or crisis.
- Select Voluntary to establish an ongoing, voluntary leave transfer program.

Begin Date and End Date

Enter the start and end dates for the leave transfer program. For ongoing programs, leave the End Date field empty.

Target Donation Hours

Specify the number of accrued hours desired for the leave transfer program. This is typically specified for emergency leave transfer programs.

Contribution Type

Specify whether contributors can make recurring contributions to the leave transfer program.

- Select One-Time to enable contributors to make a one-time donation of hours.
- Select Recurring to enable contributors to regularly donate hours to the leave transfer program. For example, contribute hours every pay period.

Program Balance Limits

Minimum Hours

Enter the minimum number of hours to maintain in the leave transfer program. The system will not disperse any hours unless the number of available contributed hours is greater than this number.

Maximum Hours

Enter the maximum number of hours to maintain in the leave transfer program. The system stops accruing contributions from all employees when the value in this field is reached or exceeded.

Payee Contribution Limits

Frequency

Indicate how often employees can contribute to the leave transfer program. The valid values are:

- Monthly
- Quarterly
- Annual

Minimum Hours

Enter the minimum number of hours each employee can contribute to the leave transfer program for each recurring contribution. For example if the Frequency is *Monthly* and you enter a value of 10 for the Minimum Hours field, then each employee that contributes to the leave transfer program must donate at least 10 hours of leave time each month.

Maximum Hours

Enter the maximum number of hours that each employee can contribute to the leave transfer program for each recurring contribution. This prevents employees from donating more hours than they regularly receive from the company.

Ceiling Limit

Enter the maximum contribution a single employee can make to a program over the duration of the leave transfer program, as specified by the program begin and end dates. The system will not accumulate any contributions from an employee once his or her donations reach this amount.

Return of Unused Leave

Allow recipient to return unused leave

Select this check box to enable a recipient to return unused hours to the contributors. Selecting this field enables you to specify the Usage Allocation Method. The system calculates the number of leave hours that should be returned to each contributor based on the Usage Allocation Method specified. When this field is selected, the system verifies that a return entitlement has been defined and associated with the originating element.

Usage Allocation Method

The fields in this region are only active when you select the Allow recipient to return unused leave check box and the Leave Program Category is set to Individual.

- When you select Weighted Average, the system calculates the usage of donated hours based on the total number of hours donated to an individual, against the amount of each contributor's donated time to that individual when an approved request is processed.
- Select FIFO to use the leave time contributed to the program in the order the hours were received.

The scenario shows the difference in calculation between the two usage allocation methods. In this example, three donors have contributed a total of 45 hours to the leave transfer program and the recipient uses 15 of those donated hours. The recipient then enters a leave return request for the remaining hours. The following table describes the individual contributions and distribution of contributed hours using the two different usage allocation methods:

Donor	***Donation Date***	***Donated Hours***	***Percentage of the Total Hours (Individual Donation / Total Donations)***	***Usage Allocation: FIFO Method***	***Usage Allocation: Weighted Average (Hours Used * Percentage of Total Hours)***
A	January 1	10	22%	0	6.6
B	February 1	15	33%	10	9.9
C	March 1	20	45%	20	13.5
TOTALS		45 Hours		30 Hours	30 Hours

In this example, Donor C contributed 20 hours to the leave transfer program, but was the last donor to contribute. The 20 contributed hours represents 45% (20 hours / 45 hours) of the hours in the leave transfer program at the time the recipient's request was processed. Using the FIFO method, the hours contributed by Donor C would not be used, since the hours donated by the other contributors were sufficient to cover the requested and returned number of hours. Using the Weighted Average allocation method, Donor C contributes 45% of the recipient's requested hours, or 13.5 hours (30 hours returned * 45%.)

Leave Program Entitlement Page

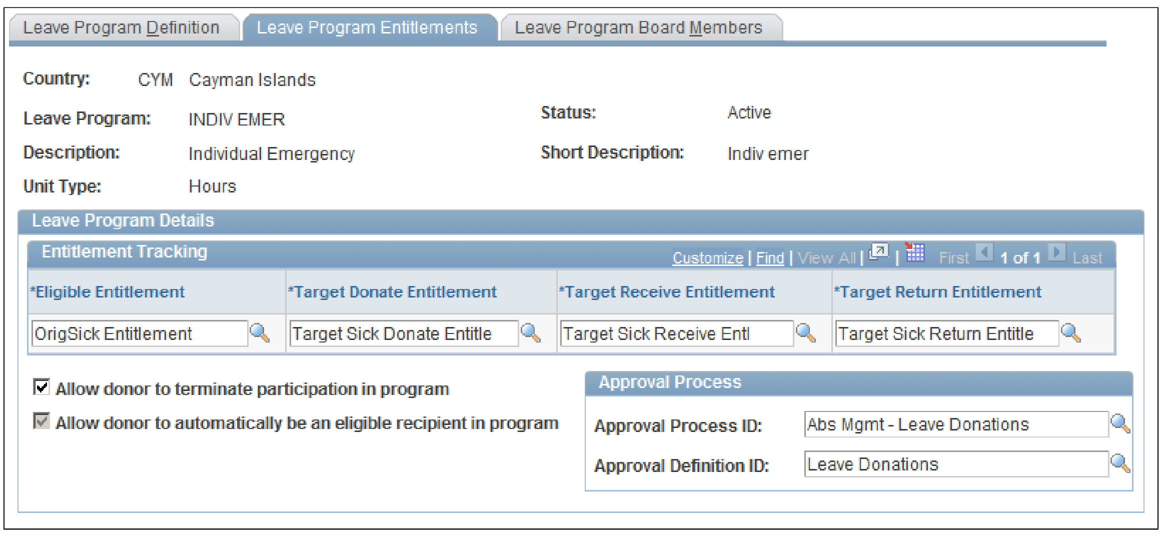
Use the Leave Program Entitlement page (GP_ABS_LVDN_PRG2) to .

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Leave Program Definition, Leave Program Entitlements

Image: Leave Program Entitlements page

This example illustrates the fields and controls on the Leave Program Entitlements page.



Use this page to define the eligible entitlements that may be donated to the leave transfer program. The eligible entitlements are then associated or linked with the defined donate entitlement, receive entitlement, and return entitlement. The association between eligible entitlements and the target entitlements is a one to one relationship.

Note: After running the first leave transfer process for a leave transfer program definition, you cannot make changes to the program definition other than to change the status to *Inactive*. If the parameters of a leave transfer program change, then you must define a new leave transfer program.

Eligible Entitlement	Enter an active, eligible, entitlement. You can specify one entitlement.
Target Donate Entitlement	Enter the donate entitlement that participants can use to donate leave time, such as a vacation donation entitlement, or a sick leave donation entitlement.

Target Receive Entitlement

Enter the receive entitlement for participant leave donations.

Target Return Entitlement

Enter the return entitlement, if any, that is used to return unused leave time back to the donor or leave transfer program.

Allow donor to terminate participation in program

Select this field to enable a donors to terminate their participation or enrollment in the leave transfer program

Allow donor to automatically be an eligible recipient in program

Select this field to enable an approved donor to also be an eligible recipient of the leave transfer program. When this check box is selected, approved donors are automatically added to the list of leave transfer recipients.

Approval Process ID

Enter the ID associated with a particular approval process definition in the Approval Workflow Engine. Each transaction registered with the Approval Workflow Engine must have at least one defined process ID.

Approval Definition ID

Enter the definition of the approval process within the Approval Workflow Engine. The definition can contain stages, paths, steps, varying hierarchies, and criteria, as well as other configurable parameters.

Leave Program Board Members Page

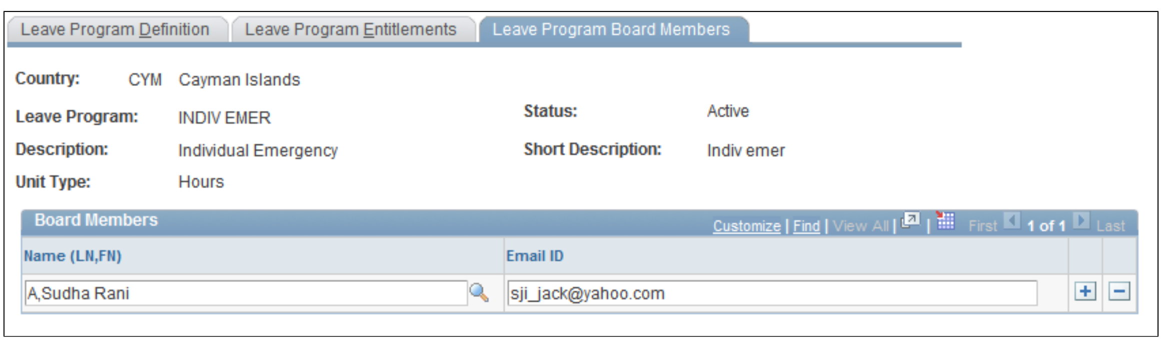
Use the Leave Program Board Members page (GP_ABS_LVDN_PRG3) to .

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Leave Program Definition, Leave Program Members

Image: Leave Program Board Members page

This example illustrates the fields and controls on the Leave Program Board Members page.



Enter the full name and email address for each board member.

Leave Transfer Configuration Page

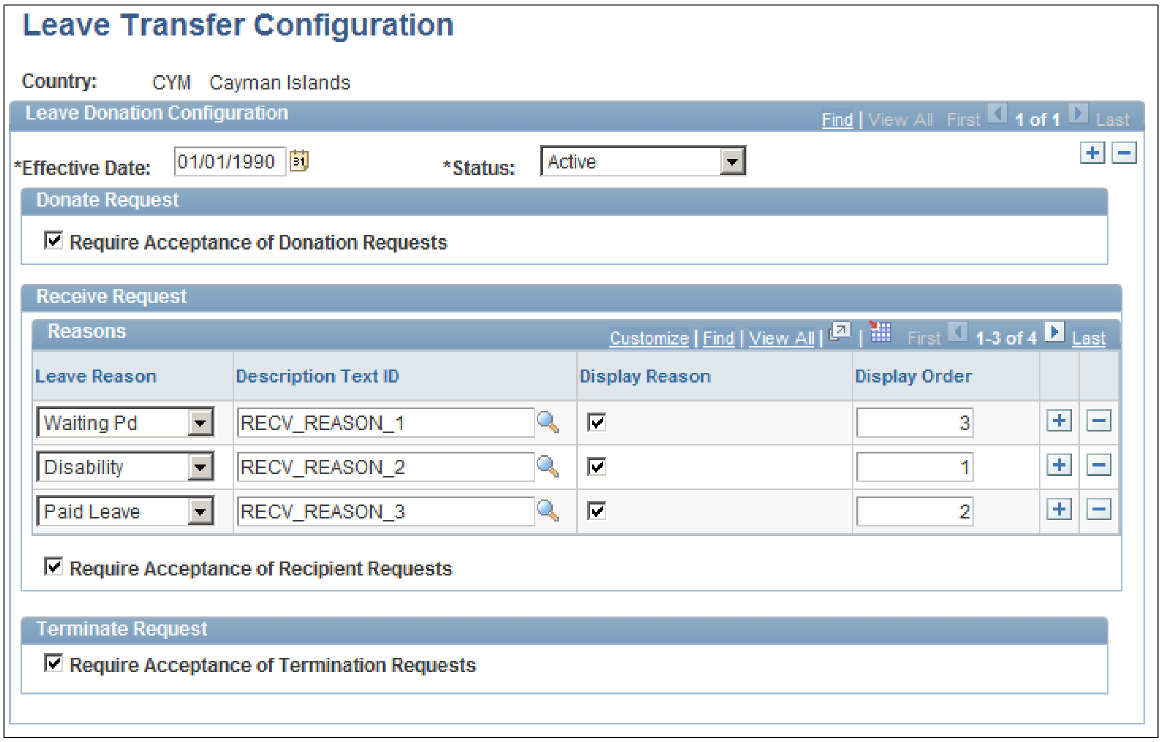
Use the Leave Transfer Configuration page (GP_ABS_LVDN_CFG) to used this page to define whether or not to display agreement and compliance confirmation as well as which, if any, leave reasons can be selected when submitting requests to receive leave.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Absence Management, Leave Transfer Configuration

Image: Leave Transfer Configuration page

This example illustrates the fields and controls on the Leave Transfer Configuration page.



This page controls some of the fields displayed on the self service requests pages. You can specify whether to r or not to display agreement and compliance confirmation. ·

Require Acceptance of Donation Requests

Select this field to require users to agree to the terms of the leave transfer program on the Request to Donate Leave page before a request to donate leave can be submitted.

Leave Reason

Define which leave reasons can be selected when requesting a donated leave transfer. The valid values are: Disability, Other, Paid Leave, Waiting Pd

Require Acceptance of Recipient Requests

Select this field to require users to agree to the terms of the leave transfer program on the Request to Receive Donated Leave page before a request to receive leave time can be submitted.

Require Acceptance of Termination Requests

Select this field to require users to agree to the terms of the leave transfer program on the Request to Terminate Participation page before a donor can end his or her participation in a leave transfer program.

Leave Transfer Recipients Page

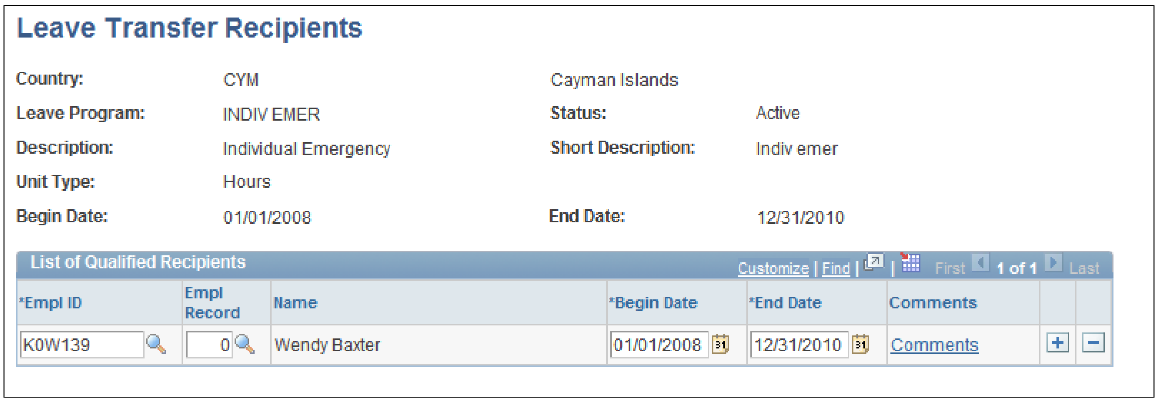
Use the Leave Transfer Recipients page (GP_ABS_LVDN_RCP) to use this page to specify the eligible recipients for a leave transfer program.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Leave Donations, Leave Transfer Recipients

Image: Leave Transfer Recipients page

This example illustrates the fields and controls on the Leave Transfer Recipients page.



Use this page to define the recipients for a leave transfer program.

Begin Date and End Date Enter the dates that a recipient in the leave transfer program is eligible to receive leave time from the program.

Comments Click to open the Comments page. The Comments page enables an administrator to enter information such as an explanation of why a recipient is eligible to receive donated leave time.

Using Leave Donation Self Service Requests

This topic discusses how to use self service pages to:

- Donate available leave time
- Receive donated leave time
- Return unused leave time
- End participation in a leave donation program
- View leave donation request history

Pages Used to Donate and Receive Leave Time

Page Name	Definition Name	Navigation	Usage
Request to Donate Leave	GP_ABS_LVDN_SSDON	Self Service, Leave Transfer Requests, Donate Leave Request	Donate leave time to an eligible employee or to a leave bank.
Request to Receive Donated Leave	GP_ABS_LVDN_SSRECV	Self Service, Leave Transfer Requests, Receive Donated Leave Request	Request donated leave from a leave program for yourself or on behalf of another employee
Request to Return Unused Leave	GP_ABS_LVDN_SSRETN	Self Service, Leave Transfer Requests, Return Unused Leave Request	Return unused donated leave to the donors or a leave bank.
Request to Terminate Participation	GP_ABS_LVDN_SSTERM	Self Service, Leave Transfer Requests, End Participation Request	Used to terminate recurring participation or enrollment in a leave transfer program
Leave Transfer Requests History	GP_ABS_LVDN_EEHIST	Self Service, Leave Transfer Requests, Leave Transfer Request History	Enables employees to view the history and status of their leave donation requests and edit any saved requests.

Request to Donate Leave Page

Use the Request to Donate Leave page (GP_ABS_LVDN_SSDON) to donate leave time to an eligible employee or to a leave bank.

Navigation

Self Service, Leave Transfer Requests, Donate Leave Request

Image: Request to Donate Leave page (1 of 2)

This example illustrates the fields and controls on the Request to Donate Leave page (1 of 2).

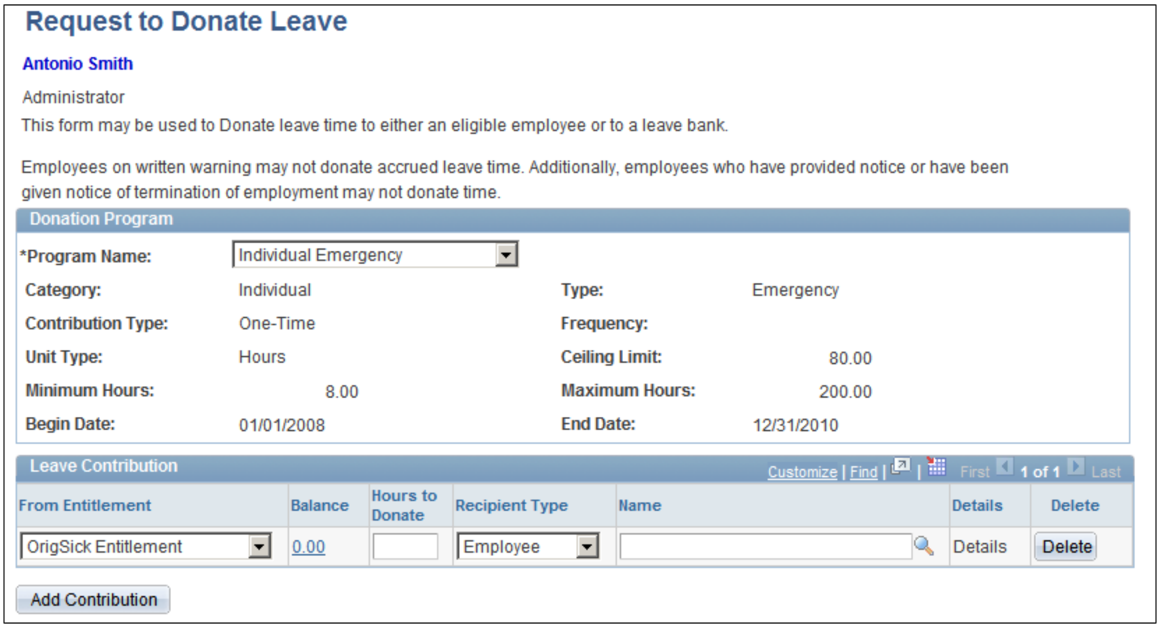
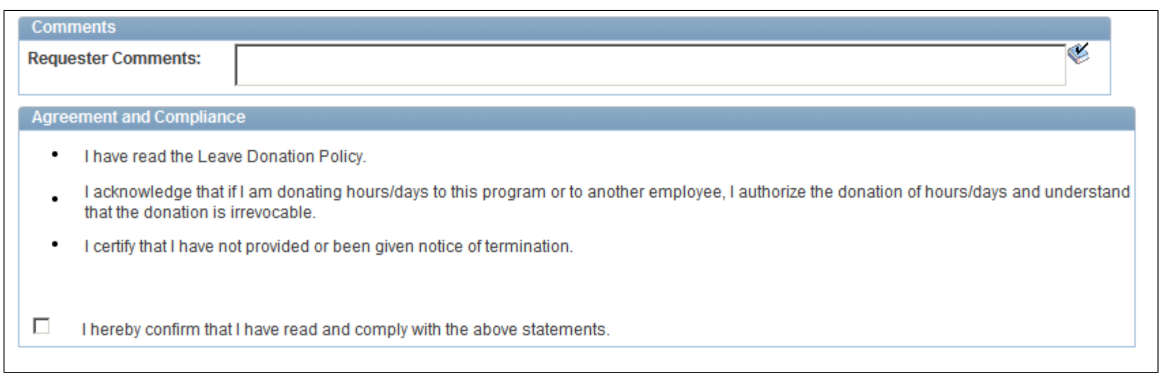


Image: Request to Donate Leave page (2 of 2)

This example illustrates the fields and controls on the Request to Donate Leave page (2 of 2).



Description Enter the name of an active leave transfer program.

Category Displays how hours contributed to the selected leave transfer program are allocated. Leave time is donated either to an individual or a leave bank.

Type Shows whether the selected leave transfer program is ongoing or has been created for a specific event. Valid values are *Voluntary* or *Emergency.*

Contribution Type Shows whether contributors can make a single contribution or recurring contributions to the selected leave transfer program.

Unit Type — Displays the time units for the selected leave transfer program, either hours or days. The names of other fields on this page may change to reflect the displayed Unit Type.

Frequency — Displays how often employees can contribute to the selected leave transfer program.

Ceiling Limit — Displays the maximum contribution a single employee can make to the selected leave transfer program.

Minimum — Displays the minimum number of hours an employee can contribute to the selected leave transfer program for each recurring contribution.

Maximum — Displays the maximum number of hours an employee can contribute to the selected leave transfer program for each recurring contribution.

From Entitlement — Select the entitlement plan to receive your donated time. You can only select entitlements that have been defined at the program definition level. For example, select from vacation time or available sick time any hours or days you want to donate to the selected leave transfer program.

Balance — Click to access the current Balance Inquiry page to view your accrual balances, including the leave transfer entitlement balances for defined donated, received, and returned entitlements.

Days to Donate — Enter the amount of time you want to donate to the selected leave transfer program. The name of this field changes toHours to Donate when the Unit Type is set to *Hours.*

Recipient Type — Select the of individual that is receiving donated leave time. This field is not available when the Category is set to *Bank.* Valid values are: *Employee* and *Other.* Selecting *Employee* enables you to enter a value in the Name field.

Name — Enter the name of the individual leave transfer recipient.

Details — Click to enter information regarding donations between agencies on the Details page.

Agreement and Compliance — Select the check box in this region to agree to the terms of the leave transfer program. You cannot submit the request to donate leave time until the check box in this region is selected. You do not need to select the check box in this region when you click the Save for Later button.

Request to Receive Donated Leave Page

Use the Request to Receive Donated Leave page (GP_ABS_LVDN_SSRECV) to .

Navigation

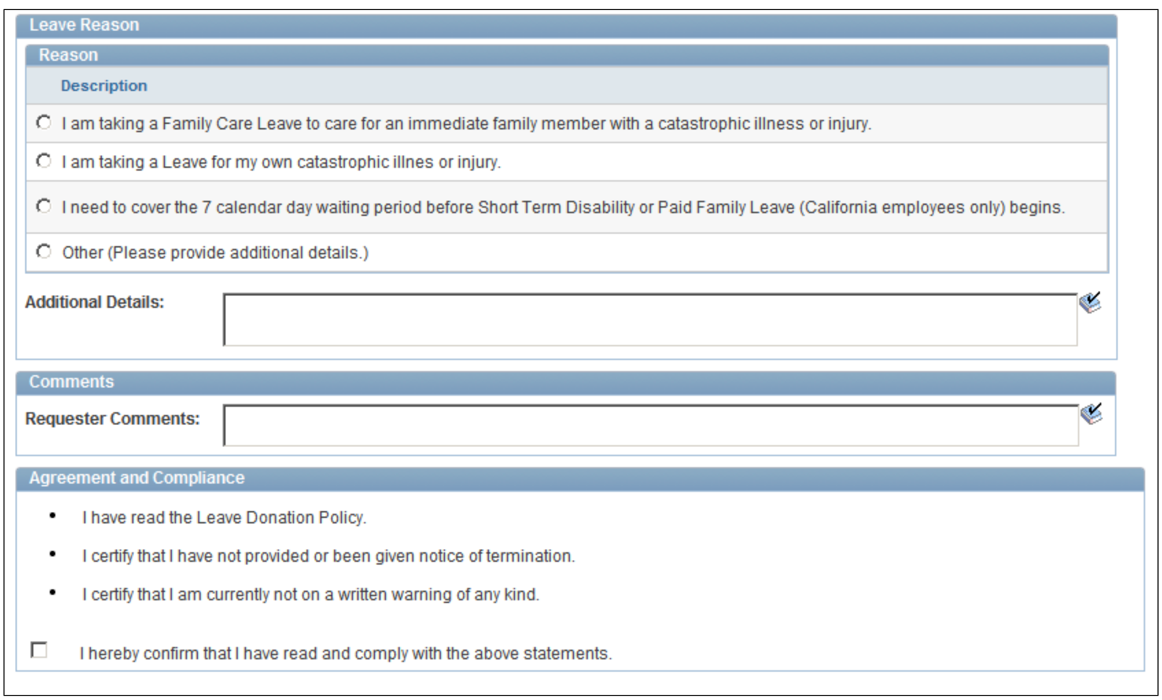
Self Service, Leave Transfer Requests, Receive Donated Leave Request

Image: Request to Receive Donated Leave page (1 of 2)

This example illustrates the fields and controls on the Request to Receive Donated Leave page (1 of 2).

Image: Request to Receive Donated Leave page (2 of 2)

This example illustrates the fields and controls on the Request to Receive Donated Leave page (2 of 2).



This page enables a user, or their proxy, to request donated leave hours from a leave transfer program with a *Bank* program category. This request needs to be approved by a leave transfer administrator.

Note: Leave transfer programs that use the *Individual* program category do not require a request to receive donated leave.

Enter the leave transfer program name in the Description field. The system automatically populates the other fields in the Donation Program region.

Recipient

Select Other Employee if you are requesting leave time for another employee. You must enter the name of the employee in the Recipient Name field. Select Self if you are requesting leave time for yourself. The Recipient Name field is not available when you request leave time for yourself.

Start Date and End Date

Enter the start and end dates for the requested leave time.

Days Requested

Enter the amount of donated leave time requested for the specified employee. The name of this field changes to Hours Requested when the Unit Type is set to *Hours.*

View Balances

Click to access the current Balance Inquiry page in order to view the specified employee's accrual balances, including the leave transfer entitlement balances for defined donated, received, and returned entitlements.

This is a Recurring Occurrence

Select to indicate an ongoing condition. This field is informational only.

Reason

Select the reason for this leave request. The available choices are defined on the Leave Transfer Configuration page.

Agreement and Compliance

Select the check box in this region to agree to the terms of the leave transfer program. You cannot submit the request to receive donated leave time until the check box in this region is selected. You do not need to select the check box in this region when you click the Save for Later button.

Request to Return Unused Leave Page

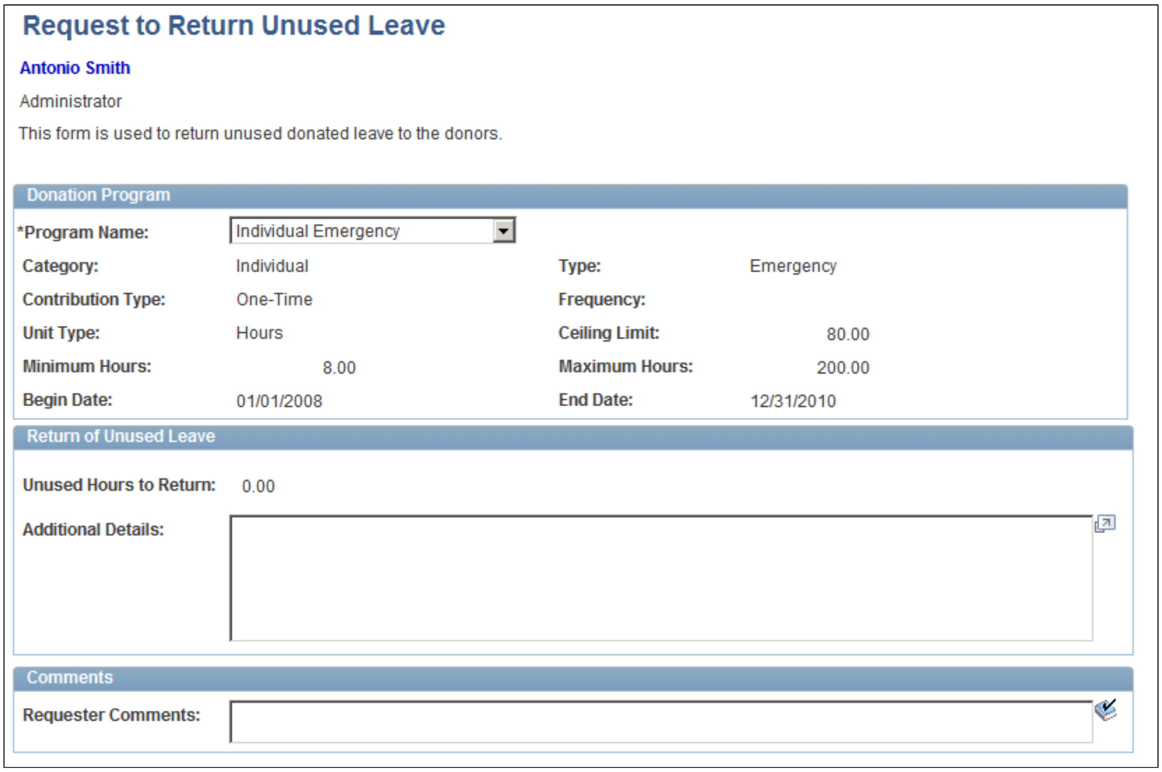
Use the Request to Return Unused Leave page (GP_ABS_LVDN_SSRETN) to return unused donated leave to the donors or a leave bank.

Navigation

Self Service, Leave Transfer Requests, Return Unused Leave Request

Image: Request to Return Unused Leave page

This example illustrates the fields and controls on the Request to Return Unused Leave page.



This page enables a leave recipient to return any unused leave time back to the donors or the leave transfer program.

Enter the leave transfer program name in the Description field. The system automatically populates the other fields in the Donation Program region.

Unused Days to Return	Displays the amount of unused leave time that the system is to return. The system returns the lesser of the target balance accumulator (RECIEVE_BAL) or the current leave balance of the originating entitlement. When the request has been processed, the name of this field is Unused Days Returned.The name of this field changes to Unused Hours to Return or Unused Hours Returnedwhen the Unit Type is set to *Hours.*

Request to Terminate Participation Page

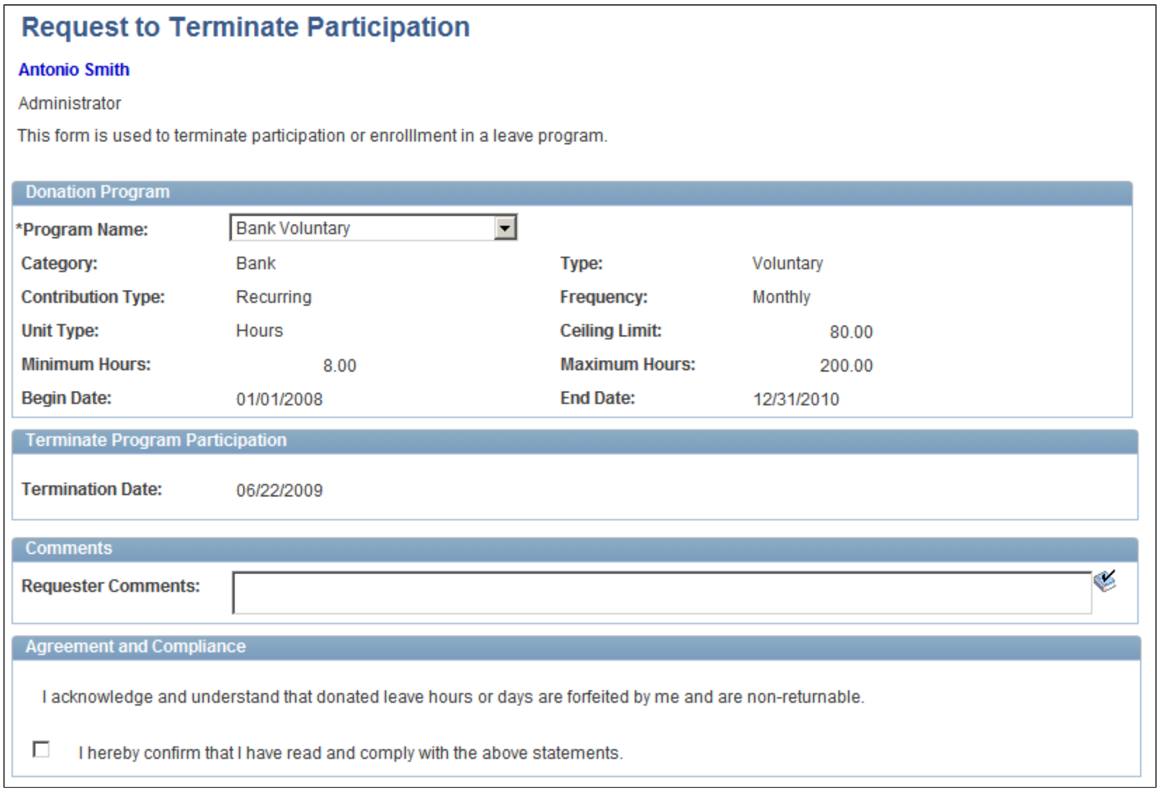
Use the Request to Terminate Participation page (GP_ABS_LVDN_SSTERM) to .

Navigation

Self Service, Leave Transfer Requests, End Participation Request

Image: Request to Terminate Participation page

This example illustrates the fields and controls on the Request to Terminate Participation page.



Request to Terminate Participation

Antonio Smith

Administrator

This form is used to terminate participation or enrolllment in a leave program.

Donation Program

*Program Name:	Bank Voluntary		
Category:	Bank	Type:	Voluntary
Contribution Type:	Recurring	Frequency:	Monthly
Unit Type:	Hours	Ceiling Limit:	80.00
Minimum Hours:	8.00	Maximum Hours:	200.00
Begin Date:	01/01/2008	End Date:	12/31/2010

Terminate Program Participation

Termination Date: 06/22/2009

Comments

Requester Comments:

Agreement and Compliance

I acknowledge and understand that donated leave hours or days are forfeited by me and are non-returnable.

I hereby confirm that I have read and comply with the above statements.

This page enables a donor to end his or her participation in a banked leave program where the donation occurs on a recurring basis.

The system does not return any donated leave time when an employee ends his or her participation in a leave transfer program. The return of unused leave time is set up at the program definition level and is controlled by the Request to Return Unused Leave page. Termination of enrollment occurs during the next available calendar run after the termination request has been approved.

Note: Terminating leave program participation and returning unused leave time are auto-approved requests. The system automatically approves these requests without input from a program administrator.

Enter the leave transfer program name in the Description field. The system automatically populates the other fields in the Donation Program region.

Termination Date	Displays the current date. This date indicates the effective date to end participation in the leave transfer program. The recurring donation stops during the next available open calendar run.
Agreement and Compliance	Select the check box in this region to agree to the terms of the leave transfer program. You cannot terminate you participation in the leave transfer program until the check box in this region is

selected. You do not need to select the check box in this region when you click the Save for Later button.

Leave Transfer Requests History Page

Use the Leave Transfer Requests History page (GP_ABS_LVDN_EEHIST) to enables employees to view the history and status of their leave donation requests and edit any saved requests.

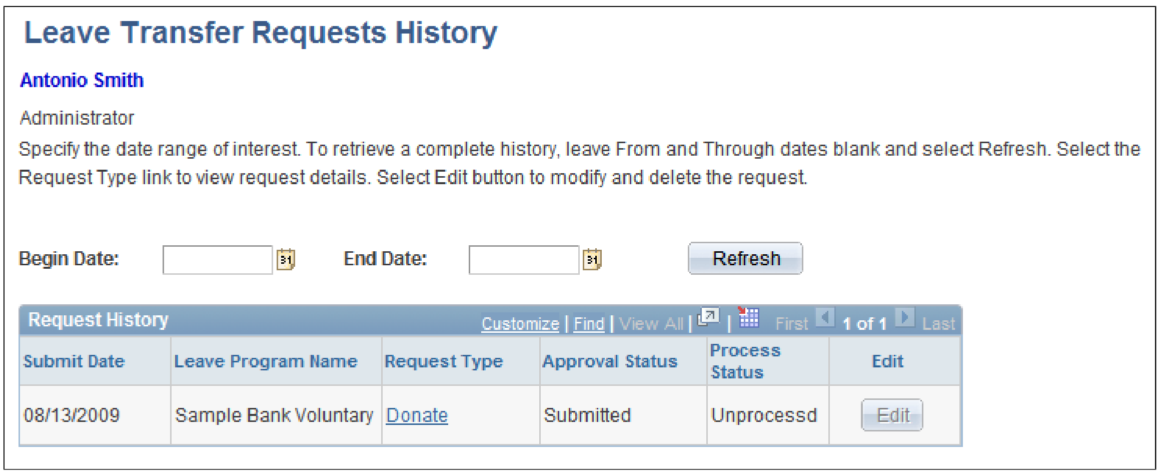
Navigation

Self Service, Leave Transfer Requests, Leave Transfer Request History

This page enables an employee to view, track, and edit any outstanding leave donation program requests.

Image: Leave Transfer Requests History page

This example illustrates the fields and controls on the Leave Transfer Requests History page.



Begin Date and End Date

Enter the date range to manage and click the Refresh button to limit the list of dates displayed in the Request History region. Retrieve a complete history by leaving the Begin Date and End Date fields empty and clicking the Refresh button

Submit Date

Displays the date that leave time was received from or donated to a leave transfer program.

Request Type

Displays the type of request. *Donate* indicates that you requested a donation to the leave transfer program specified in the Leave Program Name field. *Receive* indicates that the system received a request to receive donated leave time. Click on each value in the Request Type column to display the details of the request.

Workflow Status

Displays the status of the request. Values are:

- *Saved*
- *Submitted*
- *Approved*

- *Denied*
- *Cancelled*
- *Push Back*

  Indicating that the request needs rework.
- *Error*

  Indicating that the request has an error and the user should contact the leave program administrator.
- *Fnl Apprvl* (final approval)

  Indicating that the request is awaiting final approval.
- *Apprvl Prc* (Approval Process)

  Indicating that the request is in the approval process.
- *Admin Proc* (administrator processing)

  Indicating that the administrator is processing the request.

The values in the Workflow Status field are derived from the Absence Management table values, rather than from the Approval Workflow Engine (AWE) status values.

Process Status Displays the process status of the request. Values are *Processed* or *Unprocessed*.

Edit Click to edit the original request. *Approved* requests are not available for editing.

Managing Leave Donation Programs

This section describes how to:

- Manage and approve leave donation requests.
- Adjust leave program balances.
- Initiate requests.
- View leave transfer transactions history.

Pages Used to Administer Leave Transfer Programs

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage and Approve Requests	GP_ABS_LVDN_APPROV	Global Payroll & Absence Mgmt, Payee Data, Leave Donations, Manage and Approve Requests	Manage and approve leave donation requests.
Adjust Leave Program Balances	GP_ABS_LVDN_ADJ	Global Payroll & Absence Mgmt, Payee Data, Leave Donations, Adjust Leave Program Balances	Allocate leave time to one or more employees from a leave transfer program and transfer hours in or out of a leave transfer program and adjust the leave program bank balance.
Initiate Requests	GP_ABS_LVDN_INIT	Global Payroll & Absence Mgmt, Payee Data, Leave Donations, Initiate Requests, Initiate Requests	This page enables a program administrator to initiate requests on behalf of employees.
Leave Transfer Transactions	GP_ABS_LVDN_TRANS	Global Payroll & Absence Mgmt, Payee Data, Leave Donations, View Transaction History	View Transaction History

Manage and Approve Requests Page

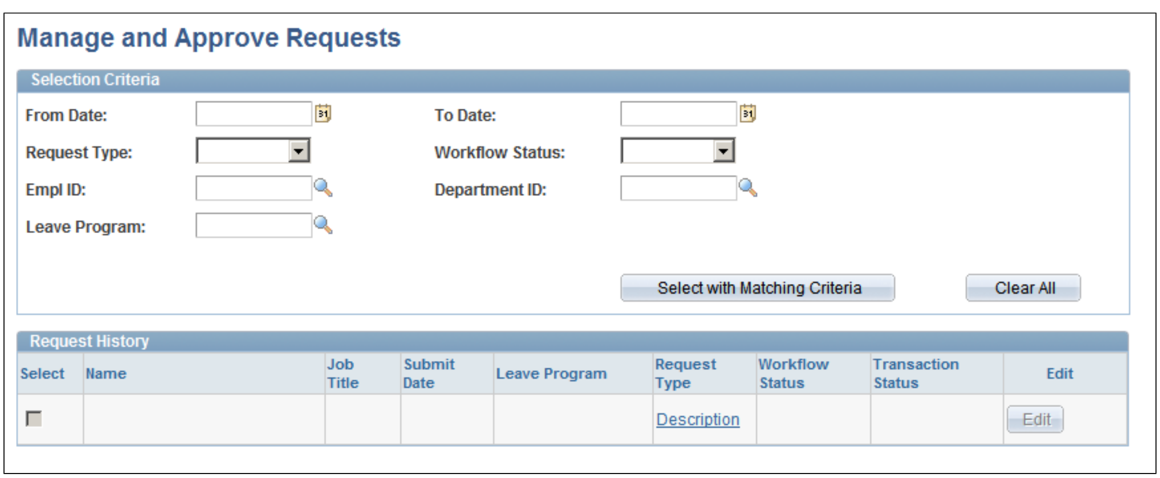
Use the Manage and Approve Requests page (GP_ABS_LVDN_APPROV) to manage and approve leave donation requests.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Leave Donations, Manage and Approve Requests

Image: Manage and Approve Requests page

This example illustrates the fields and controls on the Manage and Approve Requests page.



Use this page to edit existing requests to receive or donate leave time or to approve, deny, or push back one or more requests at one time.

The fields in the Selection Criteria region enable you to limit the number of entries displayed in the Request History region of the page.

Request Type

Select a value to filter the displayed entries in the Request History region based on the type of request.

Select one of the following values:

- *Adjust*.
- *Donate* to select requests to donate leave time.
- *Receive* to select requests to receive donated leave time.
- *Return* to select requests to return unused leave time.
- *Terminate* to select requests to terminate participation in a leave transfer program.

Workflow Status

Select a value to filter the displayed entries based on the status of the request.

Select with Matching Criteria

Click this button to populate the Request History region of the page based on the specified selection criteria.

Adjust Leave Program Balances Page

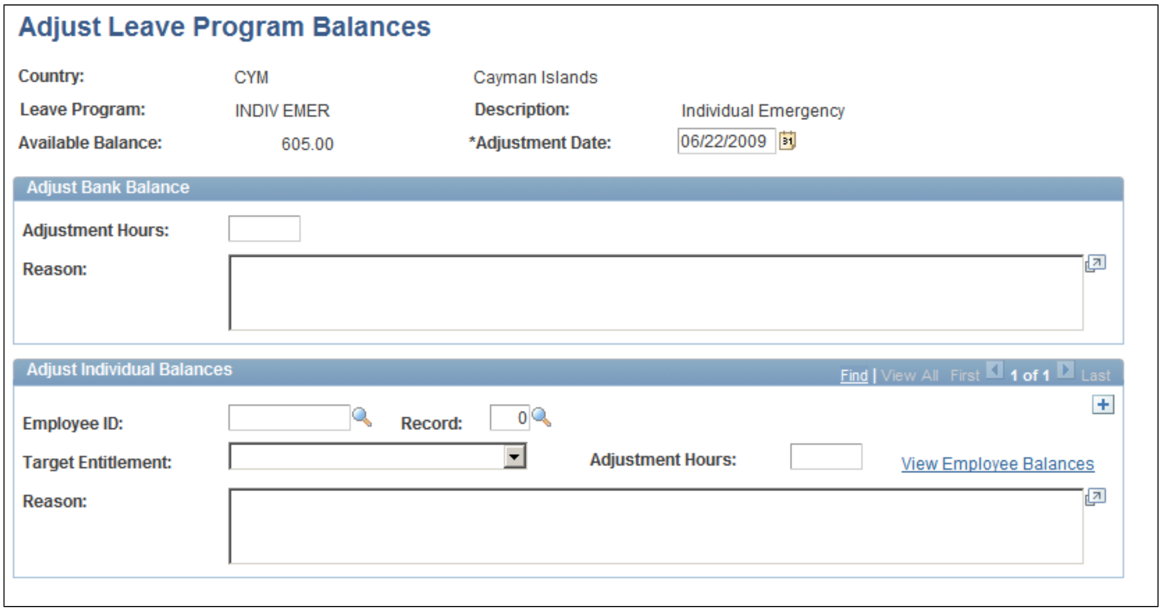
Use the Adjust Leave Program Balances page (GP_ABS_LVDN_ADJ) to allocate leave time to one or more employees from a leave transfer program and transfer hours in or out of a leave transfer program and adjust the leave program bank balance.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Leave Donations, Adjust Leave Program Balances

Image: Adjust Leave Program Balances page

This example illustrates the fields and controls on the Adjust Leave Program Balances page.



The Adjust Leave Program Balances page enables a leave transfer program administrator to handle exceptions, such as adjustments and write-offs. This page enables a program administrator to make adjustments to participating employees' balances. For example, an administrator can allocate time from a program bank to one or more individual employees.

Available Program Balance	Displays the available hours in the selected leave transfer program at the time of the last Leave Transfer Transaction process.

Adjust Bank Balance

Use the fields in this region to make manual adjustments to a leave transfer program balance for programs that have a leave program category of *Bank*. Indicate the number of hours to add or subtract from the bank balance, and any supporting comments related to the adjustment.

Adjustment Hours	Enter the number of hours to add or subtract from the balance of the specified leave transfer program. Use negative numbers to indicate hours that should be subtracted from a leave transfer program.

Adjust Individual Balances

Use the fields in this region to manually adjust a leave transfer program that uses the *Individual* leave program category.

Target Entitlement

Enter the entitlement plan that you want to adjust. You can only select entitlements that have been defined at the program definition level.

Adjustment Date

Enter the date of the adjustment in this field. The administrator can enter a date in the future for the adjustment to occur, as long as the date is prior to the end-date of the leave donation program.

View Employee Balances

Click to access the current Balance Inquiry page for the specified employee, including the leave transfer entitlement balances for donated, received, and returned entitlements.

Initiate Requests Page

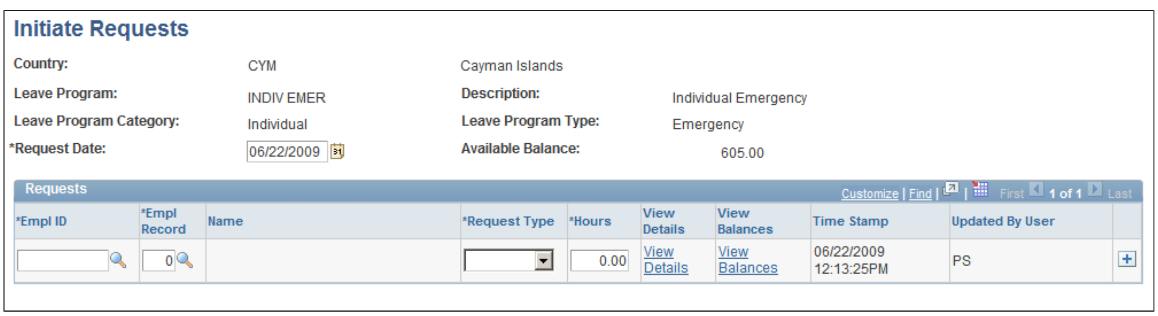
Use the Initiate Requests page (GP_ABS_LVDN_INIT) to this page enables a program administrator to initiate requests on behalf of employees.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Leave Donations, Initiate Requests, Initiate Requests

Image: Initiate Requests page

This example illustrates the fields and controls on the Initiate Requests page.



This page enables a program administrator to initiate requests on behalf of employees. For example, in cases where recipient employees may not be available to submit a request for leave time, an administrator may initiate a request on behalf of an employee.

Request Type

Select the request type to adjust or initiate for the specified employee. Values are: *Adjust*, *Donate*, *Receive*, *Return*, and *Terminate*.

Hours

Enter the number of hours to add or subtract from an individual's entitlement balance. Use negative numbers to indicate hours that should be subtracted from an individual's leave balance. You cannot enter a value greater than the available program balance.

View Details

Click to access a page with detailed information based on the specified request type. The Details page displays different employee data and information based on the following request types:

- Selecting *Donate* displays employee data and information from the Leave Contribution region of the Request to Donate Leave page
- Selecting *Receive* displays employee data and information from the Leave Time Request region of the Request to Receive Donated Leave page.
- Selecting *Return* displays employee data and information from the Return of Unused Leave region of the Request to Return Unused Leave page.
- Selecting *Terminate* displays employee data and information from the Terminate Program Participation region of the Request to Terminate Participation page.

View Balances

Click to access the current Balance Inquiry page for the specified employee, including the leave transfer entitlement balances for donated, received, and returned entitlements.

Leave Transfer Transactions Page

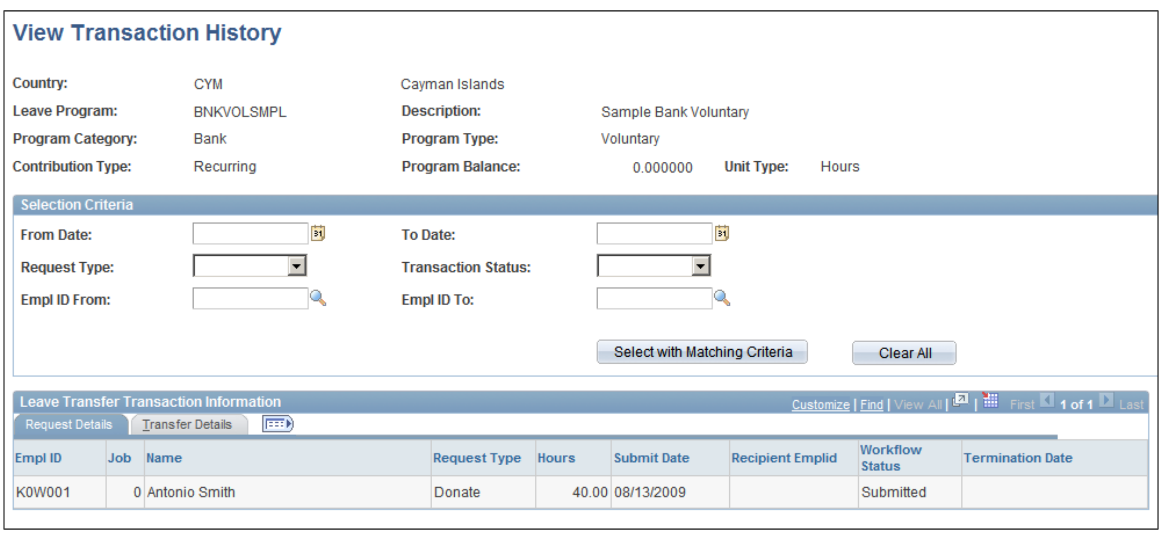
Use the Leave Transfer Transactions page (GP_ABS_LVDN_TRANS) to .

Navigation

Global Payroll & Absence Mgmt, Payee Data, Leave Donations, View Transaction History

Image: View Transaction History page

This example illustrates the fields and controls on the View Transaction History page.



From Date and To Date

Enter a range of dates for which you want to view the transaction history.

Request Type

Select the request types you want to view. Values are: *All*, *Donate*, *Receive*, *Return*, *Terminate* and *Adjustment*

Transaction Status Select the status for the requests you want to view. Values are: *All*, *Unprocessed*, and *Processed*.

EmplID From (Employee ID From) and EmplID To (Employee ID To) Enter a range of employee IDs for which you want to view the transaction history.

Select with Matching Criteria Click to populate the Leave Transfer Transaction Information region based on the criteria you specify..

Clear All Click to clear the entries in the Selection Criteria region

Transfer Details

PI Entries (Positive Input Entries) Click the links in this column to review the positive input for the entitlement on the Positive Input Details page.

Processing Leave Transfer Transactions

The Leave Transfer process locates all approved leave transfer requests and populates the GP_PI_MNL_DATA record in order to provide the revised absence information to Global Payroll.

Note: You should run this process before you initiate your standard Absence Entitlement and Absence Take processes.

Page Used to Process Leave Transfer Transactions

Page Name	*Definition Name*	*Navigation*	*Usage*
Leave Transfer Process	GP_ABS_LVDN_RUNCTL	Global Payroll & Absence Mgmt, Leave Donation Processing, Run Leave Donations	Run the Leave Transfer process to process all approved leave transfer requests.

Chapter 26

Managing Off Cycle Processing

Understanding Off-Cycle Processing

This topic discusses:

- Differences between on and off cycle runs.
- Types of off cycle transactions.
- Features of off cycle processing.
- Steps for entering off cycle requests.
- Processing and postprocessing steps.
- Off cycle batch processing.
- System elements for developing off cycle rules.

Common Elements Used for Off-Cycle Processing

Off Cycle Group

Identifies a set of off cycle transactions to process. The name of an off cycle group is user defined. You can use any value.

Period Begin Date and Period End Date

Dates the system uses to determine:

- The period for updating accumulators, for those accumulators that are defined to accumulate based on period begin date or period end date.
- The element definitions to retrieve during processing, for those elements that use period begin date or period end date as the definition as of date.

Corrections inherit these dates from the target calendar; you can override the default dates. Advance payments inherit these dates from the source calendar, the calendar that is being advanced; you cannot override these dates for advances.

Target Period ID

Affects the period for which balance accumulators are updated. The target period provides the default values for the period begin date and period end date for all transaction types except advances. For advances, the target period determines the process begin date and process end date.

Differences Between On and Off Cycle Absence Runs

On cycle processing refers to executing regularly scheduled runs. In Absence Management these are recurring runs for which a period, calendar, and calendar group have been predefined. A pay group with a monthly frequency has twelve regularly scheduled on cycle absence runs each year.

Off-cycle absence processing refers to processing absences and making corrections to finalized results outside of the normal absence schedule. Off cycle transactions are typically made to correct prior absence results or to make termination payments that can't wait until the next scheduled on cycle absence run.

With the exceptions that are explained in this documentation, the concepts that apply to on cycle processing also apply to off cycle processing: retroactivity, segmentation, calendars, calendar groups and running calculations. The primary difference between on and off cycle processing is the way in which you enter instructions for what and whom to process.

Related Links

Understanding Absence Processing

Types of Off Cycle Transactions

Absence Management supports two types of off cycle transactions.

- Corrections

  These are transactions that correct the results of a finalized absence run. An example is reversing an absence entitlement that was made to a payee in error.

- Advances

  Advances are the processing of segments before they are normally scheduled, such as the early calculation of absence transactions in order to pay wages due to termination or to process a leave of absence in advance.

Features of Off Cycle Processing

With off cycle processing, you can override supporting elements.

For all off cycle transactions except advances, you can override the values of brackets, dates, duration, formulas, and variables for a given payee and calendar. Advances will take these overrides from the calendar definitions of the calendars being advanced.

Steps for Entering an Off Cycle Payment

You can enter multiple off cycle requests for the same pay group and target period.

To enter requests for off cycle transactions:

1. Create an off cycle group using the Off Cycle On Demand (GP_ONDEMAND) component.

   An off cycle group is a group of payees that are processed together. It identifies which off cycle transactions to process and the processing instructions, including who and what to process (pay group) and when to process it (target calendar ID). Its purpose is similar to a calendar in an on cycle process, except that you enter specific instructions for each payee. Name the off cycle group on the Off Cycle On Demand page.

2. Enter individual requests for off cycle processing.

   The Off Cycle On Demand component prevents you from performing off cycle steps out of order. You will enter a request by clicking either the Create Request or Edit Request button. If at least one request has been create the button is labeled Edit Request.

   Once the button is clicked, you are transferred to the main request page which includes the valid off cycle types for your organization. On this main page, you indicate the payee ID by type of transaction. Next, select the detail link and you are transferred to the individual detail page for the transaction type.

3. Create a calendar group for the off cycle run.

   A calendar group for an off cycle run identifies the *off cycle groups* to process together (whereas a calendar group for an on cycle process identifies the *calendars* to process together). Use the same page to create all calendar groups, completing the fields that pertain to off cycle processing.

   You create a calendar group for an off cycle run directly on the Off Cycle On Demand page of the Off Cycle On Demand component by clicking the Create Calendar Group button. When you create the Calendar Group through the dashboard, the system uses the name of the off cycle group (one of the keys) as the name of the calendar group. Also, the system populates the Calendar Group page with the other information required to generate the off cycle calendar group.

   Note: When processing a correction request, ensure the Process Retro field is selected on the Calendar Group page.

Processing and Postprocessing Steps

To process requests for off cycle transactions:

1. Initiate the off cycle run.

   Use the Off Cycle On Demand page of the Off Cycle On Demand component to initiate off cycle runs by clicking the Calculate button. The calculation is performed as a remote call. The remote call causes the browser to remain on the Off Cycle On Demand page for the duration of the calculation process. Any pertinent messages are displayed upon completion. Each time the calculation is run, the system cancels the payees, identifies the payees that are eligible for calculation, and calculates all elements for the payees.

   Note: Off cycle processing can also be run using the Calculate Absence and Payroll page as it would for an on cycle process.

   When the calculation finishes, it opens the Payee Status page. From this page you can access the Results by Calendar Group page as well as the Payee Messages page. The Payee Status page reflects that the results are calculated. From this page you can review:

   - Payee Calculation Status.
   - Payee Results.

- Payee Messages.

Note: When the calendar group is created, you can access the Payee Status page at any time by clicking the View Status and Results link.

2. When you review the processing results, you can choose to:

   - Cancel the calculation. Click the Cancel button on the Off Cycle On Demand page.
   - Calculate again due to changes made to the off cycle transactions. Click the Calculate button on the Off Cycle On Demand page.
   - Finalize the end the absence calculation. Click the Finalize button on the Off Cycle On Demand page. Once this is done, move on to Step 3.

3. Run all post-processes, such as Absence Conversion Programs to Payroll for North America and/or for Payroll Interface and reports.

   Each postprocessing step needs to be run with the same sequence as on cycle.

Related Links

Viewing Payee Status and Updating a Payee's Processing Instructions

Off Cycle Batch Processing

With off cycle processing, the system automatically suspends affected payees from other runs in which they are active so that they can be included in the off cycle process. (A payee can only be active in one run at a time.)

Here's what the system does when you submit an off cycle request:

- Checks whether the payee is associated with an open calendar group.
- If yes, suspends the payee in the calendar group so that the payee can be calculated immediately in the off cycle group.

Note: If the Calculation status is set to Frozen, the system suspends the payee in the off cycle calendar group.

Transaction processing varies depending on the type of off cycle request being processed.

Corrections

Off cycle corrections are based on retroactive processing similar to the retroactive corrections that take place during on cycle runs.

- A trigger must exist on or before the period end date for the calendar being corrected or reversed.
- The type of correction is replacement which replaces an existing absence run.
- The type of retroactive method is Forced Corrective.

- New calendars are created and will be processed. :

Advances

For advances, calendar groups are processed with the applicable calendars. Batch processing follows the same logic as on cycle processing.

System Elements for Developing Off Cycle Rules

The following table provides information about delivered system elements that are used during off cycle processing:

System Element	***Description***	***Values***
GP TX TYPE	Identifies the transaction type	• R (Correction) • A (Advances) • Blank (on cycle runs)
OFF CYCLE	Identifies whether calendar is off cycle or on cycle.	• Y (Yes) = off cycle calendar. • N (No) = on cycle calendar. (Any run with a defined calendar is considered on cycle, including semi-regular runs.)
GP CORR TYPE	Identifies the correction type	• R (Replacement — Normal Retro). • W (Reversal — Replacement).

Initiating Off Cycle Transactions

This topic provides an overview of preliminary entry for off cycle transactions and discusses how to:

- Create an off cycle request.
- Enter basic off cycle information.

Pages Used to Initiate Off Cycle Transactions

Page Name	Definition Name	Navigation	Usage
Off Cycle On Demand	GP_ONDEMAND	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Off Cycle, Off Cycle On Demand, Off Cycle On Demand	Access the pages to: • Create or edit an off cycle request. • Create or Edit an off cycle calendar group. • Process the off cycle calendar group. You can calculate, cancel or finalize the run from this page.
Off Cycle Request	GP_OFFCYCLE_REQ	• Click Create Request link on the Off Cycle On Demand page. • Global Payroll & Absence Mgmt, Absence and Payroll Processing, Off Cycle, Off Cycle Request, Off Cycle Request	Access the detail pages of the off cycle transaction types for the employee ID's entered.

Understanding the Preliminary Entry for Off Cycle Transactions

You can create an off cycle request by accessing the Off Cycle On Demand page or the Off Cycle Requests page. Use the Off Cycle On Demand component (GP_ONDEMAND) to create an off cycle request, process the request, and view the results. Use the Off Cycle Requests component (GP_OFFCYCLE_REQ) to enter the employee ID for the applicable off cycle transaction type. After entering the employee ID on the Off Cycle Request page, you complete a separate page of the component to complete details for each transaction type you intend to process.

If a payee has entries for more than one transaction type, the system processes the correction transactions first, then the advance transactions. To process the transactions in any other order, set up separate off-cycle groups and process the advances in separate runs.

Off Cycle On Demand Page

Use the Off Cycle On Demand page (GP_ONDEMAND) to:

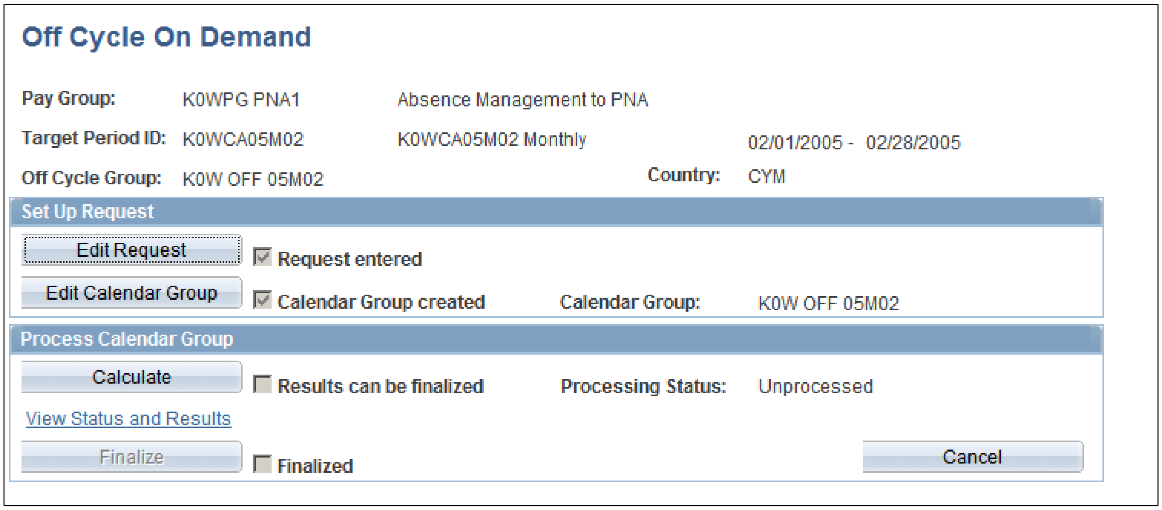
- Create or edit an off cycle request.
- Create or Edit an off cycle calendar group.
- Process the off cycle calendar group. You can calculate, cancel or finalize the run from this page.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Off Cycle, Off Cycle On Demand, Off Cycle On Demand

Image: Off Cycle On Demand page

This example illustrates the fields and controls on the Off Cycle On Demand page.



Create Request or Edit Request

Click to create a request on the Off Cycle Request page. When the request has been created, the button reads Edit Request, which you click to edit the off cycle request that is created.

Create Calendar Group or Edit Calendar Group

Click to access the Calendar Group page to create a calendar group for processing the off cycle transactions. When the calendar group has been created, the button reads Edit Calendar Group, which you click to edit the calendar group that is created.

See Defining Calendar Groups.

Calculate

Click to calculate the off cycle transactions. The calculation is performed as a remote call. The remote call causes the browser to remain on the Off Cycle On Demand page for the duration of the calculation process.

Note: The simplified approach of the Calculate push-button does not allow certain options like freezing calculations or running the process with element trace on. If this is desired, go to the Calculate Absence and Payroll page to process the off cycle calendar group.

See "Entering Processing Instructions *(PeopleSoft HCM 9.2: Global Payroll)*".

View Status and Results

Click to access the Payee Status page. Use this page to view payees by process indicator, calculation status, or other criteria and specify the action that the system is to take. Also, you can access Results by Calendar Group component (GP_RSLT_CAL

_RUN) or Payee Messages component (GP_MESSAGE) by clicking the links on the Payee Status page.

See Viewing Payee Status and Updating a Payee’s Processing Instructions.

See Viewing Results by Calendar.

See Viewing Payee Messages.

Finalize Click to finalize an off cycle run. This button is available only after the calendar group has been successfully calculated.

Cancel Click to cancel an off cycle run. This option becomes available as soon as the off cycle group has been associated with a calendar group.

Request entered, Calendar Group Created, Results can be finalized, and Finalized The check boxes to the right of the push buttons on the Off Cycle On Demand page are unavailable for entry. The system maintains these check boxes, which consists of milestones, that indicate how far along you are in the off cycle process. For example, if you have already created the request, completed your calendar group creation, and run a calculation once with no errors, the system selects several check boxes (Request entered, Calendar Group Created, and Results can be finalized) on the Off Cycle On Demand page, representing the steps you have already completed.

Off Cycle Request Page

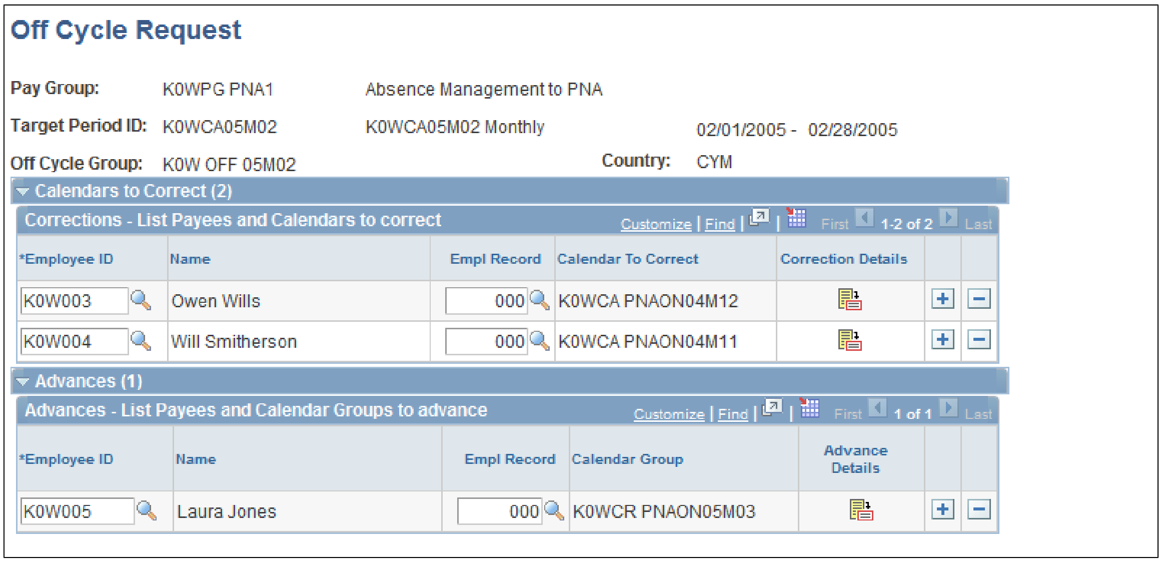
Use the Off Cycle Request page (GP_OFFCYCLE_REQ) to access the detail pages of the off cycle transaction types for the employee ID's entered.

Navigation

- Click Create Request link on the Off Cycle On Demand page.
- Global Payroll & Absence Mgmt, Absence and Payroll Processing, Off Cycle, Off Cycle Request, Off Cycle Request

Image: Off Cycle Request page

This example illustrates the fields and controls on the Off Cycle Request page.



Employee ID	Enter the employee ID in the applicable off cycle transaction section. The section will limit itself to payees (and jobs) associated with the pay group that is associated with the off cycle group.
Empl Rcd Nbr(Employee Record Number)	Select the job for which you want to create the off cycle transaction.
Correction Details or Advance Details	Click to access the Correction Detail page or Advance Detail page where you enter the details for the applicable off cycle transaction type.

Correcting or Reversing Absence Results

With its built-in retroactive processing capabilities, Absence Management generally handles corrections as a basic part of regular on cycle absence runs. With off cycle processing, you can quickly address the more critical exceptions.

This topic provides an overview of correcting absence results and discusses how to enter instructions to correct absence results.

Pages Used to Correct Absence Results

Page Name	**Definition Name**	**Navigation**	**Usage**
Correction Request Detail	GP_OFFCYCLE_C_SEC	Click Correction Details button on the Corrections - List Payees and Calendars to correct section on the Off Cycle Request page.	Enter instructions for processing absence corrections.
Absence Event Entry	GP_ABS_EVENT	Click the Absence Event Entry link on the Correction Request Detail page.	Enter absence events that need correcting.
Retro	GP_TRIGGER_RTO	Click the Review Triggers link on the Correction Request Detail page.	Enter or review retroactive trigger information.
Adjust Absence Balances	GP_PI_MNL_AE	• Global Payroll & Absence Mgmt, Payee Data, Adjust Balances, Absences • Click the Adjust Absence Balances link on the Correction Request Detail page.	Adjust frequency-based entitlement for a payee by calendar period.

Understanding Absence Result Corrections

For Absence Management the correction type of *Replacement* is processed. The type of retroactive method used with corrections is *Forced Corrective.*

Example of a Replacement Correction

For a *replacement correction,* the system handles the adjustment using the normal retroactive processing mode and processing set, as dictated by the existing triggers. Standard use and validation of retroactive rules apply (as if running on cycle). This includes:

- The retroactive mode is corrective (the system ignores for processing the retroactive events of the trigger).
- No elements are forwarded (the system ignores the retroactive processing set).
- All elements are recalculated (the system ignores the retroactive recalculate setting).

Correction Request Detail Page

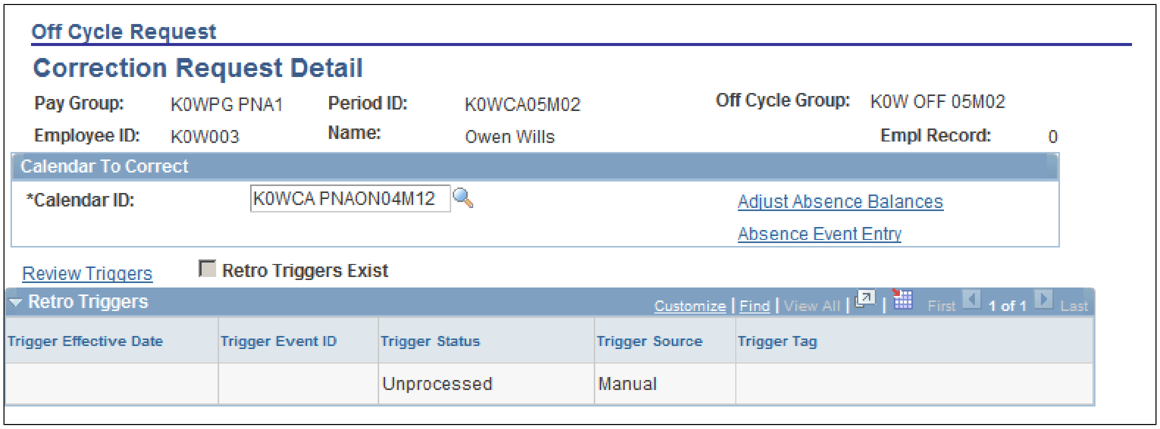
Use the Correction Request Detail page (GP_OFFCYCLE_C_SEC) to enter instructions for processing absence corrections.

Navigation

Click Correction Details button on the Corrections - List Payees and Calendars to correct section on the Off Cycle Request page.

Image: Correction Request Detail page

This example illustrates the fields and controls on the Correction Request Detail page.



Calendar ID	Select the calendar that needs a correction made to it.
Adjust Absence Balances	Use this link to enter any adjustments to absence balances.
Absence Event Entry	Click to access the Absence Event Entry page.
Review Triggers	Click link to view, edit, and add retroactive triggers.
Retro Triggers Exist (retroactive triggers exist)	This system will select this check box if a trigger exists that falls on or before the period end date of the calendar to be corrected, and if the trigger represents the same country as the country associated with the pay group of the off cycle group. If the check box is cleared, you must manually create the trigger or make the correction to data that will cause the trigger to be generated.
Retro Triggers	Displays a list of retro triggers associated with the same country as the correction.

Processing Advances

This topic provides an overview of advances and discusses how to enter instructions for advances.

Pages Used to Process Advances

Page Name	***Definition Name***	***Navigation***	***Usage***
Advance Request Detail	GP_OFFCYCLE_A_SEC	Click the Advance Details button on the Advances section on the Off Cycle Request page.	Enter instructions for processing absences in advance.
Adjust Absence Balances	GP_PI_MNL_AE	Click the Adjust Absence Balancesbutton on the Advance Request Detail page.	Adjust entitlement balances.
Retro	GP_TRIGGER_RTO	Click the Review Triggers link on the Advance Request Detail page.	Enter or review retroactive trigger information.
Absence Event Entry	GP_ABS_EVENT	Click the Absence Event Entry link on the Advance Request Detail page.	Enter absence events related to the advance absence.
Payee Calendar Groups	GP_PYE_RUN	Click the Review Payee Calendar Override link on the Advance Request Detail page.	Enter payee calendar override details for the period being advanced.

Understanding Advances

Advance processing is the processing of on cycle calendars ahead of their regular schedule. Examples include payments for early termination or a full or partial period advance.

Note: The advance on cycle calendars are processed individually exactly like they would have been within their scheduled run. The only difference is the timing.

For additional information about processing advances using on cycle processing, seeEntering Calendar Override Instructions for a Payee.

Advance Request Detail Page

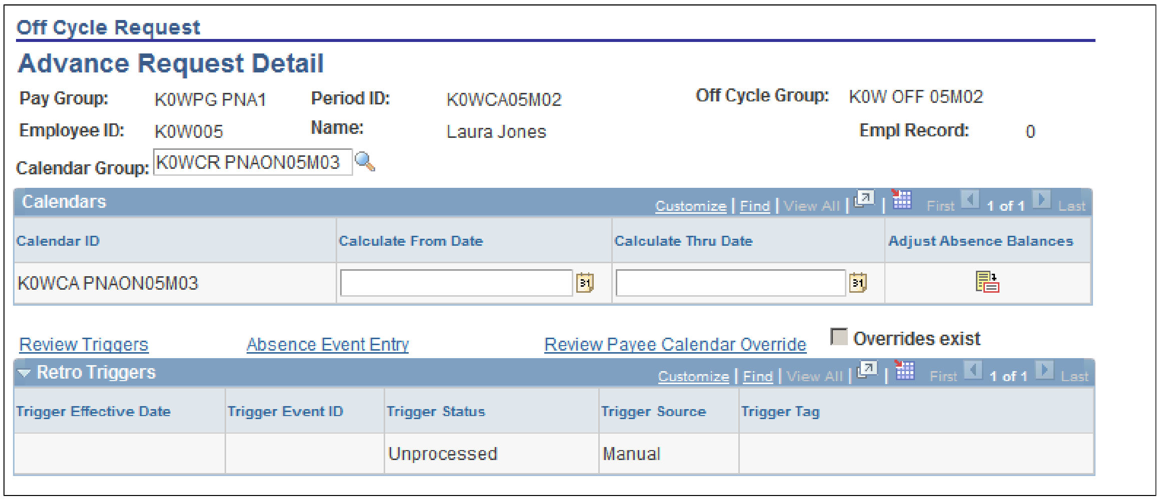
Use the Advance Request Detail page (GP_OFFCYCLE_A_SEC) to enter instructions for processing absences in advance.

Navigation

Click the Advance Details button on the Advances section on the Off Cycle Request page.

Image: Advance Request Detail page

This example illustrates the fields and controls on the Advance Request Detail page.



Note: The system will not process more than one advance for the same calendar group and person within the same off cycle run. If you need to advance smaller fractions of the same absence period (such as, the 1^{st} through the 5^{th} and the 10^{th} through 11^{th}) at the same time, you must set up two different requests and process each in a separate run.

In addition, if two advances are set up for the same payee and calendar group in two different off cycle requests, and you attempt to process these together in the same run, the system issues a warning that informs you that the duplicate was discovered and that all but one request will be ignored. You can ignore the warning and proceed, or go back and modify the request before processing.

Calendar Group

Select the unfinalized calendar group that is associated with the pay group. In the Calendars grid, the system lists, in the defined processing order, all calendars that are associated with the selected calendar group.

Calculate From Date and Calculate Thru Date

To calculate absence transactions for a partial period, enter the begin and end dates for the period of time. Entering dates here causes period segmentation to occur during the off cycle run, without the presence of a segmentation trigger. (Segmentation triggers would affect both on and off cycle transactions, which is not a desirable outcome.)

To avoid unintentional duplicate absences, whenever from and through dates are defined for a calendar, subsequent processes will review the segments to ensure that new segments do not cover the same period of time for the same calendar. This rules applies whether or not the run type allows duplicates for the calendar period.

Adjust Absence Balances	Click to access the Adjust Absence Balances page where you can adjust entitlement balances.
Review Triggers	Click the link to access the Retro page to review, add, or delete triggers.
Absence Event Entry	Click to access the Absence Event Entry page.
Review Payee Calendar Overrides	Click to access the Payee Calendar Override (GP_PYE_RUN) component. You can view or modify overrides here. The system respects all payee calendar overrides when processing the advance payment, including overrides to prevent the processing of calendars.
Overrides Exist	This indicator will be turned on if payee calendar overrides exist for the calendar group.
Retro Triggers	Displays a list of retro triggers associated with the same country as the advance.

Processing and Viewing Results for Off Cycle Transactions

The Off Cycle On Demand component is used to create a request, create a calendar, as well as, to process and view off cycle requests. On the Off Cycle On Demand page you can calculate a run, view results, and finalize or cancel the process. Every time you calculate a run, the system first cancels all results then identifies and calculates the off cycle request. Therefore iterative trigger set up is not needed, as long as you run the calculation process from the On Demand page. If you use the Calculate Absence and Payroll Run Control page to calculate your off cycle requests, iterative triggers are necessary to cause a re-identification and recalculation if you select the Calculate option without selecting the Recalculate All option.

When you are processing from this page, a remote call is made to calculate, finalize, or cancel the run, depending on the button that you click. This causes the process to run while remaining on the Off Cycle On Demand page. It will not redirect you to the Calculate Absence and Payroll page. If you want to run the process with a resolution chain, streams, or process lists, you will have to run it using the Calculate Absence and Payroll page, the same page from which you run the on cycle absence processes. When you have run the calculation process successfully from the Off Cycle On Demand page, the system will automatically transfer you to the Payee Status page, upon completion of calculation or finalize. When the you run cancel, instead of redirecting you to the Payee Status page, a message appears that confirms the cancel process ran successfully.

Related Links

Understanding Absence Processing

Viewing Payee Status and Updating a Payee’s Processing Instructions

Viewing Results by Calendar

Viewing Payee Messages

Chapter 27

Setting Up Triggers

Understanding Triggers

This topic discusses:

- Trigger uses.
- Trigger table data.
- Trigger generation.
- Managing used or obsolete triggers.
- Defining triggers manually.

Trigger Uses

In Absence Management, the mechanism used to detect online data changes that should result in iterative, retroactive, or segmentation processing is called a *trigger*. To set up triggers, you select the database records and fields that you want to make sensitive to data changes such as job location changes and terminations; then, when the change occurs, the system writes a line of data to a table called a *trigger table* to tell the system how to process the change.

There are three types of triggers:

- Iterative

  An *iterative* trigger tells the system to process (or reprocess) a payee in the current open calendar, possibly because payee data has changed or the payee was placed in suspended mode during batch processing. The system generates only one iterative trigger per payee per open calendar group, regardless of the number of calendars in the calendar group. When data changes for the payee, the system (using online code) generates iterative triggers that enable the batch process to recalculate the payee, add the payee to the calendar run, or remove the payee from the calendar run.

- Retroactive

  A *retroactive (or retro)*trigger tells the system to reprocess previously calculated (closed) calendars. For example, this can occur when a payee's absence type for days reported changes and the change goes back to a prior calendar. The absence data must be reprocessed to ensure that the payee receives the right amount of absence days for the correct type of absence.

  See Understanding Retroactive Processing.

- Segmentation

  A segmentation trigger tells the system to segment all or a subset of absence elements in an absence run in response to a change in payee data.

See Understanding Segmentation Setup.

You can generate triggers in two ways:

- Manually: Doesn't require you to set up trigger definitions. You create triggers manually for a given payee.

  See Managing Automatically Generated Triggers and Defining Triggers Manually.

  Note: You can generate triggers manually only for retroactive and segmentation triggers.

- Automatically: Requires you to set up trigger definitions. These trigger definitions tell the system how and when to generate "automatic" triggers when a database change occurs.

Once triggers are generated (manually or automatically), the batch process uses the trigger to perform the proper action.

Trigger Table Data

When a trigger is generated by a change to a record or record and field combination, the system writes the data needed to process the change to a trigger table. Each type of trigger has a separate table for storing this data.

Iterative Trigger Table

The information generated by an iterative trigger is stored in the iterative trigger table (GP_ITER_TRGR). This table contains the following data:

Field	***Purpose***
EMPLID	Iterative triggers are payee-level triggers generated from records that have Employee ID as part of their key structure. The EMPLID identifies the payee affected by the change that generates the trigger. Mass triggers function differently and are not restricted to records that have Employee ID as part of their key structure. See Understanding Mass Triggers.
CAL_RUN_ID	Identifies the calendar run in which the iterative trigger is processed.
TRGR_CREATE_TS	The system date and time when a trigger is generated (for information only). If you change data so that the same iterative trigger is generated repeatedly, a timestamp is needed to keep the instances unique.

Field	***Purpose***
ITER_TRGR_STATUS	Identifies whether the system is processing a trigger. Options are: *Canceled:* You can cancel a trigger whose status is *Unprocessed* on the Payee Triggers - Iterative page. *In-Process:* For triggers that are being considered by the batch process. *Processed:* For triggers that were processed by the system and can't be reconsidered. *Unprocessed:* For triggers that haven't been processed by the system.
ITER_TRGR_SRC	Identifies how the iterative trigger is generated. Options are: *Batch:* For triggers that are generated during batch processing. *Online:* For triggers that are generated by the online code.
COUNTRY	The country code associated with the iterative trigger.
RECNAME	Identifies the source record from which the iterative trigger is generated.
FIELDNAME	Identifies the field that generates the iterative trigger in response to a data change.
TRGR_FLD_VAL_CHAR	Identifies the character value change that causes the iterative trigger to be generated. This field is not populated if the trigger is defined at the record level only.
TRGR_FLD_VAL_DT	Identifies the date value change that causes the iterative trigger to be generated. This field is not populated if the trigger is defined at the record level only.
TRGR_FLD_VAL_NUM	Identifies the numeric value change that causes the iterative trigger to be generated. This field is not populated if the trigger is defined at the record level only.

When an iterative trigger is generated by a data change, the system writes the employee ID, the country, and the calendar run ID along with other information to the trigger table to facilitate iterative processing by the batch code.

Among other things, this data tells the system:

- Which payees to process or reprocess.
- Which open calendars to process.

In addition, the system uses the RECNAME, FIELDNAME, TRGR_FLD_VAL_CHAR, TRGR_FLD_VAL_DT, and TRGR_FLD_VAL_NUM fields to identify the source of an iterative trigger (the record, field, and/or field value changes that generate a trigger). This information enables a clearer understanding of what causes iterative processing of a payee's absences, and can be used to facilitate debugging or answer queries.

Note: You can view the trigger source data stored in this table on the Iterative page.

See Iterative Page.

Retroactive Trigger Table

The information generated by a retroactive trigger is stored in the retroactive trigger table (GP_RTO_TRGR). This table contains the following data:

Field	***Purpose***
EMPLID	Retroactive (or *retro*) triggers are payee-level triggers generated from records that have Employee ID as part of their key structure. The EMPLID identifies the payee affected by the change that generates the trigger. Mass triggers function differently and are not restricted to records that have Employee ID as part of their key structure. See Understanding Mass Triggers.
COUNTRY	The country code associated with a retroactive trigger.
TRGR_EVENT_ID	The trigger event ID associated with record, field, or value changes as defined in the trigger setup.
TRGR_EFFDT	The effective date tells the system which periods to process retroactively (for example, a retro trigger with an effective date of January 1, 2006 tells the system to reprocess all calendars beginning with the January 2006 absence run).
TRGR_CREATE_TS	The system date and time when a trigger is generated (for information only). If you change data so that the same retroactive trigger is generated repeatedly, a timestamp is needed to keep the instances unique.
RTO_TRGR_SRC	Identifies how the retro trigger is generated. Options are: *Automatic:* Identifies triggers that are generated by the online code. *Manual:* Denotes manually generated triggers. *Utility-Generated:* Not available.

Field	***Purpose***
TRGR_STATUS	Identifies whether the system is processing a trigger. Options are: *Canceled:* You can cancel a trigger whose status is *Unprocessed* on the Payee Triggers page. *In-Process:* Denotes triggers that are being considered by the batch process. *Processed:* Identifies triggers that were processed by the system and can't be reconsidered. *Unprocessed:* Identifies triggers that haven't been processed by the system.
TRGR_DESCR	This field serves as the trigger tag or description of a trigger. For use with the *Utility-Generated* source value.
CAL_RUN_ID	Identifies the calendar run in which the retroactive trigger is processed.
RECNAME	Identifies the source record from which the retro trigger is generated.
FIELDNAME	Identifies the field that generates the retro trigger in response to a data change.
TRGR_FLD_VAL_CHAR	Identifies the character value change that causes the retro trigger to be generated. This field is not populated if the trigger is defined at the record level only.
TRGR_FLD_VAL_DT	Identifies the date value change that causes the retro trigger to be generated. This field is not populated if the trigger is defined at the record level only.
TRGR_FLD_VAL_NUM	Identifies the numeric value change that causes the retro trigger to be generated. This field is not populated if the trigger is defined at the record level only.

When a retroactive trigger is generated by a data change, the system writes the employee ID, the effective date of the change (also called the trigger effective date), the country, and the associated event ID along with other information to the trigger table to facilitate retroactive processing by the batch code.

Among other things, this data tells the system:

- Which payees to process.
- Which periods to process retroactively, based on the trigger effective date.
- Which process definition to use to recalculate prior periods.

In addition, the system uses the RECNAME, FIELDNAME, TRGR_FLD_VAL_CHAR, TRGR_FLD_VAL_DT, and TRGR_FLD_VAL_NUM fields to identify the source of a retro trigger (the record, field, and/or field value changes that generate a trigger). This information enables a clearer understanding of what causes retroactive processing of a payee's absences, and can be used to facilitate debugging or answer queries.

Note: You can view the trigger source data stored in this table on the Retro page.

See Retro Page.

Note: You can generate multiple rows of trigger data for one event by making multiple record and field combinations sensitive to retroactive data changes. For example, a retroactive change in hire date and a retroactive change in pay group might both generate retro triggers for the same event. In the case of multiple retro triggers, the earliest trigger effective date is used to drive limit calculations, which, in turn, direct retroactive calculations.

Segmentation Trigger Table

The information generated by a segmentation trigger is stored in the segmentation trigger table (GP_SEG_TRGR). This table contains the following data:

Field	***Purpose***
EMPLID	Segmentation triggers are payee-level triggers generated from records that have Employee ID as part of their key structure. The EMPLID identifies the payee affected by the change that generates the trigger. Mass triggers function differently and are not restricted to records that have Employee ID as part of their key structure. See Understanding Mass Triggers.
EMPL_RCD	Identifies the job affected by a segmentation event.
COUNTRY	The country code associated with the segmentation trigger.
TRGR_EVENT_ID	The trigger event ID associated with a triggering condition, as defined in your setup. It tells the system what type of segmentation to apply and the elements to segment (in the case of element segmentation).
TRGR_EFFDT	The effective date tells the system how to segment a period (for example, a segmentation trigger with an effective date of June 15 tells the system to divide the June period into two segments, one with the dates June 1 to June 15, and another with the dates June 16 to June 30).

Field	***Purpose***
TRGR_CREATE_TS	The system date and time when a trigger is generated (for information only). If you change data so that the same segmentation trigger is generated repeatedly, a timestamp is needed to keep the instances unique.
SEG_TRGR_SRC	Identifies how the segmentation trigger is generated. Options are: *Automatic:* Identifies triggers generated by the online code. *Manual:* Denotes manually generated triggers.
SEG_TRGR_STATUS	Identifies whether the system is processing a trigger. Options are: *Active:* Indicates that the trigger has been written out and will remain active until canceled by a user. *Canceled:* You can cancel a trigger whose status is *Active* on the Payee Triggers page.
SEG_TRGR_LVL	Specifies whether a trigger is payee-level or at the payee-job (EMPL_RCD) level trigger. Instructs the system to process for one job only or for all jobs.
CAL_RUN_ID	Identifies the first calendar group ID that uses a segmentation trigger. If the segmentation trigger is reused because of retroactivity, the calendar group ID isn't updated.
RECNAME	Identifies the source record from which the segmentation trigger is generated.
FIELDNAME	Identifies the field that generates the segmentation trigger in response to a data change.
TRGR_FLD_VAL_CHAR	Identifies the character value change that causes the segmentation trigger to be generated. This field is not populated if the trigger is defined at the record level only.
TRGR_FLD_VAL_DT	Identifies the date value change that causes the segmentation trigger to be generated. This field is not populated if the trigger is defined at the record level only.
TRGR_FLD_VAL_NUM	Identifies the numeric value change that causes the segmentation trigger to be generated. This field is not populated if the trigger is defined at the record level only.

When a segmentation trigger is generated by a data change, the system writes the employee ID, the effective date of the change (also called the trigger effective date), the country, and the associated event ID along with other information to the trigger table to facilitate retroactive processing by the batch code.

Among other things, this data tells the system:

- Which payees to process.
- The dates to use for the period segments or slices.
- What type of segmentation to use and the elements to segment (in the case of element segmentation).

In addition, the system uses the RECNAME, FIELDNAME, TRGR_FLD_VAL_CHAR, TRGR_FLD_VAL_DT, and TRGR_FLD_VAL_NUM fields to identify the source of a segmentation trigger (the record, field, and/or field value changes that generate a trigger). This information enables a clearer understanding of what causes segmentation of a payee's absences, and can be used to facilitate debugging or answer queries.

Note: You can view the trigger source data stored in this table on the Segmentation page.

See Segmentation Page.

Trigger Generation

This topic discusses the concept of trigger effective date types (Trigger Effdt Type) and trigger levels, and describes how and when the system generates triggers based on effective date types and trigger levels.

Effective Dates and Effective Date Types

All triggers except iterative triggers are stored in the trigger tables with their trigger effective dates (TRGR_EFFDT). These dates are based on—but are not necessarily identical to—the dates of the database changes that cause the triggers to be generated. In the PeopleSoft system, these database change dates are recorded in the following fields: Effective Date, Begin and End Date, and Fixed Date fields. Because of the central role played by these fields, retro and segmentation triggers can *only* be generated from *dated* records: retroactive triggers can only be defined for records with *Effective* or *Begin* and *End Date* fields, or records with *Fixed Date* fields; and segmentation triggers can only be defined for records with *Effective Date* fields.

Based on which date field is the source of the trigger effective date, every retro and segmentation trigger falls into one of the following *effective date types*:

- *Effective Date*: Trigger date is based on an Effective Date field.
- *Begin/End Date*: Trigger date is based on a Begin or End Date field.
- *Fixed Date*: Trigger date is based on a fixed date that has been passed as a parameter to the generic PeopleCode function Generate_Triggers.

  See Implementing Triggers.

When the system processes retro and segmentation triggers, it uses the effective date type to determine what date to use as the trigger effective date.

Note: Iterative triggers do not use the concept of trigger effective dates, since the change date is irrelevant to their function, which is to trigger the calculation or recalculation of the current absence run for a specific payee. They can be defined for non-effective-dated records as well as effective-dated and begin and end dated records.

Trigger Levels

When you set up triggers in Absence Management, you must specify the level at which the system responds to database changes. You can set up the system to generate triggers in response to effective or begin and end date changes to any field in a record (trigger level = *Record*), to all changes to a specific field in the record (trigger level = *Field, Non Value Based*), or only when a specific value is entered in the field (trigger level = *Field, Value Based*). The trigger level determines when and under what conditions the system generates triggers.

Rules for Iterative Triggers: Generating Triggers

Iterative triggers are generated only when an open calendar group exists; the calendar group must be "Identified."

When the trigger level is *Record,* the system generates an iterative trigger if a row is added, changed, or deleted.

When the trigger level is *Field,* Non-Value-based, the system generates an iterative trigger if:

- A row and the field are changed.
- A row is added or deleted.

Note: For *Field,* Non-Value-based triggers, adding a row causes a trigger to be generated only if the field value changes.

When the trigger level is *Field,* Value-based, besides observing the rules for non-value-based triggers, the system generates an iterative trigger only if the value of the added, changed, or deleted row matches a value you specified earlier, or you have chosen to generate triggers even if no values match.

Rules for Retroactive Triggers: Setting Trigger Effective Dates and Generating Triggers

When Trigger Effdt Type is *Effective Date:*

- By default, if a row is added, the system uses the effective date as the trigger effective date.

  Note: Although the default is to use the change date (the effective date of the added row) as the trigger effective date, you can modify effective dating of retro triggers on the Trigger Definitions – Field Values page so that the trigger date falls before or after the actual change date.

  See Trigger Definitions - Field Values Page.

- If a row is deleted, the system uses the initial effective date as the trigger effective date.
- If a row is changed, the system uses the earlier of the initial effective date and the changed effective date as the trigger effective date.

The initial effective date is the effective date with which the row was loaded. The changed effective date is the effective date of the row at save time. If you haven't changed the effective date, it's the same as the initial effective date. If you've changed the effective date, it is different from the initial effective date.

When Trigger Effdt Type is *Begin/End Date:*

- By default, if a row is added, the system uses the begin date as the trigger effective date.

Note: Although the default is to use the change date (the begin date of the added row) as the trigger effective date, you can modify effective dating of retro triggers on the Trigger Definitions – Field Values page so that the trigger date falls before or after the actual change date.

See Trigger Definitions - Field Values Page.

- If a row is deleted, the system uses the initial begin date as the trigger effective date.
- If a row is changed and the end date is the only changed field, the system uses the earlier of the initial end date and changed end date as the trigger effective date; otherwise, the system uses the earlier of the initial begin date and the changed begin date as the trigger effective date.

The initial begin date is the begin date with which the row was loaded. The changed begin date is the begin date of the row at save time. If you haven't changed the begin date, it's the same as the initial begin date. If you've changed the begin date, it is different from the initial begin date.

The initial end date is the end date with which the row was loaded. The changed end date is the end date on the row at save time. If you haven't changed the end date, it's the same as the initial end date. If you've changed the end date, it's different from the initial end date.

Note: With absences, the system uses the begin date as the trigger effective date even if you change the end date. If an existing row is voided, and a new row is created, the system uses the begin date as the trigger effective date.

When Trigger Effdt Type is *Fixed Date,* the trigger date is the date that you specify as a parameter in the PeopleCode function Generate_Triggers.

When Trigger Level is *Record*:

- The system generates a retro trigger if a row is added, changed, or deleted.
- If you change multiple rows, the earliest trigger date from all the changed rows is used as the trigger effective date.

When Trigger Level is *Field,* Non-Value-based:

- If a row is added or deleted, the system finds the maximum effective-dated row that's earlier than the trigger date for the row.

  If the field value differs between the prior row and the added or deleted row, the system generates a retroactive trigger.
- If a row and the field value are changed, the system generates a retroactive trigger regardless of whether the effective date for that row is changed.
- If a row and the effective date for that row are changed (assume the effective date before the change is the "old date" and the effective date after the change is the "new date"):
  - If the field is changed, the system generates a retroactive trigger.
  - The system finds the row whose maximum effective date is less than the new date.

    If the field value differs between the prior row and the changed row, a retroactive trigger is generated.

    - The system finds the row whose maximum effective date is less than the old date.

      If the field value differs between the prior row and the changed row, a retroactive trigger is generated.

- If a prior row isn't found, the added, changed, or deleted row is the first row in the buffer.

  In this case, a retroactive trigger is generated with the primary event ID specified in the trigger definition.

When Trigger Level is *Field,* Value-based, besides observing the rules for non-value-based triggers, the system generates a retroactive trigger only if the value of the added, changed, or deleted row matches a value you specified earlier or you've chosen to generate a trigger even if no values match.

Rules for Segmentation Triggers: Setting Trigger Effective Dates and Generating Triggers

For Absence Management, you can generate segmentation triggers only from records whose Trigger Effdt Type is *Effective Date.*

See Segmentation Page.

Segmentation triggers aren't generated for deleted rows.

When Trigger Effdt Type is *Effective Date:*

- If a row is added, the system uses the effective date of the added row as the trigger effective date.
- If a row is changed, the system uses the effective date of the change as the trigger effective date (not the initial effective date).

Note: The initial effective date is the effective date with which the row was loaded. The changed effective date is the effective date of the row at save time.

- If a row is added, the system uses the begin date as the effective date of the initial trigger, and the end date + 1 as the effective date of the terminal trigger.
- If a row is changed and the end date is the only changed field, the system uses the changed end date + 1 as the new terminal trigger effective date. If a row is changed and the begin date is the only changed field, the system uses the changed begin date as the new initial trigger effective date.

The initial begin date is the begin date with which the row was loaded. The changed begin date is the begin date of the row at save time. If you haven't changed the begin date, it's the same as the initial begin date. If you've changed the begin date, it is different from the initial begin date.

The initial end date is the end date with which the row was loaded. The changed end date is the end date on the row at save time. If you haven't changed the end date, it's the same as the initial end date. If you've changed the end date, it's different from the initial end date.

When Trigger Level is *Record,* the system generates a segmentation trigger if a row is added or changed.

When Trigger Level is *Field,* Non-Value-based:

- If a row is added or changed, the system finds the row whose maximum effective date is less than the added or changed row.

  If the field value differs between the prior and current row, the system generates a segmentation trigger.

- If a prior row cannot be found:

  - If the field value is changed, the system generates a segmentation trigger.
  - If it is a new row, the system generates a segmentation trigger for all specified fields.

When Trigger Level is *Field,* Value-based, besides observing the rules for non-value-based triggers, the system generates a segmentation trigger only if the value of the added or changed row matches a value you specified earlier or you have chosen to generate triggers even if no values match.

Managing Used or Obsolete Triggers

The Absence Management system automatically marks retro and iterative triggers as used once they initiate the required processing so that they do not affect future calculations. In addition, you can manually cancel both iterative and retro triggers that have been created in error or that you do not want to impact absence processing. By contrast, segmentation triggers are designed to remain active in the system, since if a segmentation event occurs during a calculation period, it should trigger segmentation every time the period is processed. However, there are times when segmentation events need to be modified or removed after they are entered in the system, either because they should not have been entered at all, the dates of the event were entered incorrectly, or other data was recorded incorrectly. The Absence Management system addresses the problem of unnecessary segmentation triggers by automatically deleting them in response to the following data changes at each of the three trigger levels *(Record, Field-Non Value Based, Field-Value Based)*:

Data Change	***Record Trigger Level***	***Field – Non Value Based Trigger Level***	***Field – Value Based Trigger Level***
Effective, Begin, or End Date Correction	Yes	Yes	Yes
Field Value Correction	No	Yes	Yes
Row Deletion	Yes	Yes	Yes

Important! The system only deletes automatically generated triggers, not manually generated triggers or mass triggers.

Note: Although the system automatically removes segmentation triggers in the situations described here, you can also manually cancel segmentation triggers just as you can iterative and retro triggers. To manage and cancel triggers, use the pages in the Review Triggers (GP_TRIGGER) and Review Iterative Triggers (GP_TRGRITER_CALRUN) components.

Example: Removing a Segmentation Trigger In Response to a Change In the Effective Date of a Row

Assume that there is a *Field, Value Based* trigger on the JOB record.

The field and field values defined to generate triggers are Action and *DTA* (data change) or *TER* (termination).

Assume that you change the effective date of a termination action (TER) from November 15 to November 20.

When the effective date associated with this action changes, the system should:

- Delete the old trigger associated with the changed source row.
- Insert a new trigger with a new trigger effective date.

User Action	***Field Change***	***Effdt/Effseq***	***Trigger Action***	***Trigger Effdt***	***Source Field Value***	***Trigger Event ID***
Existing Row	DTA	10/20/05	Insert	10/20/05	DTA	Event 1
Existing Row	TER	11/15/05	Insert	11/15/05	TER	Event 1
Correction	TER	11/20/05	Delete	11/15/05	TER	Event 1
			Insert	11/20/05	TER	Event 1

In this example, the effective date of the November 15 termination row changes to November 20. As a result, the system deletes the November 15 trigger and creates a new trigger with an effective date of November 20.

Example: Removing a Segmentation Trigger In Response to a Change In a Field Value

Assume that there is a *Field, Value Based* trigger on the JOB record.

The field and field values defined to generate triggers are Action and *PAY* (pay rate change) or *TER* (termination).

Assume that you change the Action value of an October 20 effective-dated row from TER (termination) to DTA (data change).

When the effective date associated with this action changes, the system should delete the old trigger without creating a new one:

User Action	***Field Change***	***Effdt/Effseq***	***Trigger Action***	***Trigger Effdt***	***Source Field Value***	***Trigger Event ID***
Existing Row	PAY	01/01/05	Insert	01/01/05	PAY	Event 1
Existing Row	TER	10/20/05	Insert	10/20/05	TER	Event 1
Existing Row	DTA	11/15/05	None		TER	Event 1
Correction	DTA	10/20/05	Delete	10/20/05	TER	Event 1

User Action	Field Change	Effdt/Effseq	Trigger Action	Trigger Effdt	Source Field Value	Trigger Event ID
			No Trigger			

In this example, the value of the October 20 effective-dated row changes from TER to DTA. Because DTA is not a recognized value for trigger generation (only TER and PAY are set up to generate triggers), the system deletes the trigger with the October 20 effective date without generating a new one.

Example: Removing a Segmentation Trigger In Response to a Change In a Field Value

Assume that there is a *Field, Value Based* trigger on the JOB record.

The field and field values defined to generate triggers are Action and *DTA* (data change) or *TER* (termination).

Assume that you change the Action value of a July 1, 2005 effective-dated row from PAY (pay rate change) to DTA (data change), and that there is a second, preexisting row with a value of DTA and an effective date of January 1, 2006. This example shows that the latter row is affected by the change to the earlier row:

User Action	Field Change	Effdt/Effseq	Trigger Action	Trigger Effdt	Source Field Value	Trigger Event ID
Existing Row	PAY	01/01/05	None		DTA	Event 1
Existing Row	PAY	07/01/05	None		TER	Event 1
Existing Row	DTA	01/01/06	Insert	01/01/06	TER	Event 1
Correction	DTA	07/01/05	Delete	No trigger to delete.	TER	Event 1
			Insert	07/01/05		
			Delete	01/01/06		
			No Trigger			

In this example, the value of the July 1, 2005 effective-dated row changes from PAY to DTA. Because trigger generation is based on field value changes, and there is no change between the July 1, 2005 and January 1, 2006 rows (both have a field value of DTA), the system deletes the trigger originally created for the latter row, and inserts a new trigger with a July 1, 2005 effective date. Note that there are no triggers for the PAY rows, as PAY is not a value that has been defined for trigger generation.

Special Rules for Field-Based Segmentation Triggers for Records Containing EFFSEQ (Effective Sequence) Field

There are special rules for managing field-based segmentation triggers if the record contains the field EFFSEQ (for example, the JOB record):

- When the trigger definition is *Field – Non Value Based,* the trigger generation PeopleCode inserts a trigger for a given effective date using only the highest effective sequence row. That is, only the highest effective sequence row per effective date matters when the trigger definition is Field – Non Value based. This prevents unnecessary trigger generation when you enter first one effective sequence row and then another with the same effective date to correct errors in the first row.
- When the trigger definition is *Field – Value Based,* the trigger generation PeopleCode inserts a separate trigger for each effective sequence row with a given effective date. In other words, all effective sequence rows are processed when the trigger definition is value based. This is to accommodate situations in which it is necessary or desirable to have multiple effective sequence rows. For example, there are some fields such as JOB.ACTION in which you might enter a transfer and a promotion one after another on the same day. This field would most likely have a value-based trigger definition.

Defining Triggers Manually

In addition to setting up the system to generate triggers automatically, you can enter triggers manually on the Review Triggers component (GP_TRIGGER) by selecting the trigger type, the trigger effective date, the process definition, and other data needed by the system to initiate retroactive or segmentation processing.

Note: Iterative triggers can not be added manually.

See Managing Automatically Generated Triggers and Defining Triggers Manually.

Setting Up Trigger Definitions

This topic provides an overview of trigger definition for iterative, retro, and segmentation triggers, and describes the pages used to set up triggers.

Pages Used to Set Up Trigger Definitions

Page Name	***Definition Name***	***Navigation***	***Usage***
Trigger Definitions	GP_TRGR_SETUP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Trigger Definitions, Trigger Definitions	Define iterative, segmentation, and retroactive triggers. To create a retroactive or segmentation trigger, first define the appropriate event ID on the Retro Event Definition page or Segmentation Event Definition page.
Trigger Definitions - Field Values	GP_TRGR_SETUP_SEC	Click the List Field Values link on the Trigger Definitions page.	Indicate which field values initiate actions.

Related Links

Understanding Calendars

Understanding Retroactive Processing

Understanding Segmentation Setup

Understanding Trigger Definition Setup

This topic discusses the setup steps for automatic trigger generation by the online system.

Note: PeopleSoft recommends that when you define a retroactive or segmentation trigger, you also define an iterative trigger. If a calendar group has been calculated once and data changes are subsequently made, unless an iterative trigger is defined, retroactive or segmentation triggers generated from the data changes are not processed until the next Identify phase.

Setting Up Iterative Triggers

Iterative triggers can be defined for both effective and begin and end dated records, as well as for non-dated records.

To set up iterative triggers:

1. Select Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Trigger Definitions.

   The search page for the Trigger Definitions component (GP_TRGR_SETUP) appears.

2. Select the Add a New Value tab.

3. On the Add a New Value tab, select a country, identify the record you want to make sensitive to data changes in the Record (Table) Name field, and select a trigger type of *Iterative.*

4. Click the Add button.

   The Trigger Definitions page appears.

5. On the Trigger Definitions page, select a Trigger Level of *Record* or *Field.*

   Select *Record* to generate a trigger in response to a change to any field in the record; select *Field* if you want the system to generate a trigger only in response to changes to a specific field or group of fields in the record.

   If you select *Field,* you must list the fields that you want to make sensitive to data changes in the List Fields With Trigger group box. You can further restrict the data changes that result in trigger generation by selecting the Dependent on Field Value Action check box for a specific field and specifying the values that trigger iterative processing.

Setting Up Retro Triggers

Retro triggers can be defined for both effective and begin and end dated records, as well as for fixed date records.

To set up retro triggers:

1. Select Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Trigger Definitions.

The search page for the Trigger Definitions component (GP_TRGR_SETUP) appears.

2. Select the Add a New Value tab.
3. On the Add a New Value tab, select a country, identify the record you want to make sensitive to data changes in the Record (Table) Name field, and select a trigger type of *Retro.*
4. Click the Add button.

   The Trigger Definitions page appears.
5. On the Trigger Definitions page, select a trigger event ID (or primary event ID if the trigger level is *Field*).

   Trigger event IDs tell the system how to process retroactive data.

   Note: Define trigger event IDs on the Retro Event Definition page.

   See Setting Up Retroactive Processing.
6. On the Trigger Definitions page, select a Trigger Level of *Record* or *Field.*

   Select *Record* if you want the system to generate a trigger in response to a change to any field in the record; select *Field* if you want the system to generate a trigger in response to changes to a specific field or group of fields in the record.

   If you select *Field,* you must list the fields that you want to make sensitive to data changes in the List Fields With Trigger group box. You can further restrict the data changes that result in trigger generation by selecting the Dependent on Field Value Action check box for a specific field, click the List Field Values link, and specifying the values that trigger retro processing.
7. In addition, you must specify a trigger event ID or primary event ID at one of the following levels:

   - If you select *Record* as the trigger level, specify the trigger event ID in theTrigger Event ID field at the record level on the Trigger Definitions page.
   - If you select *Field* as the trigger level, and trigger generation is not dependent on specific field values, specify the trigger event ID at the field level in the List Fields With Trigger group box on the Trigger Definitions page.
   - If you select *Field* as the trigger level, and retro is dependent on specific field values, click the List Field Values link and specify the trigger event ID at the field value level in the Field Values group box on the Trigger Definitions – Field Values page.
   - In addition, if you select *Field* as the trigger level, you must enter a primary event ID at the record level in the Primary Event ID field on the Trigger Definitions page. This ID functions as the default event ID when the changed, added, or deleted row that triggers retro processing is the first row in the buffer (that is, a prior row cannot be found).

     Note: The Primary Event ID field appears only when the trigger type is *Retro* and the trigger level is *Field.*

Setting Up Segmentation Triggers for Effective-dated Records

In Absence Management, you can set up segmentation triggers for effective-dated records. In this topic we discuss the steps for setting up segmentation triggers for effective-dated records.

To set up segmentation triggers for effective-dated records:

1. Select Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Trigger Definitions.

   The search page for the Trigger Definitions component (GP_TRGR_SETUP) appears.

2. Select the Add a New Value tab.

3. On the Add a New Value tab, select a country, identify the record you want to make sensitive to data changes in the Record (Table) Name field, and select a trigger type of *Segmentation.*

4. Click the Add button.

   The Trigger Definitions page appears.

5. On the Trigger Definitions page, select a Trigger Level of *Record* or *Field.*

   Select *Record* if you want the system to generate a trigger in response to a change to any field in the record; select *Field* if you want to system to generate a trigger in response to changes to a specific field or group of fields in the record.

   If you select *Field,* you must list the fields that you want to make sensitive to data changes in the List Fields With Trigger group box. You can further restrict the data changes that result in trigger generation by selecting the Dependent on Field Value Action check box for a specific field, click the List Field Values link, and specifying the values that should result in trigger generation.

6. In addition, you must define a trigger event ID at the appropriate level:

   - If you select *Record* as the trigger level, define the trigger event ID at the record level on the Trigger Definitions page.
   - If you select *Field* as the trigger level, and segmentation is not dependent on specific field values, specify the trigger event ID at the field level in the List Fields With Trigger group box on the Trigger Definitions page.
   - And if you select *Field* as the trigger level, and segmentation is dependent on specific field values, click the List Field Values link and specify the trigger event ID at the field value level in the Field Values group box on the Trigger Definitions – Field Values page.

Note: The trigger event IDs tells the system what type of segmentation to use (*period* or *element* segmentation), and in the case of element segmentation, what elements to segment in response to a change in data. You define trigger event IDs on the Segmentation Event Definition page.

See Segmentation Event Definition Page.

Trigger Definitions Page

Use the Trigger Definitions page (GP_TRGR_SETUP) to define iterative, segmentation, and retroactive triggers.

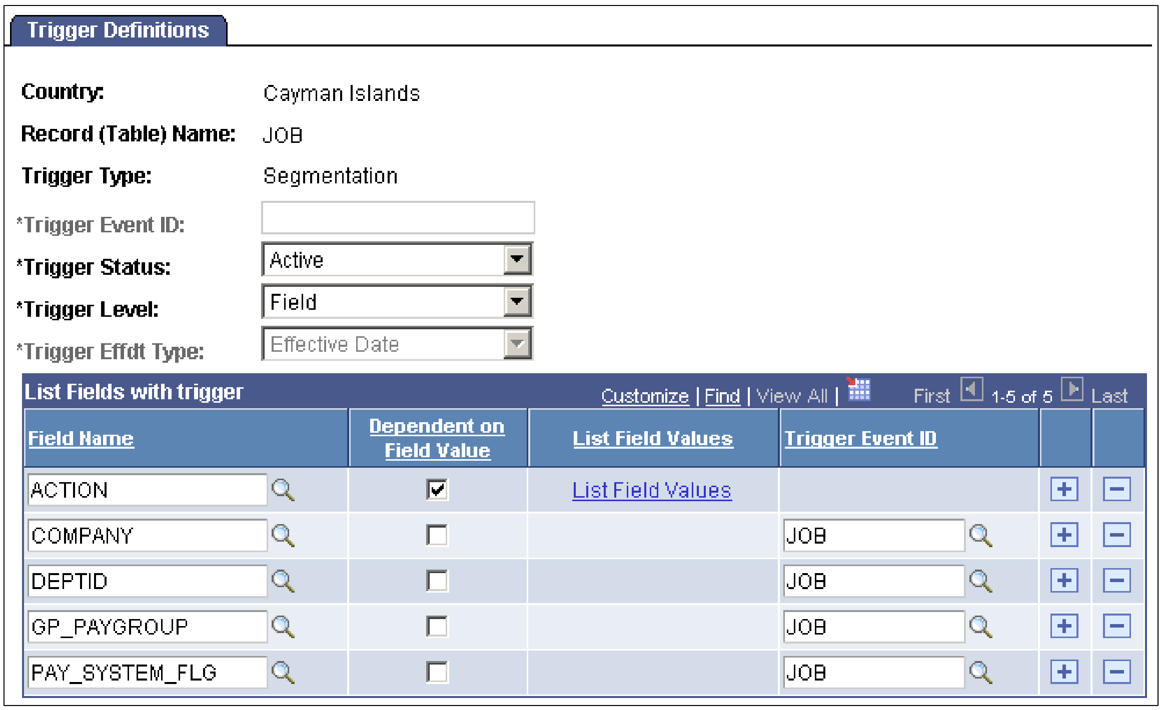
To create a retroactive or segmentation trigger, first define the appropriate event ID on the Retro Event Definition page or Segmentation Event Definition page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Trigger Definitions, Trigger Definitions

Image: Trigger Definitions page

This example illustrates the fields and controls on the Trigger Definitions page.



Note: The fields on this page vary depending on the type of trigger you are creating and the values you select.

Country	Specify the country for which you are defining the trigger.
Record (Table) Name	Displays the record (table) name that you selected to access this page. This record can stand alone or be part of the record and field combination that generates a trigger in response to an online data change.
Trigger Type	Displays the trigger type that you selected to access this page. Options are: *Iterative, Retro,* and *Segmentation.*
Trigger Event ID	For retro and segmentation triggers, specify the trigger event ID at the record level, the field level, or the field value level: • If the Trigger Level is *Record,* specify the trigger event ID in the Trigger Event ID field at the top of the page.

Note: This field isn't available at the record level when the trigger type is *Segmentation* and trigger level is *Field.*

Note: The Trigger Event ID, record level field is replaced by the Primary Event ID field when the trigger type is *Retro* and the Trigger Level is *Field* (see below).

- If the Trigger Level is *Field-Non Value Based,* specify the trigger event ID in the Trigger Event ID field in the List Fields With Trigger group box.
- If the Trigger Level is *Field-Value Based,* specify the trigger event ID in the Field Values group box on the Trigger Definitions-Field Values page.

Note: Iterative triggers don't have trigger event definitions, because their only function is to process a payee in the current open calendar; therefore, the defined event is always the same.

Trigger Status

To activate the trigger definition, select *Active.*

Trigger Level

Select *Record* if you want the system to generate a trigger in response to a change to any field in the record; select *Field* if you want the system to generate a trigger in response to changes to a specific field or group of fields in the record.

If you select *Field,* you must list the fields that you want to make sensitive to data changes in the Field column in the List Fields With Trigger group box. You can further restrict the data changes that result in trigger generation by selecting the Dependent on Field Value Action check box for a specific field, click the List Field Values link, and specifying the values that should result in trigger generation.

Primary Event ID

Enter one of the event IDs defined on the Retro Event Definition page.

The primary event ID functions as the default event ID when the trigger level is *Field* and the changed, added, or deleted row that triggers retro processing is the first row in the buffer (that is, a prior row cannot be found). In this case, the system generates a retroactive trigger using the primary retroactive event ID.

Note: The Primary Event ID field appears only when the trigger type is *Retro* and the trigger level is *Field.*

Trigger Effdt Type

This field displays one of the following values, based on the record specified in the Record (Table) Name field:

Effective Date

Begin-End Date

Fixed Date

Only retro triggers can have a trigger effdt type of *Fixed Date.* To generate retro triggers with a fixed trigger effective date, you must pass the date as a parameter to the generic PeopleCode function *Generate_Triggers.* The system generates only one trigger regardless of the number of data changes.

See Reviewing PeopleSoft Delivered Triggers.

List Fields with Trigger

If you select *Field* in the Trigger Level field, the List Fields With Trigger group box becomes available.

Field Name

Enter the name of the field that you want to make sensitive to data changes.

Dependent on Field Value

Select this check box to indicate that the fields that you've defined as sensitive to data changes are dependent on specific field values. In this case, only changes to the values you specify on the Trigger Definition - Field Values page will trigger a system action. This enables you to limit the kinds of changes that cause iterative, retroactive, or segmentation processing.

List Field Values

This link becomes available when you select the *Dependent on Field Value* check box.

Click to access the Trigger Definitions - Field Values page, where you can list the field values that trigger an action.

Trigger Event ID

This field is required when the trigger level is *Field* and Dependent on Field Value is cleared. Based on the type of trigger you are defining, enter an event ID that you defined on either the Retro Event Definition page or the Segmentation Event Definition page.

Note: This field is not used with iterative triggers.

Trigger Definitions - Field Values Page

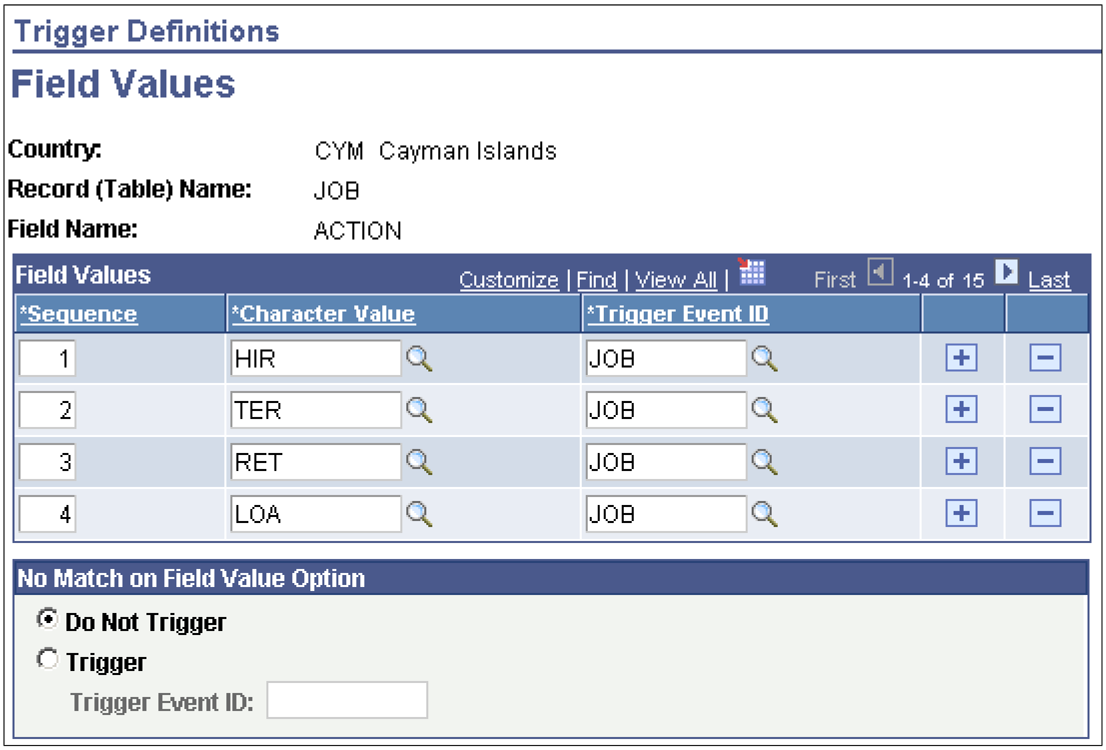
Use the Trigger Definitions - Field Values page (GP_TRGR_SETUP_SEC) to indicate which field values initiate actions.

Navigation

Click the List Field Values link on the Trigger Definitions page.

Image: Trigger Definitions – Field Values page

This example illustrates the fields and controls on the Trigger Definitions – Field Values page.



Field Values

Sequence

Enter a sequence number, which the system needs to uniquely identify the field values and distinguish them from other rows of data that you might set up.

Numeric Value

If the record and field combination stores numeric values, this field is available for entry. Enter the value that triggers a system action.

Character Value

If the record and field combination stores character values, this field is available for entry. Enter the value that triggers a system action.

Date Value

If the record and field combination stores date values, this field is available for entry. Enter the value that triggers a system action.

Trigger Event ID

This field is required when the trigger level is *Field* and Dependent on Field Value is selected. Based on the type of trigger you are defining, enter an event ID that you defined on either the Retro Event Definition page or the Segmentation Event Definition page.

Note: This field is not used with iterative triggers.

Offset Days

This field is available only when the trigger type is *Retro.*

Enter a positive or negative number to increase or decrease the retro trigger effective date relative to the date of a database change. For example, if you enter -1 in the Offset Days field for one of the values listed in the Field Values group box, and you retroactively enter that value into the database with an effective date of January 1, 2000, the system automatically adjusts the trigger effective date to December 31, 1999 (one day earlier). The system then processes pay periods going back to December 1999 rather than January 2000.

No Match on Field Value Option

Use the fields in this group box to specify a default trigger event ID to use when a change to a field involves values other than those listed on the Trigger Definitions – Field Values page. Use these fields only if you want these other values to trigger iterative, retro, or segmentation processing.

Do Not Trigger

This option is selected by default because the system assumes that triggers should be generated only when there is a match between values actually entered in the database and the field values that you identify on the Trigger Definitions – Field Values page.

Trigger

When you select this option, the Trigger Event ID field becomes available for entry.

Trigger Event ID

Enter a default trigger event ID to use to process field values that are not linked to a trigger event ID on the Trigger Definitions – Field Values page.

Example: Using Offset Days with Retro Triggers

In PeopleSoft system considers the effective date of a termination entered in the Action field in the JOB record to be the first day that a payee is no longer working (in other words, the day before the termination is the last day the payee is considered active). If you attach a trigger to this field to process retroactive terminations, the system, by default, sets the trigger effective date equal to the effective date of the termination row in JOB. This can create problems when the termination effective date is equal to the period begin date (meaning, the last day worked is the last day of the prior pay period). For example, assume that you enter a termination in the JOB record on February 1 after processing and closing the January calendar. In this situation, the system generates a retro trigger with an effective date of February 1, which is within the current period—a period in which the payee is "inactive" and will not be picked up for processing. Because there is no trigger in the prior, closed period (January), this period will not be recalculated and any rules you have set up to generate termination payments will not be processed. To avoid this problem, set the offset days for the *Termination* action value in the JOB record equal to *-1.*

Related Links

Understanding Retroactive Processing

Implementing Triggers

To implement the trigger definitions you have defined, you must set up your system so that the records used in these definitions declare and call the function Generate_Triggers in one of their field's SavePostChange PeopleCode. This PeopleCode has already been added to most of the records for which you are likely to define triggers—such as JOB—so it is unlikely that you will have to perform this step more than a few times. However, if you do need to add a trigger to a record, complete these steps.

Note: We provide a list of the records to which the SavePostChange PeopleCode has been added at the end of this documentation.

1. Declare the function that generates triggers:

   ```
   Declare Function Generate_Triggers PeopleCode
   FUNCLIB_GP.TRGR_FUNCTIONS FieldFormula;
   ```

2. Declare a local date variable as:

   ```
   Local date &L_DT;
   ```

3. Invoke the function as:

   ```
   Generate_Triggers(EMPLID, &L_DT);
   ```

The function Generate_Triggers is defined in FUNCLIB_GP.TRGR_FUNCTIONS.FieldFormula and needs two parameters when it's invoked. The parameters are:

1. &P_EMPLID

   Indicates the EMPLID for which the triggers are to be generated. Use field EMPLID for &P_EMPLID.

2. &P_FIXED_DT

   Holds the value of the trigger effective date for records with a Trigger Effdt Type of *Fixed Date.* It is ignored for records with a Trigger Effdt Type of *Effdt* or *Begin-End Date.* Use &L_DT for &P_FIXED_DT.

The variable &L_DT needs to be assigned a value only in case of the Fixed Date type of triggers. Examples are the positive input records, the Manual Positive Input table (GP_PI_MNL_DATA) and the Manual Positive Input Supporting Element Override table (GP_PI_MNL_SOVR).

Note: You can enter PeopleCode that can invoke the function only if certain conditions are met, as discussed in example 2 below.

The following example is from PeopleCode that's delivered with the database. The example shows changes necessary for any additional records that are to generate triggers.

Example: Trigger Record = GP_PYE_SOVR

Sample PeopleCode:

```
PeopleCode on GP_PYE_SOVR.EMPLID.SavePostChange

Declare Function Generate_Triggers PeopleCode
```



```
FUNCLIB_GP.TRGR_FUNCTIONS FieldFormula;

Local date &L_DT;

/*-----Function to generate Triggers for Global Payroll---*/

Generate_Triggers(EMPLID, &L_DT);
```

In this example, &L_DT isn't assigned a value, because the Trigger Effdt Type for the Payee Supporting Element Override table (GP_PYE_SOVR) is not *Fixed Date*.

Related Links

Reviewing PeopleSoft Delivered Triggers

Managing Automatically Generated Triggers and Defining Triggers Manually

This topic discusses how to:

- View, add, or cancel segmentation triggers.
- View, add, or cancel retroactive triggers.
- View the trigger status for iterative triggers.
- View iterative triggers by calendar group ID.

Pages Used to Manage Triggers and Enter Triggers Manually

Page Name	***Definition Name***	***Navigation***	***Usage***
Segmentation	GP_TRIGGER_SEG	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Triggers, Segmentation	View, add, or cancel segmentation triggers by payee. A segmentation trigger must be active to be viewed or managed on this page.
Retro	GP_TRIGGER_RTO	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Triggers, Retro	View, add, or cancel retroactive triggers by payee. A retroactive trigger must be unprocessed to be viewed or managed on this page.
Iterative	GP_TRIGGER_ITER	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Triggers, Iterative	View iterative triggers by payee. An iterative trigger must be unprocessed to be viewed on this page.
Review Iterative Triggers	GP_TRGRITER_CALRUN	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Iterative Triggers, Review Iterative Triggers	View iterative triggers by calendar group ID. An iterative trigger must be unprocessed to be viewed on this page.

Understanding Trigger Management And Manual Trigger Entry

Use the Review Triggers (GP_TRIGGER) and Review Iterative Triggers (GP_TRGRITER_CALRUN) components to:

- Review and manage triggers generated automatically by the online system.
- Define retro and segmentation triggers manually when you want to bypass the setup for online trigger generation.
- View the *source* record or field for a trigger as well as the field value changes that cause iterative, segmentation, or retro processing. This information is useful for debugging and troubleshooting when you are trying to determine why a particular instance of iterative, retro, or segmentation processing took place.

Note: The system does not display source data for manually defined triggers.

Note: You cannot define iterative triggers manually using the Review Triggers (GP_TRIGGER) or Review Iterative Triggers (GP_TRGRITER_CALRUN) components.

Segmentation Page

Use the Segmentation page (GP_TRIGGER_SEG) to view, add, or cancel segmentation triggers by payee.

A segmentation trigger must be active to be viewed or managed on this page.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Triggers, Segmentation

Image: Segmentation page – Event ID tab

This example illustrates the fields and controls on the Segmentation page – Event ID tab.

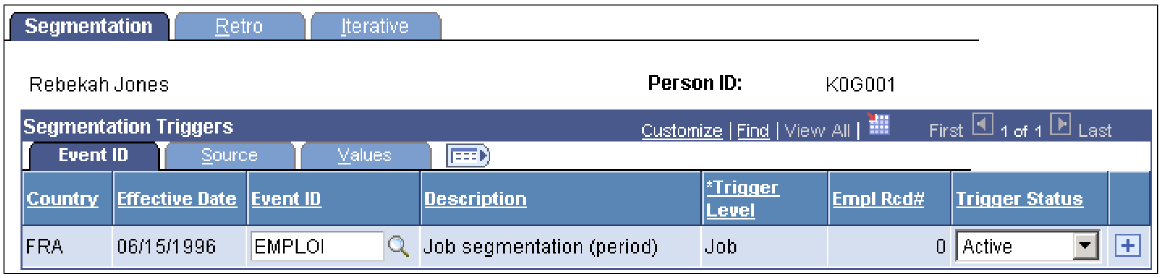


Image: Segmentation page – Source/TS tab

This example illustrates the fields and controls on the Segmentation page – Source/TS tab.

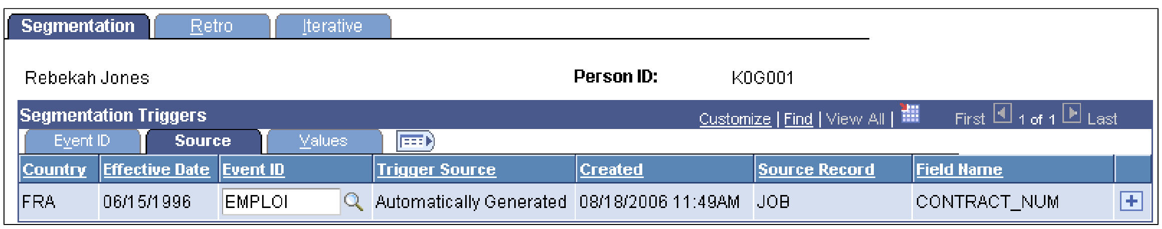
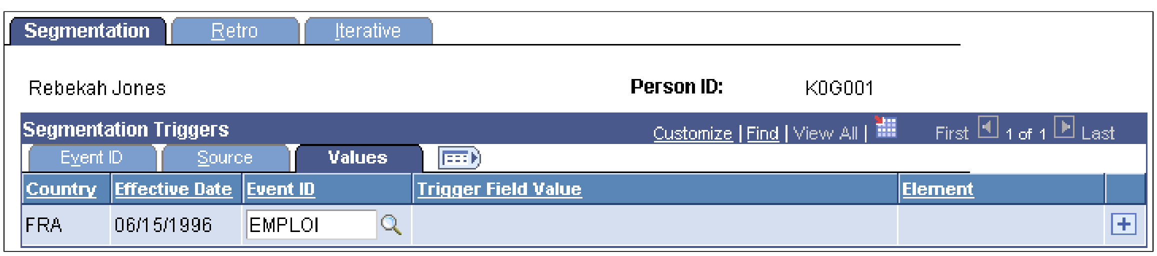


Image: Segmentation page – Value tab

This example illustrates the fields and controls on the Segmentation page – Value tab.



Event ID

Select the Event ID tab.

Use the fields on the Event ID tab to view basic data such as the trigger effective date and trigger event ID for an automatically generated segmentation trigger, or add this data to define a trigger manually.

Country

Displays the country to which the trigger applies.

Enter a country code if you are creating a trigger manually.

Effective Date

Displays the trigger effective date in relation to which a pay period or the elements in a pay period are segmented.

	Enter a trigger effective date if you are defining a trigger manually.
Event ID	Displays the event ID, which tells the system what type of segmentation to use to process segmentation events and which elements to segment (in the case of element segmentation). The event IDs displayed here are those that you defined on the Segmentation Event Definition page. Enter an event ID if you are creating a trigger manually.
Description	Displays a description of the trigger event ID that you defined on the Segmentation Event Definition page.
Trigger Level	Options are: *Payee:* If the trigger level is *Payee,* the system segments pay elements for all jobs belonging to the payee. *Job:* If the trigger level is *Job,* the system segments pay elements for the job identified by the employee record number in the Empl Rcd # field.
Empl Rcd# (employee record number)	Displays the employee record number (job) affected by the segmentation trigger. If you are defining triggers manually, select the employee record number (job) for which you want to create a trigger. If the trigger level is *Payee,* the system automatically sets the value of this field to *0.*
Trigger Status	Select a trigger status. Options are: *Active:* By default, the value of this field is *Active.* *Canceled:* Select to cancel an active segmentation trigger. When you select *Canceled,* the trigger disappears when you click Save and reenter the page.

Source/TS

Select the Source/TS tab.

Use the Source/TS tab to view the source record and field for a segmentation trigger.

The system displays either the source record, or both the source record and field for a trigger, depending on the trigger level:

Trigger Level	***Information Displayed***
Record	Record Information

Trigger Level	***Information Displayed***
Field, Non-Value Based	Record and Field Information
Field, Value-Based	Record and Field Information

Country Same as the Country field on the Event ID tab.

Effective Date Same as the Effective Date field on the Event ID tab.

Event ID Same as the Event ID field on the Event ID tab.

Trigger Source Displays one of the following values:

- *Automatically Generated*

  Indicates that the trigger was created by the online system based on predefined conditions specified during setup.

- *Manually Generated*

  Indicates that the trigger was manually entered on this page.

Source Record View the record that is the source of a trigger.

For manually defined triggers, this field is blank.

Field Name View the field that is the source of the trigger.

For manually defined triggers, this field is blank.

Timestamp Displays the day and time the trigger was created.

For manually defined triggers, this field is blank.

Value

Select the Value tab.

Use the Value tab to determine what field value change caused the system to generate a segmentation trigger.

The system displays field values only for triggers at the following trigger levels:

Trigger Level	***Information Displayed***
Field, Non-Value Based	Field Value Information For segmentation triggers generated from effective-dated records, the system displays the character, date, or numeric value that triggers segmentation.

Trigger Level	***Information Displayed***
Field, Value-Based	Field Value Information For segmentation triggers generated from effective-dated records, the system displays the character, date, or numeric value that triggers segmentation.

Country Same as the Country field on the Event ID and Source/TS tabs.

Effective Date Same as the Effective Date field on the Event ID and Source/TS tabs.

Event ID Same as the Event ID field on the Event ID and Source/TS tabs.

Character Value Displays the character value that generates a trigger.

Numeric Value Displays the numeric value that generates a trigger.

Date Value Displays the date value that generates a trigger.

Adding Manual Segmentation Triggers

To manually insert a segmentation trigger:

- Enter a country and an effective date on the Segmentation page – Event ID tab. The system uses the effective date that you specify as the basis for the trigger effective date.
- Specify an event ID for the trigger on the Segmentation page – Event ID tab.

  The system uses the event ID to determine which type of segmentation to use and which elements to segment in the case of element segmentation.

The system sets the trigger source to *Manual,* and the trigger status to *Active.*

Note: Unlike automatically generated triggers, manual triggers are independent of any database change defined by a record or record and field combination on the Triggers Definition page. It's important to understand the potential consequences of creating manual triggers. Because they aren't linked to a specific data change, you might segment periods and elements where nothing has changed.

Updating and Canceling Segmentation Triggers

For automatically and manually generated rows of trigger data:

- You can change the event ID.
- You can change the trigger status from *Active* to *Canceled.*
- You cannot reinstate a canceled trigger; you must add a new manual trigger.

For the effective date on generated rows of trigger data:

- The effective date on the Segmentation page is the date in relation to which segmentation occurs.

- You can change the effective date of a manually generated trigger.
- You cannot alter the effective date of a trigger that was generated by the system based on predefined setup rules.

Related Links

Segmentation and Retro

Retro Page

Use the Retro page (GP_TRIGGER_RTO) to view, add, or cancel retroactive triggers by payee.

A retroactive trigger must be unprocessed to be viewed or managed on this page.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Triggers, Retro

Image: Retro page – Event ID tab

This example illustrates the fields and controls on the Retro page – Event ID tab.

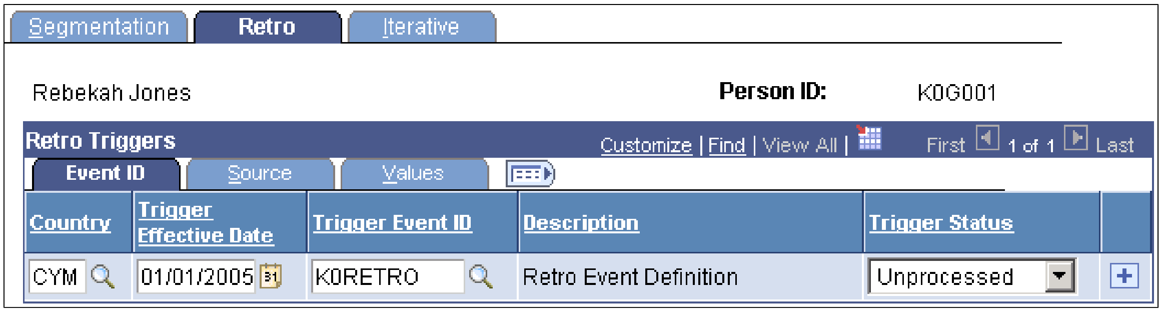


Image: Retro page – Source tab

This example illustrates the fields and controls on the Retro page – Source tab.

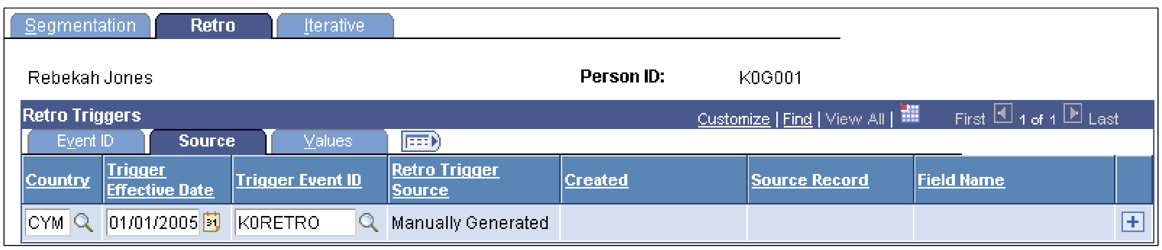
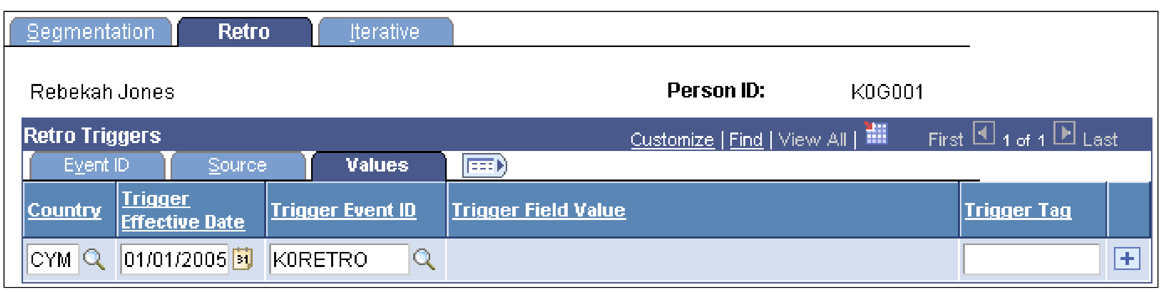


Image: Retro page – Values tab

This example illustrates the fields and controls on the Retro page – Values tab.



Event ID

Select the Event ID Tab.

Use the fields on the Event ID tab to view basic data such as the trigger effective date and trigger event ID for an automatically generated retro trigger, or add this data to define a trigger manually.

Country Displays the country to which the trigger applies.

Enter a country code if you are creating a trigger manually.

Trigger Effective Date Displays the trigger effective date. The system uses this date to determine which pay periods to recalculate.

Enter a trigger effective date if you are defining a trigger manually.

Event ID Displays the event ID, which tells the system what retro event definition to use to process the retroactive data. The event IDs displayed here are those that you defined on the Retro Event Definition page.

Enter an event ID if you are creating a trigger manually.

Description Displays a description of the trigger event ID that you defined on the Retro Event Definition page.

Trigger Status Select a trigger status.

Options are:

Unprocessed: By default, the value of this field is *Unprocessed.*

Canceled: Select to cancel a retro trigger. When you select *Canceled,* the trigger disappears when you click Save and reenter the page.

Source

Select the Source tab.

Use the Source tab to view the source record and field for a retro trigger.

The system displays either the source record, or both the source record and field for a trigger, depending on the trigger level:

Trigger Level	*Information Displayed*
Record	Record Information
Field, Non-Value Based	Record and Field Information
Field, Value-Based	Record and Field Information

Country Same as the Country field on the Event ID tab.

Effective Date Same as the Effective Date field on the Event ID tab.

Event ID Same as the Event ID field on the Event ID tab.

Trigger Source Displays one of the following values:

- *Automatically Generated*

Indicates that the trigger was created by the online system based on predefined conditions specified during setup.

- *Manually Generated*

  Indicates that the trigger was manually entered on this page.

- *Benefits Administration*

  Indicates that the trigger originates from a PeopleSoft Benefits Administration record.

- *Mass Triggers*

  Indicates that the trigger was generated using the mass trigger setup.

  See Understanding Mass Triggers.

- *Utility Generated*

  Indicates that the trigger was created by third-party software.

Trigger Tag If a trigger is utility-generated, this field displays the source of the trigger.

Source Record View the record that is the source of a trigger.

For manually defined triggers, this field is blank.

Field Name View the field that is the source of the trigger.

For manually defined triggers, this field is blank.

Value

Select the Value tab.

Use the Value tab to determine what field value change caused the system to generate a retro trigger.

The system displays field values (character, date, or numeric values) only for triggers at the following trigger levels:

- Field, Non-Value Based
- Field, Value-Based

Country Same as the Country field on the Event ID and Source tabs.

Trigger Effective Date Same as the Trigger Effective Date field on the Event ID and Source tabs.

Event ID Same as the Event ID field on the Event ID and Source tabs.

Character Value	Displays the character value that generates a trigger.
Numeric Value	Displays the numeric value that generates a trigger.
Date Value	Displays the date value that generates a trigger.
Timestamp	Displays the day and time the trigger was created. For manually defined triggers, this field is blank.

Adding Manual Retroactive Triggers

To manually insert a retro trigger:

- Enter the country and an effective date on the Retro page.

  The system uses the effective date to determine which periods to recalculate, as in standard retroactivity.

- Connect the trigger to an event ID.

  The system uses the event ID that you specify to determine how retroactivity should be processed.

The system sets the trigger source to *Manual* and the trigger status to *Unprocessed.*

Note: Unlike automatically generated triggers, manual triggers are independent of any database changes to a record or a record and field combination. It's important to understand the potential consequences of creating manual triggers. Because they aren't linked to a specific data change, you might process retroactivity in previous periods, where nothing has changed.

Warning! If you add or cancel a retroactive trigger, you should adjust the corresponding retroactive data in the database.

Updating and Canceling Retroactive Triggers

For automatically and manually generated rows of trigger data:

- You can change the event ID.
- You can change the trigger status from *Unprocessed* to *Canceled.*

  After a trigger is processed, you cannot alter the trigger status, because it's no longer unprocessed and therefore doesn't appear on the Retro page.

- You cannot reinstate a canceled trigger.

  You must add a new manual trigger.

For the trigger effective date on generated rows of trigger data:

- The trigger effective date on the Retro page is the date the system uses to determine what periods to process.
- You can change the trigger effective date of a manually generated trigger (trigger source = *Manual).*

- You cannot alter the trigger effective date of a trigger that has been generated by the system based on predefined setup rules.

Warning! Canceling a trigger does not undo the database change that created the trigger. If there's retroactivity for another reason, this change can be picked up when prior periods are recalculated.

Iterative Page

Use the Iterative page (GP_TRIGGER_ITER) to view iterative triggers by payee.

An iterative trigger must be unprocessed to be viewed on this page.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Triggers, Iterative

Image: Iterative page – Calendar Group tab

This example illustrates the fields and controls on the Iterative page – Calendar Group tab.

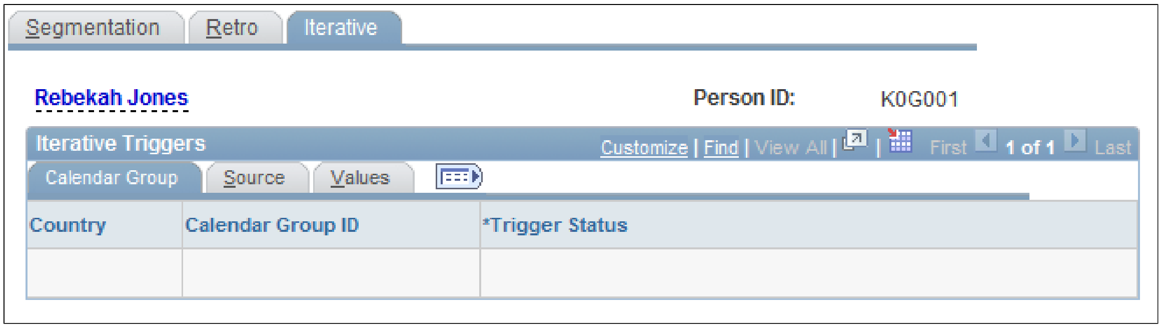


Image: Iterative page – Source tab

This example illustrates the fields and controls on the Iterative page – Source tab.

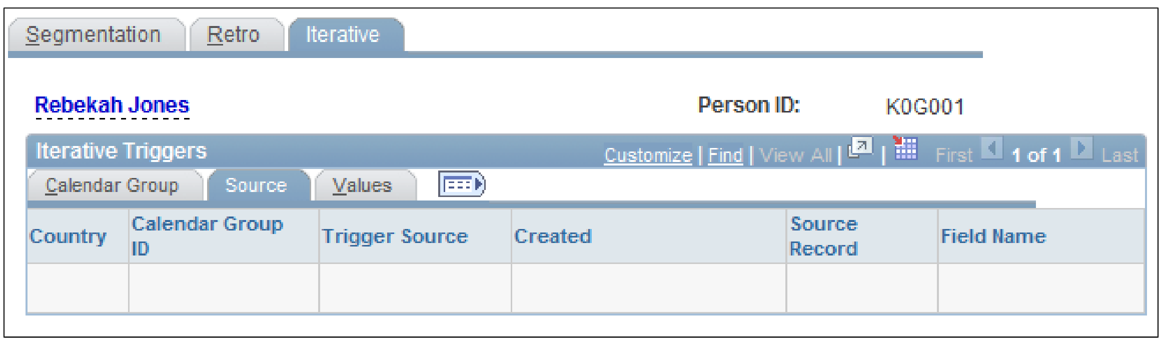
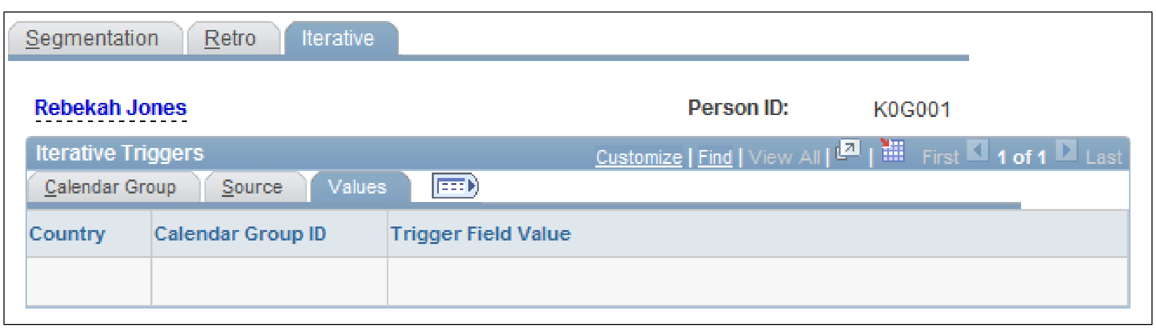


Image: Iterative page – Values tab

This example illustrates the fields and controls on the Iterative page – Values tab.



Calendar Group

Select the Calendar Group tab.

Use the fields on the Calendar Group tab to view basic data such as the trigger effective date and calendar group ID for an automatically generated iterative trigger.

Country Displays the country to which the trigger applies.

Calendar Group ID Identifies the calendar group in which the iterative trigger is processed.

Trigger Status Select a trigger status.

Options are:

Unprocessed: By default, the value of this field is *Unprocessed.*

Canceled: Select to cancel an iterative trigger. When you select *Canceled,* the trigger disappears when you click Save and reenter the page.

Source

Select the Source tab.

Use the Source tab to view the source record and field for an iterative trigger.

The system displays either the source record, or both the source record and field for a trigger, depending on the trigger level:

Trigger Level	***Information Displayed***
Record	Record Information
Field, Non-Value Based	Record and Field Information
Field, Value-Based	Record and Field Information

Country Same as the Country field on the Calendar Group tab.

Calendar Group ID Same as the Calendar Group ID field on the Calendar Group tab.

Trigger Source Displays one of the following values:

- *Batch*

  Indicates that the trigger was generated by the system during batch processing.

- *Online*

  Indicates that the trigger was generated by the online code based on conditions that you specified during setup.

- *Benefits Administration*

  Indicates that the trigger originates from a Benefits Administration record.

- *Mass Trigger*

  Indicates that the trigger was generated using mass triggers.

  See Understanding Mass Triggers.

- *Uncancel*

  Indicates that the trigger was created when the payee's status was set to *Uncancel* on the Payee Status page.

- *Unsuspend*

  Indicates that the trigger was created when the payee's status was set to *Unsuspend* on the Payee Status page.

- *Time & Labor*
- *Time & Labor Feed*

Source Record View the record that is the source of a trigger.

Field Name View the field that is the source of a trigger.

Values

Select the Values tab.

Use the Values tab to determine what field value change caused the system to generate an iterative trigger.

The system displays field values (character, date, or numeric values) only for triggers at the following trigger levels:

- Field, Non-Value Based
- Field, Value-Based

Country Same as the Country field on the Source tab.

Calendar Group ID Same as the Calendar Group ID field on the Source tab.

Character Value Displays the character value that generates a trigger.

Numeric Value Displays the numeric value that generates a trigger.

Date Value Displays the date value that generates a trigger.

Timestamp Displays the day and time the trigger was created.

Adding Manual Iterative Triggers

You cannot manually insert a row of trigger data on this page.

Updating and Canceling Iterative Triggers

For automatically generated rows of trigger data, you can change the trigger status from *Unprocessed* to *Canceled.* After a trigger is processed, you cannot alter the trigger status, because it's no longer unprocessed and therefore doesn't appear on the Iterative page.

Review Iterative Triggers Page

Use the Review Iterative Triggers page (GP_TRGRITER_CALRUN) to view iterative triggers by calendar group ID.

An iterative trigger must be unprocessed to be viewed on this page.

Navigation

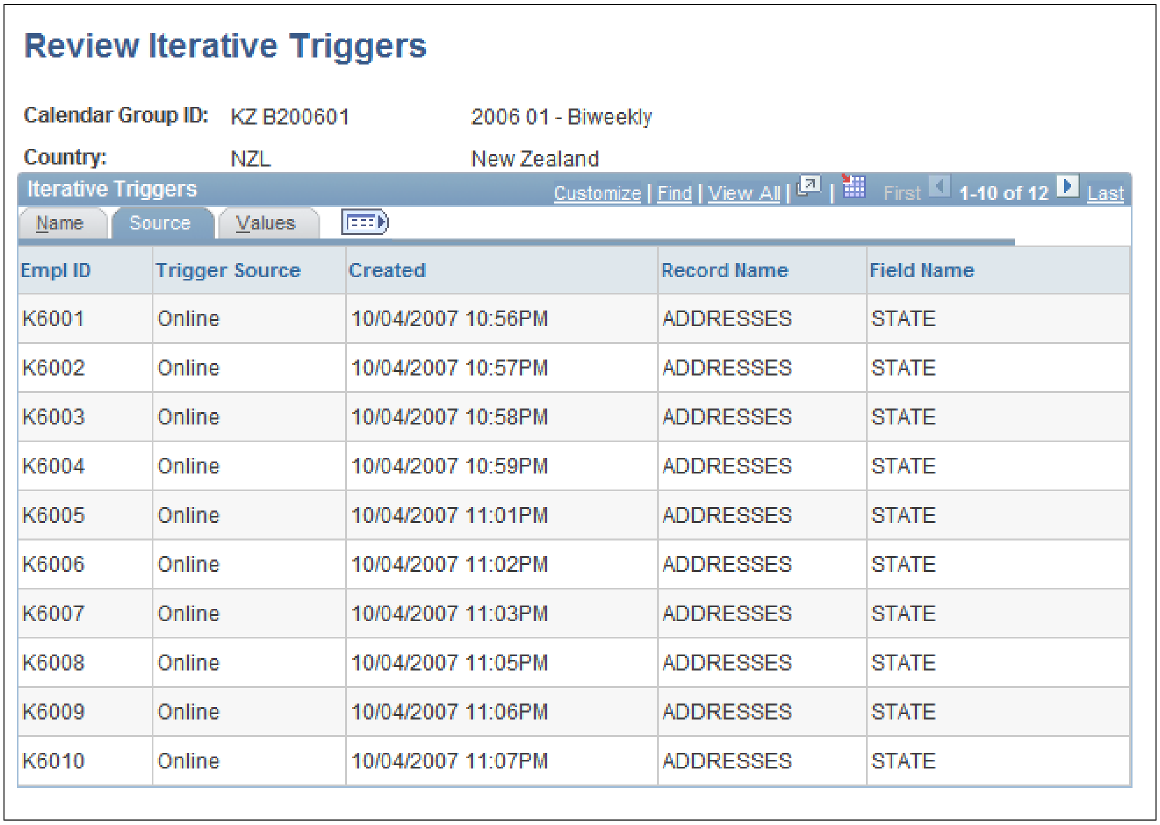
Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Iterative Triggers, Review Iterative Triggers

Image: Review Iterative Triggers page – Name tab

This example illustrates the fields and controls on the Review Iterative Triggers page – Name tab.

Image: Review Iterative Triggers page – Source tab

This example illustrates the fields and controls on the Review Iterative Triggers page – Source tab.



Review Iterative Triggers

Calendar Group ID: KZ B200601 2006 01 - Biweekly

Country: NZL New Zealand

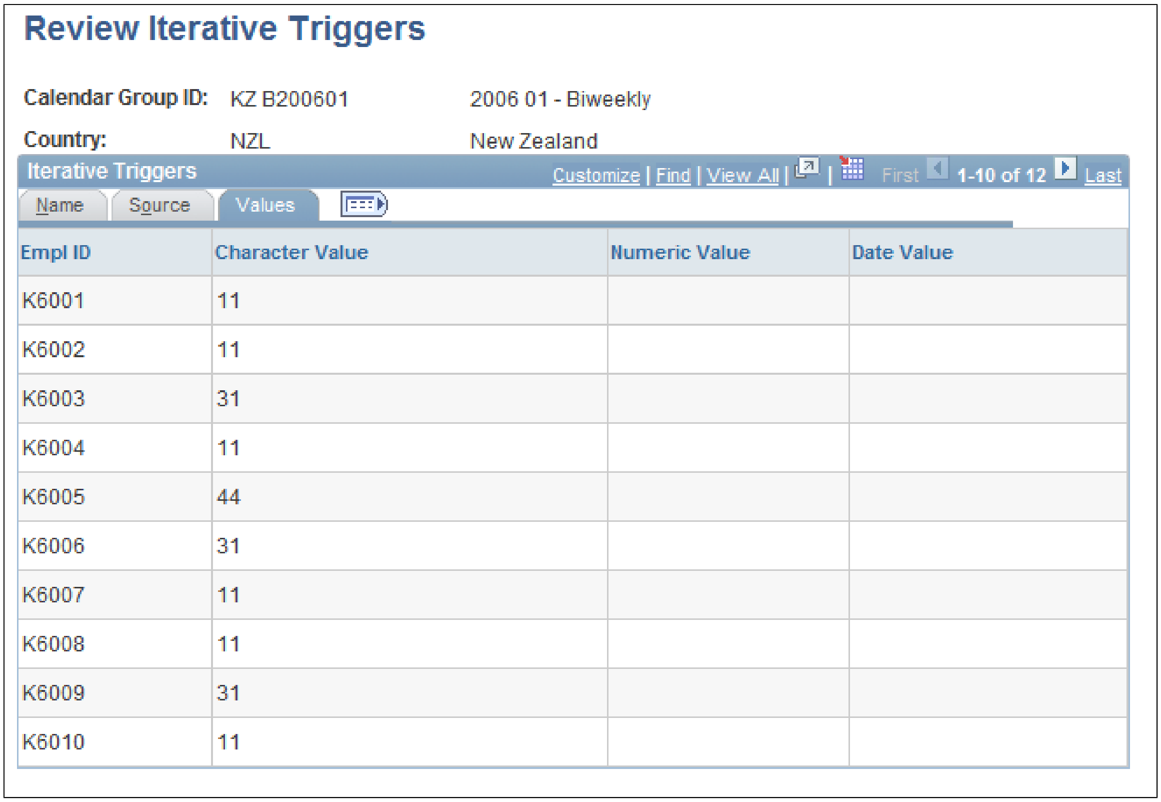
Iterative Triggers Customize | Find | View All | | First 1-10 of 12 Last

Name Source Values

Empl ID	Trigger Source	Created	Record Name	Field Name
K6001	Online	10/04/2007 10:56PM	ADDRESSES	STATE
K6002	Online	10/04/2007 10:57PM	ADDRESSES	STATE
K6003	Online	10/04/2007 10:58PM	ADDRESSES	STATE
K6004	Online	10/04/2007 10:59PM	ADDRESSES	STATE
K6005	Online	10/04/2007 11:01PM	ADDRESSES	STATE
K6006	Online	10/04/2007 11:02PM	ADDRESSES	STATE
K6007	Online	10/04/2007 11:03PM	ADDRESSES	STATE
K6008	Online	10/04/2007 11:05PM	ADDRESSES	STATE
K6009	Online	10/04/2007 11:06PM	ADDRESSES	STATE
K6010	Online	10/04/2007 11:07PM	ADDRESSES	STATE

Image: Review Iterative Triggers page – Values tab

This example illustrates the fields and controls on the Review Iterative Triggers page – Values tab.



Empl ID	Character Value	Numeric Value	Date Value
K6001	11		
K6002	11		
K6003	31		
K6004	11		
K6005	44		
K6006	31		
K6007	11		
K6008	11		
K6009	31		
K6010	11		

Name

Select the Name tab.

Use the fields on the Name tab to view basic data such as the EmplID, employee name, and status associated with an automatically generated trigger.

EmplID Displays the EmplID of the payee associated with the iterative trigger.

Name Displays the name of the payee associated with the iterative trigger.

Trigger Status Select a trigger status.

Options are:

Unprocessed: By default, the value of this field is *Unprocessed.*

Canceled: Select to cancel an iterative trigger. When you select *Canceled,* the trigger disappears when you click Save and reenter the page.

Source

Select the Source tab.

Use the Source tab to view the source record and field for an iterative trigger.

The system displays either the source record, or both the source record and field for a trigger, depending on the trigger level:

Trigger Level	***Information Displayed***
Record	Record Information
Field, Non-Value Based	Record and Field Information
Field, Value-Based	Record and Field Information

EmplID Same as the EmplID field on the Name tab.

Name Same as the Name field on the Name tab.

Trigger Source Displays one of the following values:

- *Batch*

  Indicates that the trigger was generated by the system during batch processing.

- *Online*

  Indicates that the trigger was generated by the online code based on conditions that you specified during setup.

- *Benefits Administration*

  Indicates that the trigger originates from a Benefits Administration record.

- *Mass Trigger*

  Indicates that the trigger was generated using mass triggers.

  See Understanding Mass Triggers.

- *Uncancel*

  Indicates that the trigger was created when the payee's status was set to *Uncancel* on the Payee Status page.

- *Unsuspend*

  Indicates that the trigger was created when the payee's status was set to *Unsuspend* on the Payee Status page.

- *Time & Labor*

- *Time & Labor Feed*

Record Name View the record that is the source of a trigger.

Field Name View the field that is the source of a trigger.

Values

Select the Values tab.

Use the Values tab to determine what field value change caused the system to generate an iterative trigger.

The system displays field values (character, date, or numeric values) only for triggers at the following trigger levels:

- Field, Non-Value Based
- Field, Value-Based

EmplID Same as the EmplID field on the Source tab.

Name Same as the Name field on the Source tab.

Character Value Displays the character value that generates a trigger.

Numeric Value Displays the numeric value that generates a trigger.

Date Value Displays the date value that generates a trigger.

Timestamp Displays the day and time the trigger was created.

Reviewing PeopleSoft Delivered Triggers

To facilitate trigger generation, Absence Management delivers the following records with trigger PeopleCode attached. These are delivered as a starting point. You can add trigger-generating PeopleCode to other records to meet your specific business needs, or delete the PeopleCode from any of these records:

Note: Absence Management trigger-generation logic is stored in the FUNCLIB_GP.TRGR_FUNCTIONS FieldFormula PeopleCode. In order for a record to generate triggers, the GENERATE_TRIGGERS function stored there must be declared and called from the record in SavePostedit peoplecode.

See Implementing Triggers.

- ADDRESSES
- BEN_PROG_PARTIC
- COMPENSATION
- CONTRACT_DATA
- DEP_BEN_ADDR

- DEP_BEN_EFF
- DEP_BEN_NAME
- GP_ABS_EVNT
- GP_ABS_OVRD
- GP_OFFCYCL_A_VW
- GP_OFFCYCL_M_VW
- GP_OFFCYCL_M_VW
- GP_OFFCYCL_U_VW
- GP_PI_MNL_DATA
- GP_PI_MNL_D_VW
- GP_PI_MNL_E_VW
- GP_PI_MNL_SOVR
- GP_PI_MNL_SSN
- GP_PYE_OVRD
- GP_PYE_OVR_SOVR
- GP_PYE_SECT_DTL
- GP_PYE_SOVR
- GP_RTO_TRGR
- GP_RTO_TRGR_VW
- GP_SEG_TRGR
- HEALTH_BENEFIT
- JOB
- JOB_JR
- LIFE_ADD_BEN
- LIFE_ADD_BENEFC
- PERSON
- PERS_DATA_EFFDT
- PER_ORG_ASGN
- PRIMARY_JOBS

- SCH_ASSIGN
- SCH_MNG
- SCH_TBL
- WKF_CNT_TYPE

Note: PeopleSoft recommends that you set up period segmentation triggers for changes in the Pay System Flag and Pay Group fields on the JOB record.

Chapter 28

Setting Up Mass Triggers

Understanding Mass Triggers

This feature enables you to generate employee triggers based on changes to setup tables. Mass triggers can be established for specific records on specific components. A set of SQL objects defines the population affected by the setup table change. Once the affected employees are determined, you can review the trigger details before accepting the changes.

To set up mass triggers you must:

- Define the component/record and fields that activate the trigger on the Mass Trigger Definition page.

  See Mass Trigger Definition Page.

- Set up the SQL objects that will check the records to determine the population affected by the setup table change. You must define the SQL objects using PeopleTools and select them on the Mass Trigger SQL page.

  See Mass Trigger SQL Page.

- Set up your system so that the records used in the mass trigger definitions declare and call the function Generate_Triggers in one of their field's SavePostChange PeopleCode.

  See Declaring and Calling the Generate_Triggers Function.

The mass trigger event process occurs in three steps:

1. After saving the page containing the component/record and fields that activate the mass trigger, the event and the field values are stored in the mass trigger result table (GP_MT_TRIGGER). The event status is set to Unexpanded.
2. The system evaluates the SQL objects and writes the results to the mass trigger results table (GP_MT_RESULT), which records the impacted population. The event status is set to Expanded, if all objects expand successfully.
3. The system generates a list of retro and iterative triggers for the impacted population. Once completed, the event status is set to Triggers Generated.

You can view the events and their results on the Mass Trigger Events component. The system enables you to do the following:

- Delete a trigger event using the Mass Trigger Events page. This includes the mass trigger, the impacted population, and the generated payee triggers. Deletion cannot occur if any of the generated triggers have been processed.

  See Mass Trigger Events Page.

- Manually expand an event using the Affected Employees page. You may want to generate triggers after correcting an erroneous SQL object. Manually expanded triggers can do the following:

  - Generate the impacted population and the retroactive and iterative triggers for events that have a status of Unexpanded.

  - Generate retroactive and iterative triggers for events that have a status of Expanded.

  See Affected Employees Page.

Declaring and Calling the Generate_Triggers Function

Absence Management trigger-generation logic is stored in the FUNCLIB_GP.TRGR_FUNCTIONS FieldFormula PeopleCode. In order for a record to generate triggers, the GENERATE_TRIGGERS function stored there must be declared and called from the record in SavePostChange PeopleCode. We describe this function in detail with supporting examples in the documentation on defining retroactive, segmentation, and iterative triggers. In this topic, we summarize only the main setup steps.

Using Generate_Triggers PeopleCode

To declare and call the Generate_Triggers function:

1. Declare the function that generates triggers:

   ```
   Declare Function Generate_Triggers PeopleCode
   FUNCLIB_GP.TRGR_FUNCTIONS FieldFormula;
   ```

2. Declare a local date variable as:

   ```
   Local date &L_DT;
   ```

3. Invoke the function as:

   ```
   Generate_Triggers(EMPLID, &L_DT);
   ```

The function Generate_Triggers is defined in FUNCLIB_GP.TRGR_FUNCTIONS.FieldFormula and needs two parameters when it is invoked. These parameters are:

- &P_EMPLID

  Identifies the EMPLID for which a trigger should be generated. Use field EMPLID for &P_EMPLID.

- &P_FIXED_DT

  Holds the value of the trigger effective date for records with a Trigger Effdt Type of *Fixed Date.* It is ignored for records with a Trigger Effdt Type of *Effdt* or *Begin-End Date.* Use &L_DT for &P_FIXED_DT.

The variable &L_DT needs to be assigned a value only in the case of *Fixed Date* type triggers.

Related Links

Implementing Triggers

Setting Up Mass Triggers

This topic discusses how to:

- Define mass triggers.
- Use SQL objects.
- View the SQL statement.

Pages Used to Set Up Triggers

Page Name	***Definition Name***	***Navigation***	***Usage***
Mass Trigger Definition	GP_MT_TRG_DFN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Mass Trigger Definitions, Mass Trigger Definition	Define which record activates the trigger.
Mass Trigger SQL	GP_MT_TRG_SQL	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Mass Trigger Definitions, Mass Trigger SQL	Specify which SQL objects must be executed in order to retrieve the population impacted by a mass trigger event.
View SQL Definition	GP_MT_SQLTXT_SEC	Select the View SQL Definition link on the Mass Trigger SQL page.	View the SQL definition.

Mass Trigger Definition Page

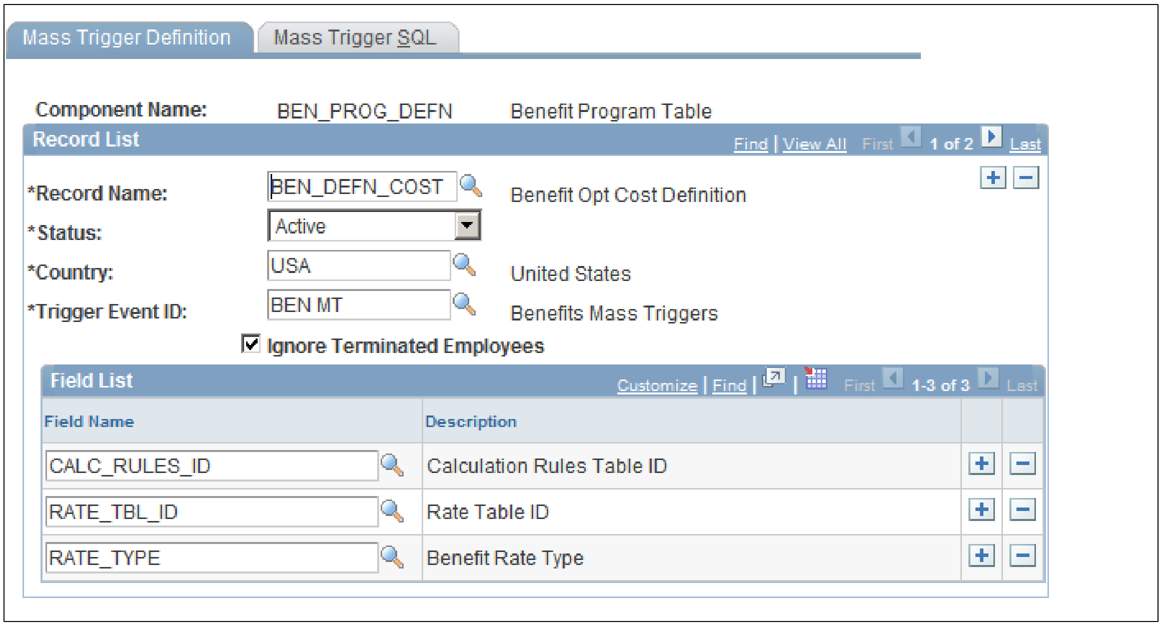
Use the Mass Trigger Definition page (GP_MT_TRG_DFN) to define which record activates the trigger.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Mass Trigger Definitions, Mass Trigger Definition

Image: Mass Trigger Definition page

This example illustrates the fields and controls on the Mass Trigger Definition page.



Trigger Event ID	Associate a Trigger Event ID with the record (table) to link the mass trigger to the retroactive process ID that processes the generated payee triggers.
Ignore Terminated Employees	Select to ignore terminated employees when processing the mass trigger.
Field Name	List the fields that cause the system to generate a mass trigger event. Fields used as input parameters on the SQL Objects page need not be listed here. The system inserts them after saving.

Mass Trigger SQL Page

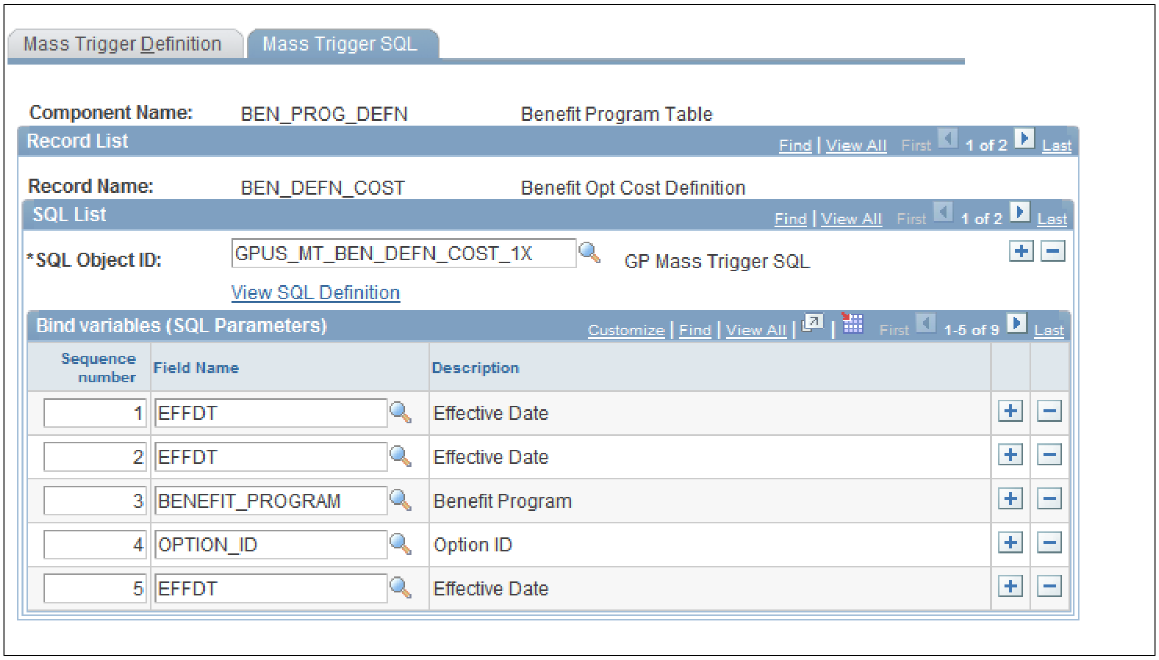
Use the Mass Trigger SQL page (GP_MT_TRG_SQL) to specify which SQL objects must be executed in order to retrieve the population impacted by a mass trigger event.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Mass Trigger Definitions, Mass Trigger SQL

Image: Mass Trigger SQL page

This example illustrates the fields and controls on the Mass Trigger SQL page.



SQL Object ID

Select any stand alone SQL object defined in Application Designer. These objects contain placeholders for input parameters.

View SQL Definition

Click to access the SQL Definition page.

Sequence number

Enter the number of the respective placeholders in the SQL object.

Field Name

Enter the fields used to fill the SQL object placeholders at runtime. Available fields prompt from the record listed above. Once saved, the system adds these fields to the Mass Trigger Definition page.

View SQL Definition Page

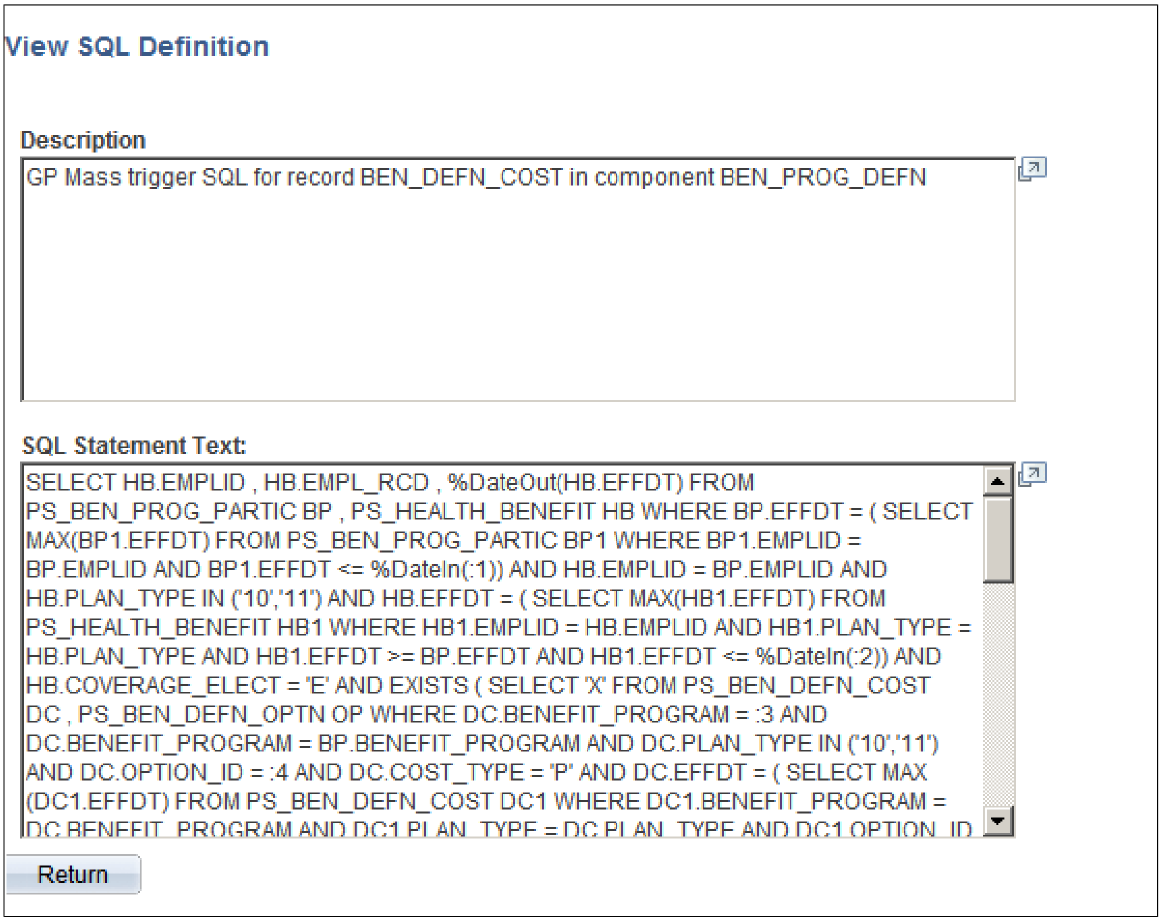
Use the View SQL Definition page (GP_MT_SQLTXT_SEC) to view the SQL definition.

Navigation

Select the View SQL Definition link on the Mass Trigger SQL page.

Image: View SQL Definition page

This example illustrates the fields and controls on the View SQL Definition page.



Use this page to view a description of the SQL statement as well view the actual SQL text.

Managing Mass Trigger Action Events

This topic discusses how to:

- Delete an event.
- Expand an event manually.
- View retroactive triggers.
- View iterative triggers.

Pages Used to Process Trigger Events

Page Name	***Definition Name***	***Navigation***	***Usage***
Mass Trigger Events	GP_MT_TRIGGER	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Mass Trigger Events	View all mass trigger events listed for a component/record. Delete an event.
Mass Trigger Event Messages	GP_MT_MSG_SEC	Click theMessages link on the Mass Trigger Events page.	View a message.
Event Message Detail	GP_MT_MSGLNG_SEC	Click the Details link on the Mass Trigger Event Messages page.	View message details.
Field Values	GP_MT_TRG_VAL	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Field Values	View the field values valid before and after the mass trigger event.
Affected Employees	GP_MT_RESULT	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Affected Employees	View the list of employees affected by the mass trigger event. Manually expand an event.
Retro Triggers	GP_MT_RTO_TRG	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Retro Triggers	View the retroactive triggers generated for a mass trigger event.
Iterative Triggers	GP_MT_ITER_TRG	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Iterative Triggers	View the iterative triggers generated for a mass trigger event.
Triggers by Calendar Group	GP_MT_ITER_SEC	Click the Triggers by Calendar Group link on the Iterative Triggers page.	View triggers by calendar group for a payee.

Mass Trigger Events Page

Use the Mass Trigger Events page (GP_MT_TRIGGER) to view all mass trigger events listed for a component/record.

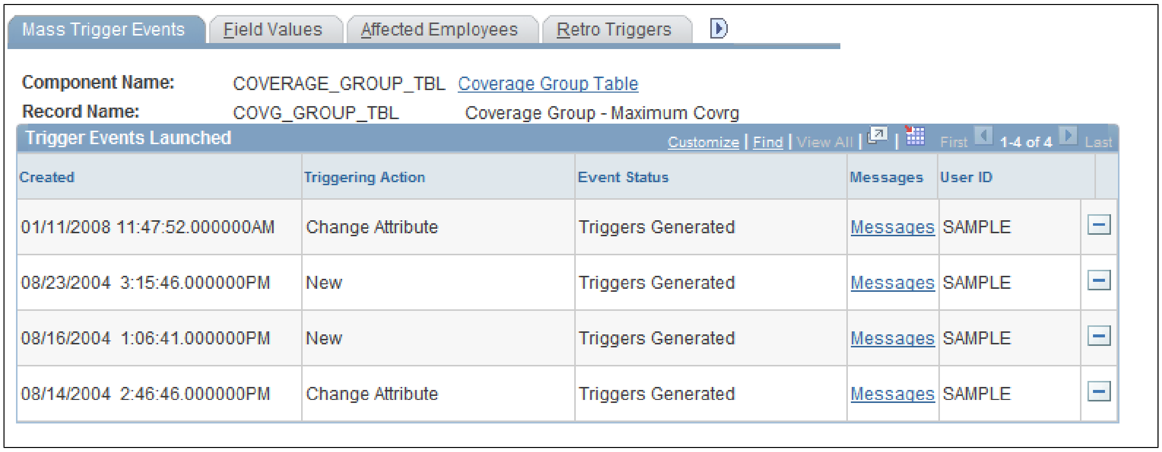
Delete an event.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Mass Trigger Events

Image: Mass Trigger Events page

This example illustrates the fields and controls on the Mass Trigger Events page.



Click the Delete button to delete an event before processing the trigger. This action deletes the event's results tables, thus removing the field values, the list of affected employees, the retroactive triggers and the iterative triggers generated for the event. Only the users who created the trigger event can delete it.

Affected Employees Page

Use the Affected Employees page (GP_MT_RESULT) to view the list of employees affected by the mass trigger event.

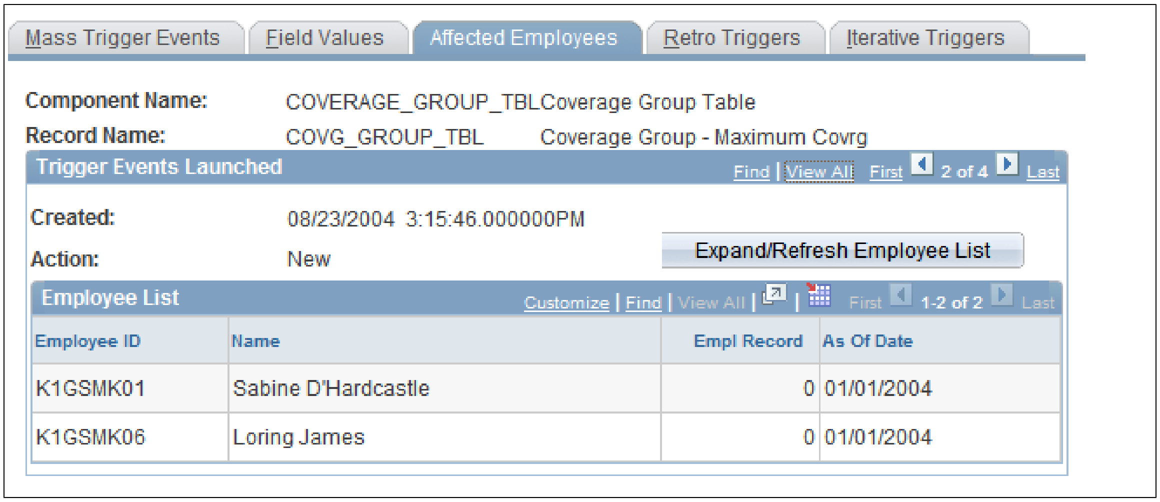
Manually expand an event.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Affected Employees

Image: Affected Employees page

This example illustrates the fields and controls on the Affected Employees page.



Expand/Refresh Employee List

Select to manually expand an event. Once activated, the system deletes the current list and generates a new one. All related retroactive and iterative triggers are also deleted and regenerated. The refresh button can only be activated if none of the related triggers have been processed. Only the user who created the mass trigger event can activate it.

Employee ID

The system generates this list when storing the mass trigger event.

As of Date

The date as of which retroactive or segmentation processing occurs.

Retro Triggers Page

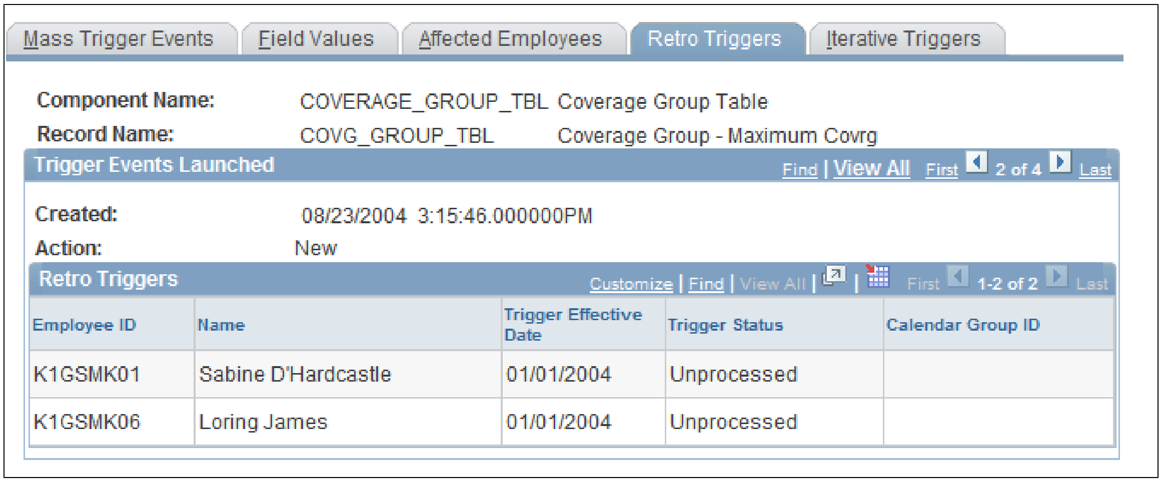
Use the Retro Triggers page (GP_MT_RTO_TRG) to view the retroactive triggers generated for a mass trigger event.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Retro Triggers

Image: Retro Triggers page

This example illustrates the fields and controls on the Retro Triggers page.



Trigger Effective Date Corresponds to the As of Date on the Affected Employees page.

Trigger Status Can either be *Unprocessed, In Process, Processed,* or *Cancelled.*

Calendar Group ID This is the ID used for processing the retroactive trigger.

Iterative Triggers Page

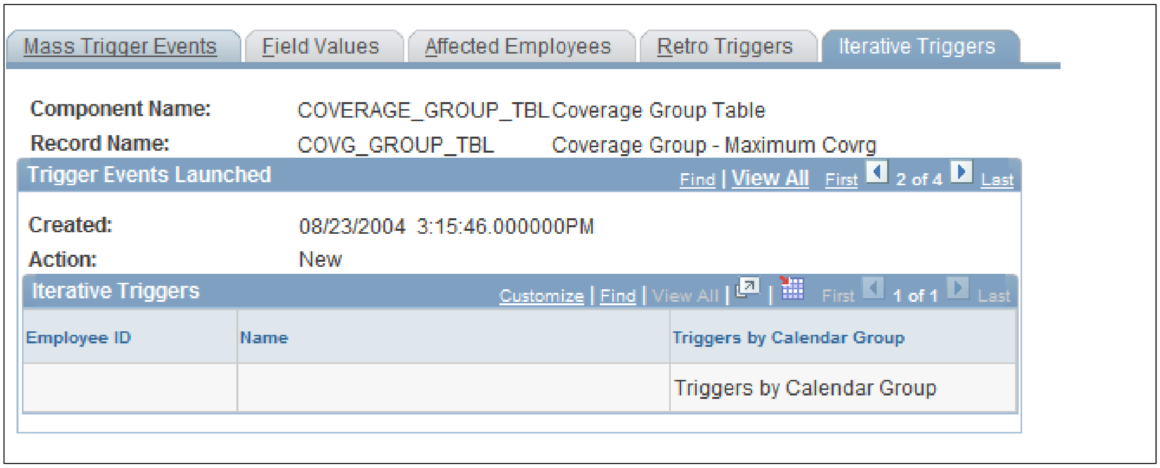
Use the Iterative Triggers page (GP_MT_ITER_TRG) to view the iterative triggers generated for a mass trigger event.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Rvw/Expand Mass Triggers, Iterative Triggers

Image: Iterative Triggers page

This example illustrates the fields and controls on the Iterative Triggers page.



When a mass trigger is expanded, an iterative trigger is generated for every affected employee and for every calendar group ID that is currently open. Click the Triggers by Calendar Group link to access the Calendar Groups page and view the calendar groups for which an iterative trigger has been created.

Chapter 29

Defining Segmentation

Understanding Segmentation Setup

Segmentation refers to the process of calculating all or a subset of elements in a process list in separate slices or segments. You can *segment* calculations based on events such as changes in compensation or employee status during a calculation period. For example, if an individual changes jobs during the period and your organization separates calculations for the first job from those for the second job, you can set up the system to trigger segmentation of entitlement when there's a change to the job change action/reason field in HR.

This topic discusses:

- Types of segmentation.
- Relationship of period, segment, and slice dates.
- Basic rules of element resolution.
- Effective-dated element definitions.
- Rules for slicing accumulators and accumulator members.
- Rules for parent and child element resolutions.
- Segmentation and payee overrides.
- Proration and segmentation.
- Retroactive processing and segmentation.
- Segmentation system elements.

Types of Segmentation

This topic discusses:

- Types of segmentation.
- Selecting elements to segment.

Types of Segmentation

Absence Management offers two types of segmentation:

- Period segmentation

  This type of segmentation is applicable when data that changes mid period, such as a compensation rate, requires all elements in the process list to be calculated repeatedly on either side of the change date. The system divides the period (defined by the period begin and end dates) into two or more distinct segments and treats each segment as a complete and separate set of absence calculations. It calculates each element in the process list for each segment, so a payee has multiple Payee Process Stat records. The system calculates each element using components that were effective during the different time slices.

- Element segmentation

  This type of segmentation is applicable when data that changes mid period requires the affected element (and perhaps a subset of other elements) to be calculated repeatedly on either side of the change date. (Each sub period is called a *slice.)* The system segments only the elements that you select and it creates separate result rows only for the specified elements. In element segmentation, there's only one result set.

Selecting Elements to Segment

With period segmentation, the system segments all elements on the process list automatically. With element segmentation, you must specify which elements in the process list to slice. To do this, you add the elements to be segmented to an *element list* that you define using the Segmentation Event Definition page.

Related Links

Segmentation Event Definition Page

Relationship of Period, Segment, and Slice Dates

For every absence period, the system generates begin and end dates for:

- Periods

  The calendar period—monthly, biweekly, or weekly—used to group and calculate a payee's absence entitlement and take. Each period has a begin and end date and can be sliced or segmented.

- Segments

  A *sub period* of time in the normal period that's created due to period segmentation. Each segment represents a separate calculation of every element in the period and has begin and end dates. Individual elements can be *sliced* within a sub period.

- Slices

  The span of time into which an element is segmented due to element segmentation. Unlike a segment or period, it doesn't represent a separate calculation, because it affects only a limited set of elements in a period or segment. Like a segment, a slice has begin and end dates.

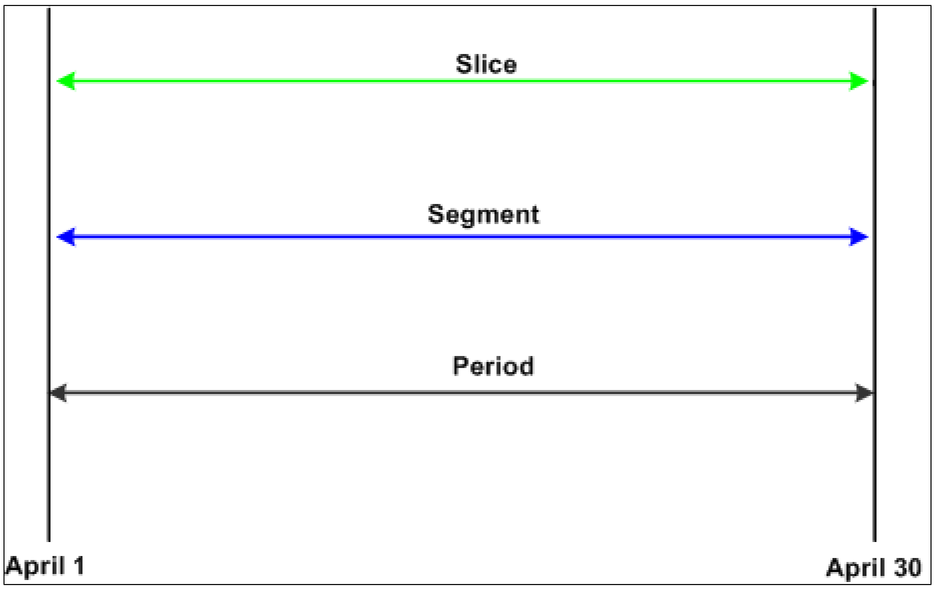
All three sets of dates (period, segment, and slice) are generated every time an absence is processed, regardless of whether a period is sliced or segmented. The begin and end dates for periods, segments, and slices, are stored in the output result tables for the period and made available as system-computed elements for use in other calculations.

Example 1: Unsegmented Period

In an unsegmented period the number of periods equals the number of segments, which equals the number of slices. All three have identical begin and end dates.

Image: An unsegmented period

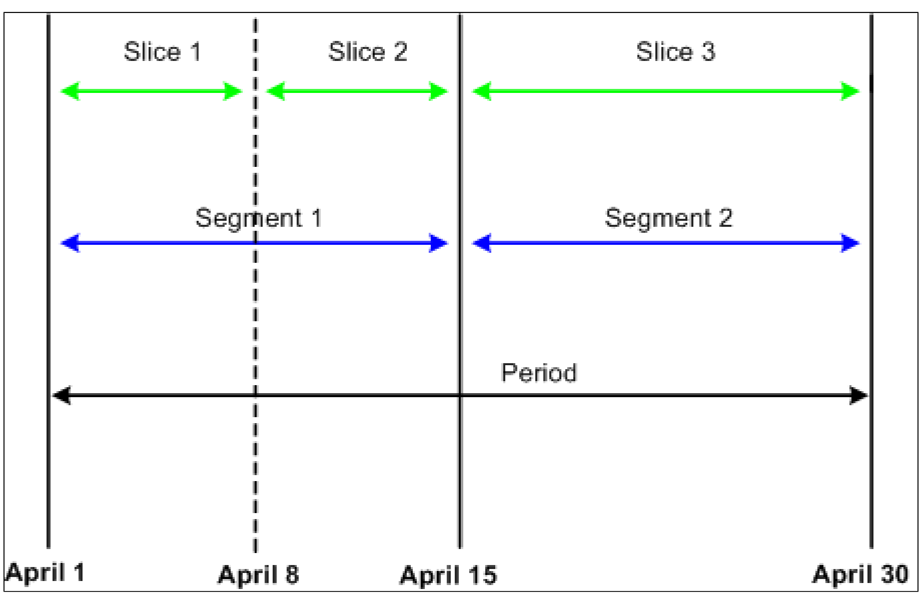
This diagram illustrates the relationship between period, segment, and slice begin and end dates for an unsegmented period.



Example 2: Segmented Period

Image: A segmented period

This diagram shows a period with two segments; segment 1 contains a sliced element.



Basic Rules of Element Resolution

This topic discusses the basic rules of element resolution for period and element segmentation.

Using Period Segmentation

With using period segmentation, all elements are resolved once in each segment.

Using Element Segmentation

When using element segmentation:

- Primary elements are resolved once in each slice if they are set up to be sliced.
- Supporting elements are resolved once in each slice if they are set up to be sliced.

  A supporting element is also resolved in each slice if it is a component of an element that's defined to be sliced. Suppose that an entitlement element E1 is sliced. If this element uses a duration element (a supporting element) that measures years of service, and the value of entitlement E1 is based on the years returned by the duration element, the duration element is resolved whenever E1 is resolved, because it's a component of E1.

Note: To define the elements to be sliced, use the Segmentation Event Definition page.

Example of Period Segmentation

In period segmentation, all elements are calculated once for each segment. This table lists examples of elements and the associated period segmentation rules:

Element	***Element Type***	***Entitlement***	***Proration***
E1	Numeric	10	Yes
E2	Formula	F1 = E1 × 10%	No
A1 (accumulator)	E1 + E2	N/A	N/A

Assume that E1 represents vacation entitlement and the value of E1 increases from 10 to 20, triggering the segmentation of the September absence period into two equal parts. This scenario is represented in this table.

Element	***Segment 1: September 1–September 15***	***Segment 2: September 16–September 30***
E1	10% × ½ = 5	20 × ½ = 10
E2	E1, Segment 1 × 10% = (5 × 10%) = .5	E1, Segment 2 × 10% = (10 × 10%) = 1
A1	Sum of E1 and E2 for Segment 1 = (5 + .5) = 5.5	Sum of E1 and E2 for Segment 2 = (10 + 1) = 11

Example of Element Segmentation

When performing element segmentation, the system segments only those elements that are included in the list of elements to be segmented.

This table lists examples of elements and associated element segmentation rules:

Element	***Element Type***	***Entitlement***	***On Element List for Segmentation?***	***Proration***
E1	Numeric	10	Yes	Yes
E2	Formula	F1 = E1 × 10%	No	Yes
A1 (accumulator)	E1 + E2	N/A	N/A	No

Assume that E1 represents vacation entitlement and the value of E1 increases from 10 to 20 on September 16, triggering the slicing of E1 into two equal parts. This scenario is represented in this table.

Element	***Segment 1: September 1–September 15***	***Segment 2: September 16–September 30***
E1	10% × ½ = 5	20 × ½ = 10
E2	Sum of E1 × 10% = (5 + 10) × 10% = 1.5	
A1	Sum of E1 and E2 = (15 + 1.5) = 16.5	

E1 is sliced once on September 16, resulting in two separate calculations for E1: one for each slice.

Related Links

Segmentation Event Definition Page

Effective-Dated Element Definitions

All effective-dated elements contain a Definition as of Date field that tells the system which effective-dated row to use when retrieving the definition of an element. Options include calendar period begin date, calendar period end date, and payment date.

The same Definition as of Date definition is used for all segments and slices within the period.

Related Links

Understanding the Process of Selecting Definition As Of Dates

Rules for Slicing Accumulators and Accumulator Members

This section describes the rules for slicing accumulators and accumulator members.

Using Period Segmentation

With period segmentation, every element and supporting element is segmented—a situation cannot exist in which an element is segmented but the accumulator to which it belongs isn't segmented.

Using Element Segmentation

The slicing of a member of an accumulator does not cause slicing of the accumulator, but the slicing of an accumulator causes all member elements to be sliced.

Rules for Parent and Child Element Resolutions

When an element is composed of (or based on) other elements, the system defines those other elements as *child* elements and the elements that are based on them as *parent* elements. Elements and supporting elements can be parents or children.

Say variable A is a percentage of entitlement E1 and entitlement E2 (variable A = 10% × (E1 + E2)). In this example, variable A is the parent and entitlement E1 and entitlement E2 are the children. The concept of *child* and *parent* elements is central to understanding how an element that's based on other elements is resolved.

Matching and Mismatching Slices and Segments

During period segmentation, all elements are segmented equally, and parent and child elements always match.

During element segmentation, parent and child elements can be sliced equally, or one may be sliced more than the other. For example, the parent might be included in the list of elements to segment, while the child is not. If the parent and child slices are identical, the parent and child are said to match; if they are not identical, they are referred to as mismatching.

Absence Management follows specific rules for processing matching and mismatching elements. These rules are illustrated in the following examples.

Examples 1–7: Parent Element Is a Primary Element or a Supporting Element

The following cases use these elements:

- Entitlement E1 = Percent of F1 (supporting element).
- Entitlement E3 = Percent of E2 (primary element).
- F1 = 100 (supporting element).
- E2 = 100 (primary element).

This table summarizes the examples that follow in this topic. The child and parent slices in these examples do not always match, as indicated in the Match/No Match column.

Case Number	***Parent Action***	***Child Action***	***Child Type***	***Match/No Match***	***Process Rule***
1	Sliced	Not Sliced	Primary Element (E2)	No Match	*Use* the value of the child for each slice of the parent.

Case Number	***Parent Action***	***Child Action***	***Child Type***	***Match/No Match***	***Process Rule***
2	Sliced	Sliced	Primary Element (E2)	Match	*Use* the slice value of the child for each slice of the parent.
3	Sliced	Sliced	Primary Element (E2)	Partial Match Child Sliced More	*Sum* the value for each child slice that matches the parent slice.
4	Sliced	Sliced	Primary Element (E2)	Partial Match Child Sliced Less	*Use* the Slice value of the child where dates match. If they don't match, *sum* the value of all child slices. May return incorrect values.
5	Sliced	Sliced	Primary Element (E2)	No Match	*Sum* the value of all child slices. May return incorrect values.
6	Not Sliced	Sliced	Primary Element (E2)	No Match	*Sum* of the child values.
7	Sliced	Not Sliced	Supporting Element (F1)	Not applicable. Matching does not matter when the child is a supporting element.	*Resolve* the value of the child for each slice of the parent. (See note following case details.)

Note: The following examples show the results with and without proration. Prorated amounts are in parentheses.

Case 1

Assumptions:

E2 (primary element) = 100

E3 (primary element) = 10% of E2

Proration on E3

Scenario: Parent is sliced; child is not sliced. Child is a primary element.

Element	*Slice 1 Results*	*Slice 2 Results*
E3 (parent)	*Slice 1* 10% of 100 (50)	*Slice 2* 10% of 100 (50)
E2 (child)	*Slice 1* 100	

Each slice of E3 uses the full value of the child (E2). This causes a warning message to be displayed in the Payee Messages component.

Case 2

Assumptions:

E2 (primary element) = 100

E3 (primary element) = 10% of E2

Proration on E2

Scenario: Parent is sliced; child is sliced. Child is a primary element.

Element	*Slice 1 Results*	*Slice 2 Results*
E3 (parent)	*Slice 1* 10% of 100 (50)	*Slice 2* 10% of 100 (50)
E2 (child)	*Slice 1* 100 (50)	*Slice 2* 100 (50)

When the parent's slice dates equal the child's slice dates, the parent uses the child's value. Although the slice dates match, without proration on the child, the results may be incorrect.

Case 3

Assumptions:

E2 (primary element) = 100

E3 (primary element) = 10% of E2

Proration on E2

Scenario: Parent is sliced; child is sliced more. Slices partially match. Child is a primary element.

Element	Slice 1	Slice 2	Slice 3
E3 (parent)	*Slice 1* 10% of 100 (33.33)	*Slice 2* 10% of 200 (33.33 + 33.34)	
E2 (child)	*Slice 1* 100 (33.33)	*Slice 2* 100 (33.33)	*Slice 3* 100 (33.33)

Slice 1 of the parent and child match, so the system sums the child slices (slice 1, in this example). For the second slice of E3 (the parent), the system sums slice 2 and slice 3 of E2 (the child), because the begin date of slice 2 and end date of slice 3 match slice 2 of E3 (the parent). This scenario causes a warning message to be displayed in the Payee Messages component.

Case 4

Assumptions:

E2 (primary element) = 100

E3 (primary element) = 10% of E2

Proration on E2

Scenario: Parent is sliced; child is sliced less. Slices partially match. Child is a primary element.

Element	Slice 1 Results	Slice 2 Results	Slice 3 Results
E3 (parent)	*Slice 1* 10% of 100 (33.33)	*Slice 2* 10% of 200 (66.67)	*Slice 3* 10% of 200 (66.67)
E2 (child)	*Slice 1* 100 (33.33)	*Slice 2* 100 (66.67)	

Generally, if the child is a primary element, it should be on the same list of elements to be sliced as the parent element. This ensures that both the child and parent have matching slices. Otherwise, the above scenario could occur and should be avoided.

The resolution is twofold. When there are exact matches (as in slice 1 of the parent and the child), the system uses the child's value. If the parent or the child has proration turned on, the result is correct. The second resolution of the parent sums all resolutions of the child (200, in this example), resulting in an over calculated amount. This is because the system cannot get a match on the slice dates for the parent and the child. Even with proration turned on, the amount of the child is overstated (see the amounts in parentheses).

Case 5

Assumptions:

E2 (primary element) = 100

E3 (primary element) = 10% of E2

Proration on E2

Parent is sliced. Child is sliced. No match on slice dates. Child is a primary element.

Element	***Slice 1 Results***	***Slice 2 Results***	***Slice 3 Results***
E3 (parent)	*Slice 1* 10% of 300 (100)	*Slice 2* 10% of 300 (100)	
E2 (child)	*Slice 1* 300 (100)	*Slice 2* 300 (100)	*Slice 3* 300 (100)

Generally, if the child is a primary element, it should be on the same list of elements to be sliced as the parent element. This ensures that both the child and parent have matching slices. Otherwise, the above scenario could occur and should be avoided.

When the parent's slice dates do not match any of the child's slice dates—as in the second resolution in Case 5—the system sums the value of all child slices for each resolution of the parent. This causes a warning message to be displayed in the Payee Messages component.

Case 6

Assumptions:

E2 (primary element) = 100

E3 (primary element) = 10% of E2

Proration on E2

Parent is not sliced. Child is sliced. No match on slice dates. (Slice dates are not applicable to the parent.) Child is a primary element.

Element	***Slice 1 Results***	***Slice 2 Results***
E3 (parent)	*Slice 1* 10% of 200 (100)	
E2 (child)	*Slice 1* 200 (100)	*Slice 2* 200 (100)

When the parent isn't sliced, and the child is—and the child is a primary element—the resolution of the parent element sums the values of all resolutions of the child. This causes a warning message to be displayed in the Payee Messages component.

Case 7

Assumptions:

E1 (primary element) = 10% of F1

F1 (supporting element) = 100

Proration on E1

Parent is sliced. Child is not sliced. Child is a supporting element.

Element	***Slice 1 Results***	***Slice 2 Results***
E1 (parent)	*Slice 1* 10% of 100 (50)	*Slice 2* 10% of 100 (50)
F1 (child)	*Slice 1* 100	*Slice 2* 100

Slice 1 of E1 resolves the child for the slice 1 time period. F1 is sliced because, as a supporting element child, it will resolve for each parent's slice.

Note: If a supporting element is populated through an array, bracket, or a formula, then that array, bracket or formula element must be on the same list of elements to slice as the parent. (Define the list of elements to slice using the Element List grid on the Segmentation Event Definition page described in this documentation.)

System Generated Warning Messages

During the absence calculation, the system issues a warning message in the following situations if the child element is a primary element and its slice dates don't match the parent's slice dates:

- Parent is sliced. Child isn't sliced (see Case 1).
- Parent is sliced. Child is sliced. The slice dates of the parent don't match the slice dates of the child (see Cases 3, 4, and 5).
- Parent isn't sliced. Child is sliced (see Case 6).

If the child element is an accumulator, a warning message is issued whenever the accumulator's slice dates don't match the parent's slice date.

Messages are displayed in the Payee Messages component.

Segmentation and Payee Overrides

You can define two types of overrides at the payee level:

- Primary element overrides.
- Supporting element overrides.

Both types of overrides are called *payee level* overrides, and the system follows the same basic rules for applying these overrides to segmented and unsegmented periods. Generally, when an absence period has period or element segmentation, payee overrides are applied to a segment based on the segment end date and the end date of the override, following the rules below. The rules are the same for primary and supporting element overrides at the payee level; only primary element overrides are discussed here. Any minor differences in these two types of overrides are clarified in the following examples.

The rules for applying overrides at the payee level are:

- Primary element overrides apply to absence entitlement and absence take elements, and the overrides must have begin dates. End dates are not required.

  Supporting element overrides apply to elements such as variables, formulas, arrays, and brackets.

- If an override is to apply to a segment, the end date of the override must equal or be greater (or blank) than the end date of the segment (see Overrides 3 and 4 in the diagram that follows).

- An override can apply to more than one segment if the end date of the override is greater than one segment's end date and greater than or equal to the subsequent segment's end date (or blank) (see Override 3 in the diagram that follows).

- If the end date of the override is less than the end date of the segment, the override doesn't apply to that segment (see Overrides 1 and 2 in the diagram that follows).

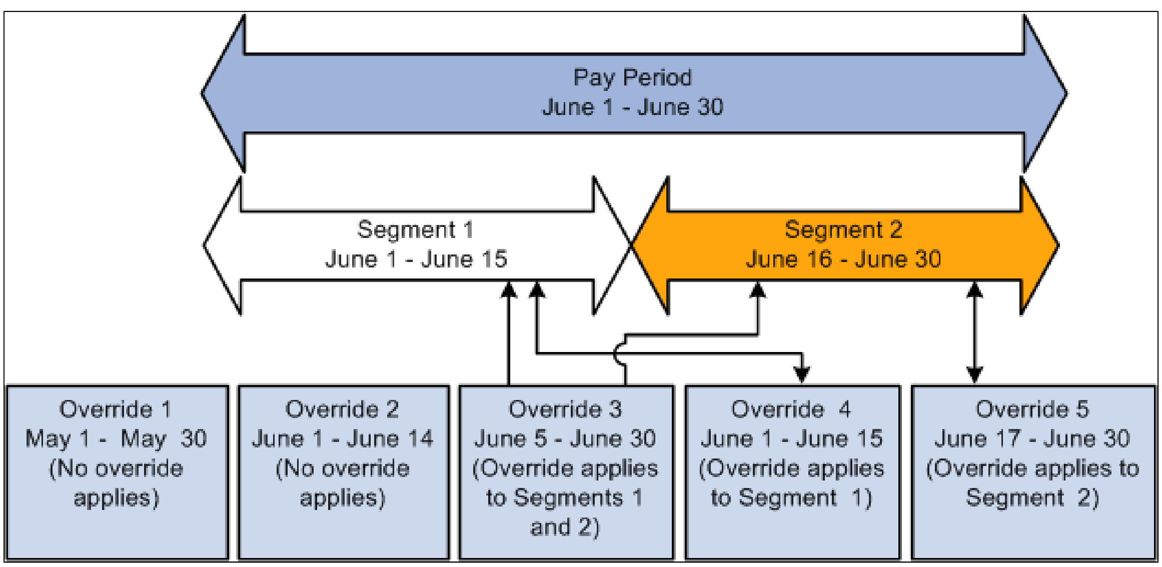
- Primary element overrides are prorated if the element is defined to be prorated.

  With supporting element overrides, the supporting element is prorated if it's a component of an element that's defined to be prorated and that element is segmented.

- Payee overrides must be active as of the segment end date.

Image: A primary element override

This diagram shows an example of a primary element override.



- Overrides 1 and 2 apply to neither segment, because their end dates come before the end dates of Segments 1 and 2.

- Override 3 applies to Segments 1 and 2 equally, because its end date is greater than the first segment's end date and greater than or equal to the second segment's end date.

- Override 4 applies to Segment 1 because its end date is greater than or equal to the end date of Segment 1 and less than the end date of Segment 2.
- Override 5 applies to Segment 2, because its end date is equal to the end date of Segment 2 and its begin date is after the end date of Segment 1.

The following examples offer a more detailed view of how payee overrides are applied to segmented and unsegmented periods:

Scenario: Two payees are eligible to receive entitlement (E1) whose value is 10. Assume that Payee 1 has no segmentation and that Payee 2 has period segmentation in the January period. The segment dates for Payee 2 are January 1, 2005−January 15, 2005 and January 16, 2005 – January 31, 2005. The payees have identical supporting element overrides, and the period being processed is January 1, 2005 – January 31, 2005. This table lists cases that show how the system applies primary element overrides:

Note: In this example, override is abbreviated *Over.*

Case	Over. Begin Dt	Over. End Dt	Over. Value	Payee 1 Results	Payee 2 Results	Reasons
1	Jan. 1, 2000	Dec. 31, 2004	20	10	10	End date is less than period/ segment end date.
2	Jan. 1, 2000	Jan. 5, 2005	20	10	10	End date is less than period/ segment end date.
3	Jan. 1, 2005	Jan. 5, 2005	20	10	10	End date is less than period/ segment end date.
5	Jan. 5, 2005	Jan. 20, 2005	20	10	S1=20 S2=10	For Payee 2, Segment 1 uses the override because the end date is greater than Segment 1's end date.

Case	Over. Begin Dt	Over. End Dt	Over. Value	Payee 1 Results	Payee 2 Results	Reasons
6	Jan. 20, 2005	Jan. 25, 2005	20	10	10	The override's begin date is greater than Segment 1's end date and its end date is less than Segment 2's end date, so the override doesn't apply to either segment of Payee 2. For Payee 1, the override's end date is less than the end date of the period, so no override applies.
7	Jan. 5, 2005	Jan. 31, 2005	20	20	S1=20 S2=20	The override's begin date is before the end date of Segment 1, and its end date is greater than or equal to the end dates of both segments, so it applies to both segments.
8	Jan. 20, 2005	Feb. 1, 2005	20	20	S1=10 S2=20	For Payee 2, Segment 1 doesn't use the override, because the override's begin date is greater than Segment 1's end date.

Note: Although these examples refer to period segmentation, the same basic rules apply to element segmentation: if a sliced element is overridden at the payee level, the override applies to the slices just as it applies to segments with period segmentation.

Related Links

Understanding Overrides

Proration and Segmentation

When you set up the Absence Management system up to segment absence entitlement elements in an absence run, you can also instruct the system to generate prorated calculation results for these elements based on such factors as the number of work hours or days in each slice/segment relative to the total number of work hours or days in the absence period. To do this, you must associate each absence entitlement element you want to prorate with a proration rule on the element definition pages. Then, when segmentation or slicing occurs, the element automatically calls the appropriate proration factor.

This topic discusses:

- Segmentation with proration
- Segmentation without proration

Segmentation with Proration

To have the system prorate a segmented, frequency-based entitlement element, specify proration as part of the element's definition.

You must define the proration rule to use in segmentation processing, because the rule is not hard-coded. Generally, a proration rule that you define consists of a numerator, representing the slice or segment, and a denominator, representing the entire calendar period.

You can determine how to define the numerator and denominator that constitute the proration factor. The numerator and denominator can be any of these elements:

- Accumulator
- Count
- Duration
- Formula
- Variable

Note: When you define a proration element, the Always Recalculate check box on the Proration Name page is automatically selected. This is to ensure that the system correctly calculates the proration factor when there is element segmentation.

Segmentation without Proration

To apply segmentation without proration, select the *No Proration* option on the Rounding/Proration page of the Absence Entitlement component.

Retroactive Processing and Segmentation

When a retroactive trigger is generated in response to an event, the system writes the effective date of the change to trigger tables in Absence Management. The system uses this date to determine how far back in time to recalculate closed periods, using this logic:

- Without backward limits, the system takes the effective date of the change that triggers retroactive processing, returns to the first calendar period in which the effective date falls, and calculates the entire period and everything going forward.
- If the effective date of the retroactive change falls mid period, the system doesn't automatically segment the period or use proration when recalculating original absence items (because it tries to recalculate the *entire* period).

- Segmentation triggers remain active and available to the system because they may be needed for future retroactive processing.

Related Links

Setting Backward and Forward Retro Limits

Trigger Table Data

Understanding Retroactive Processing

Segmentation System Elements

This table lists the system elements that are delivered for segmentation:

System Element	***Description***
FIRST ACT SEGMENT	First Active Segment (Y/N) Indicates whether the segment that is being processed is the first *active* segment within the calendar period.
FIRST SEGMENT	First Segment (Y/N) Indicates whether the segment that is being processed is the first segment within the calendar period.
LAST ACT SEGMENT	Last Active Segment (Y/N) Indicates whether the segment that is being processed is the last *active* segment within the calendar period.
LAST SEGMENT	Last Segment (Y/N) Indicates whether the segment that is being processed is the last segment within the calendar period.
SEGMENTATION-PRD	SEGMENTATION-PRD indicates whether the segment being processed is the same as the calendar period (it indicates whether period segmentation has occurred) by returning the following values: 1 (true) if the segment being processed *does not* match the calendar period and 0 (false) if this segment *does* match the calendar period.
SEGMENTATION-ELEM	SEGMENTATION-ELEM indicates whether the slice being processed is the same as the calendar period (it indicates whether element segmentation has occurred) by returning the following values: 1 (true) if the slice being processed *does not* match the calendar period and 0 (false) if this slice *does* match the calendar period.

Setting Up Segmentation

This topic provides an overview of setting up segmentation and discusses how to:

- Define segmentation events and types.
- Define trigger fields.

Pages Used to Set Up Segmentation

Page Name	***Definition Name***	***Navigation***	***Usage***
Segmentation Event Definition	GP_SEG_EVENT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Segmentation Event Definitions, Segmentation Event Definition	Define segmentation events, specify a segmentation type, and select individual elements for segmentation.
Trigger Definitions	GP_TRGR_SETUP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Trigger Definitions, Trigger Definitions	Define triggers.

Understanding Segmentation

To set up segmentation:

1. Define an event ID and segmentation type on the Segmentation Event Definition page.

   Segmentation can be caused by events such as pay group transfers, pay entity transfers, and new hires. The system does not automatically know what type of segmentation (period or element) to apply to an event. When you create an event ID, you specify:

   - The type of segmentation to use.
   - The elements to slice (for element segmentation only).

2. Define the records or record-field combinations that trigger segmentation in response to data changes on the Trigger Definition page, and link them to the event ID defined in step 1 (above).

   These records and fields become *trigger records* or *trigger fields* which trigger segmentation in response to changes in payee data. By attaching an event ID to a field, you tell the system what type of segmentation to use when a segmentation event occurs.

Related Links

Understanding Triggers
Segmentation Page

Segmentation Event Definition Page

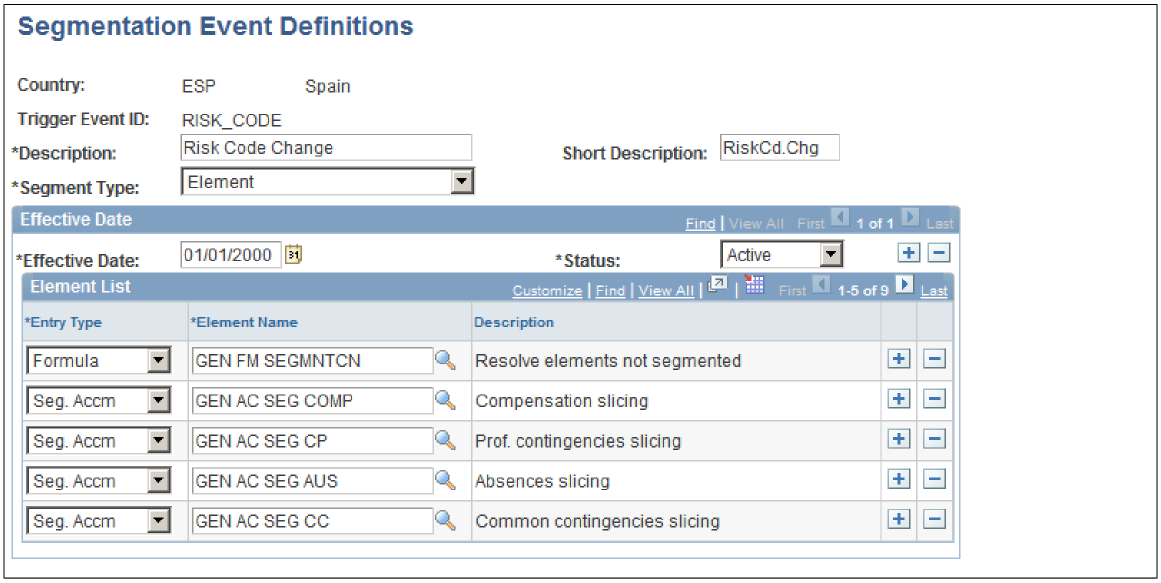
Use the Segmentation Event Definition page (GP_SEG_EVENT) to define segmentation events, specify a segmentation type, and select individual elements for segmentation.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Segmentation Event Definitions, Segmentation Event Definition

Image: Segmentation Event Definition page

This example illustrates the fields and controls on the Segmentation Event Definition page.



Country

Displays the country that uses the trigger event ID defined on this page. Event IDs are defined by country because one country (or organization in a country) might decide to process an event by segmenting one subset of elements (in the case of element segmentation), whereas another might decide to process the same event by segmenting a different subset of elements. Or one country might use period segmentation while another uses element segmentation to process the same event.

Trigger Event ID

Displays the trigger event ID that you entered to access this page.

This ID tells the system which segmentation type to use to process segmentation events and which elements to segment if you use element segmentation.

Segment Type

Select a segment type. Options are *Period* and *Element.*

See Types of Segmentation.

Effective Date

Enter the effective date of the trigger event ID. You can enter multiple effective-dated rows for each trigger event ID if the trigger event definition changes.

Status

Select the status of the trigger event ID. Options are *Active* and *Inactive.*

Element List

If you use element segmentation to process an event, you must specify which elements in the process list should be sliced, because element segmentation affects only a limited set of elements. Enter the elements to be segmented in the Element List group box.

Entry Type

Select the type of element to segment. Options are: *Abs Entitl* (absence entitlement), *Array, Bracket, Date, Formula, Seg Accm* (segment accumulator), and *WritArray* (writable array).

Note: *Earnings* and *Deduction* are used by Global Payroll only.

Only segment accumulators are available for segmentation.

Element Name

Select the element name.

Related Links

Understanding Retroactive Processing

Setting Backward and Forward Retro Limits

Trigger Table Data

Trigger Definitions Page

Use the Trigger Definitions page (GP_TRGR_SETUP) to define triggers.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Trigger Definitions, Trigger Definitions

On this page you define the records or record-field combinations that trigger segmentation, and link them to an event ID.

Note: The Trigger Definition page is also used to define iterative and retroactive triggers.

Related Links

Setting Up Trigger Definitions

Managing Segmentation

Trigger data is generated automatically by the online system based on the conditions that you specify during setup. After the online system generates segmentation triggers, use the Review Triggers - Segmentation page to manage those triggers so that segmentation occurs only when you want it to—and only in response to appropriate changes in system data.

This topic discusses how to view, add, and cancel segmentation triggers.

Page Used to Manage Segmentation

Page Name	***Definition Name***	***Navigation***	***Usage***
Segmentation	GP_TRIGGER_SEG	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Triggers, Segmentation	View, add, or cancel segmentation triggers by payee. A segmentation trigger must be active to be viewed or managed on this page.

Segmentation Page

Use the Segmentation page (GP_TRIGGER_SEG) to view, add, or cancel segmentation triggers by payee.

A segmentation trigger must be active to be viewed or managed on this page.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Prepare Payroll, Review Triggers, Segmentation

Use this page to view segmentation triggers for each employee ID/employee record combination. You can also manually add and cancel trigger rows through this page.

Related Links

Setting Up Trigger Definitions

Chapter 30

Defining Retroactive Processing

Understanding Retroactive Processing

Retroactive (retro) processing refers to the recalculation of prior periods due to changes in payee data that could result in adjustments to entitlement or compensation.

Absence Management uses a form of retroactive processing referred to as *corrective retro.* With corrective retro, the system:

1. Recalculates the elements of the absence run that are defined to be recalculated during retroactive processing.
2. Replaces the previous calculations with the recalculated values for the elements of the run.
3. Updates balance and segment accumulators in the recalculated period.
4. Executes a full reversal of the prior calculation results.

The recalculated run replaces the previously calculated run. However, the original run calculations remain available for auditing and reporting purposes.

Common Elements Used for Retroactive Processing

This section defines some of the key terms used to describe retroactivity in this documentation.

Prior Results and Recalculated Results

When retroactive processing occurs for a previously calculated period, new results are created for that period. The new results are called the *recalculated results.* The results from the previously calculated period are called the *prior results.*

Recalc Period

A period that has been previously calculated and is being recalculated due to retroactivity.

Retro Deltas

When retroactive processing occurs for a given payee, the system recalculates each element generated for the payee. The system compares the recalculated results to the prior results. The difference between these results is typically called the *retro delta.* A retro delta represents an increase or a decrease that results in an adjustment to the payee's calculations.

Note: Retro Deltas are not applicable to Absence Management.

Retro on Retro

When a period that has already been processed for retroactivity is processed again due to additional retroactive data changes, the recalculation is called *retro on retro.*

Version and Revision Numbers

In the following sections you will see numerous references to version and revision numbers. Absence Management tags each Payee Process Stat record with a version and revision number. The version number is the vehicle for tracking recalculation of a calendar period due to retroactivity.

The system defines the original set of output results for a calendar calculation as Version 1, Revision 1 (V1R1). Each subsequent recalculation of the calendar increases the version number while the revision number stays at one. For example, the first retro would be Version 2, Revision 1 (V2R1). The second retro would be Version 3, Revision 1 (V3R1), and so forth. Version numbers are updated during corrective retro processing, for example, in absence calendars. Revision numbers are updated during forwarding retro processing. (This does not occur in Absence Management.)

Related Links

Tracking Recalculated Calendars

Understanding General Rules of Retro Processing

This topic provides an example of a retroactive calculation and discusses how Absence Management:

- Tracks recalculated calendars.
- Loads balance accumulators.
- Stores recalculated results.
- Set backward and forward limits.

Example: Corrective Retro—No Exceptions

In this example, Earning 1 rate changes from 100 to 120; effective date is in period 1; notified in period 2:

Recalc Option	***Calendar Period 1***	***Prior Results (Old Value)***	***Re-Calculation (New Value)***	***Deltas***	***Corrective Replace Old Value with New Value***	***Forward Y/N***
Always	Earning 1	100	120	20	Y	N
Always	Deduction 1 (flat amount)	30	30	0	Y	N

This table shows the processing results for the example above:

Calendar Period 2	***Current Results***	***Retro Adjustment***
Earning 1	120	None
Deduction 1 (flat amount)	30	None

In this example, only Earning 1 generates a retro delta. The new value of Earning 1 replaces its old value.

Tracking Recalculated Calendars

Absence Management tags each Payee Process Stat Record with a version number to track the recalculation of a calendar period due to retroactivity.

The system defines the original set of output results for a calendar calculation as Version 1, Revision 1 (V1R1). Each subsequent recalculation increments the version number by 1. The revision number stays the same. For example, the first corrective retro is Version 2, Revision 1 (V2R1). The second corrective retro (retro on retro) is Version 3, Revision 1 (V3R1), and so forth.

The system uses these numbers to determine which calculations to use as the *old* and *new* values when processing retro deltas.

Version and Revision Numbers in Retro Adds

A retro add is a situation in which a previous calculation does not exist for a payee, and retroactivity calls for a payee process status record to be created for the first time. For example, suppose that a payee initially thought to have been hired in February was actually hired in January. There are no calculations for January, so when January is processed for retro, the system must create a payee process status record for the period and assign version and revision numbers to it. In this case, the first calculation is labeled V1R1. The reason is that corrective retro replaces the results of the prior calculation (it does not use them only to create retro deltas), so when a period is added, it treats this period as if it were the original one.

The following tables illustrate how the system numbers payee process status records in retro add situations:

Scenario:

In the following retro add situation, it is discovered that a payee who was calculated as part of period 1 should not have been processed in that period. The calculations for the payee are therefore reversed in Recalc No. 2. When it is later discovered that the payee belongs in that period after all, the system produces a new calculation using the version and revision numbers that are indicated in Recalc No. 3.

Period/Recalculation	***Numbering***
Period 1 (original calculation)	V1R1
Recalc No. 1	V2R1
Recalc No. 2 (reversal)	V3R1
Recalc No. 3 (add)	V4R1

In each example, all calculations for the payee are reversed in Recalc No. 2 when the payee is eliminated from the calendar. When the payee is later restored (when it is discovered that he or she belongs in the original calendar), new calculations are created. The new calculation uses the numbering that is indicated in Recalc No. 3.

Related Links

Retroactive Adds

Retroactive Deletes

Loading Balance Accumulators

Before the system recalculates elements during retro, it loads balances to produce the correct value for the balance accumulators.

The system loads the balance for the element from the calculation with the highest version number in the previous period.

Storing Recalculated Results

When a trigger starts retroactive processing for a payee, the system recalculates each calculation that is generated for the payee from the date of retroactivity forward. The system compares the recalculated results to the original results. If there is a difference between them, the system:

1. Stores prior results for auditing purposes.
2. Replaces the prior results with new ones in the recalculated period and stores the new calculation results for each payee.

   These results represent the true results for that period.

Setting Backward and Forward Retro Limits

In Absence Management, you use the Pay Entity Retro Limits page to establish default backward and forward limits for retro processing. These defaults tell the system how far back in time to go to recalculate closed calendars that are associated with a pay entity, and how long after a payee becomes inactive he/she is eligible for retro processing.

To determine how far back in time to go to process retroactivity, the system compares the backward limit defined on the Pay Entity Retro Limits page to the following system dates:

- Trigger Effective Date.

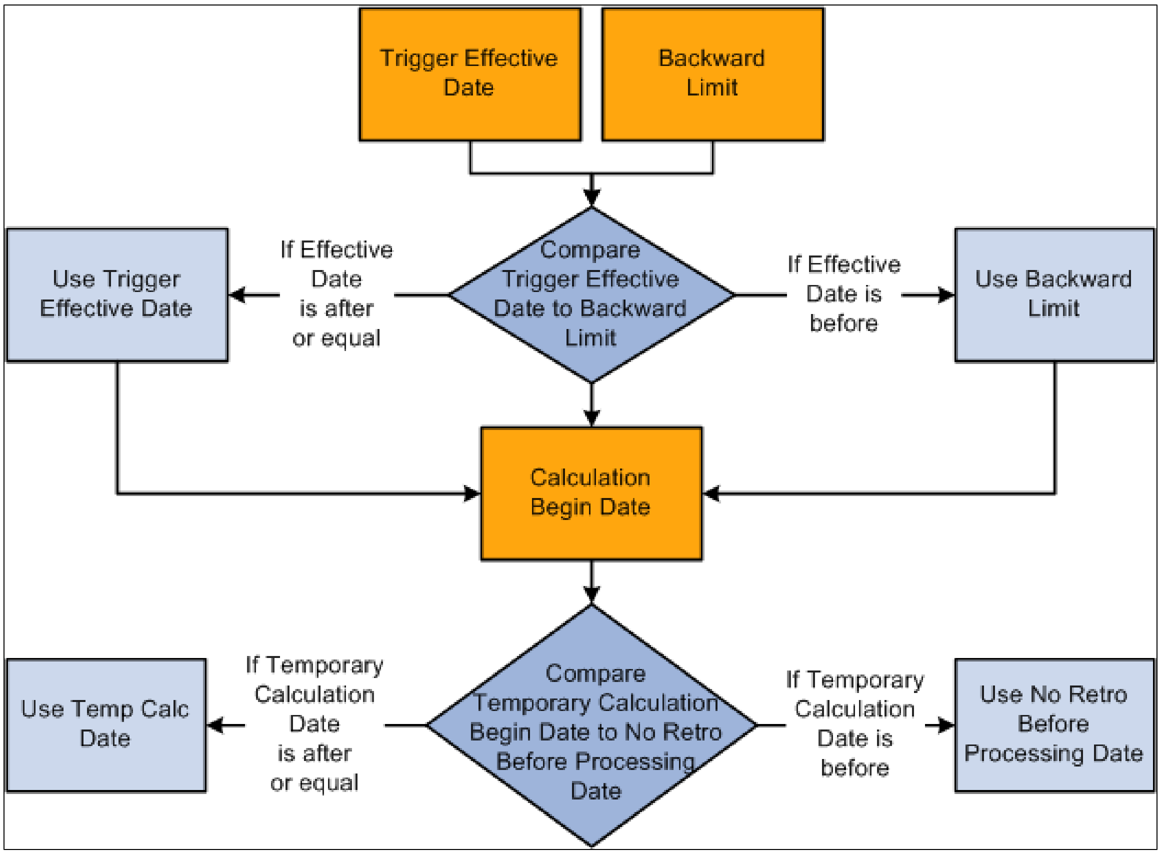
  This date—the effective date of the change that triggers retroactive processing—establishes a theoretical goal for how far back in time to go to recalculate data. When the system determines which periods to process, the backward limit date takes precedence over the trigger effective date. For example, if the trigger effective date is January 1, 1990, and the backward limit date is January 1, 1995, the backward limit date stops all calculations prior to (and including) that date. By contrast, if the backward limit date is January 1, 1990, and the trigger effective date is January 1, 1995, then the trigger effective date establishes the number of periods to recalculate.

- No Retro Processing Before Date.

This is the date that a payee enters the Absence Management system. This date takes precedence over the trigger effective date and the backward limit date because no matter what these dates are, there is no historical data to recalculate before the No Retro Processing Before Date.

Image: First recalculation period

This diagram illustrates the interaction of the dates used to determine the number of past periods to recalculate.



The Absence Management system determines the first recalculation period by comparing the trigger effective date to the backward limit date and comparing both dates to the calculation begin date.

The process for determining forward limits is less complex than for backward limits, because the system does not compare trigger effective dates to either the forward limit or the No Retro Processing Before Date. It only needs to determine whether payees are within the forward limits defined on the Pay Entity Retro Limits page. If a payee is within these limits, the system applies the backward limits to determine the number of past periods to recalculate.

For forward limits to apply, a payee must be inactive in all jobs (EMPL_STATUS on the Job record is used to validate the payee's status). A payee is considered inactive if the EMPL_STATUS value is *D* (deceased), *R* (retired), *T* (terminated), *V* (terminated pension payout), or *X* (retired-pension administration). If a payee has multiple jobs, the highest effective date of all rows that are returned is used as the inactive date.

Setting Up Retroactive Processing

To set up retroactive processing, use the Countries (GP_COUNTRY) and the Retro Process Definitions (GP_RTO_PRC_DEFN) components.

This topic provides an overview of retroactive processing setup and discusses how to:

- Define the retroactivity defaults at the country level.
- Define a retro process.
- Define trigger event IDs.
- Define backward and forward limits for retro processing at the pay entity level.
- Define retro processing limits at the payee level.

Pages Used to Set Up Retroactive Processing

Page Name	***Definition Name***	***Navigation***	***Usage***
Countries	GP_COUNTRY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Countries, Countries	Define the retro method at the country level.
Retro Process Definition	GP_RTO_PRC_DEFN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Retro Process Definitions, Retro Process Definition	Define a retro process.
Retro Event Definition	GP_RTO_EVT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Retro Event Definitions, Retro Event Definition	Associate a triggering event (a change in critical data) with one of the processes that you defined on the Retro Process Definition page.
Retro Limits	GP_PYENT_RETRO	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities, Retro Limits	Define the backward and forward limits for retro processing at the pay entity level.
Retro Limits Assignment	GP_PYE_RTO_LIM	Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Assign Retro Limits, Retro Limits Assignment	Override, at the payee level, the backward and forward limits for retro processing that you established at the pay entity level on the Retro Limits page.

Related Links

Additional Pages Affecting Retroactive Processing

Understanding Retroactive Processing Setup

Follow these steps to set up retroactive processing:

1. Specify the retroactivity defaults.

   Using the Countries page, select the corrective method for processing retroactivity. (Forwarding retro applies only to Global Payroll.)

   See Countries page.

2. Define a retro process.

   Once you have selected a default method for the country, define a retro process on the Retro Process Definition page.

3. Map retro processes to trigger event IDs.

   Use the Retro Event Definition page to associate the retro process you defined in step 2 with a trigger event ID. This event ID tells the system how to process data changes to the records or fields you make sensitive to retroactive data changes in step 4 (see below).

4. Define trigger records and fields.

   After mapping retro processes to event IDs, you must decide which database records and fields will trigger retroactive processing in response to data changes. You identify these fields and records on the Trigger Definitions component (GP_TRGR_SETUP) and link them to one of the trigger event IDs that you defined in Step 3. Because trigger event IDs identify retro process definitions, any field or record that is linked to this ID triggers the correct process in response to a data change.

5. Determine which pay entities allow retroactive processing.

   Use the Pay Entity Retro Limits page to enable retroactive processing of calendars in a pay entity.

6. Specify backward and forward limits.

   There are two pages on which you can set backward and forward limits:

   - Use the Pay Entity Retro Limits page to establish default backward and forward limits for retro processing (optional). This tells the system how far back in time to go to recalculate closed calendars that are associated with a pay entity, and how long after a payee becomes inactive he/she is eligible for retro processing.
   - If necessary, override the default backward and forward limits for specific payees using the Retro Limits Assignment page.

7. View, add, and cancel retro triggers.

   After the online system generates retro triggers, use the Payee Triggers - Retro page to manage retro events so that retroactive processing takes place only response to the appropriate changes in system data. This page enables you to view retro triggers for each payee; you can also add and cancel triggers on this page.

   Note: Retro trigger data is generated by the online system based on conditions that you specify during setup. You can also manually enter retro trigger rows that were not created automatically.

Warning! Canceling a trigger does not undo the database change that created the trigger in the first place. If there is retro for some other reason, this change may be picked up when prior periods are recalculated.

Countries Page

Use the Countries page (GP_COUNTRY) to define the retro method at the country level.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Countries, Countries

Note: We discuss the Countries page in detail elsewhere in this documentation.

See Countries page.

Retro Process Definition Page

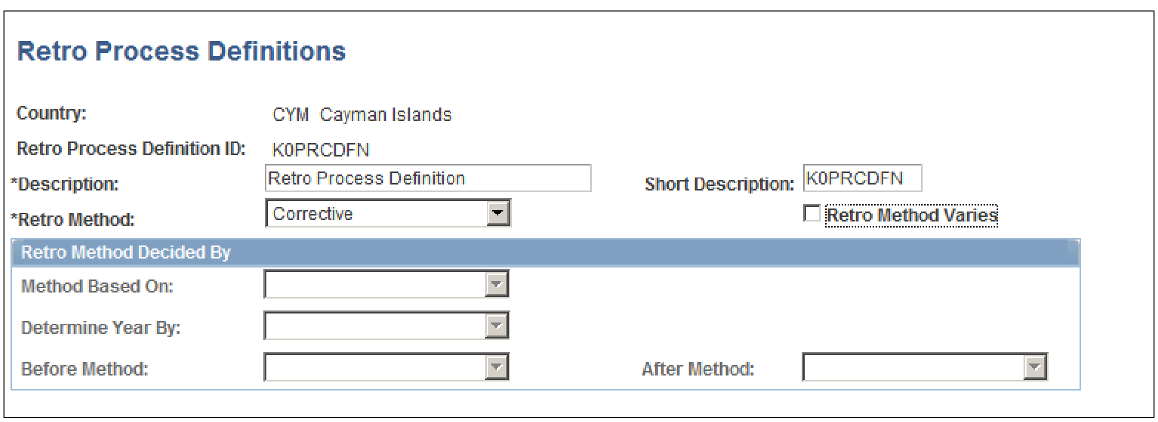
Use the Retro Process Definition page (GP_RTO_PRC_DEFN) to define a retro process.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Retro Process Definitions, Retro Process Definition

Image: Retro Process Definition page

This example illustrates the fields and controls on the Retro Process Definition page.



Retro Process Definition ID (retroactive process definition ID)	Identifies the retro process you are defining.
Retro Method	For Absence Management, this value should always be set to *Corrective.*
Retro Method Varies	Leave this check box empty. It applies only to Global Payroll.

Retro Method Decided By

The fields in this group box apply only to Global Payroll.

Retro Event Definition Page

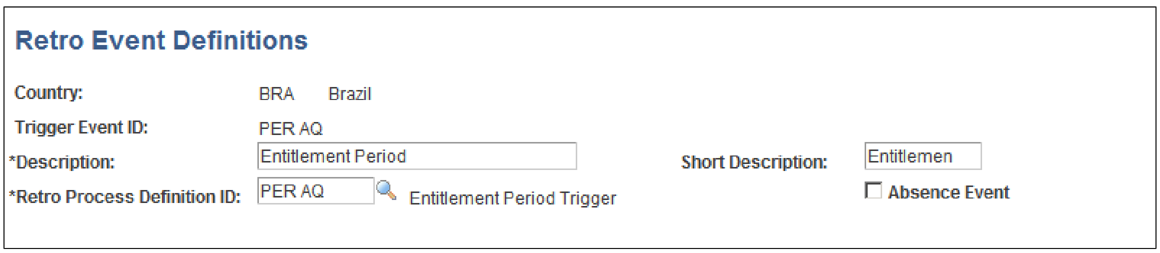
Use the Retro Event Definition page (GP_RTO_EVT) to associate a triggering event (a change in critical data) with one of the processes that you defined on the Retro Process Definition page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Retro Event Definitions, Retro Event Definition

Image: Retro Event Definition page

This example illustrates the fields and controls on the Retro Event Definition page.



The mechanism that is used to track online data changes that should trigger retroactive processing is called a *trigger*. In Absence Management, you set up triggers by identifying the records and fields that should trigger retroactive processing in response to data changes, and by defining the retro process definition to use to process these changes:

1. On the Retro Event Definition page, associate each of the retro processes defined on the Retro Process Definition page with a trigger event ID.

2. On the Trigger Definitions page, identify the records and fields that should trigger retroactive processing when data is modified or updated retroactively.

3. On the Trigger Definitions and Trigger Definitions - Field Values pages, associate the records and fields identified in step 2 with one of the trigger event IDs you defined in step 1. Because each ID is linked to a process definition, the system can automatically apply the correct retro process when one of these records of fields is modified or updated.

Note: Because the Trigger Definitions and Trigger Definitions - Field Values pages are documented in another topic, this topic describes only the use of the Retro Event Definition page.

See Understanding Trigger Definition Setup.

Country	This display-only field is populated based on the country that you selected on the search page.
Trigger Event ID	This display-only field is populated based on the trigger event ID that you selected on the search page.

Link each trigger event ID to one of the processes you defined on the Retro Process Definition page.

Retro Process Definition ID	Select a process that you defined on the Retro Process Definition page to link to the trigger event ID. **Note:** Different countries can process the same event differently.
Absence Event	Select if the trigger event ID is for an absence event only.

Example of an Absence Event

The Absence Event indicator determines the first calendar for recalculation, which avoids processing calendars unnecessarily. Selection of the indicator depends on such things as the processing order of the calendars for a particular period, as well as what absence related trigger definitions have been defined and to which retro events they point. When the indicator is set to yes, processing can start at the first absence calendar instead of the first calendar that qualifies after checking retro limits.

Note: Absence balance accumulators are always defined as corrective—they must be updated (replaced) at the end of each calculation period.

Related Links

Trigger Definitions Page

Understanding Accumulators

Retro Limits Page

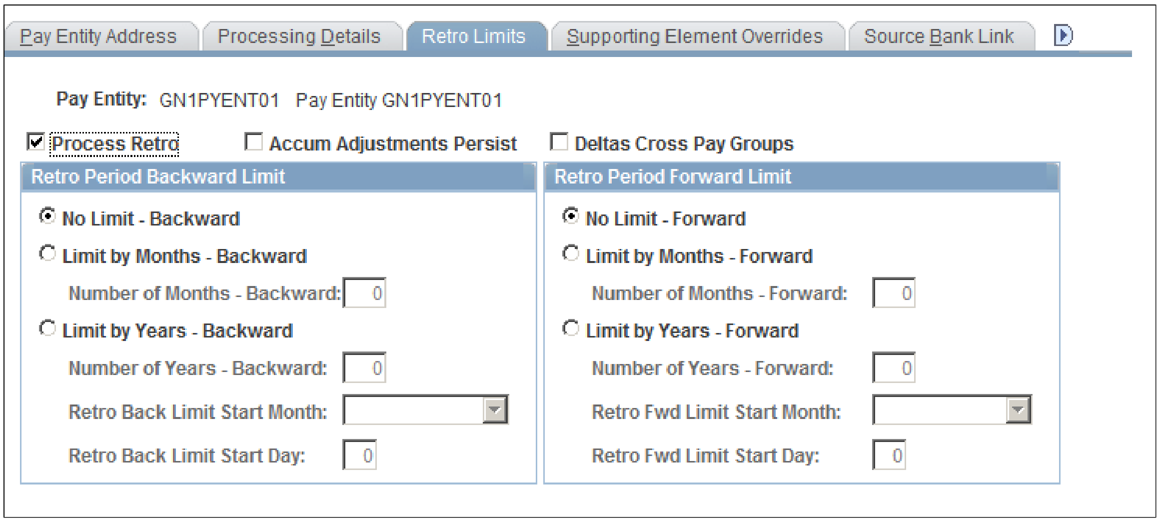
Use the Retro Limits page (GP_PYENT_RETRO) to define the backward and forward limits for retro processing at the pay entity level.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities, Retro Limits

Image: Retro Limits page

This example illustrates the fields and controls on the Retro Limits page.



After you have defined a retro method and the events that trigger retro processing, you must specify the backward and forward limits for retro processing at the pay entity level. This tells the system how far back in time to go to recalculate closed calendars, and how long a payee is eligible for retroactive processing after being inactivated or terminated.

Note: You can override backward and forward limits you define at the pay entity level using the Retro Limits Assignment page at the payee level.

Retro Period Backward Limit

Use the fields in this group box to limit the number of calendar periods that Absence Management can reprocess going into the past.

To determine how far back to go, the system compares the backward limit defined on the Retro Limits page to the retro trigger effective date. If the trigger effective date comes before the backward limit date, the system uses the backward limit date to determine the first retro period. If the backward limit date comes before the trigger effective date, the system uses the trigger date to determine the first retro period to process.

Process Retro	Select to enable retroactive processing at the pay entity level. You can override your selection at the payee level.
Acm Adjustments Persist(accumulator adjustments persist)	Select to retain adjustments to accumulator balances when retroactive processing causes an accumulator to be recalculated in a prior period. This option may be needed because Absence Management does not automatically include adjustment amounts when recalculating accumulator balances. For example, if you select this check box and reprocess a prior period in which an accumulator with a value of 100 received an

adjustment of 10, the system computes the incoming balance as the sum of the original accumulator and the user-entered adjustment, and returns a value of 110. Otherwise, the system ignores the adjustment and returns a balance of 100.

Note: The preferred approach to managing accumulator balances is to correct the elements (entitlements or takes) that contribute to the accumulator, rather than to adjust the accumulator directly. This is because other accumulators that store period-to-date amounts or other values based on the calculation of the same elements will not be automatically updated, possibly resulting in calculation or reporting errors.

Note: To adjust accumulator balances, use the Adjust Accumulator Balance page.

See Adjusting Accumulator Balances.

Deltas Cross Pay Groups
Leave this check box empty. It applies only to Global Payroll.

No Limit - Backward
If you select this option, then retro processing begins with the first period that includes the trigger effective date and goes forward.

Selecting this option does not mean that there are no limits to how far back you can go. The No Retro Processing Before date limits how far back in time you can go to process retroactivity.

Limit by Months - Backward and Number of Months - Backward
To define a limit in terms of months, select this option and enter the number of months that the system can calculate into the past. The system determines the maximum number of months to go back starting from the begin date of the first calendar in the current calendar group for the payee.

Limit by Years - Backward and Number of Years - Backward
To define a limit in years, select this option and enter the number of years that the system is to calculate into the past. This limit year, in conjunction with the Retro Back Limit Start Month and Retro Back Limit Start Day fields, determines how far back the system can go when processing retroactivity.

For example, if Number of Years - Backward is *2,* Retro Back Limit Start Month is *06* (June), Retro Back Limit Start Day is *01,* and the current period begin date is April 1, 2005, then the backward limit is June 1, 2003. The system allows retroactivity 2 years from the current period begin date, but not prior to June 1 of that year.

Retro Back Limit Start Month
Select the calendar month to use as the backward limit.

Retro Back Limit Start Day
Select the day to use as the backward limit.

Example 1: Using months criterion to determine the first retro period to recalculate.

Trigger Effective Date	***Current Calendar Period***	***Backward Limit***	***First Retro Period***
February 15, 2005	June 1, 2005−June 30, 2005	2 months = April 1, 2005	April 1, 2005 – April 30, 2005

Absence Management determines the backward limit by going back two months from the current calendar period begin date of June 1, 2005, providing a limit date of April 1, 2005. The system compares the backward limit date to the trigger effective date. The trigger effective date precedes the backward limit date, so the system uses the backward limit date to determine the first retro period. Two periods are recalculated. April (April 1, 2005−April 30, 2005) and May (May 1, 2005−May 31, 2005).

Example 2: Using years, months, and days criteria to determine the first retro period to recalculate (trigger effective date does not exceed backward limit date).

Trigger Effective Date	***Current Calendar Period***	***Backward Limit***	***First Retro Period***
June 30, 2004	June 1, 2005−June 30, 2005	Year =1, Month = 3, Day = 15 (March 15, 2004)	June 1, 2004−June 30, 2004

Absence Management determines the backward limit by going back one year (the start year is determined by the year of the begin date of the first calendar) and applying the month and day that are defined: The result is a backward limit date of March 15, 2004. The system compares the limit to the trigger effective date, which (in this example) establishes the first retro period because it does not exceed the backward limit date. Twelve periods will be recalculated.

Example 3: Using years, months, and days criteria to determine the first retro period to recalculate (trigger effective date exceeds backward limit date).

Trigger Effective Date	***Current Calendar Period***	***Backward Limit***	***First Retro Period***
February 28, 2004	June 1, 2005−June 30, 2005	Year = 1, Month = 3, Day =15 (March 15, 2004)	March 1, 2004−March 31, 2004

Absence Management determines the backward limit by going back one year (the start year is determined by the year of the begin date of the first calendar) and applying the month and day that are defined: The result is a backward limit date of March 15, 2004. The system compares that date to the trigger effective date, which (in this example) exceeds the backward limit date, so that the backward limit date determines the first retro period. Fifteen periods will be recalculated.

Retro Period Forward Limit

Use the fields in this group box to specify the amount of time that retroactive data can continue to be processed after a payee is terminated or becomes inactive.

No Limit - Forward

If you select this option, retroactive data can be processed indefinitely for inactive payees belonging to this pay entity. Although eligible for retro processing, the inactive payee is still restricted by the backward limits.

Limit by Months - Forward and Number of Months - Forward

To define the forward limit in months, select this option and enter the number of months to continue calculating retroactivity after a payee becomes inactive. The system determines the maximum number of months using the *Inactive* date of the last active job.

Limit by Years - Forward and Number of Years - Forward

To define the forward limit in years, select this option and enter the number of years beyond the inactive date to process retro. The year, in conjunction with the Retro Fwd Limit Start Month and Retro Fwd Limit Start Day, determines how long after the inactive date the system allows retroactivity processing.

Retro Fwd Limit Start Month (retro forward limit start month)

Enter the calendar month to use as the forward limit in conjunction with the year in the Number of Years - Forward field.

Retro Fwd Limit Start Day (retro forward limit start day)

The day to use as the forward limit in conjunction with the year and month entered in the Number of Years - Forward and Retro Fwd Limit Start Month fields. For example, if the Number of Years is *2,* the Retro Fwd Limit Start Month is *06* (June), the Retro Fwd Limit Start Day is *01,* and the termination date is January 1, 2005, the limit for processing retroactivity would be June 1, 2007. In this example, the system knows to allow retroactivity for 2 years from the *Inactive* date, but not after June 1 of that year.

Example 1: Using months criterion to determine the first retro period to recalculate (calendar period does not exceed forward limit).

Inactive Date	***Current Calendar Period***	***Forward Limit***	***Eligible for Retro Processing?***
January 1, 2005	June 1, 2005−June 30, 2005	12 months (January 31, 2006)	Yes

Absence Management determines the forward limit by going forward 12 months from the inactive date. The current calendar period does not exceed the forward limit, so retro processing can occur. The retro triggers are compared to the backward limits to continue the process.

Example 2: Using months criterion to determine the first retro period to recalculate (calendar period exceeds forward limit).

Inactive Date	***Current Calendar Period***	***Forward Limit***	***Eligible for Retro Processing?***
January 31, 2005	June 1, 2005−June 30, 2005	3 months (April 30, 2005)	No

Absence Management determines the forward limit by going forward 3 months from the inactive date. The current calendar period (in this example) exceeds the forward limit, so retro processing cannot occur. The retro triggers are ignored and marked as used.

Assign Retro Limits Page

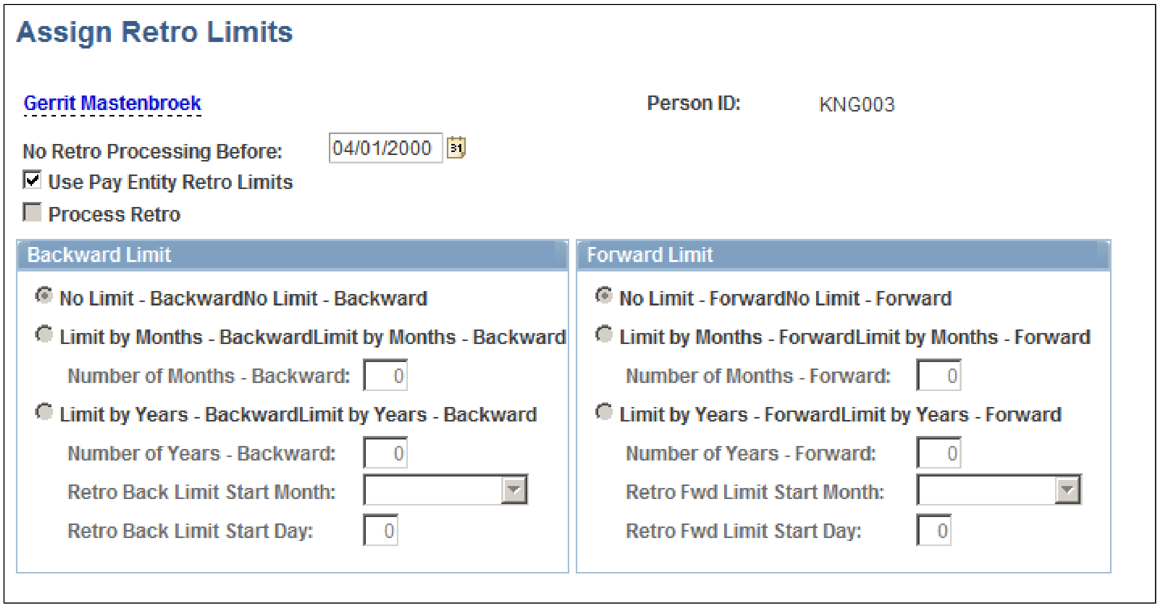
Use the Assign Retro Limits page (GP_PYE_RTO_LIM) to override, at the payee level, the backward and forward limits for retro processing that you established at the pay entity level on the Retro Limits page.

Navigation

Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Assign Retro Limits, Retro Limits Assignment

Image: Assign Retro Limits page

This example illustrates the fields and controls on the Assign Retro Limits page.



Note: The fields on this page are almost identical to those on the Retro Limits page. To view definitions of the shared fields, return to the section on the Retro Limits page. In this topic we discuss only the fields that are unique to the Retro Limits Assignment page.

No Retro Processing Before	This date is the date when Absence Management begins processing a payee. It is set by the system, but you can override it. The system cannot process retroactivity for a payee prior to this date. If a payee has multiple jobs, be sure that this date is correct, to support all jobs.
Use Pay Entity Retro Limits	Select to use the retro limits that are defined for the pay entity to which the payee belongs. When this check box is selected, the system uses the values from the pay entity definition, and all other fields on this page, other than No Retro Processing Before, are unavailable for entry. When this check box is cleared, the Process Retro check box becomes available for entry, and the system uses the values that were entered at the payee level, rather than those that were entered at the pay entity level.
Process Retro	Select if you want retroactivity to be processed. If you select this check box, the fields in the Backward Limit and Forward Limit group boxes become available for data entry.

Related Links

Setting Backward and Forward Retro Limits

Additional Pages Affecting Retroactive Processing

In addition to the pages described earlier in this documentation, several other pages affect retro processing. These pages are of two types—general setup pages and calendar setup. The following table describes these pages:

Page Type	***Page Name***	***Description***
General Setup	Pay Entity - Processing Details	Define payment keys. Retro adjustments respect payment key values when they are applied to a segment.
Calendar Setup	Run Types	Identify the run types that can process retro triggers. The run type is linked to a calendar, which is linked to a calendar group. If at least one calendar in the group is defined to process retro triggers, the calendar group uses the instructions defined for the run type as the default instructions for processing retro triggers.
Calendar Setup	Calendars - Definition	Specify the payees to process in a calendar run. You can select payees with retro triggers (active or inactive) for processing.
Calendar Setup	Calendar Group	Indicate whether to process retro triggers defaults from Run Type. If at least one calendar allows retro triggers to be processed, the Process Retro Triggers check box will be selected. Otherwise it will be cleared. It can be cleared so that retro triggers are not processed. However, you cannot select it in order to process retro triggers if the default setting is cleared.

Understanding Complex Retro Processing

This topic discusses:

- Segmentation and retro
- Retroactive deletes
- Retroactive adds

Segmentation and Retro

Segmentation can affect retro processing when a segmented period is being recalculated for retro, and the segmentation dates of the original calculation don't coincide with those of the recalculation.

This is called a *segment mismatch,* and it affects how retro deltas are calculated.

Note: Segmentation also affects how the system manages the Retro Recalculation Option of Do Not Recalculate.

See Understanding Segmentation Setup.

Calculating Deltas in Matched and Mismatched Segments

The way that Absence Management calculates deltas varies depending on whether the segmentation dates and payment keys of the prior period match those of the recalc period.

When Segments Match

When segment dates match and payment keys are the same, the system recalculates the original segments (to determine the new values for each segment), subtracts the old value from the new value for each element of pay, and writes new results to the output tables.

When Segments Don't Match

When segments don't match, the system treats the old and new values as if they belong to separate segments.

- The system creates reversal segments for each segment that existed in the prior calculation and then creates new recalc segments.
- A reversal segment does not have any results.

The new recalc segments generate the new values. The new values are written to the output result tables.

Note: When the value of a payment key (for example, company ID) changes between a prior calculation and the recalculation, the system handles the situation as a segment mismatch. That is, it treats the old and new calculations as belonging to separate segments—just as if the segment dates no longer matched.

See Understanding Segmentation Setup.

Retroactive Deletes

A retroactive delete occurs when there is a retroactive termination, a retroactive pay group transfer, or a retroactive change in pay system. In all cases the information is received after the actual effective dates for these changes. The result is that calculations where made when they should not have been and these results must be completely reversed.

Retroactive Adds

A retroactive add occurs when there is a retroactive hire or a retroactive pay group transfer. With a retroactive hire, there is no previous calculation. In the case of a retroactive pay group transfer, the retro add refers to the pay group to which the payee is transferred.

Reviewing Tips for Retroactive Processing

The following table provides hints on using retroactive processing.

Question	***Answer***
Can Absence Management calculate retro across countries?	The default retro method, retro process definitions, and trigger event IDs are defined by country. The system does not calculate retro across countries. However, if a payee transfers to another country, and it's later discovered that the payee should have received additional entitlement while employed in the first country, it might be possible to process retro for that payee even though he or she is inactive in the original country. This depends on the forward limits that apply at the pay entity level and other processing rules that determine how long after a payee is inactive he or she remains eligible for retroactive processing.
What happens when multiple triggers are generated and each points to a different retro process definition?	Suppose that multiple retro events occur, causing multiple retro triggers to be written to the trigger tables. If these triggers call for that calendar run to be processed (recalculated) using different process definitions, a conflict will occur. In such a situation, where the events that cause retroactive processing activate the application of more than one process definition for the same payee in the same calendar, the system writes an error message and does not process retro. Only the current period is calculated. Retro triggers are not marked as processed. **Note:** The retro conflict method that is specified on the Countries page does not apply to the conflict situation described here. In this situation, the retro conflict method will not resolve the conflict. However, you can change the event ID that is associated with the retro trigger, using the Payee Trigger Retro Expanded page. For a payee, you cannot have more than one process definition resulting from the retro events that cause retroactivity for that calendar run. The same process must apply for all calendars in the calendar group.

Related Links

Setting Up Retroactive Processing
Understanding Segmentation Setup

Chapter 31

Integrating Absence Management and the Payroll System

Understanding How Absence Management Integrates with the Payroll System

This topic discusses:

- Mapping Absence Management pay groups to the payroll system.
- Mapping Absence Management codes to the payroll system.
- Setting up job level data to assign Absence Management to payees.
- Running Absence Management processes to create an absence generated positive input file.
- Managing the generated positive input file.
- Running the Absence Management conversion process to Payroll for North America or Payroll Interface.
- Running payroll system processes.

Mapping Absence Management Pay Groups to the Payroll System

Pay groups are defined in both Absence Management and in the payroll system. You must establish a one-to-one correspondence between each pay group in Absence Management and each pay group in either Payroll for North America or Payroll Interface, depending on which application you use.

Mapping Absence Management Codes to the Payroll System

Absence codes in Absence Management need to be translated to either earning or deduction codes in the payroll system. You must establish a one-to-one correspondence between the codes in Absence Management and the codes in Payroll for North America or Payroll Interface, depending on which application you use.

The direct interfaces to Payroll for North America and to Payroll Interface map their Absence Codes on the Earnings/Deduction Mapping page in Absence Management. Payroll for North America with a Time and Labor interface maps Absence Codes on the Time Reporting Code— TRC page in Time and Labor.

Setting Up Job Level Data to Assign Absence Management to Payees

At the job data level you assign Absence Management to each payee. Additionally, you must enroll payees in Time and Labor if you use it in conjunction with Payroll for North America.

Running Absence Management Processes to Create an Absence Generated Positive Input File

Running the absence calculation process creates absence results as generated positive input in Absence Management.

Managing the Generated Positive Input File

Any generated positive input record created by Absence Management can be marked to not be converted or sent to the payroll system.

Running the Absence Management Conversion Process for Payroll for North America or Payroll Interface

Running the conversion process transfers or makes the absence results available to the payroll system for processing.

Running Payroll System Processes

Running the payroll process generates payroll results that take into account absence-related earning or deductions that were calculated in Absence Management and provided to your payroll system through integration.

Configuring Absence Management Integration with PeopleSoft Payroll Systems

Most mapping and setup pages are shared by Payroll for North America and Payroll Interface. Additional setup is required when Payroll for North America is used with PeopleSoft Time and Labor. After you complete the setup, the application runs separate conversion processes depending on the payroll system with which you integrate. These processes are discussed in subsequent sections.

This topic discusses how to:

- Map Absence Management pay groups to the payroll system's pay groups.
- Map Absence Management codes to the payroll system's earning or deduction codes.
- Identify the payroll and absence management systems at the payee job level.
- Work with generated positive input.

Pages Used to Configure Absence Management Integration with Payroll for North America or Payroll Interface

Page Name	*Definition Name*	*Navigation*	*Usage*
Absence Pay Group Mapping	GP_ABS_PAYGROUP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Integration, Absence Pay Group Mapping, Absence Pay Group Mapping	Map pay groups that are defined in Absence Management to pay groups that are defined in Payroll for North America or Payroll Interface.
Earnings/Deduction Mapping	GP_ABS_ERN_DED_MAP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Integration, Absence Earns/Deductn Mapping, Earnings/ Deduction Mapping	Map elements defined in Absence Management to codes in direct interface with Payroll for North America or Payroll Interface.
Manage Generatd Positive Input (Manage Generated Positive Input)	GP_ABS_MANAGE_GPI	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Absence Conversion Processing, Manage Generatd Positive Input, Manage Generatd Positive Input	View and manage generated positive input from the absence process by Calendar Group ID. Filter records by EmplID and select or clear specific records for conversion to Payroll for North America or Payroll Interface.

Absence Pay Group Mapping Page

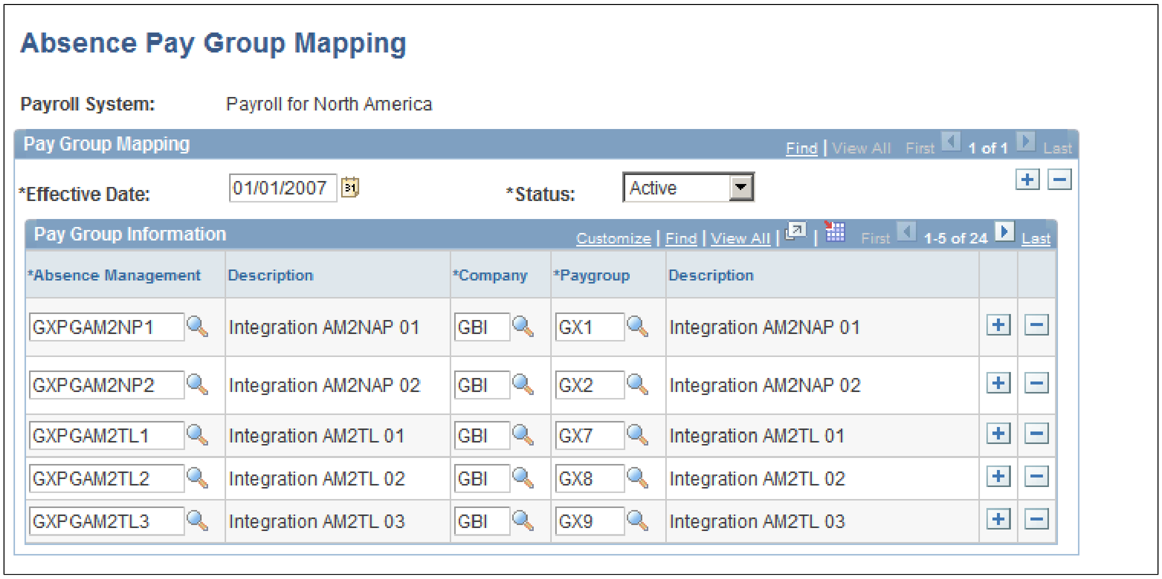
Use the Absence Pay Group Mapping page (GP_ABS_PAYGROUP) to map pay groups that are defined in Absence Management to pay groups that are defined in Payroll for North America or Payroll Interface.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Integration, Absence Pay Group Mapping, Absence Pay Group Mapping

Image: Absence Pay Group Mapping page

This example illustrates the fields and controls on the Absence Pay Group Mapping page.



Use this page to establish a one-to-one correspondence between pay groups in Absence Management and pay groups in Payroll for North America or Payroll Interface. For Payroll for North America, the pay group prompt list originates from the Payroll for North America Pay Group Table without any PI Configuration value; those for Payroll Interface have a PI Configuration value.

Note: A company may have multiple pay groups, but each pay group is attached to only one company.

Absence Earns/Deductn Mapping Page

Use the Absence Earns/Deductn Mapping page (GP_ABS_ERN_DED_MAP) to map elements defined in Absence Management to codes in direct interface with Payroll for North America or Payroll Interface.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Integration, Absence Earns/Deductn Mapping, Earnings/Deduction Mapping

You use different pages to map Absence Management codes to the payroll system's earning or deduction codes depending on which applications you use. This topic discusses pages used to:

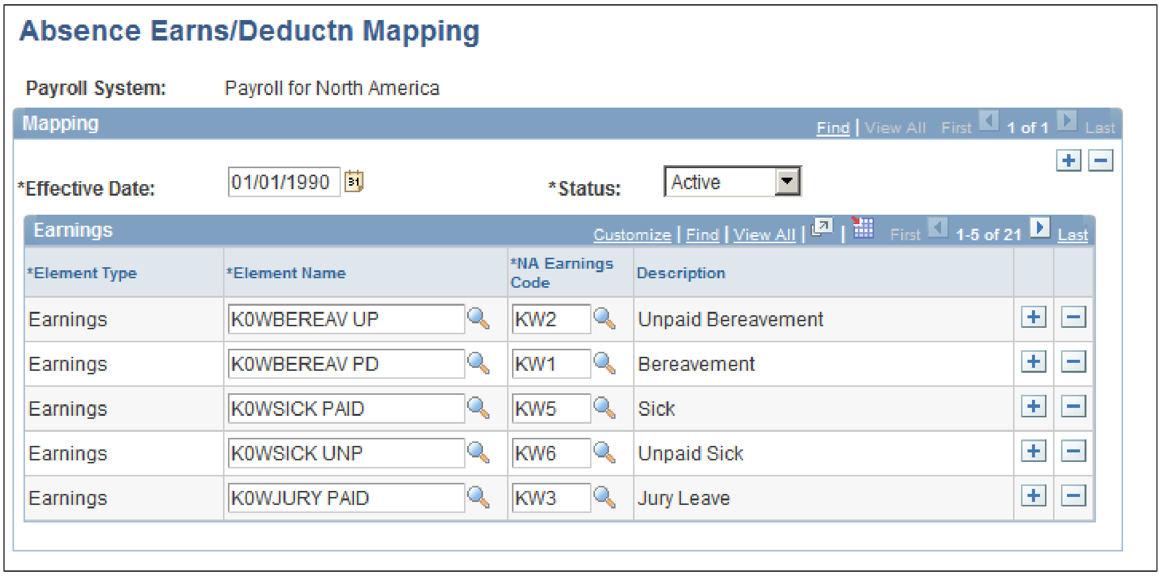
- Map Absence Management codes to Payroll for North America without Time and Labor.
- Map Absence Management codes to Payroll for North America with Time and Labor.
- Map Absence Management codes to Payroll Interface.

Mapping Absence Management Codes to Payroll for North America without Time and Labor

Access the Absence Earnings/Deduction Mapping page using Payroll for North America as the payroll system (Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Integration, Absence Earns/ Deductn Mapping, Earnings/Deduction Mapping).

Image: Absence Earns/Deductn Mapping page

This example illustrates the fields and controls on the Absence Earns/Deductn Mapping page for Payroll for North America without Time and Labor.



Use this page to map earning elements in Absence Management to Earning Codes in a Payroll for North America system that does not interface with Time and Labor.

Note: All positive input generated in Absence Management that interfaces directly with Payroll for North America without Time and Labor must be linked to earning codes on the Absence Earnings/Deduction Mapping page. Earning codes for Payroll for North America originate from the Payroll for North America Earnings Code table.

Mapping Absence Management Codes to Payroll for North America with Time and Labor

If you use Time and Labor, you must map Time Reporting Codes (TRCs) to both Payroll for North America Earnings Codes and Absence Management elements at the same time. You do this on the Time and Labor TRC setup pages by selecting the Absence Flag and selecting North American Payroll as the payroll system.

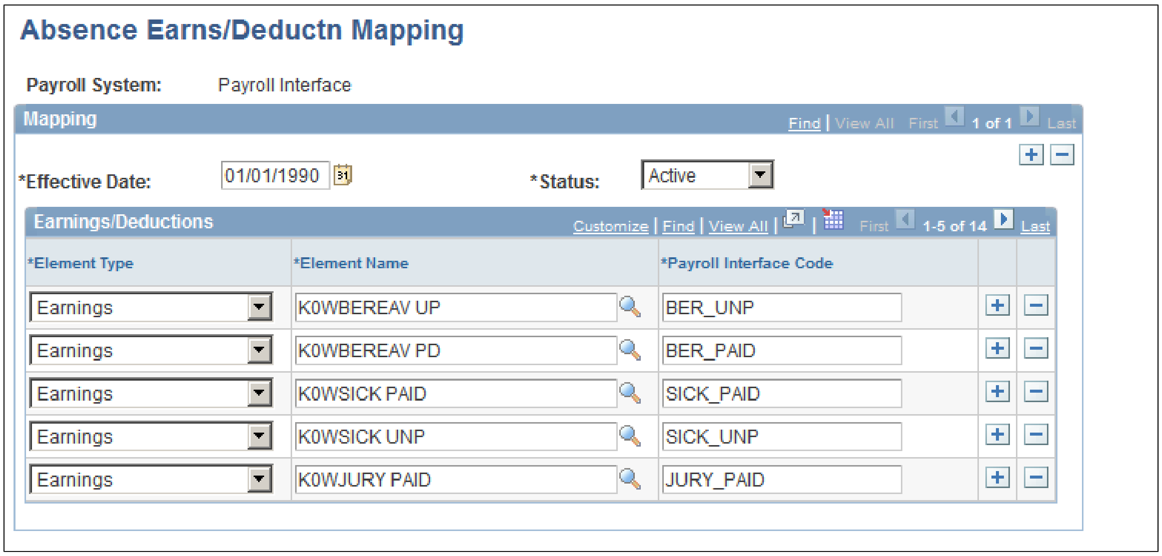
See "Defining and Mapping Time Reporting Codes (TRCs) *(PeopleSoft HCM 9.2: Time and Labor)*".

Mapping Absence Management Codes to Payroll Interface

Access the Absence Earnings/Deduction Mapping page using Payroll Interface as the payroll system (Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Integration, Absence Earns/Deductn Mapping, Earnings/Deduction Mapping).

Image: Absence Earns/Deductn Mapping page

This example illustrates the fields and controls on the Absence Earns/Deductn Mapping page for Payroll Interface.



For Payroll Interface, you can map both earning and deduction elements from Absence Management.

Note: Positive input generated in Absence Management does not need to be mapped to valid Payroll Interface codes. Absence Management does not validate Payroll Interface codes. Mapped Payroll Interface codes are free form, as defined by the third-party payroll system's interface. Element numbers (PIN_NUM), Element Codes (PIN_CODE) or Element Names (PIN_NM) can be used instead of mapped Payroll Interface codes to identify Absence codes in Absence Management's output interface file.

Identifying Absence Management at the Payee Job Level

You must identify the payroll and absence system for each payee using the Payroll page in the Job Data component of PeopleSoft HR.

See "Updating Job Data *(PeopleSoft HCM 9.2: Human Resources Administer Workforce)*".

Select *Payroll for North America* or *Payroll Interface* in the Payroll System field. In addition, select *Absence Management* in the Absence System field. Enter the Absence Management system's Pay Group, Eligibility Group, Exchange Rate Type, and Use Rate As Of in the fields provided in the Absence Management System group box. To set any of the latter three values to default from the Absence Management pay group's values, select the appropriate check box under Use Pay Group Value. Otherwise, enter a corresponding value in each field.

Note: If you are using Absence Management as a stand alone system, the valid Payroll System in Job Data is *Global Payroll.* When you select *Global Payroll* as a Payroll System, the Absence System is automatically defaulted to *Absence Management.* Thus there are no additional integration components to setup other than the usual processing and organizational framework.

Note: For Payroll for North America that interfaces with Time and Labor, the employee should also be enrolled in Time and Labor's Time Reporter Data.

Related Links

"Entering and Maintaining Time Reporter Data *(PeopleSoft HCM 9.2: Time and Labor)*"

Manage Generatd Positive Input Page

Use the Manage Generatd Positive Input (Manage Generated Positive Input) page (GP_ABS_MANAGE_GPI) to view and manage generated positive input from the absence process by Calendar Group ID.

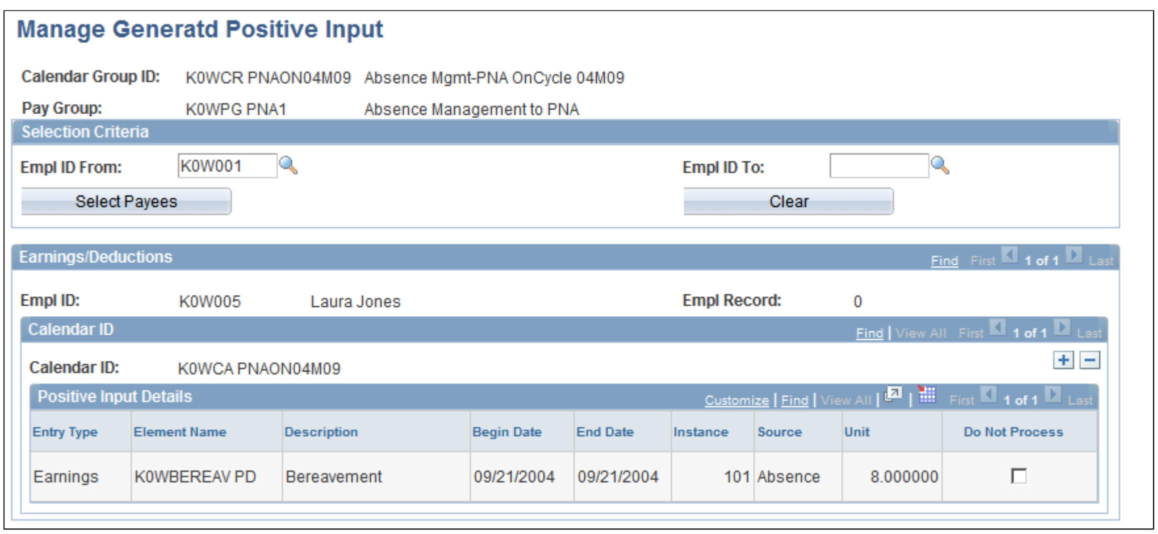
Filter records by EmplID and select or clear specific records for conversion to Payroll for North America or Payroll Interface.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Absence Conversion Processing, Manage Generatd Positive Input, Manage Generatd Positive Input

Image: Manage Generatd Positive Input page

This example illustrates the fields and controls on the Manage Generatd Positive Input page.



Absence Management creates a Generated Positive Input (GP_PI_GEN_DATA) file when the Absence Take process runs during absence processing. Absence Management uses this file to provide information to the payroll system's interface file.

After the Generated Positive Input file is created, the user can opt not to send or process some absences to the payroll system. This page displays absence results for the selected Calendar Group ID as generated positive input. Select the Do Not Process check box in the Positive Input Details group box for all items that you do not want to transfer to the payroll system that Absence Management integrates with, either Payroll for North America or Payroll Interface.

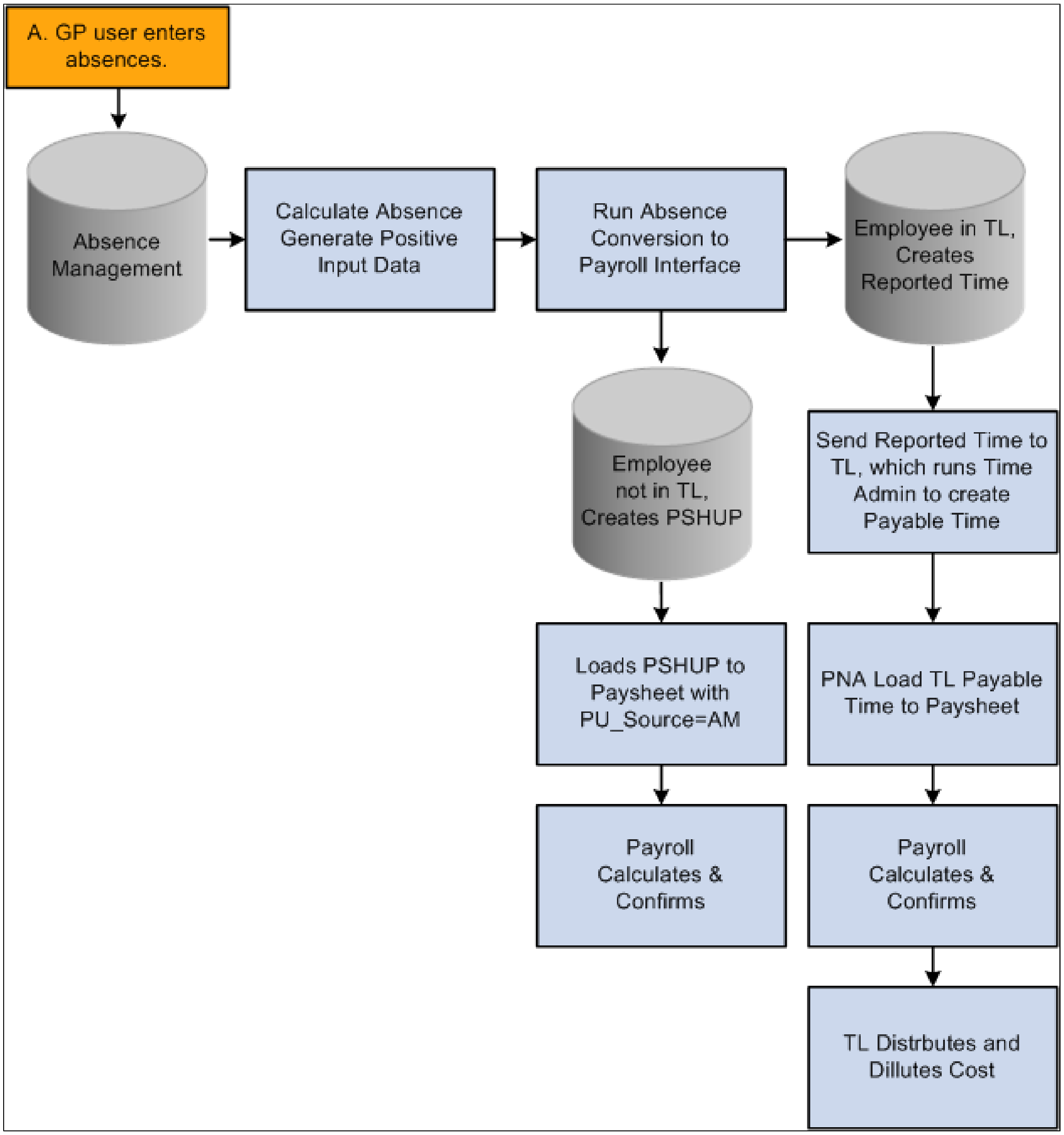
Use the following fields and buttons to filter results by Employee ID and select or clear all check boxes.

EmplID From and EmplID To	Enter an employee ID in one or both fields to limit the records that display in the Positive Input Details group box. Specifying a value in the EmplID From field sets the lower end of the range of values. Specifying a value in the EmplID To field sets the higher end of the range of values. You can leave these fields blank to display all generated positive input for the Calendar Group ID.
Select Payees	Click this button to display records for the range of EmplIDs that you specified in the EmplID From and EmplID To fields.
Clear	Click this button to remove values in the EmplID From and EmplID To fields. After clicking this button, you must click the Select Payees button again to display records for all, or a different range of EmplIDs.
Set All to Do Not Process	Click this button to select the Do Not Process check box for all displayed records.
Clear All	Click this button to clear the Do Not Process check box for all displayed records.

Integrating with Payroll for North America

Image: Absence Management Integration to Payroll for North America

This diagram illustrates the flow of information from Absence Management to Payroll for North America, with or without the interface to Time and Labor.



There are two types of integration between Absence Management and Payroll for North America, direct integration or integration though Time and Labor. To enable direct integration between Absence Management and Payroll for North America, Absence Management exports computed absence results to the PSHUP_TXN table where the rest of the interfaces with payroll for North America are deposited. Later on the Absence data can be loaded into Paysheets with the Load Transactions Table process, using the source code Absence Management.

If your organization uses Time and Labor in conjunction with Payroll for North America, Absence Management exports computed absence results in Time and Labor. Time and Labor converts the absence results into Payable Time.

This topic discusses how to:

- Run the Absence Conversion process to Payroll for North America.
- Run direct interface to Payroll for North America processes.
- Run interface to Payroll for North America through Time and Labor processes.
- Calculate absences with Payroll for North America.

Page Used to Integrate Absence Management to Payroll for North America

Page Name	***Definition Name***	***Navigation***	***Usage***
To Payroll for North America	GP_ABS_NA_RUNCTL	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Absence Conversion Processing, To Payroll for North America, To Payroll for North America	Run the process that sends the generated positive input from the absence process to the Paysheet Load Holding Record (PSHUP) for use by Payroll for North America, or create Time and Labor Payable Time for use by Time and Labor.

To Payroll for North America Page

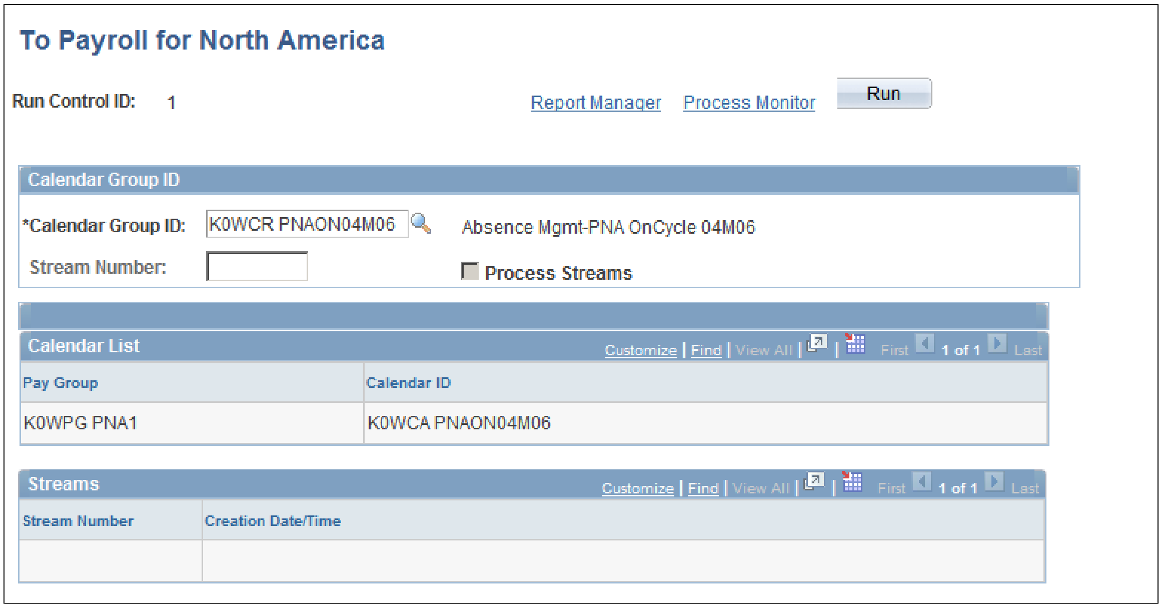
Use the To Payroll for North America page (GP_ABS_NA_RUNCTL) to run the process that sends the generated positive input from the absence process to the Paysheet Load Holding Record (PSHUP) for use by Payroll for North America, or create Time and Labor Payable Time for use by Time and Labor.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Absence Conversion Processing, To Payroll for North America, To Payroll for North America

Image: To Payroll for North America page

This example illustrates the fields and controls on the To Payroll for North America page.



Use this page to transfer generated positive input from Absence Management to Payroll for North America. After this process is completed, the Absence Management data resides in the Paysheet Load Holding Record (PSHUP_TXN) in Payroll for North America for those employees that are not enrolled in Time and Labor.

See "Loading Paysheet Transactions *(PeopleSoft HCM 9.2: Payroll for North America)*".

Time and Labor Payable Time (TL_PAYABLE_TIME) updated through the Conversion Process

When payees are enrolled in Time and Labor and you run the Absence Conversion process, the system creates Time and Labor Payable Time (TL_PAYABLE_TIME) instead of creating data in the Paysheet Load Holding Record (PSHUP_TXN).

Note: A subset of payees whose absences are processed in Absence Management can be enrolled in Time and Labor. When you run the conversion process to Payroll for North America, the system identifies which payees are enrolled in Time and Labor and creates data appropriate for processing by Time and Labor before payroll processes occur.

Paysheet Load Holding Record (PSHUP_TXN) Fields Updated Through the Conversion Process

The following table lists values that populate the Paysheet Load Holding Record (PSHUP_TXN) fields in Payroll for North America. The PSHUP_TXN fields that are not listed are populated with blanks, zeroes or nulls depending on the field type. Key fields such as PAY_END_DT, OFF_CYCLE, PAGE_NUM, LINE_NUM, ADDL_NBR and SEPCHK are assigned values during the actual Paysheet Load process.

PSHUP_TXN Field	***Value or Record.Field***
PU_SOURCE	'AM 'for Absence Management
CREATION_DT	Run's Current Date
COMPANY	JOB.COMPANY
PAYGROUP	JOB.PAYGROUP
PAY_END_DT	Null
OFF_CYCLE	'N'
EARNS_BEGIN_DT	GP_PI_GEN_DATA.BGN_DT
EARNS_END_DT	GP_PI_GEN_DATA.END_DT
EMPLID	GP_PI_GEN_DATA.EMPLID
EMPL_RCD	GP_PI_GEN_DATA.EMPL_RCD
SEQNO	Assigned Unique Sequence Number
PU_TXN_TYPE	'E'
PU_TXN_STATUS	'A'
PAGE_NUM	0
LINE_NUM	0
ADDL_NBR	0
SEPCHK	0
DEPTID	JOB.DEPTID
JOBCODE	JOB.JOBCODE
POSITION_NBR	JOB.POSITION_NBR
ACCT_CD	JOB.ACCT_CD
PU_DISTRIBUTE	'N'
ERNCD	GP_ABS_ERNDDMAP.ERNCD
ADDL_PAY_SHIFT	'N'

PSHUP_TXN Field	***Value or Record.Field***
ADDL_SEQ	0
ADDLPAY_REASON	'N'
OTH_HRS	GP_PI_GEN_DATA.GP_UNIT
HOURLY_RT	GP_PI_GEN_DATA.GP_RATE
DISABLE_DIR_DEP	N'
BUSINESS_UNIT	GP_PI_GEN_DATA.BUSINESS_UNIT
AMT	GP_PI_GEN_DATA.GP_AMT
MANUAL_CHECK	'N'
CURRENCY_CD	GP_PI_GEN_DATA.CURRENCY_CD
GROSSUP	'N'

Running Payroll System Processes for Payroll for North America

Absence Management converts the generated positive input file into a Payroll for North America Paysheet Transaction file (PSHUP_TXN) for employees not enrolled in Time and Labor. The paysheet transactions can be loaded using the Load Paysheet Transactions page in Payroll for North America by selecting *Absence Management* in the Paysheet Update Source field in the Calculate Options group box.

Absence Management data sent to Paysheets via Paysheets transaction file will be editable in Paysheets, just as rest of the transactions loaded using this method.

Note: If an employee is enrolled in Time and Labor in the middle of a pay period and there is absence data reported for such period of time, a portion of the absence will be sent to the Paysheet Transaction file and the other portion will be sent to Time and Labor Payable Time.

See "Load Paysheet Transactions Page *(PeopleSoft HCM 9.2: Payroll for North America)*".

Running Payroll for North America through Time and Labor

For employees enrolled in Time and Labor, the conversion process creates Time and Labor Payable time from Absence Management's generated positive input. . Consequently, you can load the payable time which includes your absence and time to paysheets using the Load Time and Labor process page in Payroll for North America.

Calculating Absences with Payroll for North America

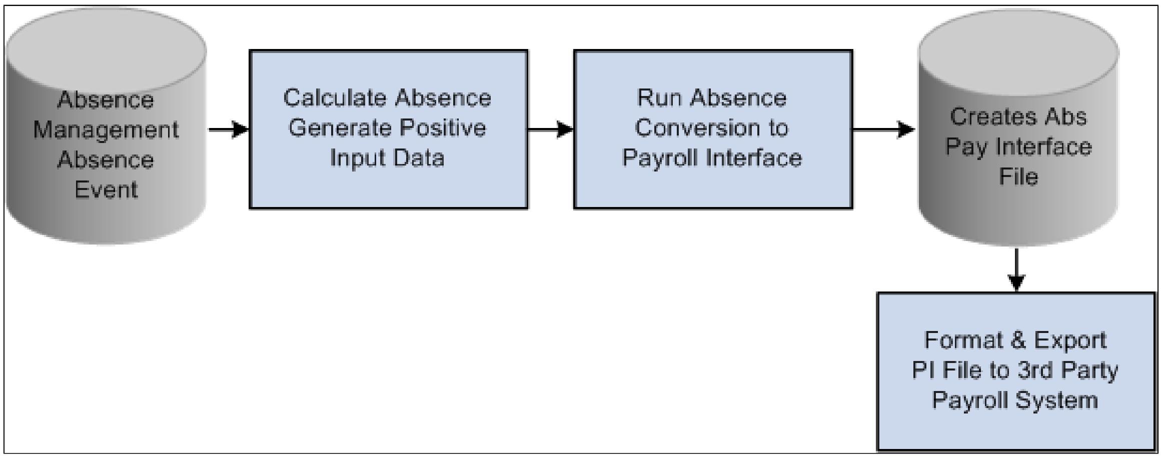
After absence transactions are loaded into paysheets, Payroll for North America calculates the absences as earnings. If there is an interface through Time and Labor, then the process can go through Time and Labor cost distribution as needed.

See "Understanding the Pay Calculation Business Process *(PeopleSoft HCM 9.2: Payroll for North America)*".

Integrating with Payroll Interface

Image: Absence Management Integration to Payroll Interface

This diagram illustrates the flow of information from Absence Management to Payroll Interface.



This topic discusses how to:

- Run the Absence Conversion process.
- Set up and run Payroll Interface processes.

Pages Used to Integrate Absence Management with Payroll Interface

Page Name	***Definition Name***	***Navigation***	***Usage***
To Payroll Interface File	GP_ABS_PI_RUNCTL	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Absence Conversion Processing, To Payroll Interface, To Payroll Interface File	Run the process that sends the generated positive input from the absence process to a new table from which Payroll Interface extracts data for use in the payroll system.

To Payroll Interface File Page

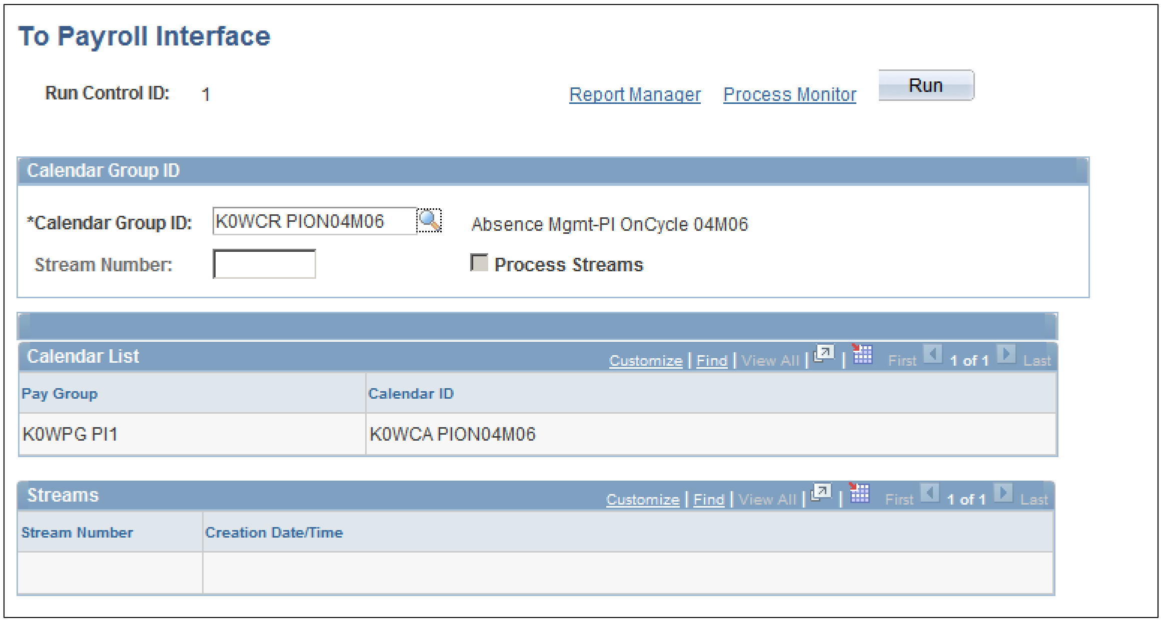
Use the To Payroll Interface File page (GP_ABS_PI_RUNCTL) to run the process that sends the generated positive input from the absence process to a new table from which Payroll Interface extracts data for use in the payroll system.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Absence Conversion Processing, To Payroll Interface, To Payroll Interface File

Image: To Payroll Interface File page

This example illustrates the fields and controls on the To Payroll Interface File page.



Use this page to transfer generated positive input from Absence Management to Payroll Interface. After this process is completed, the Absence Management data resides in new table, Absence Management to Payroll Interface - Output File (GP_ABS_PAY_INTF), from which Payroll Interface extracts data for use in the payroll system.

Absence Management to Payroll Interface - Output File (GP_ABS_PAY_INTF) Fields Updated Through the Conversion Process

The following table shows values that populate GP_ABS_PAY_INTF fields for Payroll Interface. This record is available for further conversion and export according to third-party payroll system's requirements using Payroll Interface components.

GP_ABS_PAY_INTF	***Value or Record.Field***
EMPLID	GP_PI_GEN_DATA.EMPLID
EMPL_RCD	GP_PI_GEN_DATA.EMPL_RCD
GP_PAYGROUP	GP_PI_GEN_DATA.GP_PAYGROUP
CAL_ID	GP_PI_GEN_DATA.CAL_ID
SRC_CAL_ID	GP_PI_GEN_DATA.SRC_CAL_ID
PI_VER_NUM	GP_PI_GEN_DATA.PI_VER_NUM

GP_ABS_PAY_INTF	***Value or Record.Field***
PIN_NUM	GP_PI_GEN_DATA.PIN_NUM
PI_SOURCE	GP_PI_GEN_DATA.PI_SOURCE
GEN_INSTANCE	GP_PI_GEN_DATA.GEN_INSTANCE
BGN_DT	GP_PI_GEN_DATA.BGN_DT
END_DT	GP_PI_GEN_DATA.END_DT
SRC_CAL_RUN_ID	GP_PI_GEN_DATA.SRC_CAL_RUN_ID
PAY_SYSTEM_FLG	JOB.PAY_SYSTEM_FLG
COMPANY	JOB.COMPANY
PAYGROUP	JOB.PAYGROUP
PI_FIELD_VALUE	GP_ABS_ERNDDMAP.PI_FIELD_VALUE
PIN_CODE	GP_PIN.PIN_CODE
PIN_NM	GP_PIN.PIN_NM
PI_ACTION_TYPE	GP_PI_GEN_DATA.PI_ACTION_TYPE
CURRENCY_CD	GP_PI_GEN_DATA.CURRENCY_CD
RATE_ASOF_DATE	GP_PI_GEN_DATA.RATE_ASOF_DATE
GP_RATE	GP_PI_GEN_DATA.GP_RATE
GP_UNIT	GP_PI_GEN_DATA.GP_UNIT
GP_BASE	GP_PI_GEN_DATA.GP_BASE
GP_PCT	GP_PI_GEN_DATA.GP_PCT
GP_AMT	GP_PI_GEN_DATA.GP_AMT
BUSINESS_UNIT	GP_PI_GEN_DATA.BUSINESS_UNIT
DESCR	GP_PI_GEN_DATA.DESCR
ABS_PRD_BGN_DT	GP_PI_GEN_DATA.ABS_PRD_BGN_DT
ABS_PRD_END_DT	GP_PI_GEN_DATA.ABS_PRD_END_DT

GP_ABS_PAY_INTF	***Value or Record.Field***
ABS_BGN_DT	GP_PI_GEN_DATA.ABS_BGN_DT
ABS_END_DT)	GP_PI_GEN_DATA.ABS_END_DT

Setting Up and Running Payroll Interface Processes

Use Payroll Interface pages to set up and configure the process of extracting data from the new table that Absence Management creates during the Absence Conversion process to Payroll Interface. On the Payroll Interface set up pages enter GP_ABS_PAY_INTF as the Record Name. For Field Names, enter those listed in the table in the previous section.

See "Exporting or Importing Data *(PeopleSoft HCM 9.2: Payroll Interfacechan)*".

Absence Management Integration and Retroactivity

Regardless of the payroll system's retroactive mode—which can be corrective or forwarding—the Absence Management retro conversions are always done in corrective mode. This means that all prior transactions for the retroactive period are reversed and new transactions are created for all entries from the recalculated results. This ensures that not only changes to amounts, but also changes to Absence Take codes and any segmentation that may result from retroactive processes is reflected in the updated transactions. Payroll for North America, Time and Labor and/or any third-party payroll system integrated with Payroll Interface processes the reversing of old transactions as well as new transactions; consequently, the system calculates the correct net amount for each absence code.

Note: If an employee whose absences are tracked using Absence Management is transferred to a different pay systems that uses Absence Management, we recommend that this be done at the beginning or end of the pay period. The generated positive input from Absence Management does not handle segments; consequently, there is a risk of sending the absence data to both systems if the Calendar ID's Additional Criteria is defined to process positive input.

Chapter 32

Managing Applications and List Sets

Understanding Applications and List Sets

Application definitions and list sets work together, so you can configure the appearance of:

- Administrator results
- Reports
- Processes

Application definitions are high-level groups of settings that enable you to define what types of fields and field values you require at multiple element levels (list sets, element groups, and elements, for example). When you create a list set, the system prompts you to enter an application. Based on the application definition you select, the Define List Set page refreshes to display the available configuration fields.

List sets enable you to create groups of elements and corresponding element attributes to associate with a specific application, such as administrator results, a new report, or a process. For example, if you were to create your own report, you could have a list of entitlements, takes, and accumulators from which you would extract your report data. You can further specify the circumstances under which certain elements may or may not be printed. The List Set feature enables you to do this without having to create new pages and new records. In summary, list sets enable you to:

- Associate groups of elements with a specific application.
- Associate which element groups are part of the list set.
- Set up the configuration required for the application at various levels, including the list set level, element group level, and element level.

Note: To illustrate the relationship between applications and lists sets, we present exhibits that reference the delivered RSLT_ADM application. This application is delivered for use with the Administrator Results component, and is only one of many ways in which you can define applications and lists sets to control a variety of reports and processes in your system.

Primary List Set Components

The Application Definition and List Set feature is composed of three key parts:

- Element Groups

  An element group is a list of elements. An absence administrator can use element groups to create a list of elements that may be used for one or multiple applications.

- Application Definitions

An application definition describes a set of attributes, such as sequence or print options, used to indicate what attributes the absence administrator will need to assign to elements in a list set to make them available for an application.

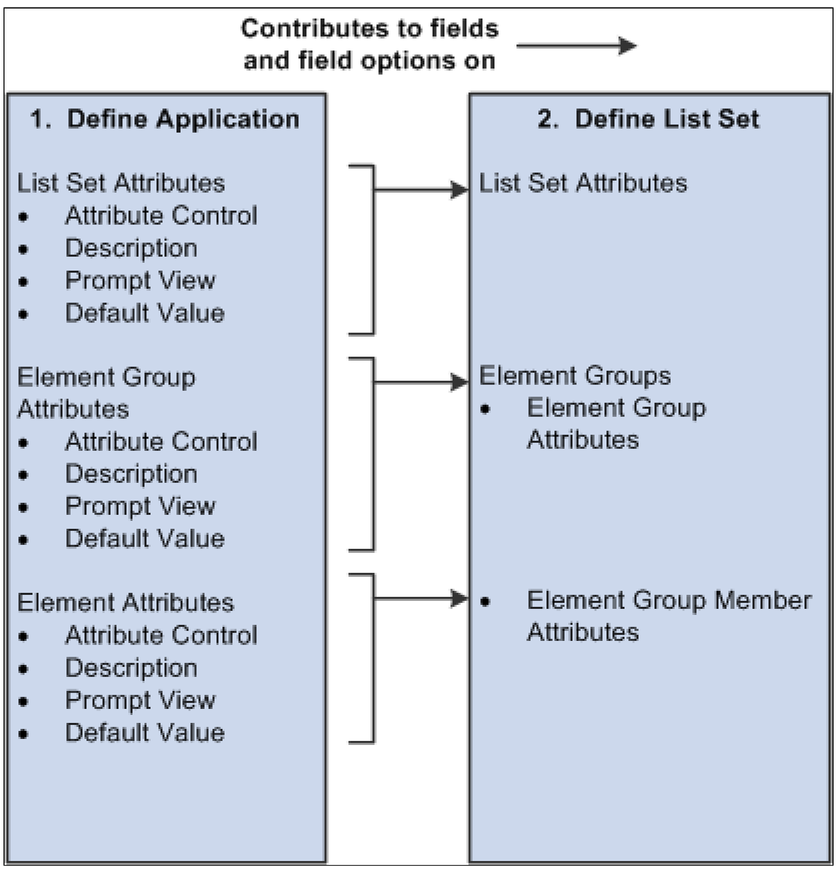
- List Sets

  A list set is a set of element groups connected to an application definition in order to assign application specific attributes to list sets. The absence administrator uses list sets to group the element groups together and assign attributes to the elements, element groups, or the entire set. The list set includes all of the elements that will be available for the application.

Setup Flow of Application Definitions and List Sets

Image: How application definitions contribute to list set setup

This diagram illustrates how setup on the Application Definition page determines which fields appear on the Define List Set page.



How to Set Up Applications and List Set Configurations

To build a list set using an application definition you must complete the following steps:

1. Use the Define Application page to identify and label the attributes you want to define. These can be defined at the list set, element group, and element level. The system uses the information on the Define Application page to populate the List Set page.

2. Use the Define Values for Attribute secondary page to specify additional values, as necessary.

3. Use the Define List Set page to identify various element groups that you want to associate with the list set, and specify attribute values for each. If you defined any attributes at the list set level on the Define Applications page, the system displays them here. You may also create new element groups from this page if you have not previously done so.
4. Use the Element Group Attributes secondary page to view or update element group and element attribute details.

Prerequisite for Applications and List Sets

Element groups are needed on the Define List Set page. Therefore, before you can set up application definitions and lists sets, you should set up element groups. If you do not set up Element Groups prior to creating a list set, you will have the opportunity to create the element group as you go. However, PeopleSoft recommends that you define any needed element groups before you set up applications and list sets.

Related Links

Defining Element Groups

Common Elements Used to Manage Applications and List Sets

Application	A feature, process, or report delivered by Absence Management or developed by the customer that requires the use of element groups and list sets.
Attribute	Characteristics defined for elements in a list, groups in a set, or for an entire set of elements such as at the element level "Print Rate" check box or at the list level "Rate Column Label" character field.
Element Group	An element group is a list, or group of elements.
List Set	A set of element groups defined for use with an application.

Setting Up Applications

To set up application definitions, use the Define Application (GP_ELN_APP) component.

This topic discusses how to set up application definitions.

Pages Used to Set Up Application Definitions

Page Name	***Definition Name***	***Navigation***	***Usage***
Define Application	GP_ELN_APP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define Application, Define Application	Define attributes attached to a list set, an element group, or an element.
Define Values for Attribute	GP_ELN_LIST_SET GP_ELN_LIST_LST GPE_ELN_LIST_PIN	For attribute controls with a value of *Drop Down List,* click the Values link on the Define Application page.	Set up the specific attribute values available for a list set, element group, or element.

Define Application Page

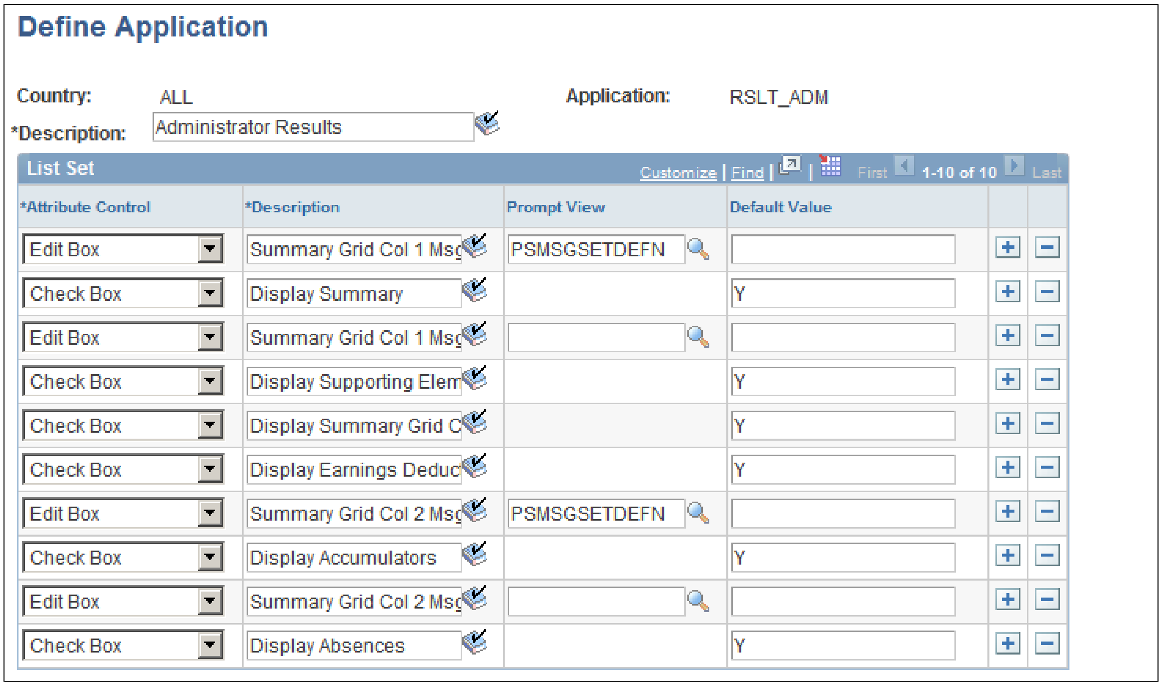
Use the Define Application page (GP_ELN_APP) to define attributes attached to a list set, an element group, or an element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define Application, Define Application

Image: Define Application page (1 of 2)

This example illustrates the fields and controls on the Define Application page (1 of 2).



Define Application

Country: ALL Application: RSLT_ADM

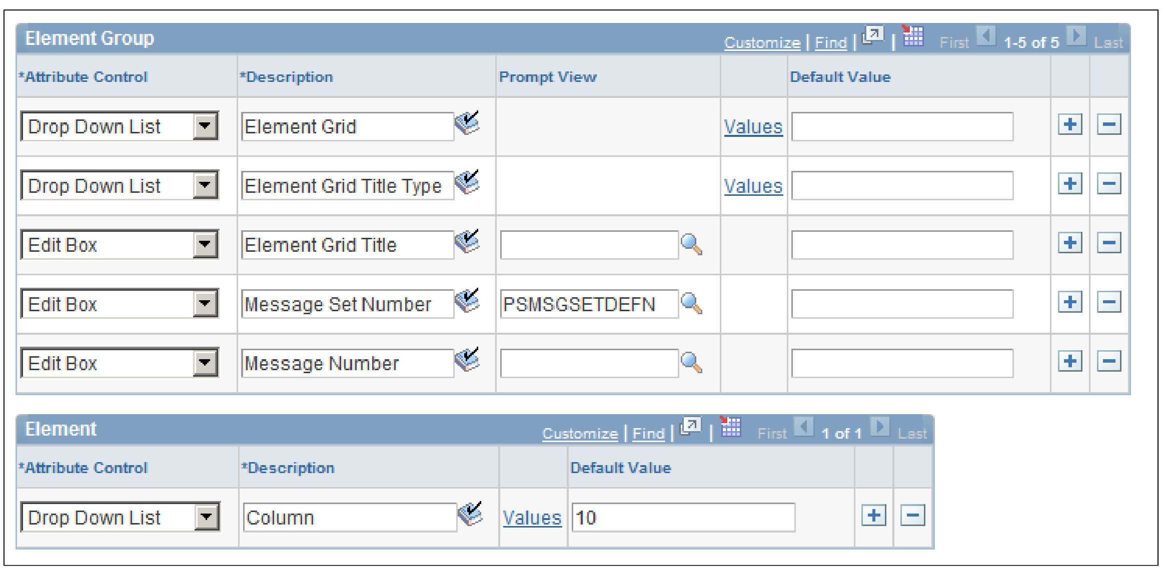
*Description: Administrator Results

List Set — Customize | Find | First 1-10 of 10 Last

*Attribute Control	*Description	Prompt View	Default Value
Edit Box	Summary Grid Col 1 Msg	PSMSGSETDEFN	
Check Box	Display Summary		Y
Edit Box	Summary Grid Col 1 Msg		
Check Box	Display Supporting Elem		Y
Check Box	Display Summary Grid C		Y
Check Box	Display Earnings Deduc		Y
Edit Box	Summary Grid Col 2 Msg	PSMSGSETDEFN	
Check Box	Display Accumulators		Y
Edit Box	Summary Grid Col 2 Msg		
Check Box	Display Absences		Y

Image: Define Application page (1 of 2)

This example illustrates the fields and controls on the Define Application page (1 of 2).



Element Group — Customize | Find | First 1-5 of 5 Last

*Attribute Control	*Description	Prompt View		Default Value
Drop Down List	Element Grid		Values	
Drop Down List	Element Grid Title Type		Values	
Edit Box	Element Grid Title			
Edit Box	Message Set Number	PSMSGSETDEFN		
Edit Box	Message Number			

Element — Customize | Find | First 1 of 1 Last

*Attribute Control	*Description		Default Value
Drop Down List	Column	Values	10

Note: PeopleSoft delivers an application of RSLT_ADM with a country of *ALL* (shown in the preceding exhibit), designed to work in conjunction with the Administrator Results component. . You should not modify this delivered application. Link this delivered application with a list set of your choosing, and use it to control the appearance of the Administrator Results component.

See Defining Administrator Absence Results.

See Viewing Administrator Absence Results.

There is no minimum number of attributes required for each level (represented by the three group boxes). An application definition can be created without specifying attributes. This may be done for applications for which you intend to use the list set solely to group multiple element groups. There is a maximum of ten attributes for each level.

Attributes defined at the list set level apply to all of the element lists in the set.

Attribute Control

Specify how to display the attribute on the Define List Set page. Options are:

Check Box: This attribute is displayed as a check box.

Drop Down List: This attribute is a character field that only accepts input from a list of values that you can create on the Define Values for Attribute page.

Edit Box: This attribute is a character field that accepts any character value.

Translate: This attribute is a character field that only accepts input from a prompt list of translate values.

Description

Enter the field label name to appear on the List Set Definition page.

Prompt View

Select a record from which to create a prompt table. The input will be validated against this table. This field is available only if the Attribute Control is *Edit Box.*

Important! This is straight prompting on the record specified. There is no additional security utilized nor any relationship prompting (for example, using SetID logic, and so on).

Values

Select this link to record the available values on the Define Values for Attribute page. This field is available only if the Attribute Control is *Drop Down List.*

Field Name

Enter an element that contains translate values. The system presents these translate values in a drop down list on the Define List Set page. This field is available only if the Attribute Type is *Translate.*

Default Value To have the system populate a specific attribute value on the Define List Set page, enter a valid default value. The default value must be valid for the associated attribute control.

Define Values for Attribute Page

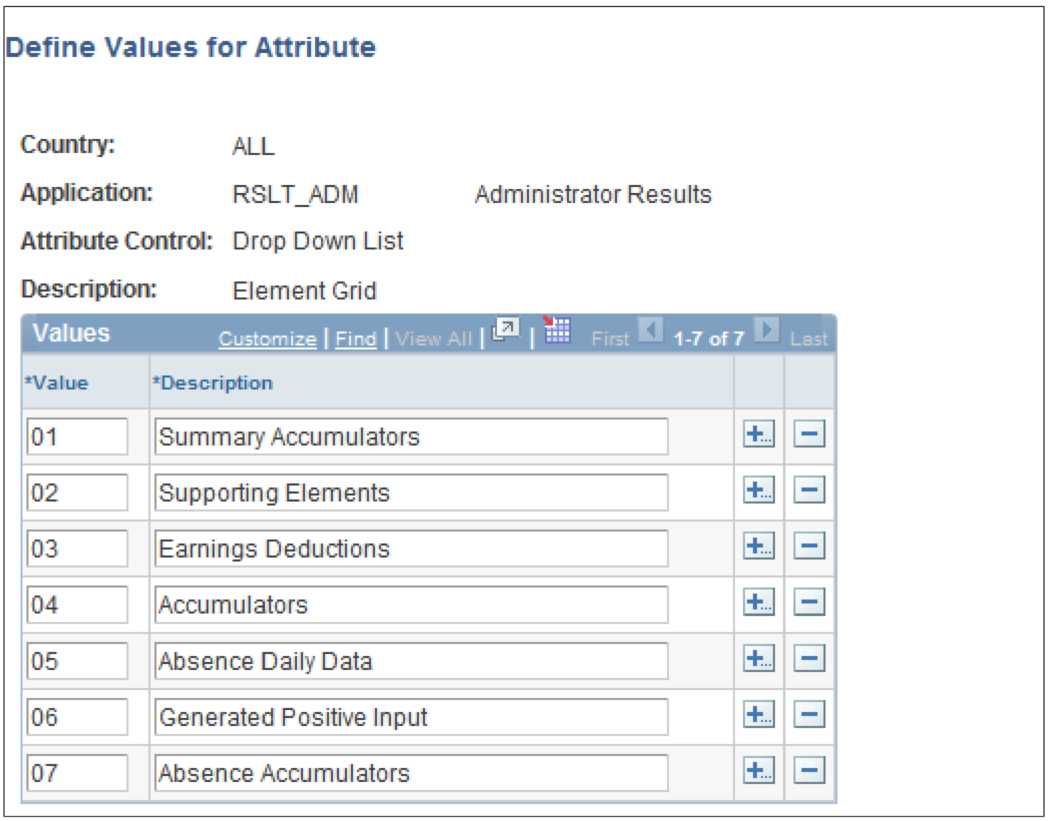
Use the Define Values for Attribute page (GP_ELN_LIST_SET) to set up the specific attribute values available for a list set, element group, or element.

Navigation

For attribute controls with a value of *Drop Down List,* click the Values link on the Define Application page.

Image: Define Values for Attribute page

This example illustrates the fields and controls on the Define Values for Attribute page.



For attributes with an attribute control of *Drop Down List,* you must specify the drop down field values. The system displays these values as options on the Element Group Attributes page during list set setup. You can use any value in the Value column as a default value.

Value Enter the value returned.

Description Enter the description associated with the value.

Setting Up List Sets

To create list sets, use the Define List Set (GP_ELN_SET) component.

This topic discusses how to define list sets.

Pages Used to Define List Sets

Page Name	***Definition Name***	***Navigation***	***Usage***
Define List Set	GP_ELN_SET	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define List Set, Define List Set	Assign element groups to an application.
Element Group Attributes	GP_ELN_SET_SEC	Select the Element Group Details link on the Define List Set page.	Enter the element and element group attribute values for a list set.

Define List Set Page

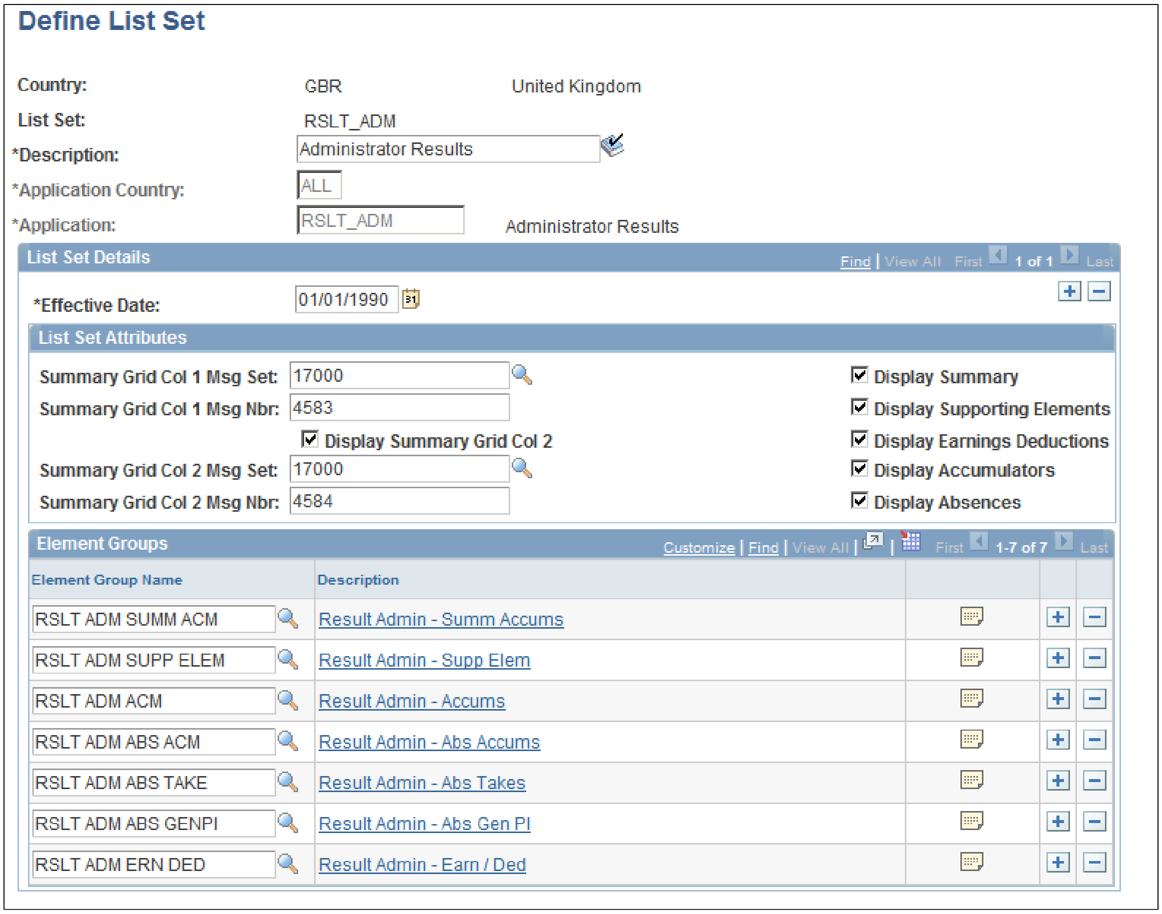
Use the Define List Set page (GP_ELN_SET) to assign element groups to an application.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define List Set, Define List Set

Image: Define List Set page

This example illustrates the fields and controls on the Define List Set page.



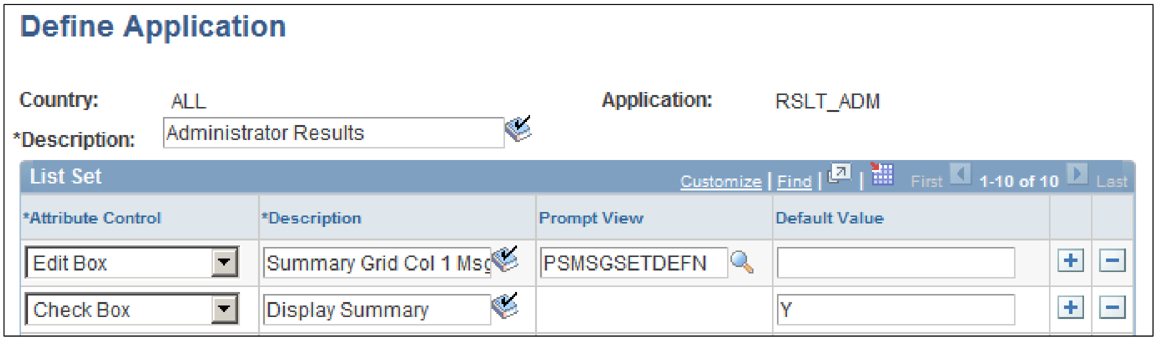
Description	Enter a description for the list set.
Application Country	Select the country for which you want to locate an application definition.
Application	Select the application definition. Doing so will cause the system to display a variety of fields on the page, based on the values defined for the application definition.

List Set Attributes

All of the fields in the List Set Attributes group box are user-defined and come from the setup on the Define Application page. For example, the Summary Grid Col 1 Msg Set field in the previous exhibit was defined on the Define Application page using the Attribute Control, Description, and Prompt View fields. The Display Summary check box was defined there as well. In row number 2 of the following exhibit, you can see that the Display Summary check box was set up with a default value of *Y* for yes. This means that on the Define List Set page in *Add* mode for the *RSLT_ADM* application, the Display Summary check box appears and is selected by default.

Image: Example of the setup source for the List Set Attributes group box

This example illustrates the fields and controls on the Example of the setup source for the List Set Attributes group box.



Element Groups

Initially, in *Add* mode, there are no element groups in this group box. You must select all of the element groups you want to associate with this list set. If you want to assign an element group that has not yet been created, you may do so by clicking the Create new Element Group link.

Element Group Name

Enter the element groups to associate with this list set. The element groups you specify can appear in any component, report, or process that you configure using the list set.

Description

Click to access the Element Group Members page, where you can review details for the element group, and make changes if necessary.

Element Group Details

Click to access the Element Group Attributes page, where, depending on your settings on the Application Definition page, you can define more specifically where and how the details for each element group will appear in related components, reports, and processes.

Create new Element Group

Click to access the Element Groups component in *Add* mode where you can create an element group. This link is useful if you have not previously defined an element group that you want to reference in your list set.

See Defining Element Groups.

Note: The Define List Set page displays all of the added and updated elements with their default attribute values. The system first loads the list of elements from the element group definition and then assigns the values of the attributes from the GP_ELN_PIN_ATTR table. Thus, the page always displays the exact element group members. If an element is removed from the element group, the element is removed from the list set. The element group member list is refreshed each time the user views the Element Group Details page.

Element Group Attributes Page

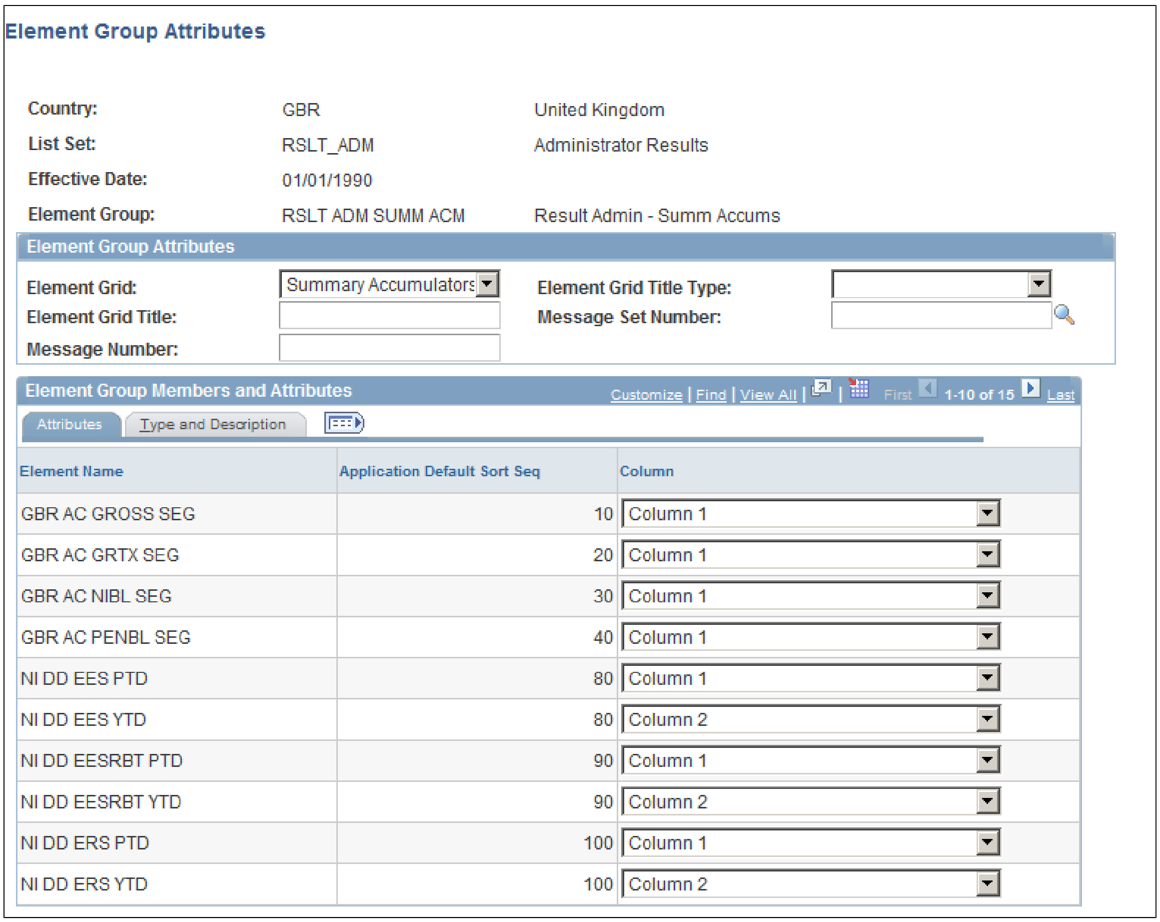
Use the Element Group Attributes page (GP_ELN_SET_SEC) to enter the element and element group attribute values for a list set.

Navigation

Select the Element Group Details link on the Define List Set page.

Image: Element Group Attributes page

This example illustrates the fields and controls on the Element Group Attributes page.



The fields available on this page depend upon the values selected on the Define Application page. The system refreshes the values on this page each time you access it, in order to account for any changes at the element group level.

Each time you access the page, the system:

- Brings in any new elements that are members of the defined element group, along with their default attribute values.
- Removes any elements that are no longer members of the defined element group.

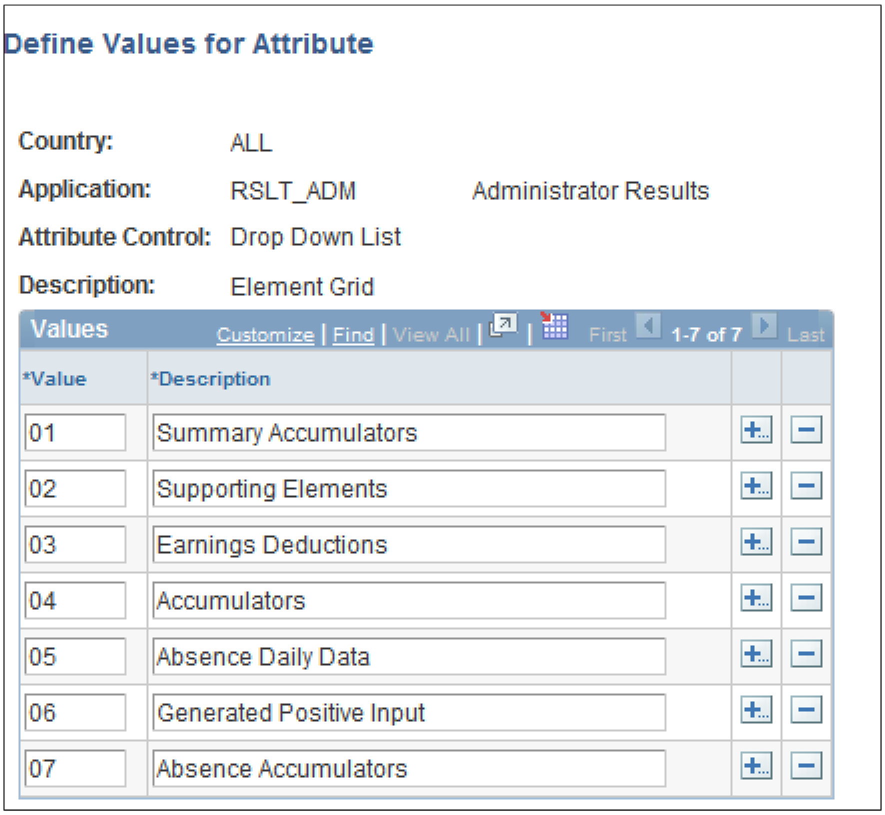
Use this page to define more specifically where and how the details for each element group appear in components, reports, and processes that use this list set.

Element Group Attributes

All of the fields in the Element Group Attributes group box are user-defined and come from the setup on the Define Application page. For example, the Element Grid field in the previous exhibit was defined on the Define Application page using the Attribute Control, Description, and Values fields. In the following exhibit, you can see that the Element Grid field was set up with valid values of *Summary Accumulators, Supporting Elements, Earnings Deductions, Accumulators, Absence Daily Data, Generated Positive Input,* and *Absence Accumulators.*

Image: Example of the setup source for the Element Group Attributes group box

This example illustrates the fields and controls on the Example of the setup source for the Element Group Attributes group box.

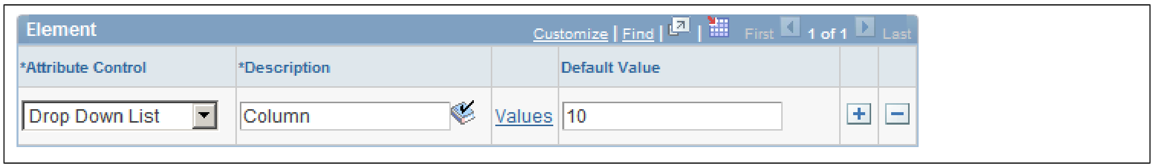


Element Group Members and Attributes

Each element that is a member of the element group appears in the Element Name column on the Element Group Attributes page. Then, based on settings from the Define Application page setup, you can specify details for reach. For example, the Column header on the Attributes tab of the Element Group Attributes page comes from the Attribute Control and Description fields on the Define Application page.

Image: Element Group Attributes page

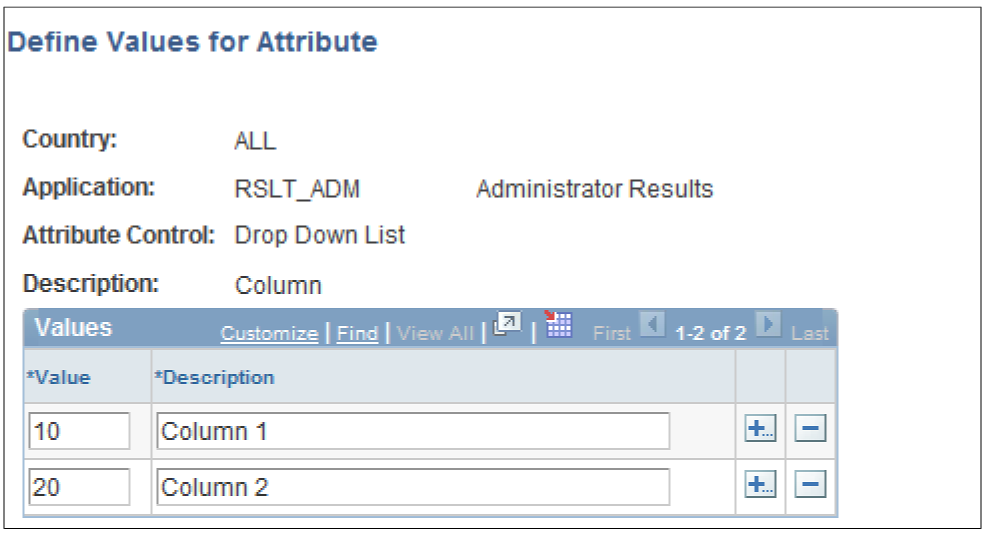
This example illustrates the fields and controls on the Element Group Attributes page.



The available values under the Column header on the Attributes tab of the Element Group Attributes page comes from the corresponding Define Values for Attribute page.

Image: Example of the setup source for the field values in the Element Group Members and Attributes group box

This example illustrates the fields and controls on the Example of the setup source for the field values in the Element Group Members and Attributes group box.

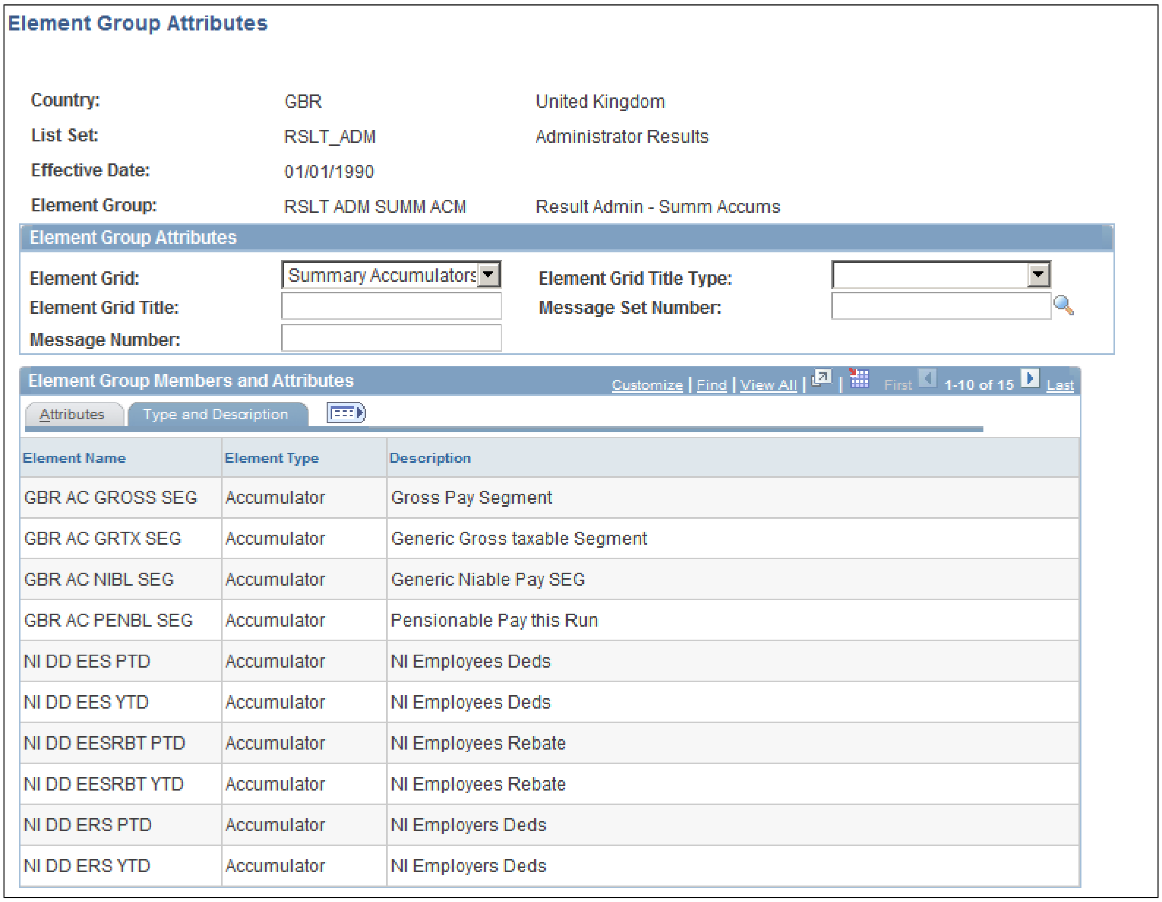


Type and Description

Access the Type and Description tab.

Image: Element Group Attributes page: Type and Description tab

This example illustrates the fields and controls on the Element Group Attributes page: Type and Description tab.



On this tab you can view the element type and description values for each element. These values come from the element setup. The description is what appears in the component, report, or process that you configure using this list set.

Chapter 33

Using the Utilities

Understanding the Absence Management Utilities

This topic discusses:

- Utility usage guidelines.
- The packaging and upgrading processes.
- Base and related languages.
- The versioning functions.
- The delete functions.
- The process of connecting UNIX and NT directories.

Common Terms Used in This Documentation

Element Map

Depicts the relationships between the elements in your database.

The element map plays a critical role in packaging and moving elements and data to other databases. Because the map must be current and accurate when you create packages, the system rebuilds it when you start the process that creates rule packages. During mapping, the system validates that the defined fields exist in the records.

Note: Mapping includes PIN-level records only. You must include those records that don't have a PIN number as the primary key in order to use the non-rule packager.

Focus Element

The focal point of a process or action.

Non-rule

Non-rule data includes processing results, payee data, setup definitions, and other data where PIN_NUM isn't the primary key.

Package Status

Click this link to access the Package Status page.

PIN Code (pay item name code)

The only element attribute that must be unique across databases. Like a PIN number, it's automatically assigned to every element, those delivered by PeopleSoft and those you create. The Code consists of the element name plus the suffix *ALL* if the element is used by all countries, or a three-character country code if the element is used by one country—for example, BASE ALL or

	BASE ITA. When you move elements between databases, the system compares the elements that you're exporting with those in the target database. PIN code is one of the attributes that the system checks when comparing elements.
PIN Number (pay item name number)	This number is a pointer back to a PIN name-related data in GP _PIN, and other tables. It is generated and assigned to every element, those delivered by PeopleSoft and those you create. Absence Management programs access and process elements by referring to their PIN numbers (PIN_NUM), not their names. PIN numbers are assigned sequentially in a given database, meaning that the same element can have different PIN numbers in different databases. So when you move elements between databases, the utilities don't rely on the PIN number to determine if the source elements that you're copying exist in the target database.
Rule	In Absence Management a rule is an element or combination of elements used to define a business rule. For example, an entitlement or take rule, or a count or rounding rule. The primary key for rule-definition tables is PIN_NUM.
Target PIN Number (target pay item name number)	The element's PIN number in the target database.
Upgrading	This process consists of copying items from a source database to a target database; comparing the copied items with items already in the target database; overlaying items in the target database or adding new items, depending on the comparison results; and deleting selected items from the target database.
Source Database	The database containing the rule or non-rule elements that you are packaging from and moving into the target database.
Target Database	The database into which you are moving the packaged rule or non-rule elements from the source database.

Related Links

Why the Core Application Uses Element Name Number (PIN) Processing

Utility Usage Guidelines

Absence Management provides a suite of integrated tools for implementing and maintaining the elements that define your absence rules. You can use these utilities to view the relationships between elements, package and move elements and data between databases, and delete elements. When implementing your absence system, you can use the utilities to move all or selected rules that you've created and tested into your production database. In an existing system, these utilities streamline the process of introducing new rules, installing system updates, and moving processing results and absence data to other databases.

Here are some guidelines for using the utilities:

- Operations involving the utilities can have a significant impact on the system, so anyone using these tools must be very familiar with Absence Management.
- Source and target databases must use the same PeopleTools release.

  The source and target databases used by the non-rule packager must share the same base language.
- Do not change the PIN_CODE in the Absence Management language table (GP_PIN_LANG).

  Doing so can affect your ability to move elements.
- The utilities shouldn't be used during an absence run or while online work is being performed, but rather after business hours.
- *You can import only one package at a time.*

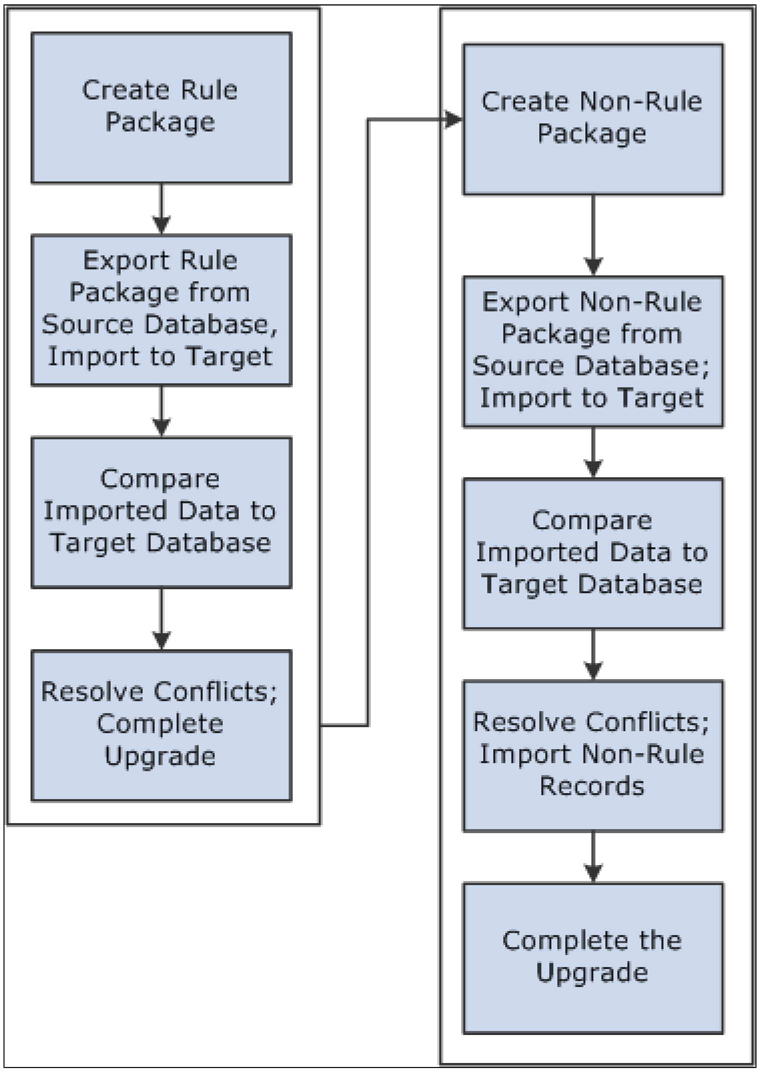
Warning! Attempting to import more than one package at a time could result in the loss of critical data.

The Packaging and Upgrading Processes

To move rules and data between databases, you use several utilities in a specific sequence.

Image: Moving rules and data between databases

This illustration shows the typical sequence for using the utilities to move rules and data between databases.



To move rules and data between databases:

1. Create and upgrade a rule package.

   A rule package contains elements that are defined in records with PIN_NUM as the primary key. You use the Create/Export Rule Package and Apply Rule Package components to package and upgrade the elements you want to move. You can select individual elements for a package by name or by attribute, or you can select elements based on their version number. You tell the system whether you want to include only the focus elements or the focus elements plus the elements the focus elements use, based on the element map.

   You can direct the system to delete or upgrade elements in the target database. A batch process creates a package of elements that you can view online.

After creating a package, you export it from the source database and import it into the target database; the system adds 50 000 000 to the value of each PIN number in the package to avoid overwriting elements in the target database that have matching PIN numbers.

An batch compare process follows, in which the system compares the packaged elements with those in the target database. The goal is to determine which elements are new to the target database, which match elements that exist in the database, and which need deleting according to your instructions. Elements that are new to the target database are assigned the next PIN number.

After reviewing the results of the comparison and resolving conflicts, you complete the upgrade process.

2. Create and upgrade a non-rule package.

   Non-rule packages contain data from records where PIN_NUM is *not* the primary key—plus information about related elements.

   To create a non-rule package:

   a. Define the criteria for creating the package of data to move.

   b. Export the non-rule data and element information from the source database.

   c. Import information for the elements (not the elements themselves) into the target database.

   d. Run a compare process that compares the packaged elements with those in the target database and identifies conflicts to address before importing non-rule data.

   e. Import the non-rule data and start an upgrade process that renumbers the PINs in the non-rule data records that were moved to the target database.

      For example, imagine that the absence results record (GP RSLT ABS) contains a take element with a PIN number of 1333 on the source database. The element was moved to the target database, and because it matches (based on PIN code) an element in the target database with PIN number 3453, the non-rule packager renumbers the PIN number in the absence results record.

Base and Related Languages

In the case of rule packages, the source and target database need not have the same base language. The rule packager, using Data Mover functionality, can identify the base language in the target database and use the correct language from either the base or related language table if that language existed in the source package. Additionally, the rule packager also creates a related language entry on the target database for the source database's base language. Consider the following example:

A German (DEU) target database contains the following data:

Base Data

PIN_NUM	PIN_CODE	Translatable Data	Non translatable Data
701	GP_TEMP001_DEU	Current German Text content	Current values on the target database

You create a package from an English (ENG) source database copying PIN_CODE GP_TEMP001 for base language only. The system:

- Exports a data file containing information for PIN_CODE GP_TEMP001 from the ENG database.

  The data file contains the new PIN_NUM of 50 000 701.

- Imports the data file to the target database.

  Upon import, DataMover automatically creates a related language row with a language code of ENG.

The German target database now looks like this:

PIN_NUM	PIN_CODE	Translatable Data	Non translatable Data
701	GP_TEMP001_DEU	CONTENT	Current values on the target database
50 000 701	GP_TEMP001_DEU	TAKE	New values from the source database

Related Language Data

PIN_NUM	PIN_CODE	LANGUAGE_CD	Translatable Data
50 000 701	GP_TEMP001_DEU	ENG	TAKE

The system then:

- Connects 50 000 701 with 701 using the PIN_CODE.
- Copies the DEU translatable fields from 701 to 50 000 701.
- Deletes the original PIN_NUM 701.
- Renumbers the new rows with the PIN_NUM of the target database.

The result of the process is updated information on the base table and a new ENG entry on the related language table, as shown below.

Base Table

PIN_NUM	PIN_CODE	Translatable Data	Non translatable Data
701	GP_TEMP001 DEU	CONTENT	New values from the source database

Related Language Table

PIN_NUM	***PIN_CODE***	***LANGUAGE_CD***	***Translatable Data***
701	GP_TEMP001 DEU	ENG	TAKE

Had the package been defined as both *base* and *related languages,* the swapping of languages to some extent would already have been completed by datamover during the package import (if a related language row for the language of the target database was part of the package.) This would result in overlaying translatable fields of the base row with the contents of the copied language row. If only the related language was copied with the package, the process is the same as described above, except for translatable fields of the base row of the target database, which would be updated to contain the values of the moved language row.

The Versioning Functions

You can use the versioning utilities of Absence Management to assign a version number to elements, and then have the system package only elements with this version number. Having created a package by version, you can move it to another database. In this case, the system moves changes from element definitions or component records.

Version-based packages only pull data from the database base language table, not from the Pay Item Names — Related Language table (GP_PIN_LANG). The only way to move related language information from GP_PIN_LANG is to use a regular rule package.

The Delete Functions

To delete rules from the target or source database, you can enter instructions for deleting elements when defining the selection criteria for a package. To preserve the integrity of your data, you can delete an element only if it's not associated with other data. That is, the element being deleted must meet all the following conditions:

- Not used in a result table.
- Not associated with payee data.
- Not linked to a non-rule table.
- Not used by another element.
- Not created by the PeopleSoft system.

Important! PeopleSoft recommends that you place elements to be deleted in a separate package from elements that you want to move from the source to the target database.

Related Links

Define Criteria By Attribute Page

The Process of Connecting UNIX and NT Directories

If your application runs on UNIX, exporting and importing packages involves additional considerations. You can create data mover scripts on the UNIX machine, but the data mover used for importing and exporting packages can only be run through an NT Process Scheduler.

Important! Any job or process that uses data mover in a UNIX environment *must* run on an NT Process Scheduler.

Because UNIX and NT reference directories differently, you must define a shared directory that can be accessed by both platforms. In order to do so, the same paths must be mounted on both platforms. The path name must be defined identically on both machines. For example, we have defined the following directory structure to store datamover files:

- NT system: \\xx-xxx\hcm\datamover\
- UNIX system: /xx-xxx/hcm/datamover/

When you specify the path names before creating scripts, importing packages, or exporting packages, you must always use the NT notation including the double back slash. PeopleCode automatically transcribes the path name to the appropriate platform notation when needed.

Important! You *must* add the location of your scripts to the psprcs.cfg file in the NT Process Scheduler. You should verify that the section marked *[Data Mover]* has the Input and Output paths pointed to the same drive.

Defining Element Relationships

To define element relationships, use the Define Element Relationships (GP_PIN_FLD_MAP1) component.

The Define Element Relationships utility builds an element map that shows how elements with PIN numbers are related. It defines the relationship between elements, and enables packager to determine if elements are used in non-rule data, which is important when deleting elements and packaging non-rule data.

Although the packager process rebuilds the map when you create a rule package, we recommend that you rebuild the map when you define new elements, change existing elements, or delete elements. It's also advisable to rebuild the map for the target database after completing an upgrade. This ensures that the map is current when displayed.

This topic discusses how to:

- Rebuild element maps
- Review for errors

Pages Used to Define Element Relationships

Page Name	*Definition Name*	*Navigation*	*Usage*
Define/Build	GP_PIN_FLD_MAP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define Element Relationships, Define/Build	Start the GP_PINMAP process, which rebuilds element maps. View which records contain fields that store PIN numbers. You can add and delete records that you've created to the rule map.
Validation	GP_PIN_FLD_MAP_ERR	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define Element Relationships, Validation	Review for errors after rebuilding the element map.

Related Links

Adding Records to an Element Map

Define/Build Page

Use the Define/Build page (GP_PIN_FLD_MAP) to start the GP_PINMAP process, which rebuilds element maps.

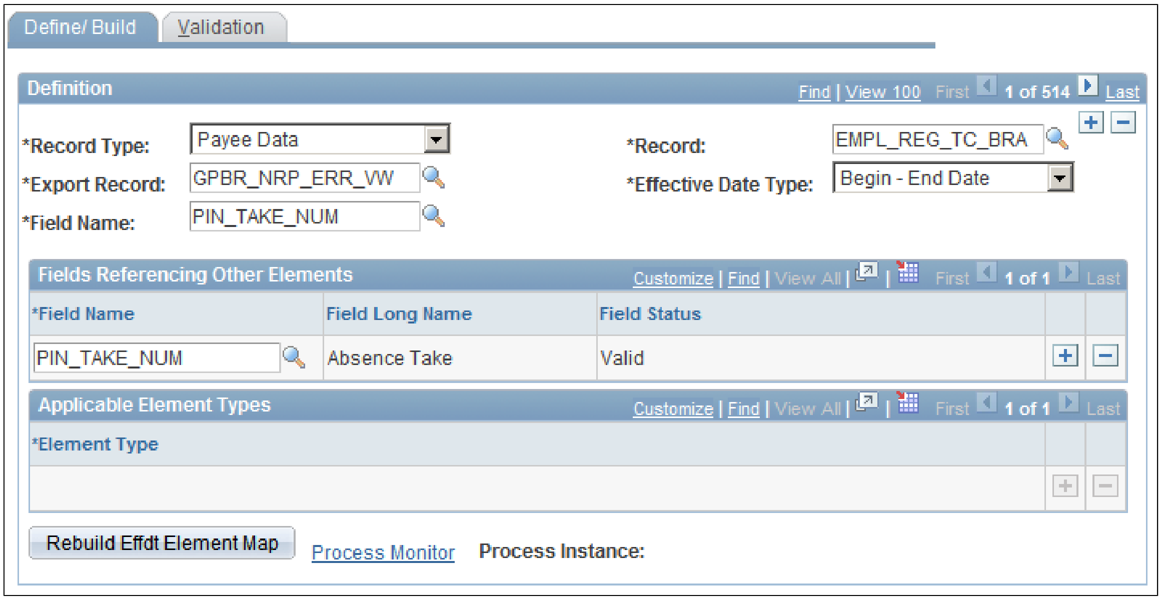
View which records contain fields that store PIN numbers. You can add and delete records that you've created to the rule map.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define Element Relationships, Define/Build

Image: Define/Build page

This example illustrates the fields and controls on the Define/Build page.



This page only lists those records that contain elements (which store PIN numbers). PIN NUM is often the key to these records, though this is not always the case.

Note: You cannot edit this page if it displays information for a PeopleSoft-delivered object.

See Adding Records to an Element Map.

Record Type

Select a record type, which is the type of record that contains elements. Values are:

Element Definition: Records of this type define elements with a primary key of PIN_NUM. Examples: GP_ABS_TAKE (absence takes), GP_ARRAY arrays and GP_FORMULA (formulas).

Note: The Element Definition record type is used only by PeopleSoft.

Records that contain elements but don't define elements have one of the following record types:

Set-up Definition: These are records you define when you implement Absence Management. Examples: GP_ELIG_GRP_ MBR (eligibility group member) and GP_RUN_TYPE_DTL (run type detail).

Output Result Data: These records contain calculation results. Examples: GP_RSLT_ACUM (accumulator results) and GP_RSLT_PIN.

Payee Data: These records contain payee-specific data. Examples: GP_ABS_EVENT (absence events) or GP_PYE_OVRD (payee overrides).

Record

Displays the name of the record, containing one or more elements.

Export Record

Displays the name of the record that the system uses when exporting this data to another database.

Effective Date Type

Identifies whether the record is effective-dated. If this field is set incorrectly, the packager may fail.

Effdt (effective date): This is the default value. Indicates that the record is effective-dated. Example: GP_BRACKET.

Note: If you include in a package an element that has more than one effective-dated row, the system tries to match each row when comparing the source elements with the target database. If it finds a match, it replaces the row in the target database; if it doesn't find a match, it adds the row to the target database. And if a row in the target database has no match , the system leaves the row in the target database unchanged.

No Effdt (not effective-dated): Indicates that the record doesn't have an effective date. Example: GP_ARRAY.

Note: If you include in a package an element with no effective date, the system replaces all data for that element in the target database when you upgrade the package.

Begin − End: Indicates that the record isn't effective-dated but contains begin and end dates. Example: GP_ACM_MBR.

Note: If you include in a package an element with begin and end dates, the system replaces all data for that element in the target database when you upgrade the package.

Field Name

Displays the name of the field in the record that contains other PIN number elements.

For a record type of *Element Definition,* the system displays the name of the key field (PIN_NUM).

Fields Referencing Other Elements

This group box displays all fields that store the PIN numbers of (member) elements that are used by the record/field combination at the top of the page.

The sample page displays information for GP_ERN_DED, the record that defines earning and deduction elements. This record can use up to 17 elements. PIN_AMT_NUM and PIN_BASE_NUM are some of the fields that store PIN numbers of member elements. For example, PIN_BASE_NUM identifies the element that returns the base amount. To resolve an earning or deduction element, the system must know the PIN numbers of elements that store the amount, base, generation control instructions, and so on.

Field Name

Displays the name of the field that stores a member element's PIN number.

Field Long Name

Displays the long name of the field.

Field Status

Displays the field's status. Values are:

Valid: Indicates that the field in the record existed when the element map was last rebuilt.

Invalid: Indicates that a field has been renamed or removed from the record, or that the record no longer exists. The system flags invalid fields when you rebuild the element map.

Applicable Element Types

When the record type is *Element Definition,* this group box identifies the corresponding element types.

Element Type

Important when packaging elements. The element type that you select when creating a package gives the system information needed to select rows from the appropriate record.

Rebuild Effdt Element Map (rebuild effective-dated element map)

Click to start the rebuild process. If the system cannot build the element map because of errors, this message appears on the page: "Effdt Element Map hasn't been built. Please check Validation page for errors."

Note: If the rebuild process is unsuccessful, an error message also appears in the message log.

Validation Page

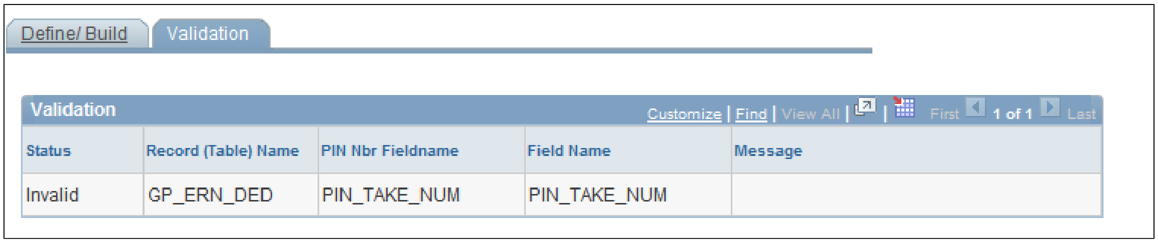
Use the Validation page (GP_PIN_FLD_MAP_ERR) to review for errors after rebuilding the element map.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Define Element Relationships, Validation

Image: Validation page

This example illustrates the fields and controls on the Validation page.



Review this page for errors generated by the rebuild process.

Status	Displays *Invalid* if an error occurred. Usually means that a field has been renamed or removed from the record, or that the record no longer exists. If this is a PS Delivered/Maintained (PeopleSoft system delivered/maintained) record, contact the PeopleSoft support. If the error involves a record that you created, check the record to make sure all the fields are still valid.
Record (Table) Name	Identifies the record that contained the invalid field.
PIN Num Fieldname (pay item name number field name)	Displays the name of the field that appears in the Field Name field at the top of the Define/Build page.
Field Name	Displays the field name that no longer exists in the record but appears on the Define/Build page.
Message	Displays an error message pertaining to the specific field.

Adding Records to an Element Map

The procedure of adding records to an element map depends on the record's main (first) key:

- If the main key is PIN_NUM, the record type is *Element Definition,* (also called Rule Definition).

Note: Rule definitions are created only by PeopleSoft.

- If the main key is not PIN_NUM, the record type is *Output Result Data, Payee Data,* or *Set Up Definition,* depending on its purpose.

This topic discusses how to add non-rules to an element map.

Adding Non-Rules to an Element Map

This section describes the procedure for adding non-rule definitions to an element map, where the record's main key is not PIN_NUM.

To add a non-rule to an element map:

1. Use PeopleTools to create a SQL view for the record.

   The view must have the same structure as your new record, as illustrated in the following example.

   In the Select statement, enter + *50 000 000* after each field in the record that references a PIN number.

2. On the Define/Build page, add a row for the new record.
3. Complete these fields on the Define/Build page:

   a. For Record Type, select *Output Result Data, Payee Data,* or *Set up Definition.*

   b. For Record, select your new record.

   c. For Export Record, select the view that you created in step 1.

   d. For Effective Date Type, select the appropriate value for the record.

   e. For Field Name, select any field in the record that references PIN_NUM.

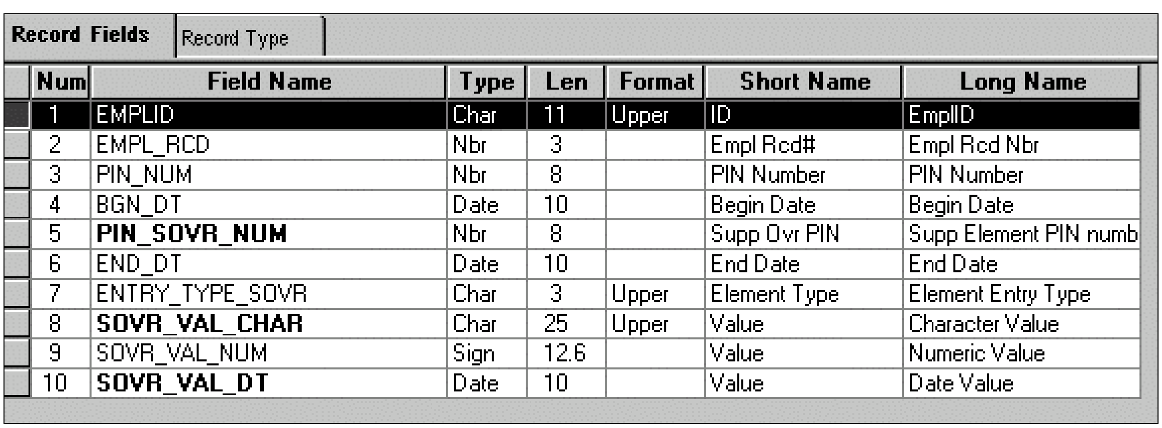
   f. In the Fields Referencing Other Elements group box, list each field within your record that contains a PIN number.

   This includes the field name defined in step e. You can select only PIN_NUM.

Example

Image: Record definition for GP_PYE_OVR_SOVR

This illustration shows how your SQL statement should match the record structure.



Num	Field Name	Type	Len	Format	Short Name	Long Name
1	EMPLID	Char	11	Upper	ID	EmplID
2	EMPL_RCD	Nbr	3		Empl Rcd#	Empl Rcd Nbr
3	PIN_NUM	Nbr	8		PIN Number	PIN Number
4	BGN_DT	Date	10		Begin Date	Begin Date
5	**PIN_SOVR_NUM**	Nbr	8		Supp Ovr PIN	Supp Element PIN numb
6	END_DT	Date	10		End Date	End Date
7	ENTRY_TYPE_SOVR	Char	3	Upper	Element Type	Element Entry Type
8	**SOVR_VAL_CHAR**	Char	25	Upper	Value	Character Value
9	SOVR_VAL_NUM	Sign	12.6		Value	Numeric Value
10	**SOVR_VAL_DT**	Date	10		Value	Date Value

```
SELECT EMPLID
,EMPL_RCD
,PIN_NUM + 50000000
,BGN_DT
,PIN_SOVR_NUM + 50000000
,END_DT
```



```
,ENTRY_TYPE_SOVR
,SOVR_VAL_CHAR
,SOVR_VAL_NUM
,SOVR_VAL_DT
  FROM PS_GP_PYE_OVR_SOVR
```

Viewing Element Relationships

You can use the View Element Relationships utility to view hierarchical maps, including a map that existed as of a specific date.

This topic discusses how to:

- View elements used by a focus element.
- View elements that use a focus element.

Pages Used to View Element Relationships

Page Name	***Definition Name***	***Navigation***	***Usage***
Uses	GP_PINTREE_EFFDT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, View Element Relationships, Uses	View a map of elements that a focus element uses. The element relationship map must be built before the data is displayed.
Used By	GP_PINTREE_EFFDT2	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, View Element Relationships, Used By	View elements that use the focus element.

Uses Page

Use the Uses page (GP_PINTREE_EFFDT) to view a map of elements that a focus element uses.

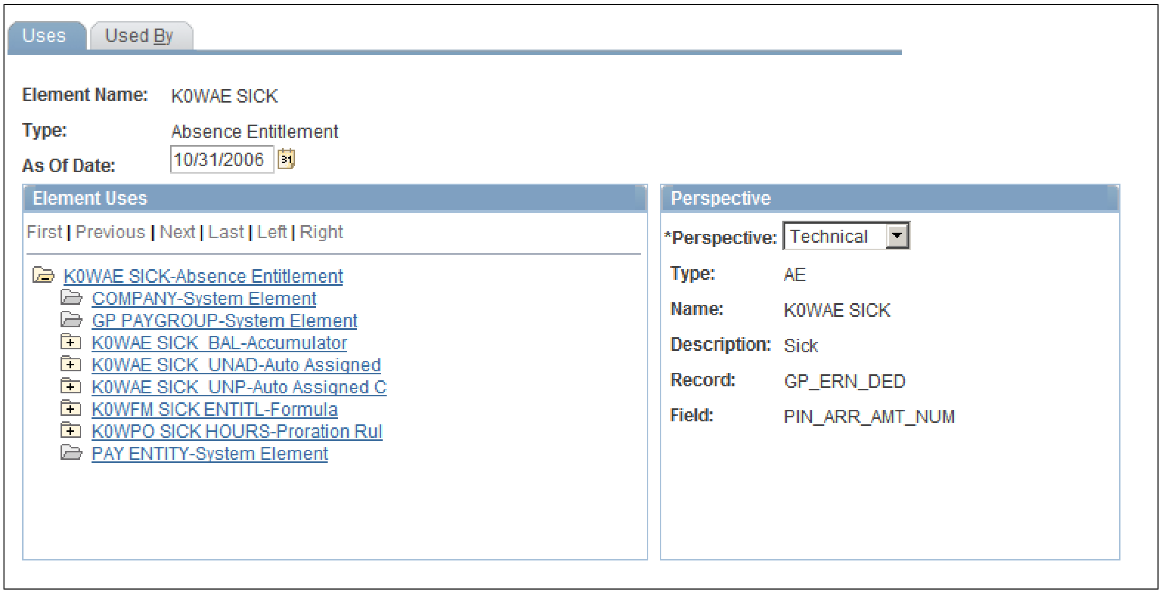
The element relationship map must be built before the data is displayed.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, View Element Relationships, Uses

Image: Uses page

This example illustrates the fields and controls on the Uses page.



Element maps include fields that contain PIN_NUM only. So, when looking at the map for an entitlement element, you don't see fields for frequency, currency, and other non-element information.

Element Name — Displays the name of the element that you selected on the search page. This is the *focus* element.

Type — Displays the element type of the focus element.

As Of Date — To see the relationship map that was in effect on a specific date, enter the date in this field.

Element Uses — Click the element name to view its member elements. This information appears in a tree structure that expands or collapses as you click the + or − folder before an element name.

Perspective

To see additional information on a related element, click the element name in the Element Uses group box and select a view in the Perspective field.

Perspective — Select the format for the data in this group box. Values are:

Functional: Displays descriptive names of the data.

Technical: Displays technical names for the data.

Type — *Functional:* Displays the name of the element type for the selected element.

Technical: Displays the 2 character code of the element type for the selected element.

Name

Displays the name of the selected element. (The name is the same for the functional and technical views.)

Description

Displays the description of the selected element. (The description is the same for the functional and technical views.)

Record

Functional: Displays the descriptive name of the record in which the selected element resides.

Technical: Displays the technical name of the record in which the selected element resides.

Field

Functional: Displays the descriptive name of the field that stores the element's value.

Technical: Displays the technical name of the field that stores the element's value.

Used By Page

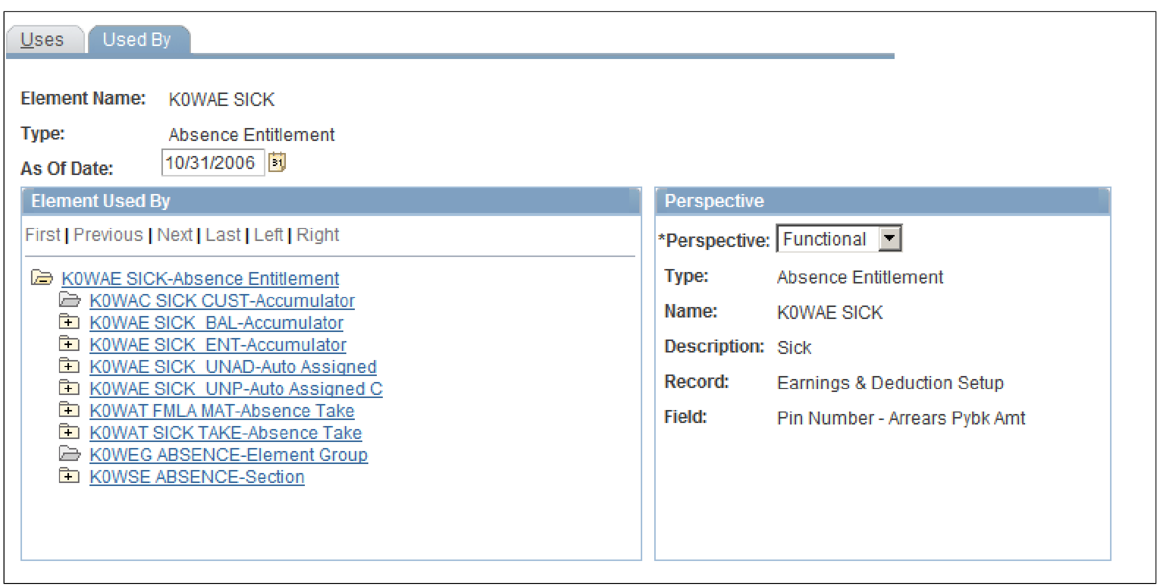
Use the Used By page (GP_PINTREE_EFFDT2) to view elements that use the focus element.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, View Element Relationships, Used By

Image: Used By page

This example illustrates the fields and controls on the Used By page.



This page resembles the Uses page but shows all elements that use the focus element.

Related Links

Uses Page

Creating and Exporting Rule Packages

Absence Management offers a streamlined package creation process that enables you to create rule packages, create import/export scripts, and export rule packages using a single component for both standard and version based rule packages. You can run each step in this process—from package creation, to script creation, to package export—as part of a continuous sequence of steps, or run one step at a time. The Absence Management system ensures that each step is complete before the next step begins, and displays the status of the package so that you can track your progress through the export process.

In addition, Absence Management enables you to specify a default location on the Installation Settings page for the scripts used in the import/export process so that you do not need to enter the same basic information each time you export a package.

This topic provides an overview of how to create and export rule packages, and discusses how to:

- Name rule packages.
- Select elements for a rule package by element.
- Select elements for a rule package by attribute.
- Select elements for a rule package by version.
- Modify the SQL Where clause for selection criteria.
- Create packages and scripts, and export packages.
- View the elements in a rule package.
- View version details for a package by version.
- View the status of a package.
- View a script.

Pages Used to Create and Export Rule Packages

Page Name	***Definition Name***	***Navigation***	***Usage***
Package Definition	GP_PKG_DFN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package, Package Definition	Name a rule package and enter a description and comments.
Define Criteria By Element	GP_PKGCRIT_ELM_SEC	Click Define Criteria By Element link on the Package Definition page.	Define selection criteria for a package by element.

Page Name	**Definition Name**	**Navigation**	**Usage**
Define Criteria By Attribute	GP_PKGCRIT_ATR_SEC	Click Define Criteria By Attribute link on the Package Definition page.	Define selection criteria for a package by attribute.
Define Criteria By Version	GP_PKGCRIT_VER_SEC	Select the Version Based check box on the Package Definition page and click the Define Criteria By Version link.	Define selection criteria for a package by version.
Where Clause	GP_PKG_CRIT2_SEC	Click the Show Where Clause link on the Define Criteria By Attribute page.	View and modify the SQL Where clause for the selection criteria defined on the Define Criteria By Version page.
Package Processing	GP_PKG_S_RUNCTL	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package, Package Processing	• Package elements meeting the selection criteria you have defined. • Generate scripts for the export and import process. • Export packages.
View Package	GP_PKG_VIEW	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package, View Package	View the elements in a rule package. View the action (upgrade or delete) that the system takes when you copy the package. You can cancel elements in the package.
View Version Detail	GP_PKG_VERDTL_SEC	Click the View Version Detail link on the View Package page for a package by version.	View version details for a package by version.
Package Status	GP_PKG_DTTM_SEC	Click the Package Status link on the Package Processing page.	View the date and time a package was created, exported, imported, compared, and upgraded.
View Scripts	GP_PKG_SCRIPTS_SEC	Click the View Scripts link on the Package Processing page.	View export, import, and cleanup scripts.

Understanding How to Create and Export Rule Packages

To create and export a rule package:

Note: Rule packages can only include elements defined in records having PIN_NUM as the key.

---

1. Define criteria for selecting the elements in a rule package.

   You can define different kinds of selection criteria:

- Use the Define Criteria By Element page of the Create/Export Rule Package (GP_PKG_CREXP) component to select elements for a package by name.
- Use the Define Criteria By Attribute page of the Create/Export Rule Package component to select elements by attribute (element type, owner, used by, class, category, country).

  You can modify the SQL code that the system uses to select elements when you define criteria by attribute.
- Use the Define Criteria By Version page of this component to select elements for a package based on their version number.

You can specify criteria by element *and* by attribute for the same package. If you do this, the system selects all elements that meet the criteria specified on the Define Criteria By Element page *or* the Define Criteria By Attribute page.

You cannot define criteria by version for a package together with criteria by element and/or by attribute. Version criteria are exclusive of other selection criteria.

2. Run the create package process to package the elements meeting the selection criteria.

   Do this on the Package Processing page of the Create/Export Rule Package component.
3. View the package and clear any elements that you do not want to move to the target database.

   Do this on the View Package page of the Create/Export Rule Package component
4. Run the create scripts process.

   Do this on the Package Processing page.

   Note: The system generates three scripts for the export and import process: xxx_exp.dms (export script), xxx_imp.dms (import script), and gp_cleanup.dms (cleanup script), where xxx represents the name of the rule package.
5. Review the scripts created in step 4 (above).

   Do this on the View Scripts page of the Create/Export Rule Package component.
6. Run the export package process.

   Do this on the Package Processing page.

   You must export the package before you can import it into the target database.

Note: This section represents the create rule package, create import/export scripts, and export rule package steps as separate, discrete processes; however, you can also run these steps as part of a single continuous process.

Warning! If you add or change an element after creating a package, you must recreate the package to include the element.

Package Definition Page

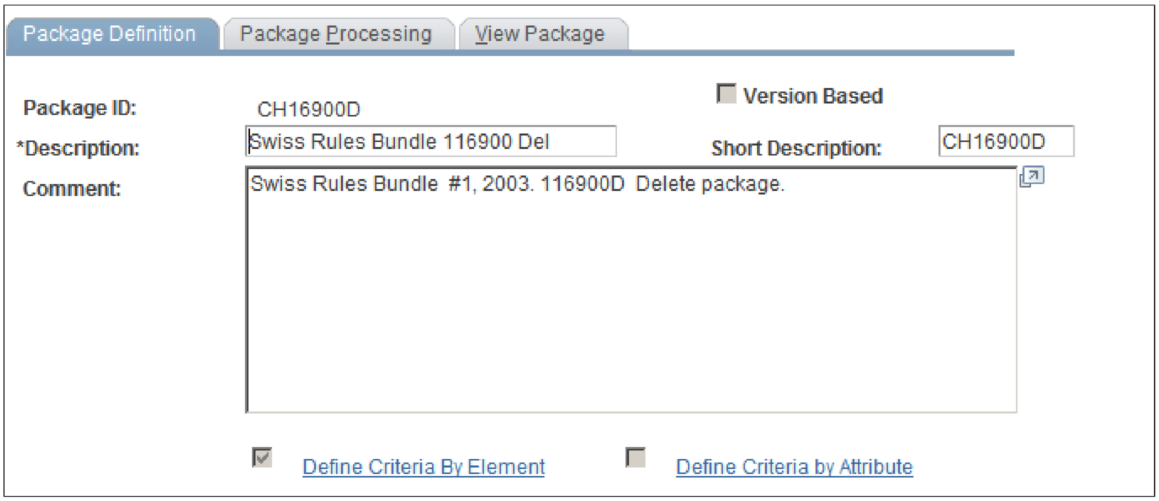
Use the Package Definition page (GP_PKG_DFN) to name a rule package and enter a description and comments.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package, Package Definition

Image: Package Definition page

This example illustrates the fields and controls on the Package Definition page.



Enter a description of the package and comments.

Description and Comment

Enter a description of the package and comments.

Version Based and Define Criteria By Version

Select the Version Based check box to define a package using version criteria. By default, this check box is cleared.

When you select this check box, the Define Criteria By Version link appears and the Define Criteria By Element and Define Criteria By Attribute Links disappear.

Click the Define Criteria By Version link to access the Define Criteria By Version page, where you can specify the version of the elements that you want to include in the rule package.

Define Criteria By Element

Click to access the Define Criteria By Element page, where you can select elements to include in the package by name.

Note: When you specify the elements to include in the package on the Define Criteria By Element page and click OK, the check box in front of this link is automatically selected.

Define Criteria by Attribute

Click to access the Define Criteria By Attribute page, where you can select elements to include in the package based on attributes of the elements.

Note: When you define element attributes on the Define Criteria By Attribute page and click OK, the check box in front of this link is automatically selected

Note: You cannot define version based criteria for a package together with element or attribute criteria, as these package types are mutually exclusive. The system provides the following controls to prevent this from occurring: After you define and save version criteria for a package, you cannot access the Define Criteria By Element or Define Criteria By Attribute pages to add element and attribute criteria. In addition, if you try to combine package types before saving your work—for example, you define a version based rule package and then try to define additional criteria by element or by attribute—all of the version criteria you have already entered will be deleted at save time and you will receive a warning message.

Note: After you import a package, the Define Criteria By Element, Define Criteria By Attribute, and Define Criteria By Version links are disabled and you can no longer modify the selection criteria.

Define Criteria By Element Page

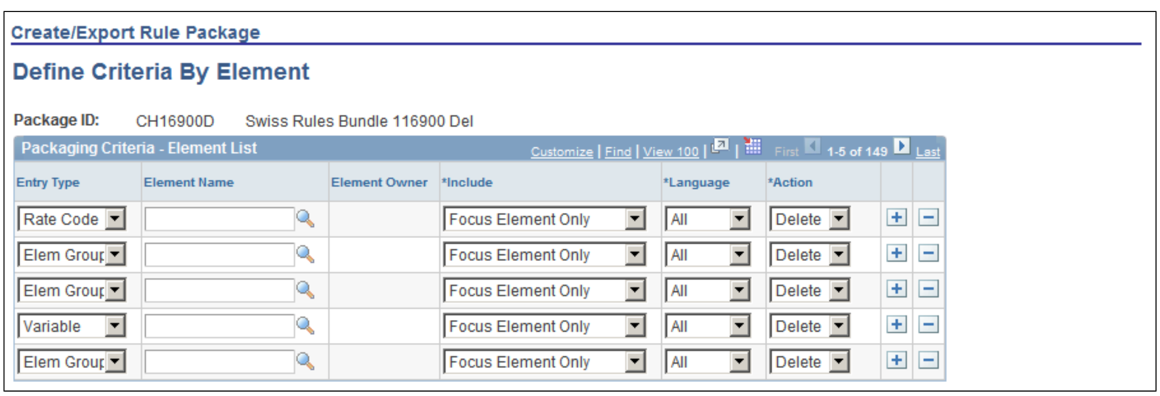
Use the Define Criteria By Element page (GP_PKGCRIT_ELM_SEC) to define selection criteria for a package by element.

Navigation

Click Define Criteria By Element link on the Package Definition page.

Image: Define Criteria By Element page

This example illustrates the fields and controls on the Define Criteria By Element page.



Packaging Criteria - Element List

Entry Type

Select the entry type for the element to include in the package. This determines which elements you can select in the Element Name field.

Element Name

In this required field, select the name of the element to include in the package. This element is referred to as the *focus* element.

Element Owner

Identifies who created the element that you selected in the Element Name field and who's responsible for maintaining it. Valid values are *Customer, Modified, PS Mnt* (PeopleSoft Maintained), *PS NonMnt,* and *PS Secure.*

Include

Select the elements to include in the package.

Values are:

Focus Element + Members: The system includes focus elements (the elements in the Element Name field) as well as any member elements used by the focus elements (as depicted on the Uses page).

Focus Element Only (default): The system includes focus elements as well as any auto-generated components and accumulators. First level elements are selected as information only elements.

Warning! Select *Focus Element Only* only if you know that the target database contains all the member elements. If it doesn't, the system reports an error during the compare process.

Note: The system always includes information for the member elements in the package—even when you select *Focus Element Only.* Although the member elements aren't copied to the target database, the system uses the information to perform the Compare process described later in this documentation.

Language

Specify whether to copy base and related language data to the target database.

All fields on GP_PIN that are translatable have associated related language data. Related language data is stored on the related-language table for GP_PIN, GP_PIN_LANG.

Valid values are:

- *All:* Add all language information to the package.
- *Base:* Select to get only the base language data.
- *Related:* Copy all language data related to the element but not for the element itself.

Action

Select the action the system should take with this element when upgrading the target database. Values are:

Upgrade (default): Adds the element to the target database or updates a matching element that's in the target database.

Delete: Deletes the element from the target database. (One database can be used as both the source and target database.)

You cannot delete elements that meet any of the following conditions:

- Used in a results table.
- Associated with payee data.
- Linked to a non-rule table.
- Used by another element.
- Delivered by the PeopleSoft system.

Note: You can delete the related language or all language information but not the base language alone.
If you are deleting both a parent and a child element, you must still unhook the child from the parent.

Warning! PeopleSoft strongly recommends that you place deletes in a separate package from all other elements.

Related Links

Base and Related Languages

Define Criteria By Attribute Page

Use the Define Criteria By Attribute page (GP_PKGCRIT_ATR_SEC) to define selection criteria for a package by attribute.

Navigation

Click Define Criteria By Attribute link on the Package Definition page.

Image: Define Criteria by Attribute page — Attribute Set1 tab

This example illustrates the fields and controls on the Define Criteria by Attribute page — Attribute Set1 tab.

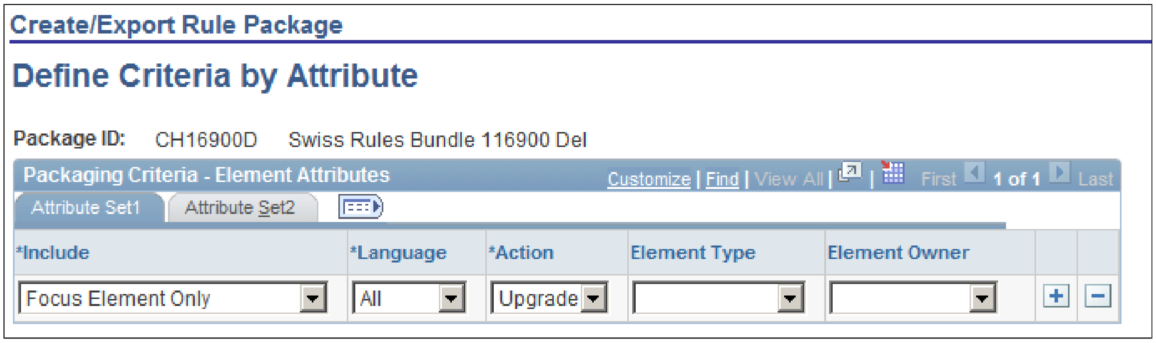
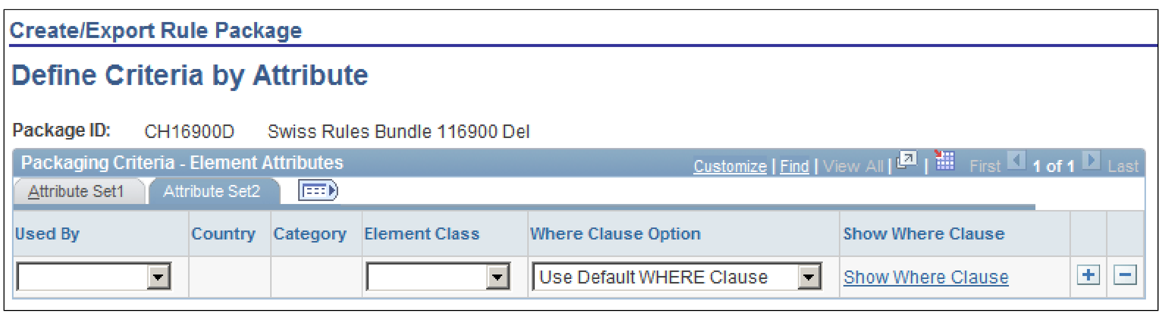


Image: Define Criteria by Attribute page — Attribute Set2 tab

This example illustrates the fields and controls on the Define Criteria by Attribute page — Attribute Set2 tab.



Attribute Set1

Select the Attribute Set1 tab.

Include

Specify whether the package includes only focus elements (which meet the selection criteria on the Attribute Set1 tab) or also includes elements that are used by the focus elements.

Values are *Focus Element + Members* and *Focus Element Only.*

Focus Element + Members: The system includes focus elements (in the Element Name field) as well as any member elements used by the focus elements (as depicted on the Element Relationship Uses page).

Focus Element Only (default): The system includes focus elements as well as any auto generated components and accumulators. First level elements are selected as information only elements. Information only elements are used by the focus element and its immediate children (if this information has not been previously selected).

Warning! Select *Focus Element Only* only if you know that the target database contains all the member elements. If it doesn't, the system reports an error during the compare process.

Note: The system always includes information for the member elements in the package—even when you select *Focus Element Only.* Although the member elements aren't copied to the target database, the system uses the information to perform the compare process described later in this documentation.

Language

Specify whether to copy base and related language data for GP_PIN fields to the target database.

All fields on GP_PIN that are translatable have related language data. This data is stored in the related-language table for GP_PIN, GP_PIN_LANG.

Values are:

- *All:* Add all language information to the package.
- *Base:* Select to get only the base language data.
- *Related:* Copy all language data related to the element but not for the element itself.

Action

Select the action the system should take with this element when upgrading the target database. Values are:

Upgrade (default): Adds the element to the target database or updates a matching element that's in the target database.

Delete: Deletes the element information from the target.

You cannot delete elements that meet any of the following conditions:

- Used in a results table.
- Associated with payee data.
- Linked to a non-rule table.
- Used by another element.
- Delivered by the PeopleSoft system.

Note: You can delete the related language or all language information but not the base language alone.
If you are deleting both a parent and a child element, you must still unhook the child from the parent.

Warning! PeopleSoft strongly recommends that you place deletes in a separate package from all other elements.

Element Type

Select the element type.

Element Owner

Select the element owner. Valid values are: *Customer, Modified, PS Mnt, PS Non-Mnt,* and *PS Secure.*

Attribute Set2

Select the Attribute Set2 tab.

Used By

Select where elements are used. Valid values are *All Countries* (default) and *Specific Country.* If you select *Specific Country,* you must select the country in the Country field.

Country

Select the country's three-digit country code if you selected *Specific Country* in the Used By field.

Category

To select only elements assigned to a particular category, select the category. (You assign a category to an element on the Element Name page.)

Element Class

Select the element class to package. (You assign an element class to an element on the Element Name page.)

Valid values are: *Customary, Not Classified, Sample Data, Statutory,* and *System Data.*

Where Clause Option

The system converts the criteria entered on the Define Criteria by Attribute page into SQL in order to select elements for the package.

Values are:

Use Default WHERE Clause: Tells the system to use the default Where clause. If the where clause has been changed and *Use Default WHERE Clause* is selected again, the page discards any SQL code modifications you have made and reverts to the Where clause based on the criteria you specified.

Change WHERE Clause: Makes all other fields on the page unavailable and puts the SQL code on the Where Clause page in edit mode.

Show Where Clause

Displays the Where Clause page, where you can view and alter the SQL code for your selection criteria.

Related Links

Define Criteria By Element Page

Understanding Security

Base and Related Languages

Where Clause Page

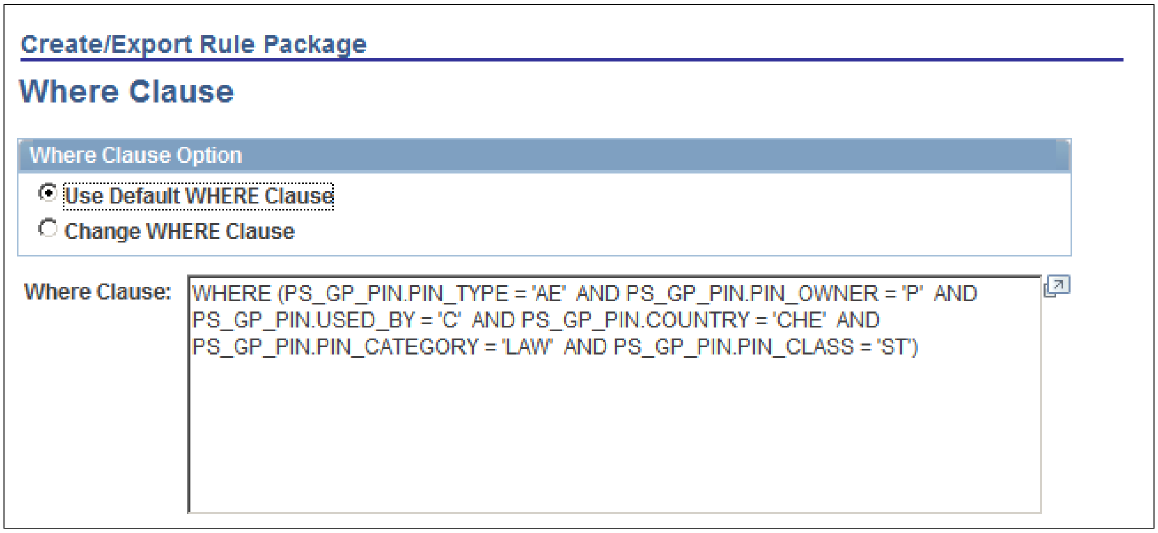
Use the Where Clause page (GP_PKG_CRIT2_SEC) to view and modify the SQL Where clause for the selection criteria defined on the Define Criteria By Version page.

Navigation

Click the Show Where Clause link on the Define Criteria By Attribute page.

Image: Where Clause page

This example illustrates the fields and controls on the Where Clause page.



Where Clause Option	Select *Use Default WHERE Clause* to use the default clause or revert to it after editing the SQL code. Any edits you make to the Where clause will be lost when you select *Use Default WHERE Clause.* Select *Change WHERE Clause* to make the code on the lower part of the page available for editing.
Where Clause	If you select *Use Default WHERE Clause* as the Where Clause Option, the system displays the Where clause of the SQL statement that it created based on the selection criteria defined on the Define Criteria by Attribute page. The Where clause is not editable. If you select *Change Where Clause,* you can edit the SQL Where clause. The following rules apply: • Do not use PIN_NUM as a selection criterion or any field where PIN_NUM can be stored. (Doing so prevents renumbering during the import process.) • Add the prefix PS_GP_PIN to field names that you enter. Example: PS_GP_PIN.RECALC_IND.

Note: When you Click OK and save, the system checks for the use of PIN_NUM, and looks for SQL syntax errors.

Define Criteria By Version Page

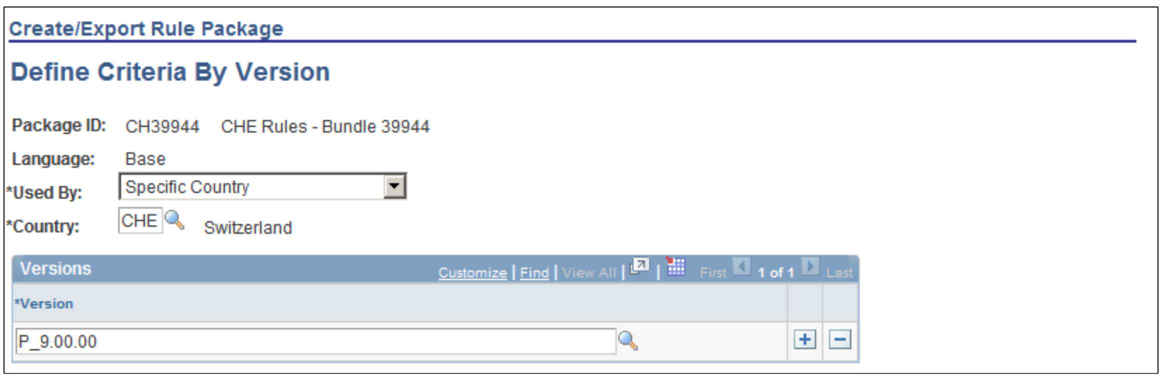
Use the Define Criteria By Version page (GP_PKGCRIT_VER_SEC) to define selection criteria for a package by version.

Navigation

Select the Version Based check box on the Package Definition page and click the Define Criteria By Version link.

Image: Define Criteria By Version page

This example illustrates the fields and controls on the Define Criteria By Version page.



Used By

Select *All Countries* or *Specific Country* depending on whether you are defining version criteria for all countries or a single country.

Specific Country

If you select *Specific Country* in the Used By field, specify the country.

Version

Select the version of elements to include in the package. You can select multiple versions if they are for the same country.

Package Processing Page

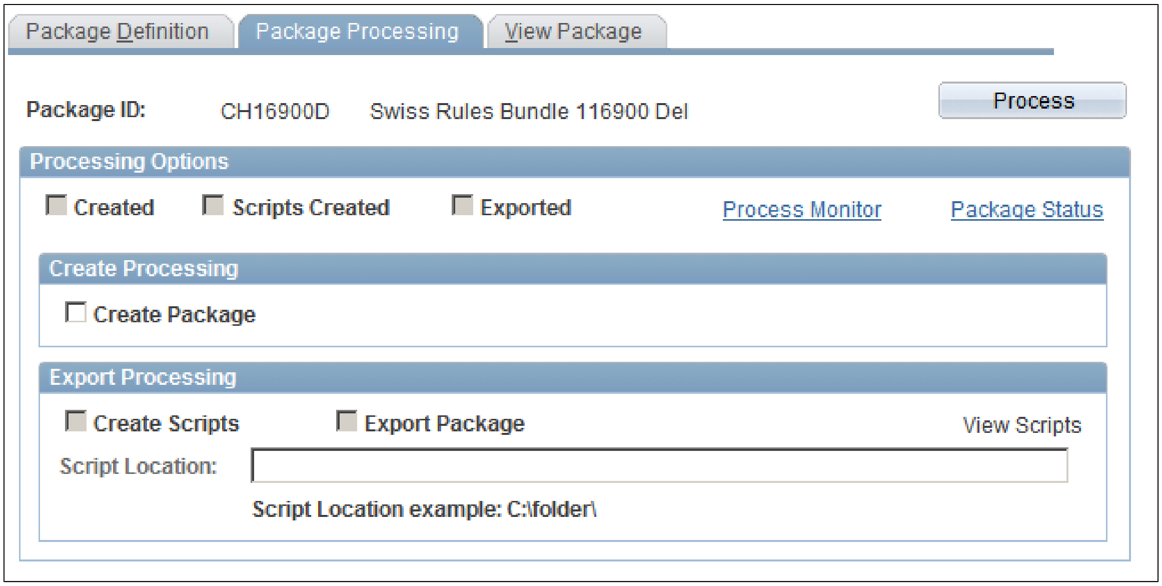
Use the Package Processing page (GP_PKG_S_RUNCTL) to .

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package, Package Processing

Image: Package Processing page

This example illustrates the fields and controls on the Package Processing page.



After defining selection criteria for a package, use the Package Processing page to:

- Create packages based on the selection criteria you have defined.
- Create scripts to use in the export and import process.
- Export packages to the target database.
- Track the status of a package.

During the export process, the system automatically adds 50 000 000 to the value of the PIN number assigned to each element so that it can distinguish the imported elements from elements that exist in the target database.

Processing Options

The check boxes under Processing Options display the status of the creation and export process. Status values are:

- *Created*: If this check box is selected, the package has been created.
- *Scripts Created*: If this check box is selected, scripts have been created for the package.
- *Exported*: If this check box is selected, the package has been exported to the target database.

Package Status Click to access the Package Status page, where you can view the date and time packages and scripts were created, and see when packages were exported, imported, compared, and upgraded.

Create Processing

Create Package

Select Create Package to have the program create the package based on the criteria, attributes, or version you have defined.

Export Processing

Create Scripts

Select Create Scripts to have the system to generate three scripts for the export and import process: xxx_exp.dms (export script), xxx_imp.dms (import script), and gp_cleanup.dms (cleanup script), where xxx represents the name of the rule package.

This check box becomes available under the following conditions:

- You select the Create Package check box.
- The package has already been created.

Note: You must specify a path to the script location to generate a script.

Note: You can select Create Package and Create Scripts at the same time, and the system will generate the package and then create the export and import scripts. However, you cannot select Create Scripts before you generate the package.

Script Location

Specify the path to the location where you want the scripts to be created.

This field becomes available when you:

- Select the Create Scripts check box.
- Select the Export Package check box.
- Have created the scripts for a package.

The location of the scripts and data files must be accessible by both the import and export NT Process Scheduler for the import and export databases. You must specify the script location in the Process Scheduler configuration file (psprcs.cfg).

Note: We discuss how to specify the script location in the Process Scheduler configuration file in the section titled *The Process of Connecting UNIX and NT Directories.*

See The Process of Connecting UNIX and NT Directories.

Note: You can define a default script location on the Installation Settings page for all packager scripts.

See Installation Settings Page.

View Scripts

Click to access the View Scripts page, where you can review export and import scripts.

Export Package

Select Export Package to have the system export the package during processing.

This field becomes available when you:

- Select the Create Package and Create Scripts check boxes.
- Have created a package and then select the Create Scripts check box.
- Have created the package and the scripts.

After exporting the package from the source database, you can import it into the target database using the Apply Rule Package (GP_PKG_APPLY) component.

Note: During the export process, the system automatically adds 50 000 000 to the value of the PIN number assigned to each element so that it can distinguish the imported elements from elements that exist in the target database.

Process

Click the Process button to call and run the processes denoted by the check boxes you have selected: Create Package, Create Scripts, and Export Package. Note that you can select all three check boxes at the same time and run these processes as a single, continuous sequence, or run one process at a time. However, the processes must run in the order of create package first, then create scripts, then export package.

Note: When you click the Process button the Process Monitor page appears, so that you can monitor the process. Wait until the program finishes before opening a page associated with the package.

View Package Page

Use the View Package page (GP_PKG_VIEW) to view the elements in a rule package.

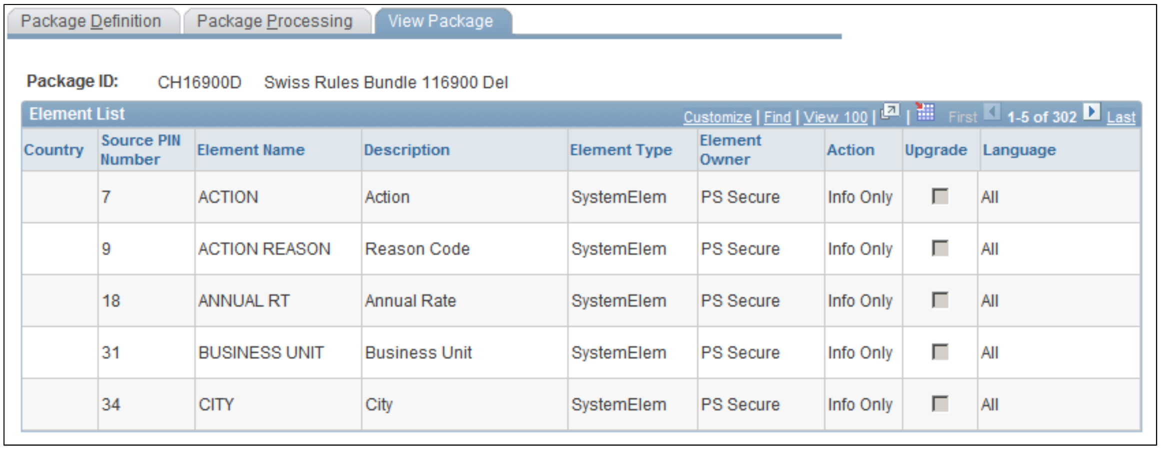
View the action (upgrade or delete) that the system takes when you copy the package. You can cancel elements in the package.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create/Export Rule Package, View Package

Image: View Package page

This example illustrates the fields and controls on the View Package page.



Country	Source PIN Number	Element Name	Description	Element Type	Element Owner	Action	Upgrade	Language
	7	ACTION	Action	SystemElem	PS Secure	Info Only		All
	9	ACTION REASON	Reason Code	SystemElem	PS Secure	Info Only		All
	18	ANNUAL RT	Annual Rate	SystemElem	PS Secure	Info Only		All
	31	BUSINESS UNIT	Business Unit	SystemElem	PS Secure	Info Only		All
	34	CITY	City	SystemElem	PS Secure	Info Only		All

After creating a package, you can view the elements in the package and individually select any elements that you do not want to export to the target database.

Action

Displays the action applicable to the element in your package.

Values are: *Upgrade, Delete,* and *Info Only.*

When deleting items, the source database and target database can be the same.

Upgrade

This check box is selected by default to include the element in the package for export. Clear it to exclude the element from the export.

View Version Detail

If the elements displayed on the View Package page are packaged by version, the View Version Detail link appears. Click this link to access the View Version Detail page, where you can view each element's version number and the database records (tables) containing the element definitions.

View Version Detail Page

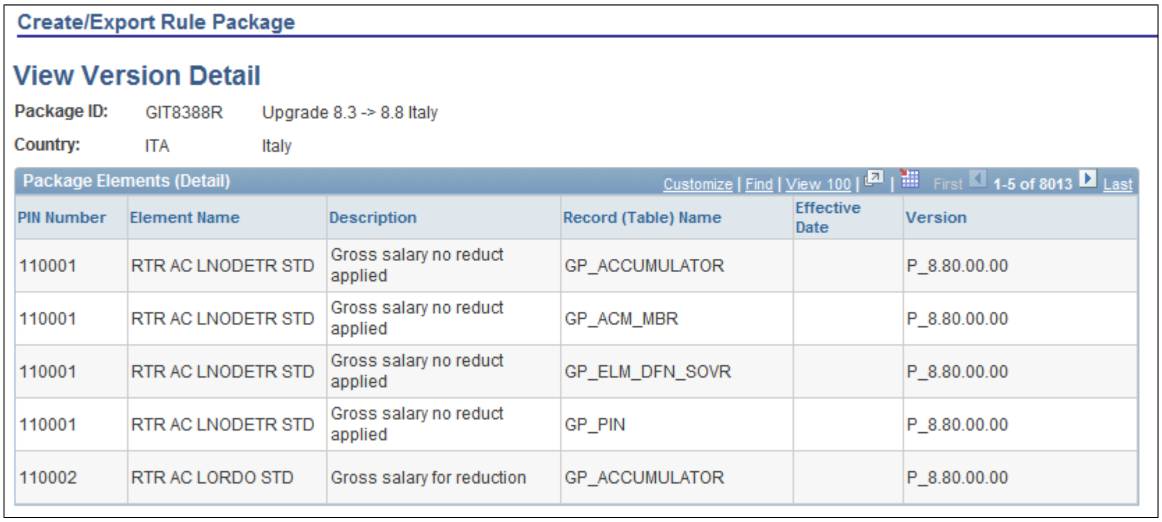
Use the View Version Detail page (GP_PKG_VERDTL_SEC) to view version details for a package by version.

Navigation

Click the View Version Detail link on the View Package page for a package by version.

Image: View Version Detail page

This example illustrates the fields and controls on the View Version Detail page.



PIN Number	Element Name	Description	Record (Table) Name	Effective Date	Version
110001	RTR AC LNODETR STD	Gross salary no reduct applied	GP_ACCUMULATOR		P_8.80.00.00
110001	RTR AC LNODETR STD	Gross salary no reduct applied	GP_ACM_MBR		P_8.80.00.00
110001	RTR AC LNODETR STD	Gross salary no reduct applied	GP_ELM_DFN_SOVR		P_8.80.00.00
110001	RTR AC LNODETR STD	Gross salary no reduct applied	GP_PIN		P_8.80.00.00
110002	RTR AC LORDO STD	Gross salary for reduction	GP_ACCUMULATOR		P_8.80.00.00

For elements packaged by version, access the View Version Detail page to view each element's version number and the database records (tables) containing the element definitions.

Package Status Page

Use the Package Status page (GP_PKG_DTTM_SEC) to view the date and time a package was created, exported, imported, compared, and upgraded.

Navigation

Click the Package Status link on the Package Processing page.

Image: Package Status page

This example illustrates the fields and controls on the Package Status page.

View the date and time packages and scripts were created, and see when packages were exported, imported, compared, and upgraded.

View Scripts Page

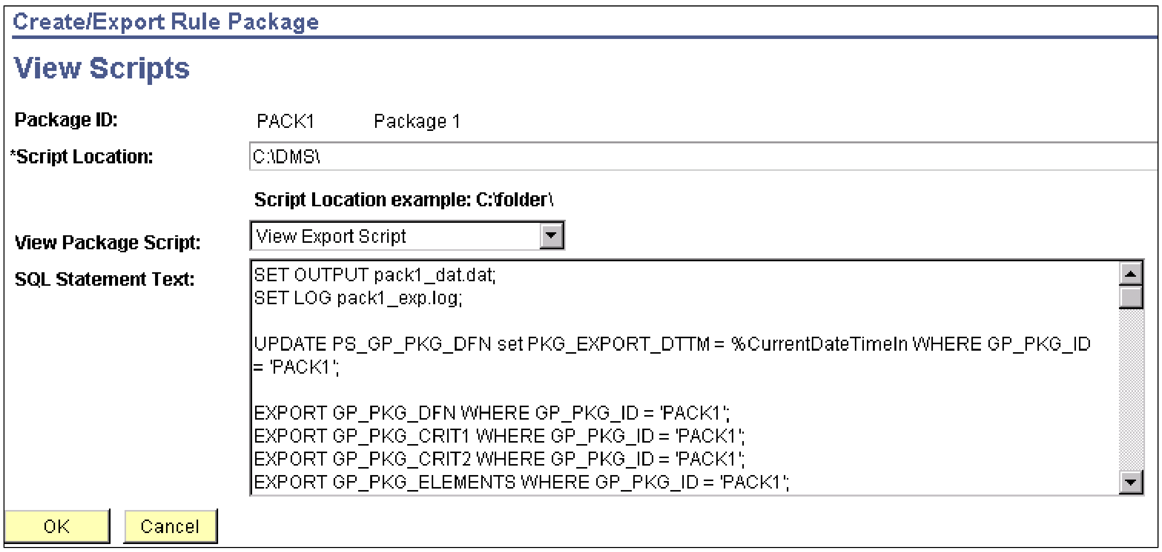
Use the View Scripts page (GP_PKG_SCRIPTS_SEC) to view export, import, and cleanup scripts.

Navigation

Click the View Scripts link on the Package Processing page.

Image: View Scripts page

This example illustrates the fields and controls on the View Scripts page.



Script Location

Displays the script location, which must be accessible by both the import and export NT Process Scheduler for the import and export databases. You must specify the script location in the Process Scheduler configuration file (psprcs.cfg).

Note: We discuss how to specify the script location in the Process Scheduler configuration file in the section titled *The Process of Connecting UNIX and NT Directories.*

See The Process of Connecting UNIX and NT Directories.

Note: You can define a default script location on the Installation Settings page for all packager scripts.

See Installation Settings Page.

View Package Script

Select the type of script that you want to view: export, import, or cleanup. The DataMover script appears.

Importing, Comparing, and Upgrading Rule Packages

Absence Management offers a streamlined package import and compare process that enables you to run the import, compare, and upgrade process using a single component for both standard and version based rule packages. You can run each step in this process—from package import, to comparison, to upgrade—as part of a continuous sequence of steps, or run one step at a time. The Absence Management system ensures that each step is complete before the next one begins, and displays the status of the package so that you know exactly where you are in the process.

In addition, Absence Management enables you to specify default packager-related options on the Installation Settings page so that you do not need to enter the same basic information each time you run the import, compare, and upgrade process. Use the Installation Settings page to:

- Specify a default location for the scripts used in the import process.
- Specify compare report print options for standard and version based rule packages to control the type of information that appears in the compare report.
- Specify the conditions under which an upgrade is permitted—that is, you can elect to proceed with upgrades despite errors and warnings in the compare process, or choose not to allow upgrades containing errors or warnings.

See Installation Settings Page.

This topic provides an overview of rule package, imports, comparisons, and upgrades, and discusses how to:

- Import a package.
- Run the compare report.
- Start the compare and upgrade processes.
- Review for upgrade errors.

Pages Used to Import, Compare, and Upgrade Rule Packages

Page Name	***Definition Name***	***Navigation***	***Usage***
Package Definition	GP_PKG_DFN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package, Package Definition	View the description and package ID of a rule package.
Package Processing	GP_PKG_T_RUNCTL	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package, Package Processing	• Import rule packages into the target database. • Run the Compare process and generate the Compare Report. • Run the Upgrade Process.

Page Name	Definition Name	Navigation	Usage
Package Elements	GP_PKG_ELEM_UPG	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package, Package Elements	View the results of the Compare processes and exclude elements from the Upgrade process.
Package Compare Audit	GP_PKG_CMP_AUDIT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package, Package Compare Audit	Review for errors that occur during the Compare process. Before continuing with the Upgrade process, correct the errors and rerun the Compare process.
Package Status	GP_PKG_DTTM_SEC	Click the Package Status link on the Package Processing page.	View the date and time a package was created, exported, imported, compared, and upgraded.
View Scripts	GP_PKG_SCRIPTS_SEC	Click the View Scripts link on the Package Processing page.	View export, import, and cleanup scripts.

Understanding Rule Package Imports, Comparisons, and Upgrades

After running the export process, use the Apply Rule Package (GP_PKG_APPLY) component to import the package into to the target database, compare the rules in the source database to those in the target database, and upgrade the rule package.

To import, compare, and upgrade a rule package:

1. Run the import process on the Package Processing page of the Apply Rule Package component.
2. Compare the packaged elements with the elements in the target database by running the compare process and generating the compare report on the Package Processing page of the Apply Rule Package component. Generating the compare report is optional.

   The system determines which elements are new to the target database, which update existing elements in the target database, and which need deleting from the target database.
3. Review the compare report and the results displayed on the Package Elements and Package Compare Audit pages of the Apply Rule Package component to determine the results of the compare process.

   On the Package Elements page you can exclude elements from the upgrade process.
4. Resolve warnings and errors that are identified in the compare report, on the Package Elements page, and on the Package Compare Audit page during the compare process.

   Warnings and errors can occur for several reasons. For example, the source element could use other elements that don't exist in the target database and are not included in your package or an element that you want to delete could be used in a results table. The corrective action depends on the type of error and warning.

5. Rerun the compare process on the Package Processing page after correcting errors or excluding elements from the package.

6. Run the upgrade process after deciding whether to proceed with errors and/or warnings.

   Do this on the Package Processing page.

   During the upgrade process the system:

   - Updates the imported elements with the correct PIN number if they already exist in the database.
   - Assigns new numbers to the new elements.
   - Deletes rows according to the option chosen in the package.

   You can run this process only once.

Note: This section presents the package import, comparison, and upgrade steps as separate, discrete processes; however, you can run these steps as part of a single continuous process.

Note: Before moving multiple elements simultaneously, it is recommended that you back up the target database.

What Happens During the Compare Process

For each exported element, the system looks for an element in the target database with the same PIN code, element type, and element owner.

Image: Compare process for rule packages (flowchart 1)

This flowchart shows the logic that the system uses to perform the comparison and generate the resulting warning or error messages (flowchart 1).

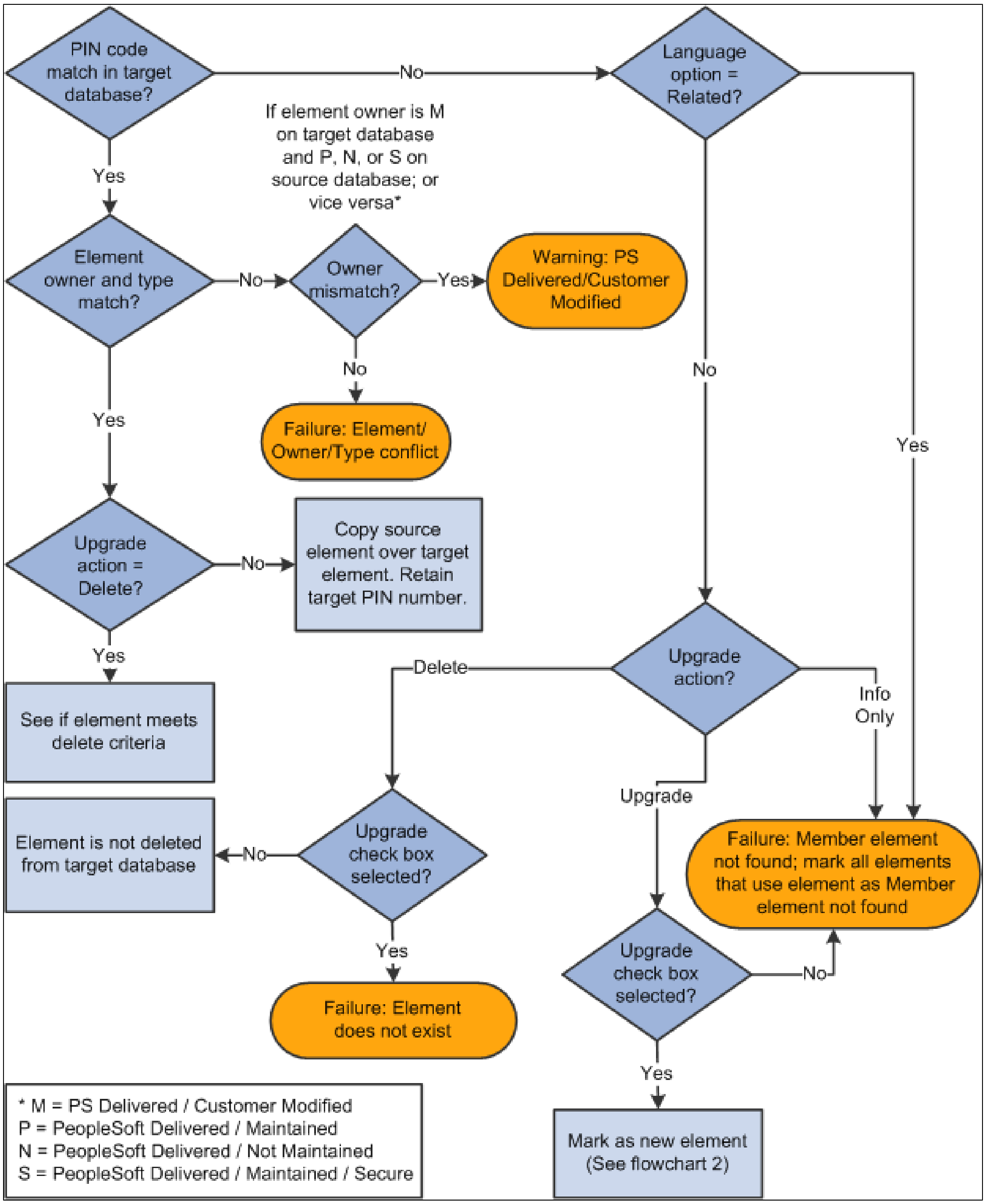
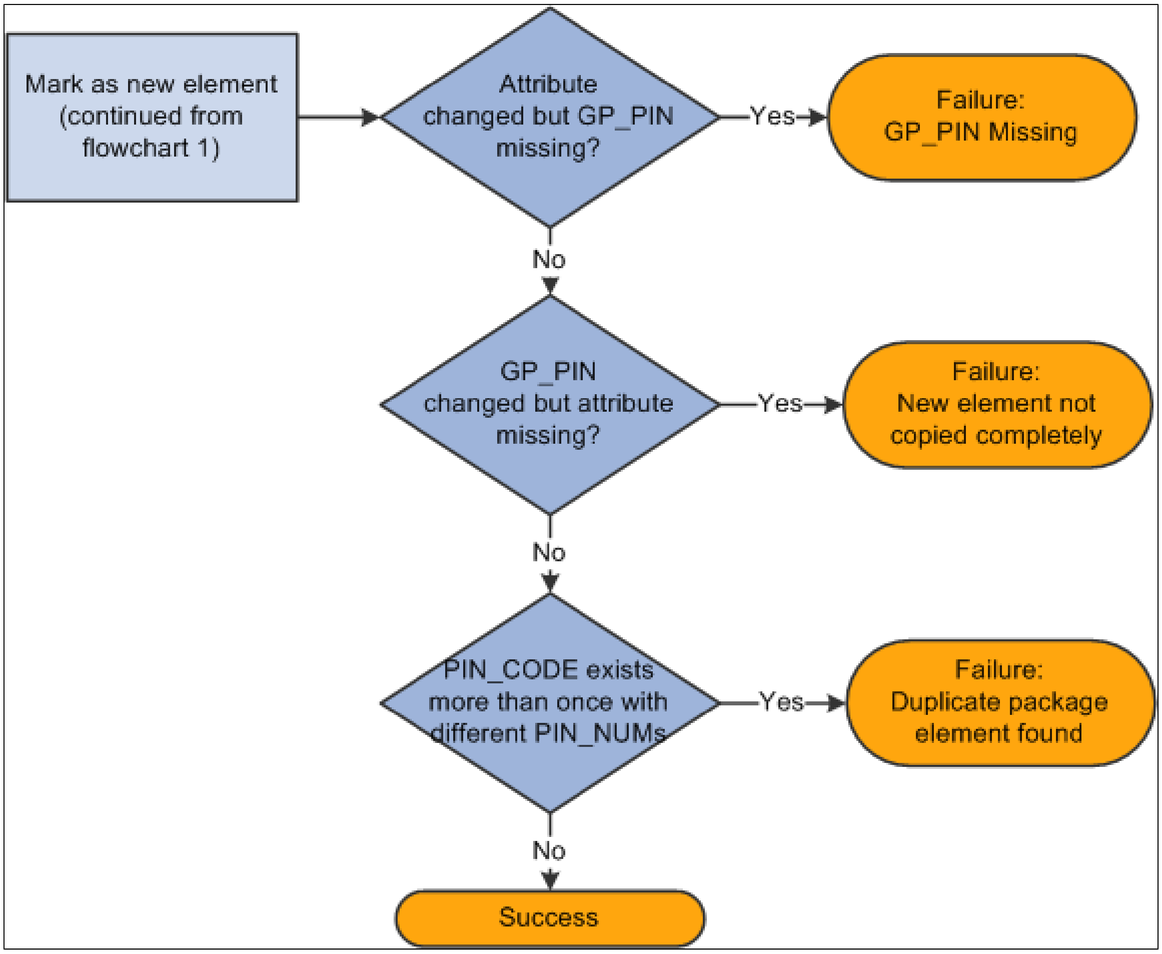


Image: Compare process for rule packages (flowchart 2)

This flowchart shows the logic that the system uses to perform the comparison and generate the resulting warning or error messages (flowchart 2).



Warning! Upgrades override elements in the target database with the information that has been sent over from the source.

Related Links

The Delete Functions

Running the Compare Report

You can generate a compare report while performing the compare process. The compare report enables you to see what elements the Rule Package will change on a field-by-field basis. Use this information to decide whether to upgrade a specific element.

The compare report creates a report displaying the affected elements and what the differences are between the elements in the Rule Package and the elements in the target database. The compare report can only be run at the same time as the compare process.

Compare Report Summary Page

The summary page is the first page of the compare report. It includes the following information:

- Type of rule package (regular or version based).
- Version of the elements included in the rule package if the package is version based.
- The names of the source and target databases.
- The date and time that the import and compare processes were run.
- The countries with elements included in the package.
- The total number of elements in each of these categories listed below, depending on the Compare Report Print Options selected on the Package Processing page:
  - Elements with errors/warnings.
  - Modified elements.
  - New elements.
  - Deleted elements.
  - Unchanged elements.

Note: These totals are for all of the elements in a package except those that are for information only, and are not separated by country. The exception to this rule is that the total for errors/warnings includes informational elements.

Compare Report Body

The body of the compare report consists of four columns. The columns and contents are described in the following table:

Column	***Contents***
Elements	• PIN code. • PIN type. • Upgrade action (either Upgrade, Delete, or Informational Only). • Upgrade (either Yes or No). • Compare status. • Error or Warning (if applicable). **Note:** Upgrade action, upgrade, compare status, and error or warning messages appear only on the Elements With Error/ Warning Messages page of the report.

Column	*Contents*
Record.Field	Record and field name for the values contained in the Source Database and Target Database columns.
Source Database	Data values that are moving from the source to the target database as part of the Rule Package for the applicable record or field name.
Target Database	Data values that are currently in the target database for the applicable record or field name.

Note: Elements in the compare report are displayed based on the alphabetical order of their country codes. For example, elements for *CHE* (Switzerland) appear before elements for *DEU* (Germany). The country code *All* (Across All Countries) appears if there is an element in the package that is defined for *All* countries or is in error/warning status.

Elements Displayed in the Compare Report

The compare report is made up of different sections containing detailed information about different categories of elements:

- Elements with Errors or Warnings — All elements that have an error or warning message appear in this first section with basic information about the element (if it is available). All errors and warnings should be looked into and resolved before continuing the upgrade process.
- Modified Elements — This section is for modified elements and displays the rows (records and fields) that will be changed in an upgrade. If a new row of data is being added, it also appears in this section.

  Important! The element definition tables for array, bracket, formula, fictitious calculation, and historical rule elements include a sequence number field. This field is not always displayed online and has a purely technical function; however, you may see these elements appearing in the compare report as *modified* due only to changes in their sequence number. This is expected, as the report provides a field-by-field comparison. If the report lists these elements as modified, you should determine whether fields and information other than sequence number have changed (as this is what is critical from a functional perspective). If only the sequence number has changed, there will be no functional impact from an upgrade to these elements.

  Important! Rate Code elements are keyed by both PIN Number (PIN_NUM) and HR Compensation Rate Code (COMP_RATECD). As a result, if the HR Rate Code is changed in an element definition, you will see this displayed in the modified elements section of the compare report as a new row (with 2 key fields appearing) and a deleted row (with 2 key fields appearing).

- New Elements — This section is for new elements in the rule package (elements that are not in the target database), and displays the following fields from GP_PIN: PIN Code (as the key field); PIN_NM; DESCR; COMMENTS.
- Deleted Elements — This section is for deleted elements, and displays the following fields from GP_PIN: PIN Code (as the key field); PIN_NM; DESCR; COMMENTS.
- Elements with no changes — Only pin code and element name are displayed in this section.

Note: These report sections are displayed country by country in alphabetical order of the country codes. For example, report sections for CHE (Switzerland) appear before those for DEU (Germany). If you request a report section and there are no elements belonging to that category, the following message appears in that section of the compare report: "There are no elements that qualify for this section." For country code 'All' (Across All Countries), the report sections only print out if there are elements to report on. No page is printed if no elements exist for 'All' in the section—not even the message noted above appears. Country code 'All' pages always appear at the end of the report.

Note: For formulas, only the formula text is displayed, rather than details about each individual field. For all PIN Number fields, the compare report displays the corresponding PIN Code instead of the PIN Number.

Note: In the compare report, record information is printed in the following sort order: GP_PIN (if applicable), Parent Element Definition Record (if applicable), and Child Element Definition Records (if applicable). Within each of these records, the data displayed is sorted by effective-date descending (if effective date is in the record) and then by key fields ascending.

Package Definition Page

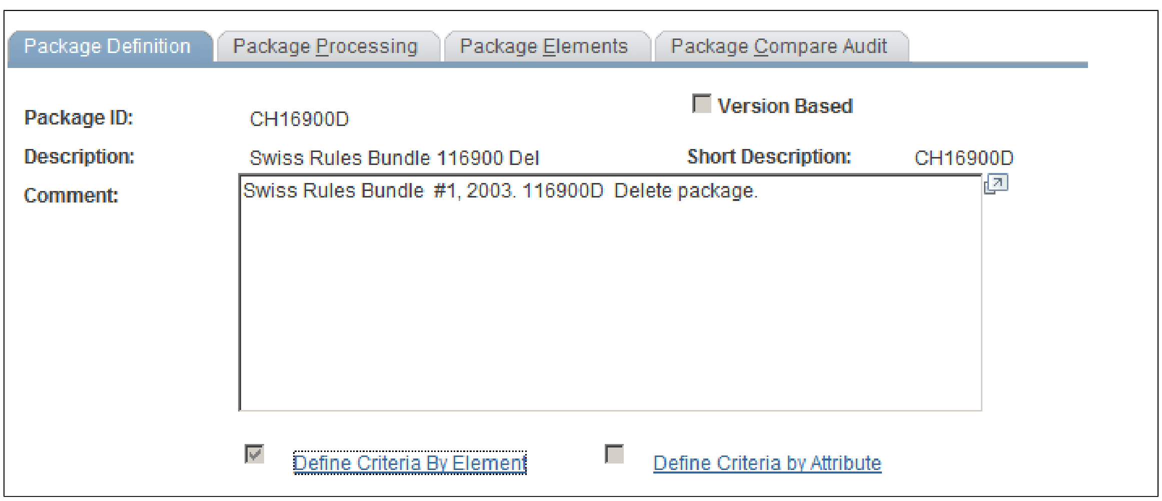
Use the Package Definition page (GP_PKG_DFN) to view the description and package ID of a rule package.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package, Package Definition

Image: Package Definition page

This example illustrates the fields and controls on the Package Definition page.



View the Package ID and description of the package you are comparing and upgrading.

Package Processing Page

Use the Package Processing page (GP_PKG_T_RUNCTL) to .

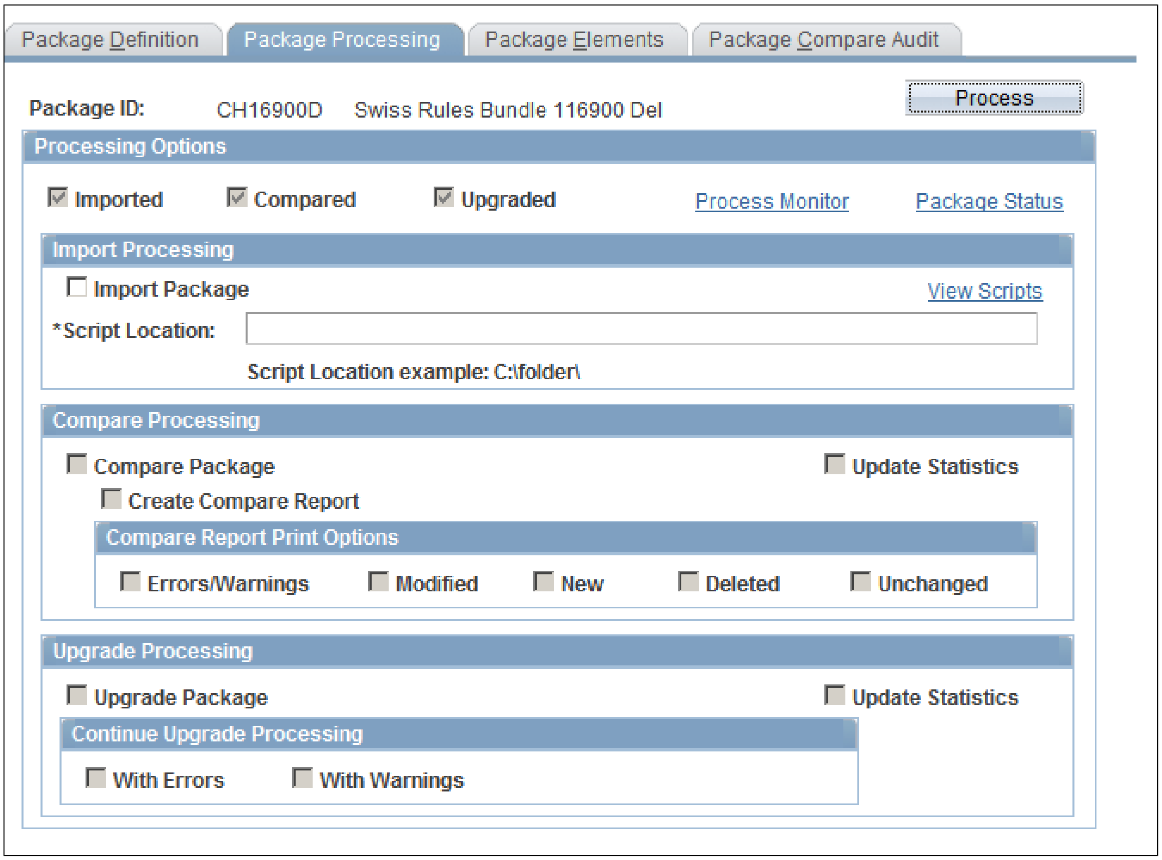
Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package, Package Processing

Access this page from the *target* database.

Image: Package Processing page

This example illustrates the fields and controls on the Package Processing page.



Use this page to import, compare, and upgrade rule packages and to track the status of an upgrade.

Processing Options

The check boxes under Processing Options display the status of the upgrade. Status values are:

- *Imported*: If this check box is selected, the package has been imported into the target database.
- *Compared*: If this check box is selected, the elements in the package have been compared with those in the target database.
- *Upgraded*: If this check box is selected, the target database has been upgraded with the elements in the package.

Package Status	Click to access the Package Status page, where you can view the date and time packages and scripts were created, and see when packages were exported, imported, compared, and upgraded.

Import Processing

Import Package

Select Import Package to instruct the system to import the elements in the package into the target database during processing. You must specify a path to the scripts used to import the package.

This check box is always enabled, regardless of whether the package has already been imported.

Script Location

Specify the path to the location where you want the scripts to be created.

The location of the scripts and data files must be accessible by both the import and export NT Process Scheduler for the import and export databases. You must specify the script location in the Process Scheduler configuration file (psprcs.cfg).

Note: We discuss how to specify the script location in the Process Scheduler configuration file in the section titled *The Process of Connecting UNIX and NT Directories.*

See The Process of Connecting UNIX and NT Directories.

Note: You can define a default script location on the Installation Settings page for all packager scripts.

See Installation Settings Page.

View Scripts

Click to access the View Scripts page, where you can view the export, import, and cleanup scripts.

Compare Processing

Compare Package

Select Compare Package to have the system compare the imported elements with those in the target database during processing.

This check box is enabled when:

- The package has already been imported but not upgraded.
- You select the Import Package check box.

When the compare process is complete, check the Package Upgrade tab on the Package Elements tab and then review the Package Compare Audit page for errors.

Create Compare Report

Select to generate a report comparing elements in the rule package to the elements in the target database on a field-by-field basis.

This check box is enabled when you select the Compare Package check box.

Update Statistics

Select to update statistics in the appropriate tables when running the compare process.

Compare Report Print Options

These check boxes determine what data appears in the compare report.

- *Errors/Warnings*: Report includes all warning or errors that occur during the compare.

  The default setting for this check box is *on.*

- *Modified*: Report includes packaged elements that are different from those in the target database.

  The default setting for this check box is *on.*

- *New*: Report includes the new elements.

  The default setting for this check box is *off.*

- *Deleted*: Report includes the elements selected for deletion.

  The default setting for this check box is *off.*

- *Unchanged*: Report includes the elements that have not changed.

  The default setting for this check box is *off.*

Note: You can set default print options for the compare report on the Installation Settings page. You can override these defaults when you run the compare process on the Package Processing page.

See Installation Settings Page.

Upgrade Processing

Upgrade Package

Select Upgrade Package to have the system upgrade the target database with the elements in the package during processing.

This check box is enabled when:

- The package has been compared but not upgraded.
- You select the Compare Package check box.

This process upgrades only those elements that pass the compare process without errors. You can upgrade a package only once.

Note: The upgrade process will not be completed if there are errors or warnings—unless you select *upgrade with errors and/or warnings.* If you choose *not* to upgrade with errors and warnings and there is an error or a warning, the process monitor will show success but the message log will display one of the following messages:
1. "The Upgrade process cannot continue because the compare process finished with some elements having a status of Error. Please see online 'Package Elements' page or review the 'Error/Warning' section of your report."
or
2. "The Upgrade process cannot continue because the compare process finished with some elements having a status of Warning. Please see online 'Package Elements' page or review the 'Error/Warning' section of your report."
Even with the upgrade with errors and warnings check boxes selected, at least one element must have a status of success for the process to upgrade the elements. You must fix the errors.

Important! Do not run the compare and upgrade processes together with regular payroll processes. This is to avoid affecting other users.

Update Statistics

Select to generate and view statistics on the upgrade process.

This check box becomes available when you select Upgrade Package.

Continue Upgrade Processing

Select *With Errors* and/or *With Warnings* to proceed with the upgrade despite errors and warnings in the compare report. If you do not select one or both of these options, and there are errors or warnings, the process will not upgrade. The process will run to success but a message will be generated with information about the errors or warnings.

These check boxes become available when the Upgrade Package check box is selected.

Note: Even with the *With Errors* check box selected, elements that are in error are not included in the upgrade—only elements in the package that are not in error are upgraded in the target database when you run the upgrade process. By contrast, selecting the *With Warnings* check box does not prevent an element with an associated warning from being included in the upgrade if the upgrade check box is selected. However, if you do not select *With Errors* and/or *With Warnings,* and there is even a single error or warning, the process will not upgrade. The process will run to success but a message will be generated with information about the errors or warnings.

Note: You can set default options for continuing an upgrade on the Installation Settings page. You can override these defaults when you run the upgrade process on the Package Processing page.

See Installation Settings Page.

Process

Click the Process button to call and run the processes denoted by the check boxes you have selected: Import Package, Compare Package, and Upgrade Package. Note that you can select all three check boxes at the same time and run these processes as a single, continuous sequence, or run one process at a time. However, the processes must run in the order of import first, then compare, then upgrade.

Note: When you click the Process button the Process Monitor page appears, so that you can monitor the process. Wait until the program finishes before opening a page associated with the package.

Package Elements Page

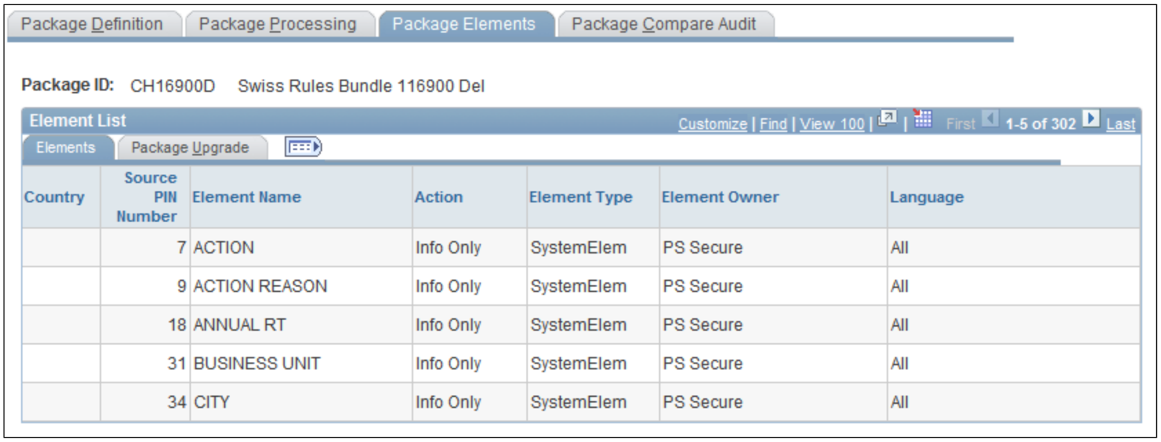
Use the Package Elements page (GP_PKG_ELEM_UPG) to view the results of the Compare processes and exclude elements from the Upgrade process.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package, Package Elements

Image: Package Elements page – Elements tab

This example illustrates the fields and controls on the Package Elements page – Elements tab.


Package Definition | Package Processing | Package Elements | Package Compare Audit

Package ID: CH16900D Swiss Rules Bundle 116900 Del

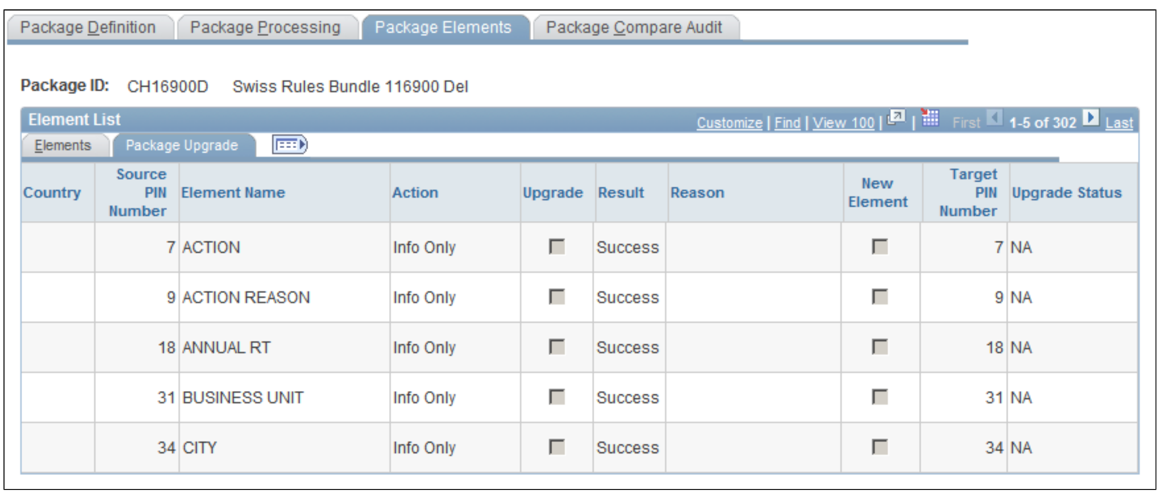
Element List — Customize | Find | View 100 | First 1-5 of 302 Last

Elements | Package Upgrade

Country	Source PIN Number	Element Name	Action	Element Type	Element Owner	Language
	7	ACTION	Info Only	SystemElem	PS Secure	All
	9	ACTION REASON	Info Only	SystemElem	PS Secure	All
	18	ANNUAL RT	Info Only	SystemElem	PS Secure	All
	31	BUSINESS UNIT	Info Only	SystemElem	PS Secure	All
	34	CITY	Info Only	SystemElem	PS Secure	All

Image: Package Elements page – Package Upgrade tab

This example illustrates the fields and controls on the Package Elements page – Package Upgrade tab.


Package Definition | Package Processing | Package Elements | Package Compare Audit

Package ID: CH16900D Swiss Rules Bundle 116900 Del

Element List — Customize | Find | View 100 | First 1-5 of 302 Last

Elements | Package Upgrade

Country	Source PIN Number	Element Name	Action	Upgrade	Result	Reason	New Element	Target PIN Number	Upgrade Status
	7	ACTION	Info Only	☐	Success		☐	7	NA
	9	ACTION REASON	Info Only	☐	Success		☐	9	NA
	18	ANNUAL RT	Info Only	☐	Success		☐	18	NA
	31	BUSINESS UNIT	Info Only	☐	Success		☐	31	NA
	34	CITY	Info Only	☐	Success		☐	34	NA

This page displays the results of the compare process. If failures are reported, correct the errors before continuing with the upgrade. The Package Compare Audit page provides additional information about the errors.

Source PIN Number (source pay item name number)	Displays the PIN number of the element from the source database (without an added 50 000 000).
Element Name	Displays the name of the element in the source database.
Upgrade	Select this option to overwrite the element with the data from the source database. If you modified the target element then your changes will be lost. To exclude the element from the upgrade process, clear the check box. Excluded elements will retain any changes you may have made.

Important! If you exclude an element from the package, you must rerun the compare process before resuming the upgrade.

Result

Displays the result of the comparison. Values are:

Not Done: You haven't yet run the compare process.

Success: The compare process encountered no errors.

Failure: The compare process failed. The Reason field shows why.

Warning: The PeopleSoft system has modified the element in the source database (the upgrade flag is checked on) or you have taken control of the element ownership (the upgrade flag is checked off). The Reason field explains the reason for the warning.

In order to accept or ignore the change, update the upgrade flag to indicate whether you want the element upgraded.

Note: Failures are listed first, followed by warnings and then successes, so if the entries on the first page all read Success, you can assume that the entire comparison process succeeded.

Reason

If the compare process failed or generated a warning, one of the following reasons appears here:

New Element Not Copied Completely: You're trying to copy a new element into the target database but that element has no GP_PIN record—only a definition. (For example, you stamp and package elements by version. Another person modifies the element and clears the version number.) Restamp the element with the appropriate version and export it again.

Note: This error occurs when an element is new and only GP_PIN is brought in and not the definition, or when the definition is there but not GP_PIN.

Element Owner / Type Conflict: The PIN code for the source element matches a PIN code in the target database, but the owner or element type doesn't match. Use the Element Rename page to change the PIN code in the target database.

If an element is customer-defined, the Element Owner field on the Compare and Upgrade Package - Package Elements page reads *Customer*.

Member Element not found: The source element uses other elements that don't exist in the target database and aren't included in the package. Remove the element from the upgrade process by clearing the *Upgrade* check box, or include the missing elements in the packaging criteria, recreate the package in the source database, and re-import it.

Mbr Element Owner/Type Conflict (member element owner/type conflict): This is similar to the *Element Owner/Type Conflict* message but applies to a member element that's used by the focus element. Use the Element Rename page to change the PIN code in the target database.

Element does not exist: You're trying to delete an element that's not in the target database.

PS Delivered/Customer Modified: This warning indicates that the element in the target database has been modified and no longer matches the element in the source database. To accept the PeopleSoft or customer modifications and overwrite any changes in the target database, select the Upgrade check box. The element ownership remains PS Delivered/Customer Modified once the check box is selected.

PS Delivered/PS Modified: This warning indicates that the PeopleSoft system has changed the ownership of the element in the source database so that it's no longer PeopleSoft delivered or maintained. To reject the change, clear the Upgrade check box.

Cannot delete PS-Owned Element: You're trying to delete a PeopleSoft-owned element from the target database. You cannot delete such elements.

Duplicate Package Element Found: You're trying to import an element that is in another package that's being upgraded.

Used in Non-Elem Defn (element definition): You are trying to delete an element that is used in a non-element definition. Modify the non element definition so that it no longer uses this element.

Used in Output Results: You are trying to delete an element that is used in a processing result table. (Results cannot be deleted from the result tables.)

Used in Payee Data: You're trying to delete an element that's associated with payee data. Modify the payee data so that it no longer uses this element.

Used in Rule Defn (definition): You are trying to delete an element that is used by another element. Modify the rule definition so that it is no longer uses this element.

Auto-component used in RuleDfn (rule definition): You are trying to delete an element whose component is used by a rule definition. Modify the element definition so that it is no longer uses this component.

New Element — The check box is selected if the element to be upgraded isn't in the target database.

Upgrade Status — Indicates whether the upgrade process has occurred. Changes from *Not Done* to *Done* after you complete the compare and upgrade processes.

Package Compare Audit Page

Use the Package Compare Audit page (GP_PKG_CMP_AUDIT) to review for errors that occur during the Compare process.

Before continuing with the Upgrade process, correct the errors and rerun the Compare process.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Apply Rule Package, Package Compare Audit

Image: Package Compare Audit page – Elements tab

This example illustrates the fields and controls on the Package Compare Audit page – Elements tab.

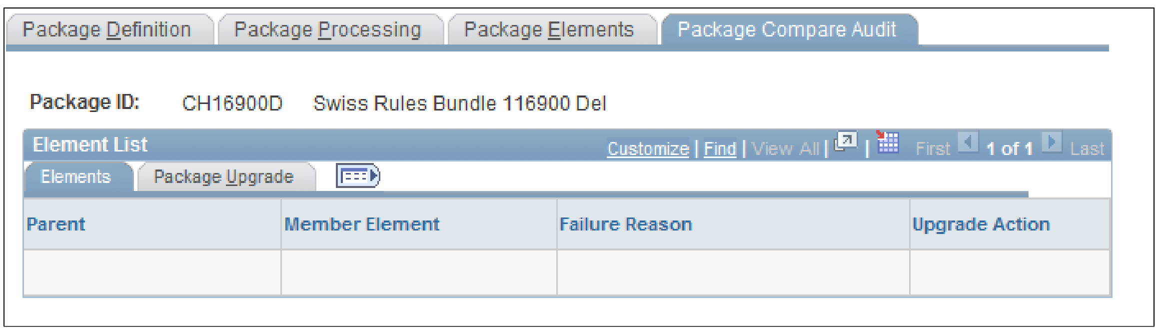
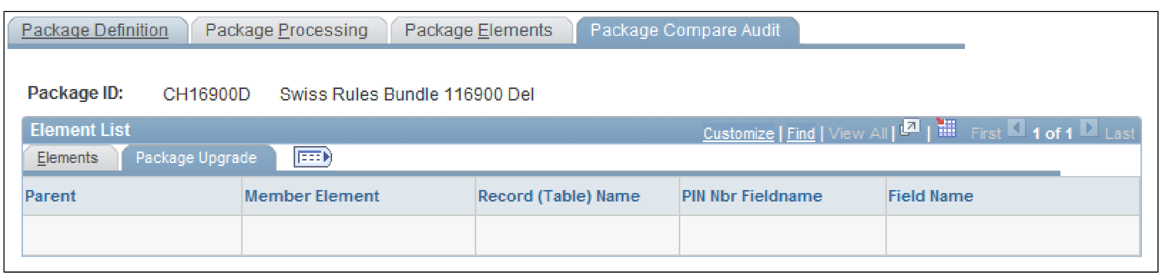


Image: Package Compare Audit – Package Upgrade tab

This example illustrates the fields and controls on the Package Compare Audit – Package Upgrade tab.



Parent — Displays the name of the parent element.

Member Element — Displays the name of the member element that generated the error.

Failure Reason — Displays the cause of the failure. The same information appears in the Reason field on the Package Elements tab.

Upgrade Action — Displays the action that the system was trying to take when the error occurred. Values are: *Upgrade, Delete,* and *Info Only.*

Package Upgrade

Select the Package Upgrade tab.

Parent — Displays the name of the parent element that generated the error.

Member Element — Displays the name of the member element that generated the error.

Record (Table) Name — Displays the name of the record that stores the parent element and its members.

PIN Num Fieldname (pay item name number field name) — Displays the name of the field that contains the key field.

Field Name — Displays the name of the field that contains the member element that created the error.

Package Status Page

Use the Package Status page (GP_PKG_DTTM_SEC) to view the date and time a package was created, exported, imported, compared, and upgraded.

Navigation

Click the Package Status link on the Package Processing page.

Image: Package Status page

This example illustrates the fields and controls on the Package Status page.

View the date and time packages and scripts were created, and see when packages were exported, imported, compared, and upgraded.

View Scripts Page

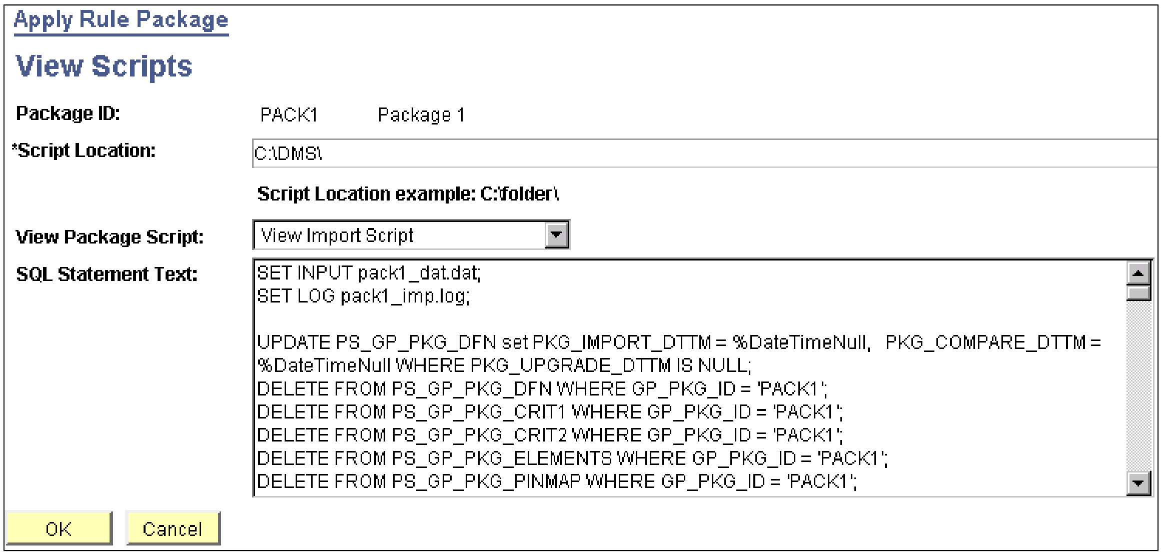
Use the View Scripts page (GP_PKG_SCRIPTS_SEC) to view export, import, and cleanup scripts.

Navigation

Click the View Scripts link on the Package Processing page.

Image: View Scripts page

This example illustrates the fields and controls on the View Scripts page.



Script Location

Displays the script location, which must be accessible by both the import and export NT Process Scheduler for the import and export databases. You must specify the script location in the Process Scheduler configuration file (psprcs.cfg).

Note: We discuss how to specify the script location in the Process Scheduler configuration file in the section titled *The Process of Connecting UNIX and NT Directories.*

See The Process of Connecting UNIX and NT Directories.

Note: You can define a default script location on the Installation Settings page for all packager scripts.

See Installation Settings Page.

View Package Script

Select the type of script that you want to view: export, import, or cleanup. The DataMover script appears.

Renaming Elements

This topic provides an overview on how to rename elements, and discusses renaming an element.

Page Used to Rename Elements

Page Name	*Definition Name*	*Navigation*	*Usage*
Element Rename	GP_PIN_RENAME	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Rename Element Codes, Element Rename	Change an element's PIN code.

Understanding How to Rename Elements

Sometimes the compare process finds an element in the target database whose PIN code is the same as the source element's, but the two elements have different element types or owners. In this case, you receive one of the following error messages: "Element Owner/Type Conflict" or "Mbr Element Owner/Type Conflict."

To continue exporting the element, you can use the Element Rename Utility to change the PIN code of the target element. After changing the PIN code, always rerun the compare process.

When you instruct the system to change an element's PIN code, it checks the following:

- Is the new PIN code already in use?

  If yes, the system generates an error.
- Is the old PIN code used in PeopleSoft Time and Labor?

  If yes, the system creates a warning. Remap the element in Time and Labor to reflect the new code.
- Is the new PIN code the same as the old PIN code?

  If yes, the system issues a warning.

Important! Do not rename an element when you are in the process of creating a package.
PeopleSoft created elements cannot be renamed.

Warning! Time and Labor stores PIN code information, so if you make a change, you must update Time and Labor data accordingly.

Related Links

The Delete Functions
"Integrating Time and Labor with Global Payroll *(PeopleSoft HCM 9.2: Time and Labor)*"

Element Rename Page

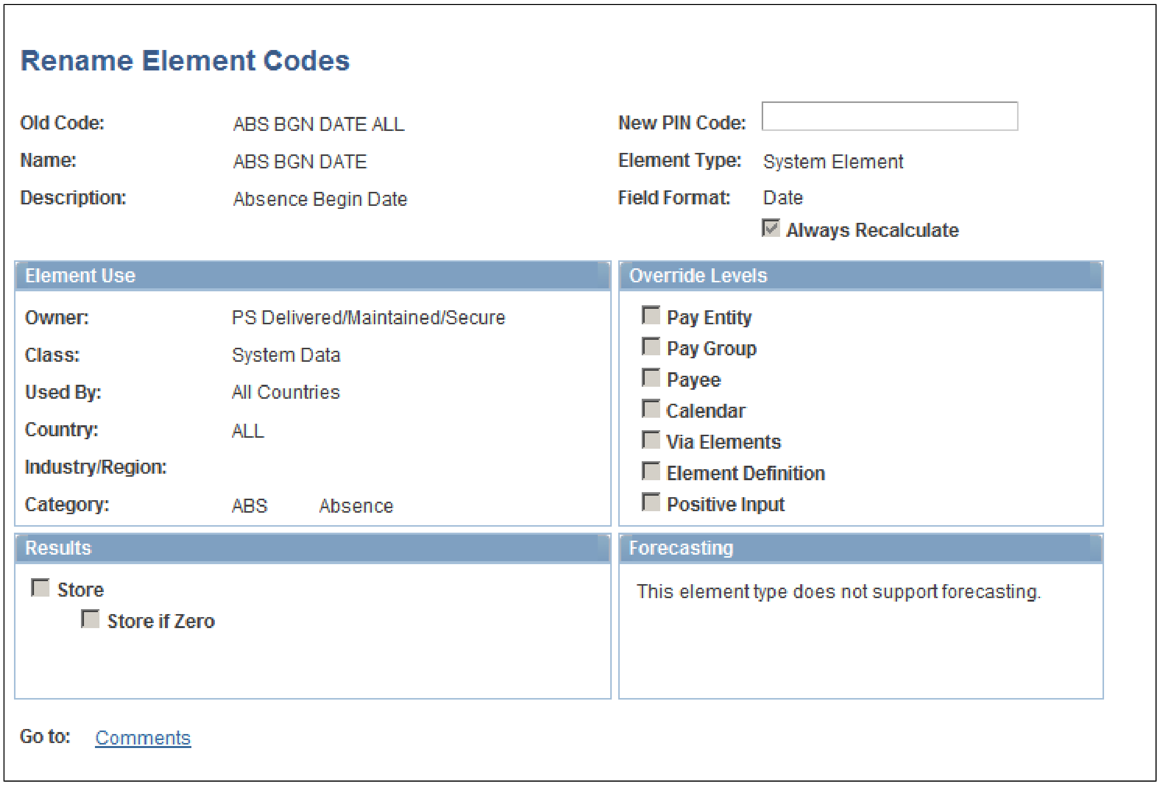
Use the Element Rename page (GP_PIN_RENAME) to change an element's PIN code.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Rename Element Codes, Element Rename

Image: Rename Element Codes page

This example illustrates the fields and controls on the Rename Element Codes page .



New PIN Code (new pay item name code)	Enter the new code. The old PIN code is replaced when you save. **Note:** When renaming a PIN, make sure that you use the PIN name plus the country suffix. For example: PIN NAME DEU.

Creating and Exporting Non-Rule Packages

This topic provides an overview of creating and exporting non-rule packages and discusses how to:

- Name non-rule packages.
- Define selection criteria.
- Modify the SQL Where clause for the selection criteria.
- Display elements of a non-rule package.
- Export and import non-rule packages.

- View non-rule package scripts.

Pages Used to Create and Export Non-Rule Packages

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Non-Rule Package – Package Definition Export Non-Rule Package – Package Definition	GP_NR_PKG_DFN	• Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create Non-Rule Package, Package Definition • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Export Non-Rule Package, Package Definition	Name or view a non-rule package and enter a description and comments.
Package Criteria	GP_NR_PKG_CRIT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create Non-Rule Package, Package Criteria	Define criteria for selecting items for the non-rule package and create the package.
Create Non-Rule Package – Package Records	GP_NR_PKG_RECS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create Non-Rule Package, Package Records	View and optionally edit the Where clause of a SQL statement that the system creates based on selection criteria that you enter on the Package Criteria page.
Export Non-Rule Package – Package Records	GP_NR_PKG_DATA	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Export Non-Rule Package, Package Records	• Create scripts and export package records and element information. • View Where clause of SQL statement that the system creates based on selection criteria that you enter on the Package Criteria page.

Page Name	Definition Name	Navigation	Usage
Create Non-Rule Package – Package Elements Export Non-Rule Package – Package Elements	GP_NR_PKG_ELMTS	• Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create Non-Rule Package, Package Elements • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Export Non-Rule Package, Package Elements	View the elements of a non-rule package.
View Script	GP_NR_PKG_EXPIMP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Export Non-Rule Package, View Script	View non-rule export and import scripts.
Package Status	GP_NR_PKG_DTTM_SEC	• Click Package Status link on Package Definition page. • Click Package Status link on Package Criteria page. • Click Package Status link on Package Records page. • Click Package Status link on Package Elements page. • Click Package Status link on View Script page.	View the date and time a package was created, exported, imported, compared, and upgraded.

Understanding How to Create and Export Non-Rule Packages

Non-rule packages contain both non-elements and element information. Non-elements are those that belong to records where PIN_NUM is *not* the primary key.

Important! When creating a non-rule package, make sure that records that are related to the record you are moving are included in the same package. To move a complete set of related data, you need to understand which records are related.

Before moving non-rule data, make sure that the elements that are associated with the non-rule data exist in the target database. You can do this by creating a rule package that contains the elements that are associated with the data record that's being moved and copying (upgrading) the rule package to the target database.

For example, suppose that you are moving non-rule calendar detail records. Calendar details are associated with the process number element (PIN_PRC_NUM). Before moving the calendar data, create a rule package that contains the process number element and move it to the target database. The system can assign a new PIN number to this element in the target database, if necessary. Once this package is in the target database, you can move the calendar details by creating a non-rule package.

When the system moves the calendar details, it finds the process number element in the target database, retrieves the new PIN number that was assigned during the rule upgrade process, and renumbers the process number PIN in the calendar detail record. (Without renumbering, the calendar detail would contain PIN numbers that may not exist or are not related the element used by that calendar in the target database.)

To create and export a non-rule package:

1. Create the non-rule package.

   To do this, use the Create Non-Rule Package (GP_NR_PKG_CREATE) component.

   On this component you can:

   - Define the selection criteria for the records to move from the source database.
   - Run the create package process.
   - View the rules that are associated with the data that you're moving.

2. Export the non-rule package.

   To do this, use the Export Non-Rule Package (GP_NR_PKG_EXPORT) component.

   The system exports the non-rule data and the element information contained in the non-rule package.

Note: Absence Management enables you to specify a default location for the scripts used in the export non-rule package process so that you do not need to enter the same basic information each time you export a package. To do this, access the Installation Settings page for Absence Management (Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Settings) and specify the script location.

Create Non-Rule Package – Package Definition Page

Use the Create Non-Rule Package – Package Definition page (GP_NR_PKG_DFN) to name or view a non-rule package and enter a description and comments.

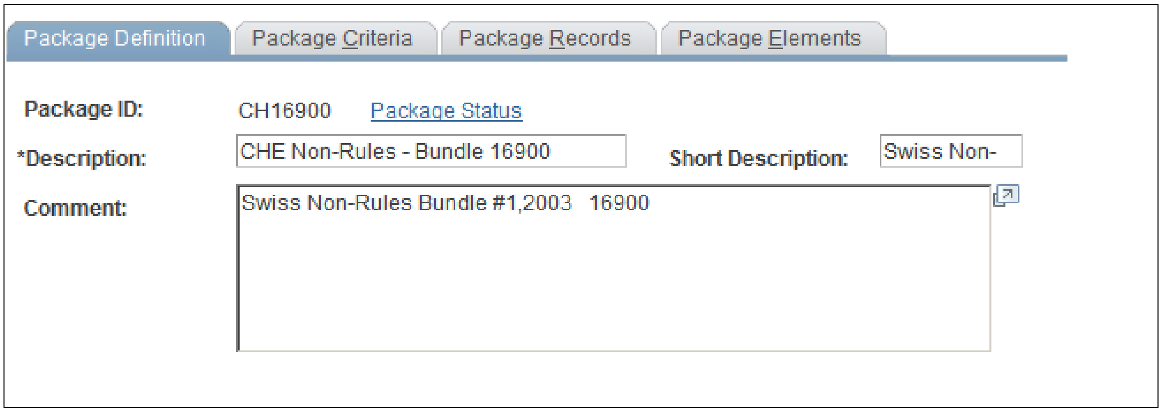
Navigation

- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create Non-Rule Package, Package Definition
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Export Non-Rule Package, Package Definition

Enter a description of the package and comments.

Image: Package Definition page

This example illustrates the fields and controls on the Package Definition page.



Package Criteria Page

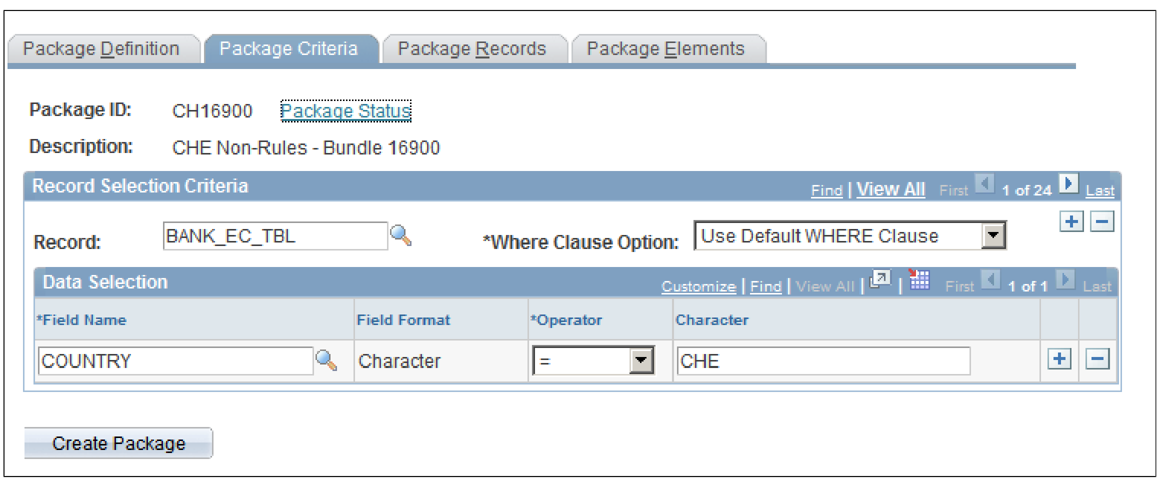
Use the Package Criteria page (GP_NR_PKG_CRIT) to define criteria for selecting items for the non-rule package and create the package.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create Non-Rule Package, Package Criteria

Image: Package Criteria page

This example illustrates the fields and controls on the Package Criteria page.



Package ID

Displays the package ID.

Record

Select the record that contains the data to move. The Data Selection group box becomes available.

Where Clause Option

The system converts the criteria entered on this page into SQL in order to select elements for the package.

Values are:

Use Default WHERE Clause: Tells the system to use the default Where clause. If the where clause has been changed and *Use Default WHERE Clause* is selected again, the page discards any SQL code modifications you have made and reverts to the Where clause based on the criteria you specified.

Change WHERE Clause: Makes all other fields on the page unavailable and puts the SQL code on the Package Records page in edit mode.

Data Selection

Use the fields in the Data Selection group box to indicate which data to move. Selection criteria are optional, but if you don't enter selection criteria, no delete process is performed on the target database before source data importation. This can result in a "Duplicate Record" message from Data Mover during import, or it can cause the upgrade process to fail.

Field Name

Select the field on which to base the selection criteria. (It is advisable to use a key field, which are identified in the prompt table's Key Position column.)

Field Format

Displays the format of the field that you selected.

Operator

Select the operator that the system uses to select the data to include in the package. Values are *<, <=, <>, =, >, >=,* and *LIKE.* If you select *LIKE,* you can enter a partial value, such as *S,* in the field to the right.

In the field on the right of the Operator field, enter the value the system searches for. (The name of this field varies with field format.)

Create Package

Click to create the package after defining the selection criteria. The Create Non-Rule Package - Package Records page appears when the package is created.

To review the package contents, select the Package Elements tab.

Create Non-Rule Package – Package Records Page

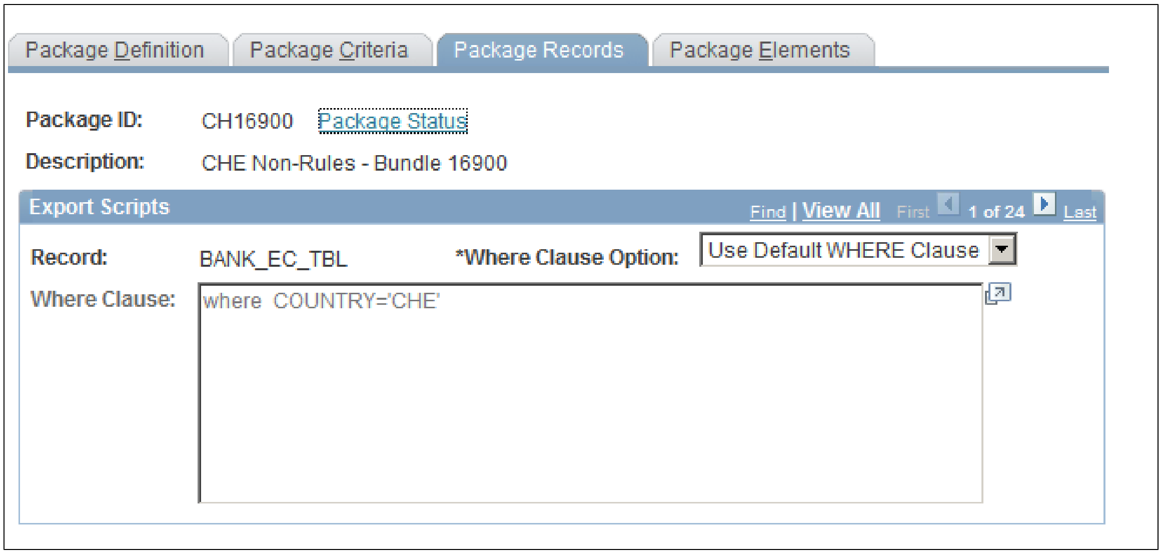
Use the Create Non-Rule Package – Package Records page (GP_NR_PKG_RECS) to view and optionally edit the Where clause of a SQL statement that the system creates based on selection criteria that you enter on the Package Criteria page.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create Non-Rule Package, Package Records

Image: Create Non-Rule Package - Package Records page

This example illustrates the fields and controls on the Create Non-Rule Package - Package Records page.



Record

Displays the record from which fields are selected.

Where Clause Option

Select a Where clause option. Values are:

Change WHERE Clause: Select to edit the SQL code on the lower part of the page.

Use Default WHERE Clause: Select to use the default clause or revert to it after editing the SQL code. Changes that you have made to the Where clause are lost and the field is disabled.

Where Clause

If you selected *Use Default WHERE Clause* in the Where Clause Option field, the system displays the Where clause of the SQL statement it created based on the selection criteria that you entered for the package on the Create Non-Rule Package - Package Criteria page. This WHERE clause cannot be edited.

If you selected *Change Where Clause,* you can edit the SQL. Do not use PIN_NUM as a selection criterion or any field where PIN_NUM can be stored. (Doing so prevents renumbering during the import process.)

Create Non-Rule Package – Package Elements Page

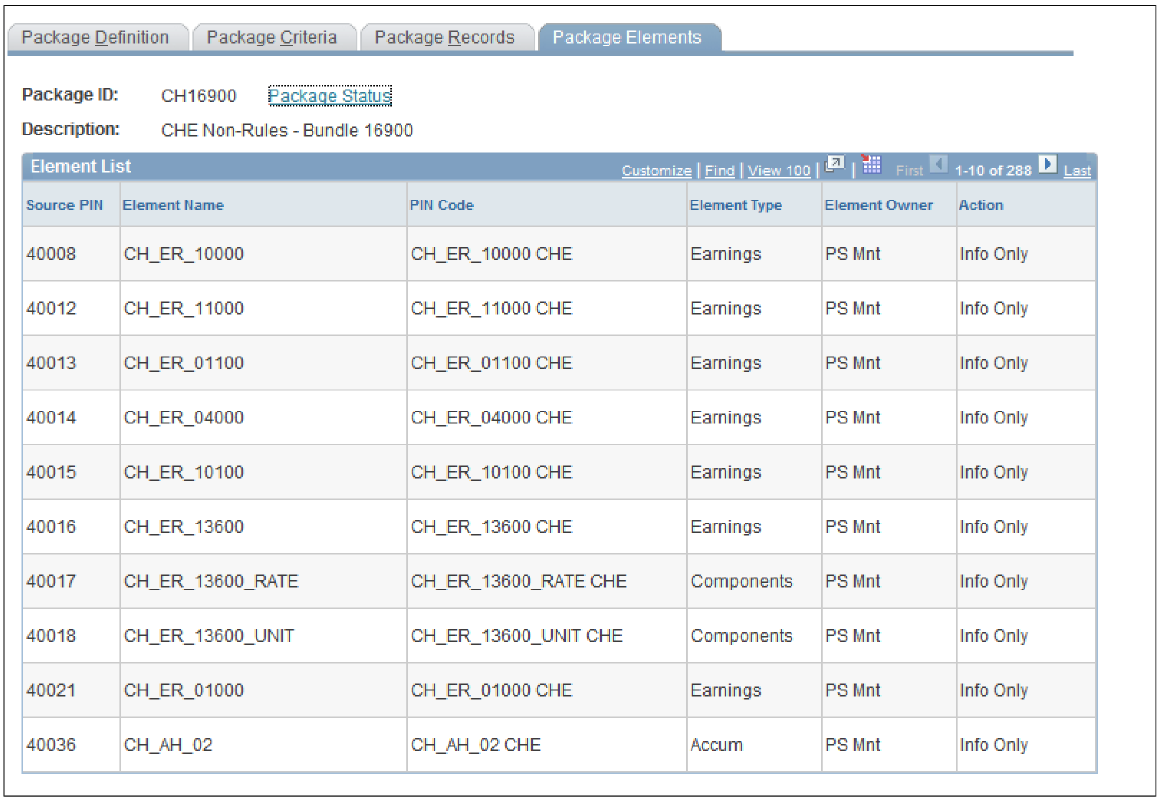
Use the Create Non-Rule Package – Package Elements page (GP_NR_PKG_ELMTS) to view the elements of a non-rule package.

Navigation

- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Create Non-Rule Package, Package Elements
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Export Non-Rule Package, Package Elements

Image: Package Elements page

This example illustrates the fields and controls on the Package Elements page.



Package Definition | Package Criteria | Package Records | Package Elements

Package ID: CH16900 Package Status

Description: CHE Non-Rules - Bundle 16900

Element List — Customize | Find | View 100 | First 1-10 of 288 Last

Source PIN	Element Name	PIN Code	Element Type	Element Owner	Action
40008	CH_ER_10000	CH_ER_10000 CHE	Earnings	PS Mnt	Info Only
40012	CH_ER_11000	CH_ER_11000 CHE	Earnings	PS Mnt	Info Only
40013	CH_ER_01100	CH_ER_01100 CHE	Earnings	PS Mnt	Info Only
40014	CH_ER_04000	CH_ER_04000 CHE	Earnings	PS Mnt	Info Only
40015	CH_ER_10100	CH_ER_10100 CHE	Earnings	PS Mnt	Info Only
40016	CH_ER_13600	CH_ER_13600 CHE	Earnings	PS Mnt	Info Only
40017	CH_ER_13600_RATE	CH_ER_13600_RATE CHE	Components	PS Mnt	Info Only
40018	CH_ER_13600_UNIT	CH_ER_13600_UNIT CHE	Components	PS Mnt	Info Only
40021	CH_ER_01000	CH_ER_01000 CHE	Earnings	PS Mnt	Info Only
40036	CH_AH_02	CH_AH_02 CHE	Accum	PS Mnt	Info Only

Note: This display page lists the rule elements used in the records being moved to the new database. These are informational elements. The page doesn't show data in records where PIN Num is not a field.

Export Non-Rule Package – Package Records Page

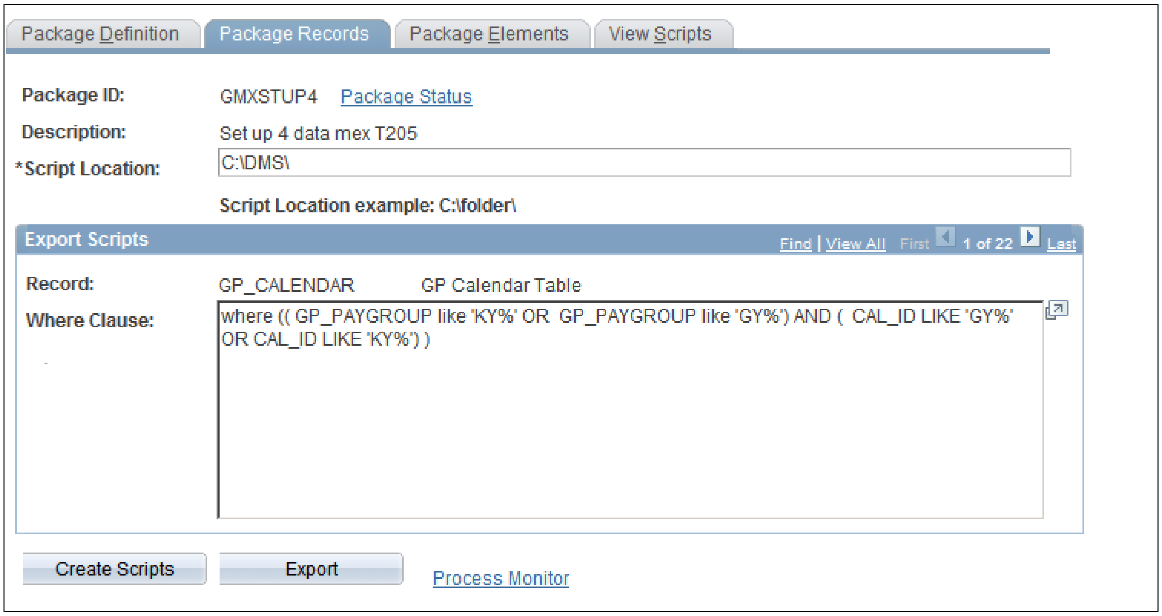
Use the Export Non-Rule Package – Package Records page (GP_NR_PKG_DATA) to .

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Export Non-Rule Package, Package Records

Image: Export Non-Rule Package - Package Records page

This example illustrates the fields and controls on the Export Non-Rule Package - Package Records page.



Script Location

Specify the path to the location where you want the import/ export scripts to be created when you click the Create Scripts button.

The location of the scripts and data files must be accessible by both the import and export NT Process Scheduler for the import and export databases. You must specify the script location in the Process Scheduler configuration file (psprcs.cfg).

Note: We discuss how to specify the script location in the Process Scheduler configuration file in the section titled *The Process of Connecting UNIX and NT Directories.*

See The Process of Connecting UNIX and NT Directories.

Note: You can define a default script location on the Installation Settings page for all packager scripts.

See Installation Settings Page.

Record

Displays the name of the record containing the data that you're exporting.

Where Clause

Displays the Where clause of the SQL statement that selects the data to be exported.

Create Scripts	Click to create the import and export scripts for the non-rule package: xxx_elements_imp.dms, xxx_elements_exp.dms, xxx_records_exp.dms, and xxx_record_imp.dms (where xxx = name of package). The scripts will be created in the script location you specify.
Export	Click to export the package once you have selected a script location.

View Script Page

Use the View Script page (GP_NR_PKG_EXPIMP) to view non-rule export and import scripts.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Export Non-Rule Package, View Script

Script Location	Displays the script location, which must be accessible by both the import and export NT Process Scheduler for the import and export databases. You must specify the script location in the Process Scheduler configuration file (psprcs.cfg). **Note:** We discuss how to specify the script location in the Process Scheduler configuration file in the section titled *The Process of Connecting UNIX and NT Directories.* See The Process of Connecting UNIX and NT Directories. **Note:** You can define a default script location on the Installation Settings page for all packager scripts. See Installation Settings Page.
View Package Script	Select the type of script that you want to view: either export or import scripts for the elements and records. The DataMover script appears.

Package Status Page

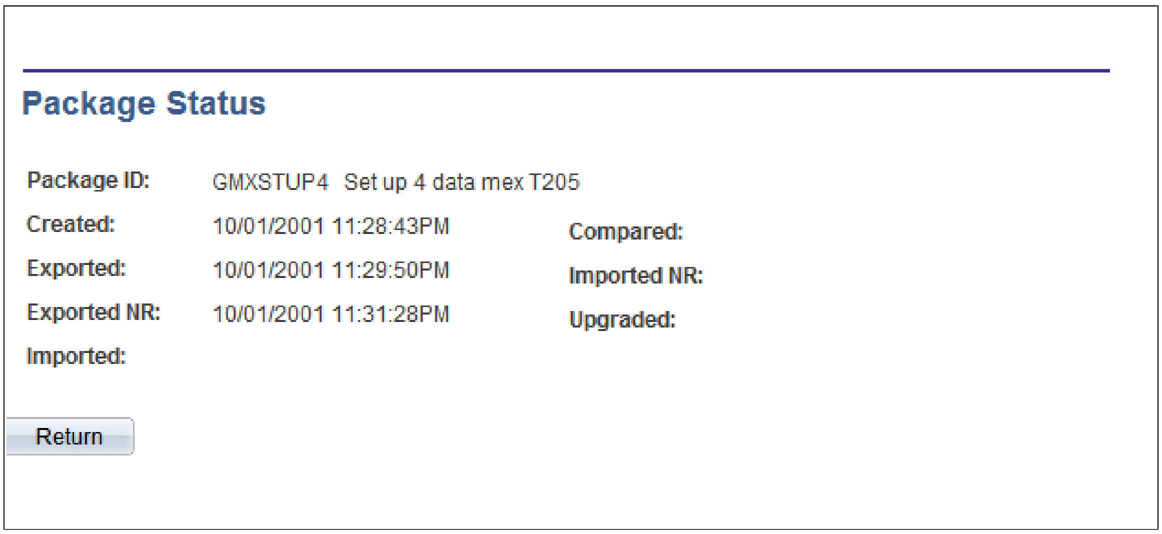
Use the Package Status page (GP_NR_PKG_DTTM_SEC) to view the date and time a package was created, exported, imported, compared, and upgraded.

Navigation

- Click Package Status link on Package Definition page.
- Click Package Status link on Package Criteria page.
- Click Package Status link on Package Records page.
- Click Package Status link on Package Elements page.
- Click Package Status link on View Script page.

Image: Package Status page

This example illustrates the fields and controls on the Package Status page.



View the date and time a package was created, exported, imported, compared, and upgraded.

Importing, Comparing, and Upgrading Non-Rule Packages

This topic provides and overview of comparing and upgrading non-rule packages and discusses how to:

- Import non-rule element information.
- Compare non-rule packages with the data in a target database.
- Import non-rule records.
- Upgrade non-rule packages.

Pages Used to Import, Compare, and Upgrade Non-Rule Packages

Page Name	***Definition Name***	***Navigation***	***Usage***
Import Non-Rule Elements – Package Definition Compare Non-Rule Package – Package Definition Import Non-Rule Records – Package Definition Upgrade Non-Rule Package – Package Definition	GP_NR_PKG_DFN	• Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements, Package Definition • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Compare Non-Rule Package, Package Definition • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, Package Definition • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Upgrade Non-Rule Package, Package Definition	• Name a non-rule package and enter a description and comments. • View the name and description of a non-rule package.
Import Non-Rule Elements - Package Records Import Non-Rule Records – Package Records	GP_NR_PKG_DATA	• Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements, Package Records • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, Package Records	• Import non-rule element information into the target database. • Import non-rule records into the target database. • View Where clause of SQL statement that the system creates based on selection criteria that you enter on the Package Criteria page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Upgrade Non-Rule Package – Package Records	GP_NR_PKG_RECS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Upgrade Non-Rule Package, Package Records	• View and optionally edit the Where clause of a SQL statement that the system creates based on selection criteria that you enter on the Package Criteria page. • Upgrade a non-rule package. The Compare process must be successfully completed before you can upgrade the package.
Import Non-Rule Elements – Package Elements Compare Non-Rule Package - Package Elements Import Non-Rule Records – Package Elements	GP_NR_PKG_ELMTS	• Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements, Package Elements • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Compare Non-Rule Package, Package Elements • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, Package Elements	• Compare data from the source database with the data in the target database. • View the contents of the imported package.
Import Non-Rule Elements - View Script Import Non-Rule Records – View Script	GP_NR_PKG_EXPIMP	• Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements, View Script • Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, View Script	View export/import scripts.

Page Name	Definition Name	Navigation	Usage
Package Status	GP_NR_PKG_DTTM_SEC	• Click Package Status link on Package Definition page. • Click Package Status link on Package Records page. • Click Package Status link on Package Elements page. • Click Package Status link on View Scripts page.	View the date and time a package was created, exported, imported, compared, and upgraded.

Understanding How to Import, Compare, and Upgrade Non-Rule Packages

After creating and exporting a non-rule package:

1. Import the non-rule elements.

   To do this, use the Import Non-Rule Elements (GP_NR_PKG_IMPORT) component.

   The system imports the element information only—not the elements themselves.

2. Compare the elements in the non-rule package with those in the target database to ensure that the non-rule elements are in the target database.

   To do this, use the Compare Non-Rule Package (GP_NR_PKG_COMPARE) component.

   Using this component you:

   - Compare the element information in the package with the element information in the target database.
   - Identify any missing elements that need to be moved into the target database.

3. Import the non-rule records.

   To do this, use the Import Non-Rule Records (GP_NR_PKG_IMPRECS) component.

4. Upgrade to the non-rule package.

   To do this, use the Upgrade Non-Rule Package (GP_NR_PKG_UPGRADE) component.

Note: Absence Management enables you to specify a default location for the scripts used in the import non-rule package process so that you do not need to enter the same basic information each time you import a package. To do this, access the Installation Settings page for Absence Management (Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Settings) and specify the script location.

Import Non-Rule Elements – Package Definition Page

Use the Import Non-Rule Elements – Package Definition page (GP_NR_PKG_DFN) to

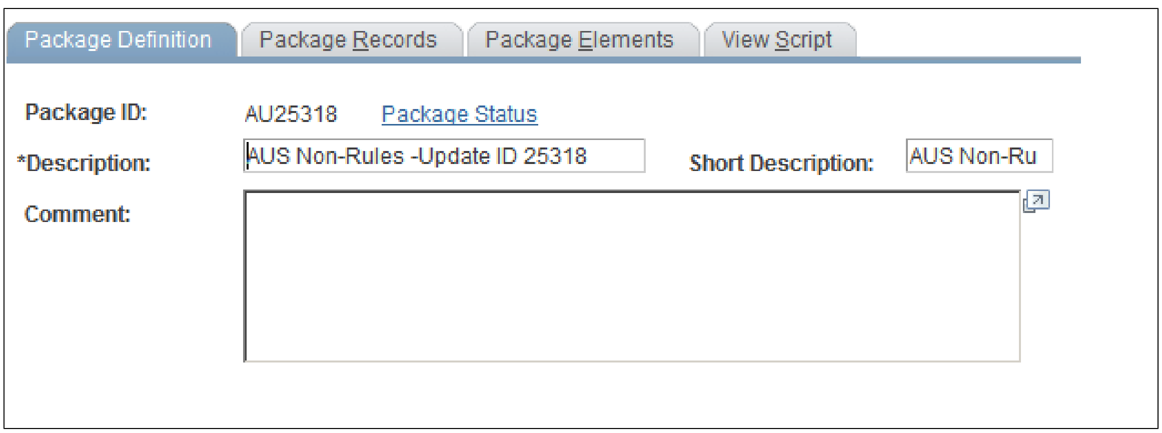
- Name a non-rule package and enter a description and comments.
- View the name and description of a non-rule package.

Navigation

- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements, Package Definition
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Compare Non-Rule Package, Package Definition
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, Package Definition
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Upgrade Non-Rule Package, Package Definition

Image: Package Definition page

This example illustrates the fields and controls on the Package Definition page.



Enter or view a description of the package and comments.

Import Non-Rule Elements - Package Records Page

Use the Import Non-Rule Elements - Package Records page (GP_NR_PKG_DATA) to

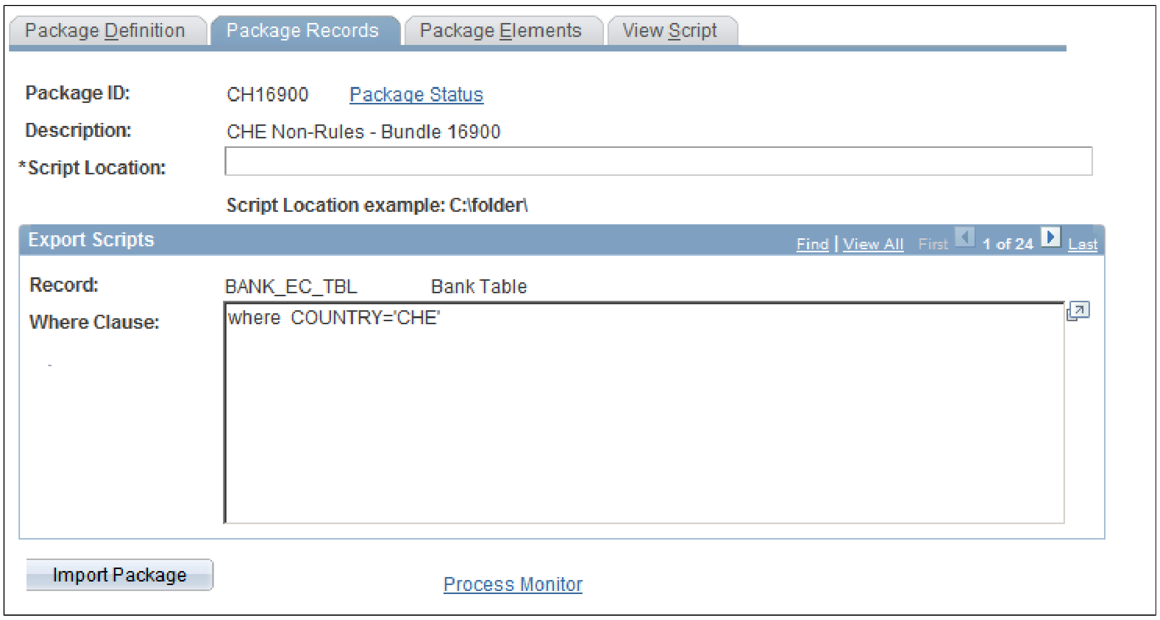
- Import non-rule element information into the target database.
- Import non-rule records into the target database.
- View Where clause of SQL statement that the system creates based on selection criteria that you enter on the Package Criteria page.

Navigation

- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements, Package Records
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, Package Records

Image: Package Records page

This example illustrates the fields and controls on the Package Records page.



Script Location

Displays the script location, which must be accessible by both the import and export NT Process Scheduler for the import and export databases. You must specify the script location in the Process Scheduler configuration file (psprcs.cfg).

Note: We discuss how to specify the script location in the Process Scheduler configuration file in the section titled *The Process of Connecting UNIX and NT Directories.*

See The Process of Connecting UNIX and NT Directories.

Note: You can define a default script location on the Installation Settings page for all packager scripts.

See Installation Settings Page.

Import Package

If the button is available, click to start the import process.

Import Non-Rule Elements – Package Elements Page

Use the Import Non-Rule Elements – Package Elements page (GP_NR_PKG_ELMTS) to .

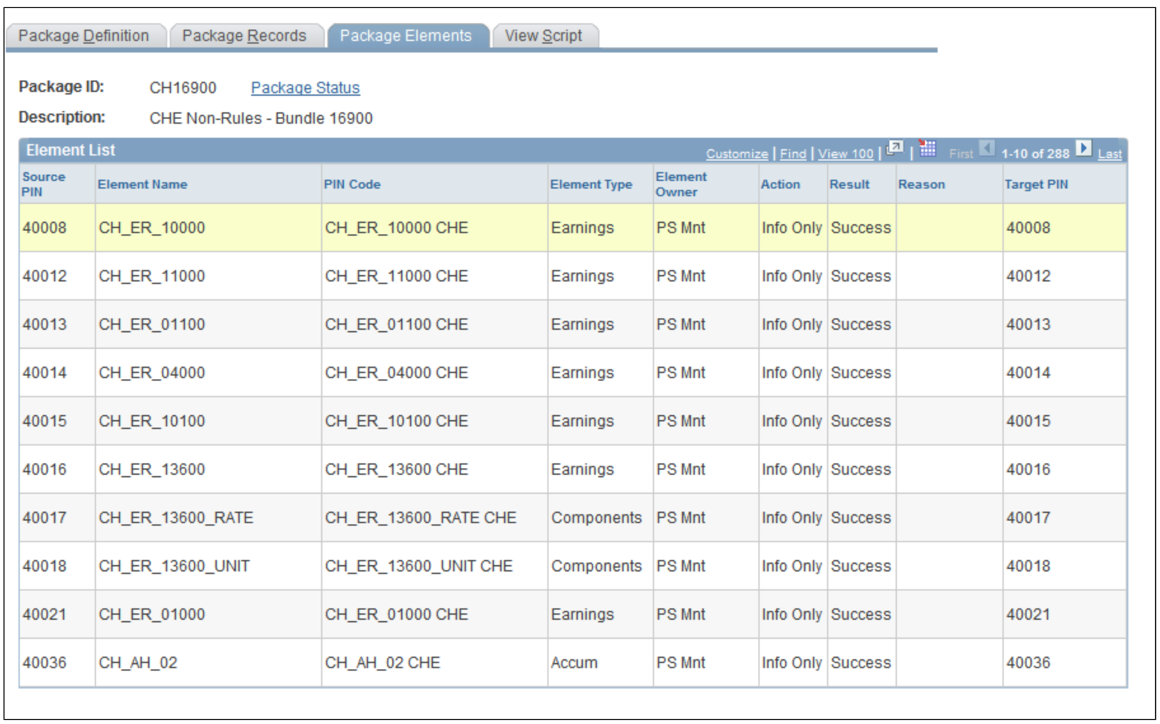
- Compare data from the source database with the data in the target database.
- View the contents of the imported package.

Navigation

- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements, Package Elements
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Compare Non-Rule Package, Package Elements
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, Package Elements

Image: Compare Non-Rule Package - Package Elements page

This example illustrates the fields and controls on the Compare Non-Rule Package - Package Elements page.


Package Definition | Package Records | Package Elements | View Script

Package ID: CH16900 Package Status

Description: CHE Non-Rules - Bundle 16900

Element List — Customize | Find | View 100 | First 1-10 of 288 Last

Source PIN	Element Name	PIN Code	Element Type	Element Owner	Action	Result	Reason	Target PIN
40008	CH_ER_10000	CH_ER_10000 CHE	Earnings	PS Mnt	Info Only	Success		40008
40012	CH_ER_11000	CH_ER_11000 CHE	Earnings	PS Mnt	Info Only	Success		40012
40013	CH_ER_01100	CH_ER_01100 CHE	Earnings	PS Mnt	Info Only	Success		40013
40014	CH_ER_04000	CH_ER_04000 CHE	Earnings	PS Mnt	Info Only	Success		40014
40015	CH_ER_10100	CH_ER_10100 CHE	Earnings	PS Mnt	Info Only	Success		40015
40016	CH_ER_13600	CH_ER_13600 CHE	Earnings	PS Mnt	Info Only	Success		40016
40017	CH_ER_13600_RATE	CH_ER_13600_RATE CHE	Components	PS Mnt	Info Only	Success		40017
40018	CH_ER_13600_UNIT	CH_ER_13600_UNIT CHE	Components	PS Mnt	Info Only	Success		40018
40021	CH_ER_01000	CH_ER_01000 CHE	Earnings	PS Mnt	Info Only	Success		40021
40036	CH_AH_02	CH_AH_02 CHE	Accum	PS Mnt	Info Only	Success		40036

After completing the first part of the export and import process, log onto the target database and perform the compare process, which verifies that the elements needed by the data you're moving exist in the target database. The compare process checks PIN code and PIN type.

If the elements don't exist or if the element types do not match, the compare process fails and you must create a rule package and move the package to the target database before continuing with the non-rule upgrade.

Element List

This group box shows the results of the comparison of the source and target databases. If the compare process reports failures, correct the errors before continuing with the upgrade process.

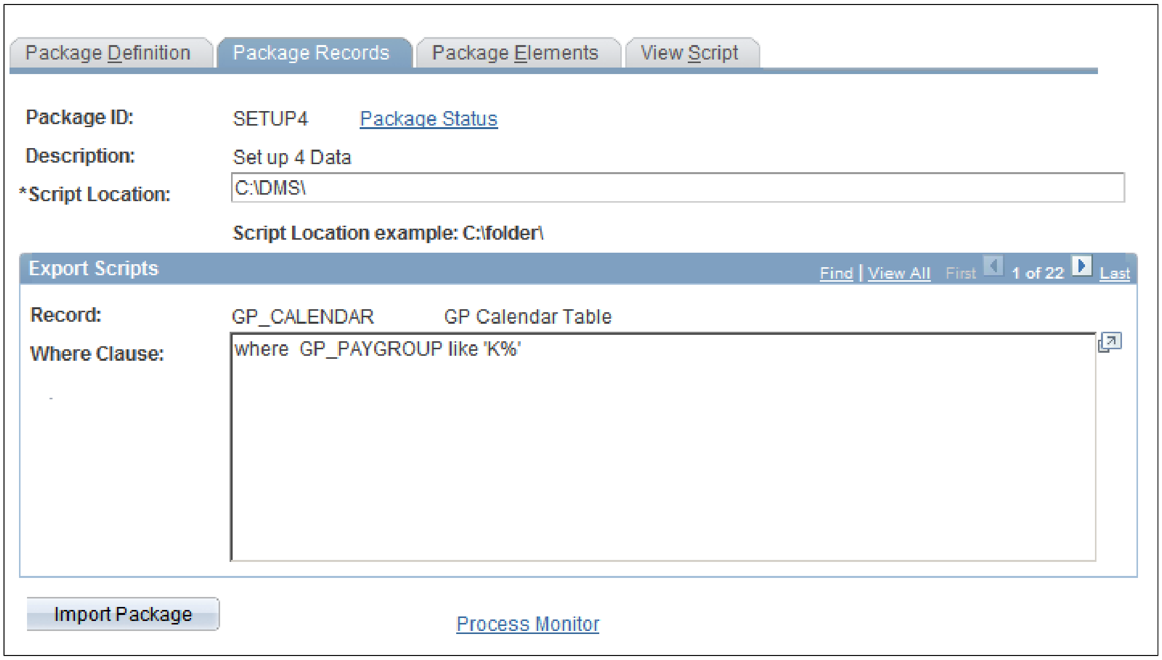
Source PIN (source pay item name)	Displays the PIN number of the element from the source database (without 50000000 added).
Element Name	Displays the name of the element in the source database.
PIN Code (pay item name code)	Displays the element's PIN code.
Element Type	Displays the element's type.
Element Owner	Identifies who created the element and who's responsible for maintaining it. Valid values are: *Customer, Modified, PS Mnt, PS NonMnt,* and *PS Secure.*
Result	Displays the results of the comparison: *Not Done:* You haven't yet run the compare process. *Success:* The compare process didn't encounter any errors. *Failure:* The compare process failed. The Reason field shows why.
Reason	If the compare process failed, displays one of the following values: *Not Found:* Create a new rule package that includes the missing elements and move the package to the target database before continuing with the non-rule upgrade. *Type Cnflt* (type conflict): The element types do not match. Most likely this error occurred because you created an element that has the same PIN code, but a different type. Rename your element and create a new rule package that includes the element that is being used.
Compare	Click to start the compare process. Once the process is complete, the Element List group box shows, element by element, whether a match was found. If the process generates no errors, the following message appears: "Compare process completed successfully. You can now import non-rule records from the source database."

Importing Non-Rule Records

Access the Import Non-Rule Records - Package Records page (Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, Package Records).

Image: Import Non-Rule Records - Package Records page

This example illustrates the fields and controls on the Import Non-Rule Records - Package Records page.



After reviewing the results of the compare process and moving any missing elements into the target database, you can import the non-rule records into the target database.

Click the Record Import button to import the records.

Upgrade Non-Rule Package – Package Records Page

Use the Upgrade Non-Rule Package – Package Records page (GP_NR_PKG_RECS) to

- View and optionally edit the Where clause of a SQL statement that the system creates based on selection criteria that you enter on the Package Criteria page.
- Upgrade a non-rule package.

  The Compare process must be successfully completed before you can upgrade the package.
- View and optionally edit the Where clause of a SQL statement that the system creates based on selection criteria that you enter on the Package Criteria page.
- Upgrade a non-rule package.

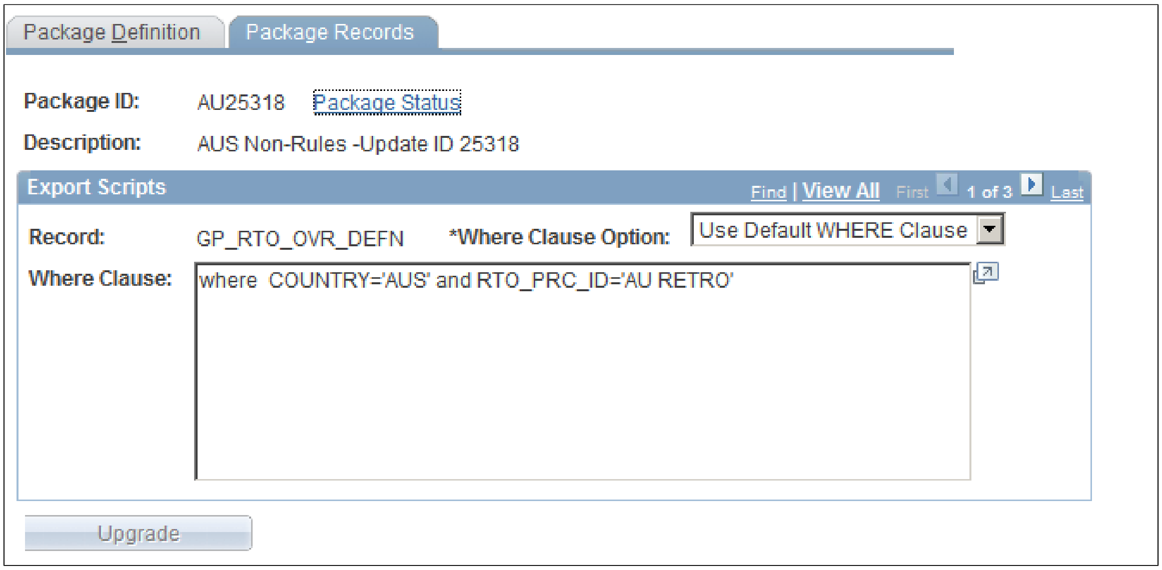
  The Compare process must be successfully completed before you can upgrade the package.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Upgrade Non-Rule Package, Package Records

Image: Upgrade Non-Rule Package - Package Records page

This example illustrates the fields and controls on the Upgrade Non-Rule Package - Package Records page.



The final step is to renumber the elements on the non-rule data that you've imported so that they have the same PIN numbers as the matching elements in the target database, using the Upgrade Non-Rule Package component.

Upgrade	Click to start the upgrade process. A message tells you when the process is complete. You cannot compare or upgrade the same package again unless you re-import records and elements into the target database.

Import Non-Rule Elements - View Script Page

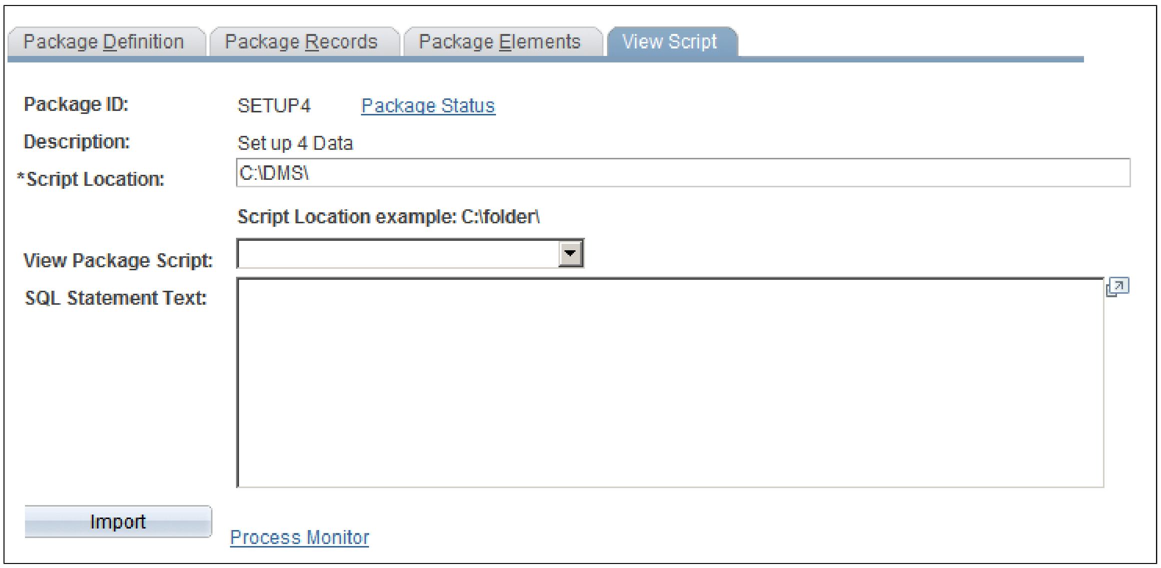
Use the Import Non-Rule Elements - View Script page (GP_NR_PKG_EXPIMP) to view export/import scripts.

Navigation

- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Elements, View Script
- Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Import Non-Rule Records, View Script

Image: View Script page

This example illustrates the fields and controls on the View Script page.



Script Location

Displays the script location, which must be accessible by both the import and export NT Process Scheduler for the import and export databases. You must specify the script location in the Process Scheduler configuration file (psprcs.cfg).

Note: We discuss how to specify the script location in the Process Scheduler configuration file in the section called *The Process of Connecting UNIX and NT Directories.*

See The Process of Connecting UNIX and NT Directories.

Note: You can define a default script location on the Installation Settings page for all packager scripts.

See Installation Settings Page.

View Package Script

Select the type of script that you want to view: export or import. The DataMover script appears.

Package Status Page

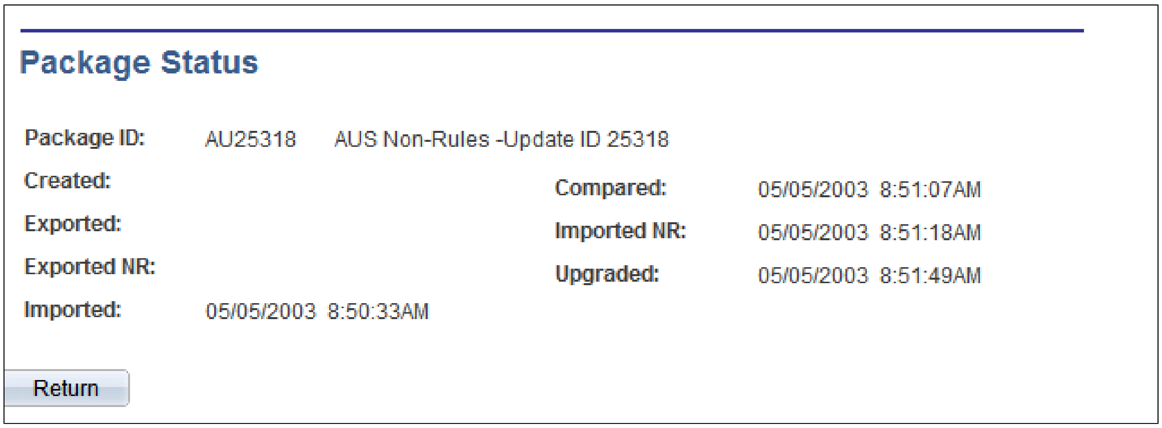
Use the Package Status page (GP_NR_PKG_DTTM_SEC) to view the date and time a package was created, exported, imported, compared, and upgraded.

Navigation

- Click Package Status link on Package Definition page.
- Click Package Status link on Package Records page.
- Click Package Status link on Package Elements page.
- Click Package Status link on View Scripts page.

Image: Package Status page

This example illustrates the fields and controls on the Package Status page.



View the date and time a package was created, exported, imported, compared, and upgraded.

Copying Packages

This topic discusses how to:

- Copy a rule package and its selection criteria.
- Copy a non-rule package and its selection criteria.

Note: Copying packages alone does not prepare the package for export. You must also run the create rule or non-rule process, which attaches all elements to the package.

Pages Used to Copy Packages

Page Name	***Definition Name***	***Navigation***	***Usage***
Copy Rule Package	GP_PKG_COPY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Copy Rule Package, Copy Rule Package	Copy an existing rule package and its selection criteria. This does not copy the element information.

Page Name	***Definition Name***	***Navigation***	***Usage***
Copy Non-Rule Package	GP_NR_PKG_COPY	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Copy Non-Rule Package, Copy Non-Rule Package	Copy an existing non-rule package and its selection criteria. This does not copy the element information.

Copy Rule Package Page

Use the Copy Rule Package page (GP_PKG_COPY) to copy an existing rule package and its selection criteria.

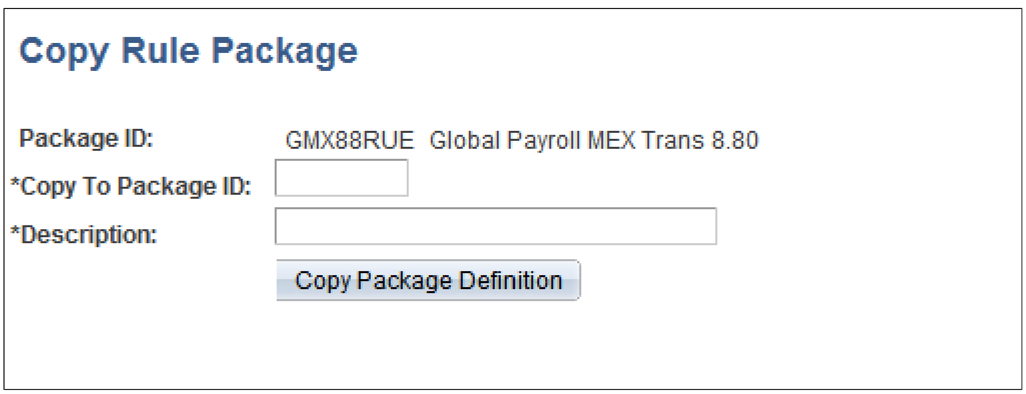
This does not copy the element information.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Copy Rule Package, Copy Rule Package

Image: Copy Rule Package

This example illustrates the fields and controls on the Copy Rule Package.



Copy To Package ID	Enter up to eight alphanumeric characters for the new package ID.
Copy Package Definition	Click to copy the package.

Copy Non-Rule Package Page

Use the Copy Non-Rule Package page (GP_NR_PKG_COPY) to copy an existing non-rule package and its selection criteria.

This does not copy the element information.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Copy Non-Rule Package, Copy Non-Rule Package

See the field descriptions for the Copy Rule Package page.

Related Links

Copy Rule Package Page

Stamping and Packaging Elements by Version

This topic provides an overview of stamping and packaging elements by version and discusses how to:

- Stamp elements with a new version number.
- Define version relationships.
- Identify elements to package.
- View version details.

Pages Used to Stamp and Package Elements by Version

Page Name	*Definition Name*	*Navigation*	*Usage*
Version Stamping	GP_STAMPING	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Version Stamping, Version Stamping	Stamp elements with a new version number, and initiate the stamping process.
Define Version Relationships	GP_VER_RULE_DFN	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Define Version Relationships, Define Version Relationships	View version relationships between element definition records. Displays the Rule Definition record and the corresponding child records.

Understanding How to Stamp and Package Elements by Version

Versioning is a way to track the elements that were delivered for each release or update and to package elements by version. For example, elements delivered with Absence Management 8.9 are labeled 8.90.00. Major releases, updates, and hot fixes typically require a new version of all or some previously delivered rules.

You can assign a version number (or label) to multiple elements and use the versioning utilities to package elements by version so that they can be moved to another database.

When you package elements by version, the system pulls the rows associated with the version that you specify. Once the elements are packaged, you can move them across databases, using the same procedures that apply to rule packages; you export the elements, compare them with existing elements in the database, and complete the upgrade.

To package elements by version:

1. Stamp the appropriate version number(s) on the elements that you want to package using the Version Stamping (GP_STAMPING) component.

2. Use the Define Criteria By Version page of the Create/Export Rule Package (GP_PKG_CREXP) component to define selection criteria for packaging the elements that you stamped in step 1.

3. Follow all other instructions presented elsewhere in this documentation for creating and exporting rule packages.

   See Creating and Exporting Rule Packages.

4. Follow the instructions presented elsewhere in this documentation for importing, comparing, and upgrading rule packages.

   See Importing, Comparing, and Upgrading Rule Packages.

Related Links

Defining Element Names

Stamping Elements with a New Version Number

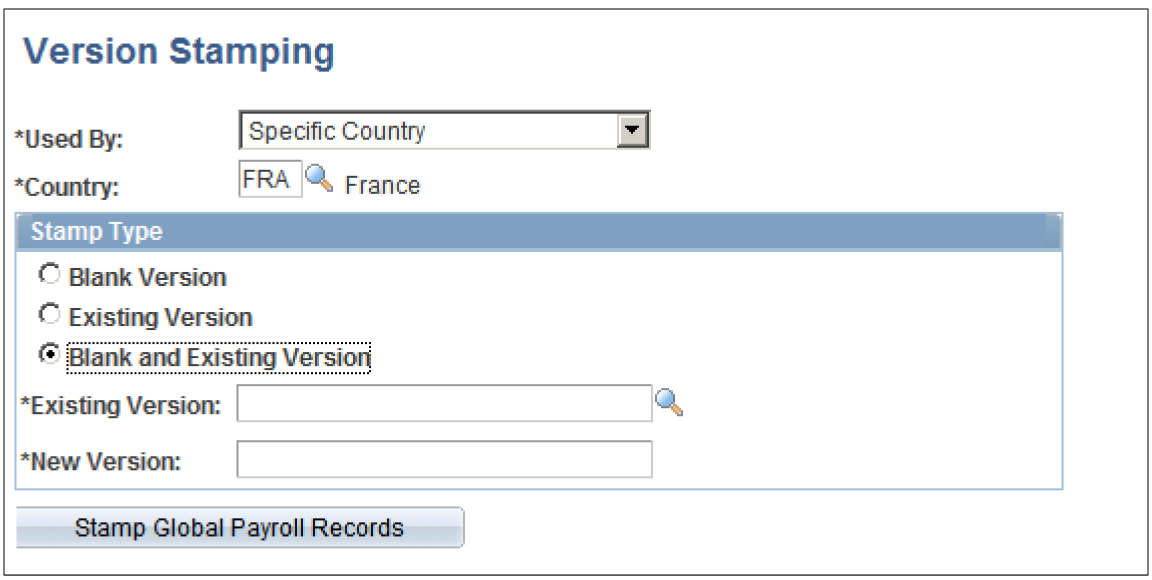
Use the Version Stamping page (GP_STAMPING) to stamp elements with a new version number, and initiate the stamping process.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Version Stamping, Version Stamping

Image: Version Stamping page

This example illustrates the fields and controls on the Version Stamping page.



Use this page to *stamp* a version on elements that you add or modify or to restamp an existing version of an element.

Used By

You can stamp elements that are applicable to all countries or limit the stamping to one country. If you select *All Countries,* the Country field defaults to *All.* If you select *Specific Country,* specify the country code in the Country field.

Stamp Type

Indicate the elements to stamp:

Blank: Elements that have no existing version.

Existing Version: Elements whose version is what you specified in the Existing Version field.

Blank and Existing Version: Elements with no existing version and elements associated with the version that you specified in the Existing Version field.

Existing Version

Becomes available when you select *Existing Version* or *Blank and Existing Version* as the stamp type. Select from any existing version. The system looks for all elements associated with the version that you select.

New Version

Enter up to 16 alphanumeric characters for the name of the new version. The system adds the prefix *C_* to the name if this is a customer installation. A package coming from the PeopleSoft system would have version numbers, preceded by *P_*. When using the User Version functionality provided on the Element Name page, the system adds the prefix *INT_* to those versions. The Element name page is documented in another section of this documentation.

See Defining Element Names.

Stamp Global Payroll Records

Click to initiate the stamping process. The system stamps the selected elements with the new version after clearing the existing Version entries, if any.

Note: Versioning occurs only in element definition records (records with a primary key of PIN_NUM).

Defining Version Relationships

Use the Define Version Relationships page (GP_VER_RULE_DFN) to view version relationships between element definition records.

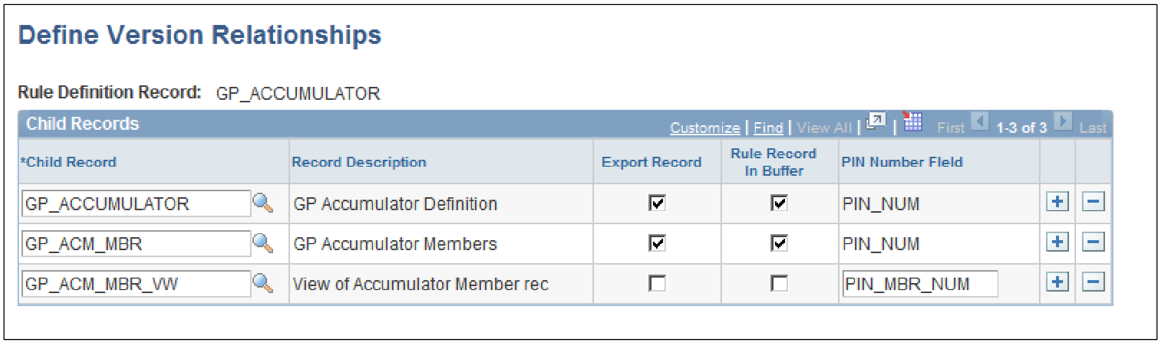
Displays the Rule Definition record and the corresponding child records.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Manage Global Payroll Packages, Define Version Relationships, Define Version Relationships

Image: Define Version Relationships page

This example illustrates the fields and controls on the Define Version Relationships page.



Rule Definition Record

Displays the name of the parent record that contains the field GP _VERSION.

Child Record

Displays the child record whose data when changed causes GP _VERSION to be cleared from the corresponding row in parent record. (The name of the parent record is displayed here if there are no children.)

Export Record

Selected if the child record is to be included in the version package for export and import.

For example, when an accumulator element changes, only data in GP_ACCUMULATOR and GP_ACM_MBR needs to be moved. The child record, GP_ACM_MBR_VW, does not need to be exported and imported because it is used only to associate accumulators with earnings and deductions in the Earnings and Deductions components.

Rule Record in Buffer

Applicable to accumulators only.

Selected if the record that has GP_VERSION is in the component buffer (for example, when an earning accumulator is changed, and needs GP_VERSION cleared). Record GP_ ACCUMULATOR is not in the component buffer. Select this check box to prevent the system from looking for the record in RECNAME_RULE_DFN in the component buffer and issue a SQLEXEC instead. The child record that exists in the earnings component is GP_ACM_MBR_VW.

PIN Number Field

Displays the name of the PIN_NUM field on the record that needs GP_VERSION cleared. Using the earlier example, the earning accumulator PIN_NUM is contained as PIN_MBR_ NUM in the earnings component buffer and PIN_NUM itself contains the earning PIN. So, when updating data for GP_

ACCUMULATOR, data for PIN_MBR_NUM value and not PIN_NUM value from the earnings component must be updated.

Chapter 34

Defining Security

Understanding Security

Security refers to the ability to restrict users from viewing or updating certain data or payees.

In Absence Management, there are two levels of security:

- Element-level security

  Restricts the elements that a user can view or update, based on the User Rules Profile page and the Used By, Owner, and Override Levels fields on the Element Name page.

- Payee-level security

  Restricts the payees that a user can view, based on the standard department-level security in PeopleSoft HR.

Note: Absence Management can also use the group security feature in PeopleSoft Time and Labor.

Element Usage Security

You set up profiles for your users that give them access to country-specific element information. For example, if your organization operates only in France, users do not need element information that is specific to the United Kingdom. *Element-usage security* limits the number of elements that appear in prompt tables to those that are relevant to the user.

Owner Security

Owner security refers to who owns and maintains an element—PeopleSoft or the customer. Certain elements can be modified only by PeopleSoft, while others can be modified by the customer.

The Owner field on the Element Name page identifies an element's owner.

Related Links

Defining Element Names

Override Levels

Override levels for an element vary, depending on the element type. Typical override levels include Pay Entity, Pay Group, Pay Calendar, Payee, and Via Elements. You indicate these on the Element Name page by using check boxes. These check boxes indicate whether the element can be updated through overrides or by another element.

The update Via Element security feature controls which elements can be updated by another element. You can update an element by means of another element in four places in the application:

- Arrays (through the Map Retrieved Fields to Variable Elements fields on the Field Map and Keys page).
- Brackets (through the Return Columns fields on the Bracket Search Keys/Return Columns page).
- Dates (through the Date Extract fields on the Date Extract page).
- Formulas (through the Assign To columns on the Formula Field-by-Field Definition page).

The system checks the User Rules Profile and element-usage security to ensure that the only elements that are available for access can be updated by another element.

Related Links

Defining Element Names

Common Elements Used to Define Security

Prompt edits	Records or views that you use as an online prompt on a specified field.
Query security records	Records or views that you use in PeopleSoft Query.
Search records and search views	Records and views that you use to access a component.

Restricting User Access

You can control whether a user can access elements that are defined for all countries or for a specific country and whether a user can take control of PeopleSoft-delivered and maintained elements.

This topic provides an overview of restricting access to country-specific elements and discusses how to define elements for user access.

Page Used to Restrict User Access

Page Name	***Definition Name***	***Navigation***	***Usage***
User Rules Profile	GP_OPR_RULE_PRF	Set Up HCM, Security, User Maintenance, Global Payroll User Profile, User Rules Profile	Control whether a user has access to elements defined for all countries or a specific country. Also define if users can take control of PeopleSoft Delivered/Maintained elements. Create a user ID in PeopleTools before using this page.

Understanding How to Restrict Access to Country-Specific Elements

When you create an element, you designate (in the Used By field of the Element Name page) whether it can be used by all countries or by a specific country. An element cannot use an element that is defined at a lower level. For instance, a duration element that is defined for *All Countries* cannot use a variable defined for only one country—France, for example. It can only use elements defined for *All Countries.* However, a duration that is defined for France can use variables defined for France as well as variables defined for *All Countries.*

The User Rules Profile page defines the default values that users see in the Used By and Country fields when adding an element.

This table shows how the settings on the User Rules Profile page affect the Used By and Country fields on the Element Name page:

User Rules Profile page	***Element Name page***
Used By = All Countries	Used By = All Countries is the default. Country field defaults to value *ALL.*
Used By = Specific Country	Used By = Specific Country and can't be changed. Country field defaults to Country and can't be changed.

Warning! Carefully consider the consequences of changing the Used By field after you save an element that is defined for *All Countries.*. Problems can result if the element has been used in absence processing.

Note: The User Rule Profile in Absence Management is in addition to the User Rules Profile in HR.

User Rules Profile Page

Use the User Rules Profile page (GP_OPR_RULE_PRF) to control whether a user has access to elements defined for all countries or a specific country.

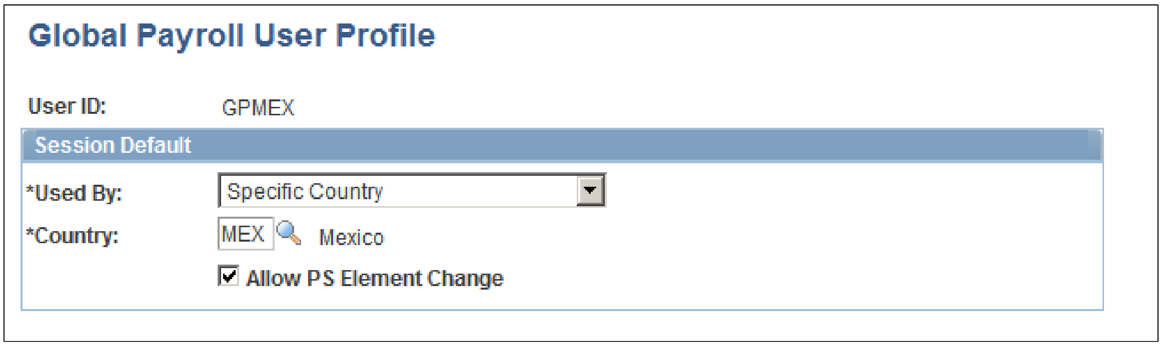
Also define if users can take control of PeopleSoft Delivered/Maintained elements. Create a user ID in PeopleTools before using this page.

Navigation

Set Up HCM, Security, User Maintenance, Global Payroll User Profile, User Rules Profile

Image: Global Payroll User Profile

This example illustrates the fields and controls on the Global Payroll User Profile .



All search views refer to the information that you enter here to determine which elements to display.

Session Default

Used By

Specify which elements the users with this User ID can access. Values are:

All Countries: Elements defined for All Countries.

Specific Country: Elements defined only for the country you select in the Country field.

Note: You associate a rule with a country when you define an element on the Element Name page.

Allow PS Element Change (allow PeopleSoft element change)

Select to enable users to take control of PS Delivered/ Maintained elements. Taking control of an element means that a user can edit the element's definition and change the element owner to PS Delivered-Customer Modified. Once a user takes control of an element, it cannot be changed back to PS Delivered/Maintained.

See the product documentation for *PeopleTools: Security Administration*.

Related Links

Defining Element Names

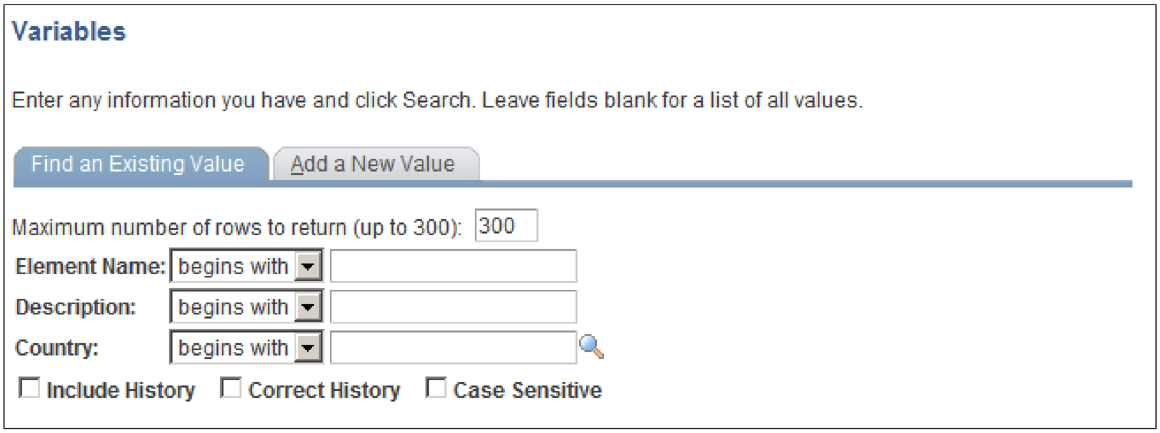
Element Security

This topic discusses the security that governs element selection from within a component.

The following tables describe element-level security by menus and components. Following is an example of the Search page that is referred to in the tables:

Image: Search page

This example illustrates the fields and controls on the Search page.



Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements - All Element Definition Components

Security on the Search Page	***Security Governing Element Selection From Within the Component***
Add Mode - When you add a new element, the system has no information about the element, so there is no security. Applicable to Non-Add mode. If User Rules Profile = *All Countries,* then Used By = *All Countries* Or Used By = *Specific Country.* If User Rules Profile = *Specific Country,* then Used By = *All Countries* Or Used By = *Specific Country.* Country must match the Country on the User Rules Profile page.	*Element-usage security:* If Used By = *All Countries,* then the elements it can use must also be Used By = *All Countries.* If Used By = *Specific Country,* then the elements it can use must also be Used By = *All Countries* Or The elements it can use must be Used By = *Specific Country,* and the value in the Country field must equal the country that the element is being used by. *Update by element security:* For the following elements, you can update element security with the Via Element override check box on the Element Name page: - Formula definitions/Assigned To field. - Date definitions/Date Extract fields. - Bracket definitions/Return Column field. - Array definitions/Retrieved fields. **Note:** If User Rules = *Specific Country,* you cannot change the Used By field on such an element.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Eligibility Groups

Security on the Search Page	***Security Governing Element Selection From Within the Component***
Security is handled inside the component.	*Element usage (which element groups appear on the prompt list):* If User Rules Profile = *All Countries,* then No security. If User Rules Profile = *Specific Country,* then Used By = *All Countries* Or Used By = *Specific Country.* Country on the Element Name page must match the Country on the User Rules Profile page.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entities

Security on the Search Page	***Security Governing Element Selection From Within the Component***
Add Mode - When you add a new Pay Entity, the system has no information about the Pay Entity, so there is no security Applicable to Non-Add mode. If User Rules Profile = *All Countries,* then No security. If User Rules Profile = *Specific Country,* then Pay Entity Country must = User Country.	*Supporting Element Overrides - element usage is based on Pay Entity Country:* You must enter Pay Entity Country before entering any Supporting Element Overrides. Used By = *All Countries* Or Used By = *Specific Country,* and Country on the Element Name page matches Country on the Pay Entity page. Pay Entity Override is selected on the Element Name page.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups

Security on the Search Page	***Security Governing Element Selection From Within the Component***
Add Mode - When you add a new Pay Group, the system has no information about the Pay Group, so there is no security. Mode does not equal Add. If User Rules = *All Countries,* then No security. If User Rules Profile = *Specific Country,* then Pay Entity Country = User Country.	*Rounding/Proration elements - element usage is based on Pay Entity Country:* Used By = *All Countries* Or Used By = *Specific Country,* and Country matches Pay Entity Country. *Supporting Element Overrides - element usage is based on Pay Entity Country:* Used By = *All Countries* Or Used By = *Specific Country,* and Country matches Pay Entity Country. Pay Group Override is selected on the Element Name page.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Processing - Run Types

Security on the Search Page	***Security Governing Element Selection From Within the Component***
Security is handled inside the component.	*Element usage (which process list appears on the prompt list):* If User Rules Profile = *All Countries,* then No security. If User Rules Profile = *Specific Country,* then Used By = *All Countries* Or Used By = *Specific Country,* and Country matches User Country.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendars

Security in the Search Page	***Security Governing Element Selection From Within the Component***
Applicable to all modes (in relation to the Pay Group field). If User Rules Profile = *All Countries,* then No security. If User Rules Profile = *Specific Country,* then Pay Entity *Country* that is associated with the pay group must match User *Country.*	*Supporting Element Overrides and Elements to Exclude - element usage is based on Pay Entity Country:* Used By = *All Countries* Or Used By = *Specific Country,* and Country matches Pay Entity Country. Calendar override check box must be selected.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Framework, Calendars, Calendar Group

Security in the Search Page	***Security Governing Element Selection From Within the Component***

Add Mode - When you add a new calendar group, the system has no information about the calendar group, so there is no security.
 	
Applicable to Non-Add mode.
 	
If User Rules Profile = *All Countries,* then
 	
No security.
 	
If User Rules Profile = *Specific Country,* then
 	
Calendar Run ID Country must match User Country.
	Country - Valid countries are based on User Rules Profile Country:
	
	If User Rules Profile = *All Countries,* then No security
	
	If User Rules Profile = *Specific Country,* then Calendar Run ID Country appears as the default in User Country and cannot be changed.
	
	Pay Entity/Pay Group/Calendar ID is based on Calendar Run ID Country:
	
	You must enter Calendar Run ID Country before entering Pay Groups, or Calendar IDs.
	
	Pay Group Country (Country of the Pay Entity that is associated with the Pay Group) must match Calendar Run ID Country.
	
	Calendar Country (of the Pay Entity Country that is associated with Pay Group for Calendar) must match Calendar Run ID Country.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Retro Process Definitions

Security on the Search Page	***Security Governing Element Selection From Within the Component***

For all modes.
 	
If User Rules Profile = *All Countries,* then
 	
No security.
 	
If User Rules Profile = *Specific Country,* then
 	
Country = User Country.
	Security is handled by the search page security.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Retro Process Overrides

Security on the Search Page	***Security Governing Element Selection From Within the Component***

For all modes.
 	
If User Rules Profile = *All Countries,* then
 	
No security.
 	
If User Rules Profile = *Specific Country,* then
 	
Country = User Country.
	Formula Element, Element, and Forward to Element - element usage is based on Retro Process Definition Country:
	
	Used By = *All Countries*
	
	Or
	
	Used By = *Specific Country,* and Country matches Retro Process Definition Country.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Retro Event Definitions (retroactive event definitions)

Security on the Search Page	***Security Governing Element Selection From Within the Component***

Country Security (which countries appear on prompt list):
 	
If User Rules Profile = *All Countries,* then
 	
User is allowed to work on any country in Absence Management.
 	
If User Rules Profile = *Specific Country,* then
 	
The only valid value is the Country that matches User Country. This value is defaulted in and the field is disabled.
	Retro Process Definition (for Event Process Definition) Security (which retro process definitions appear in prompt list):.
	
	The Country on the Retro Process Definition must match the selected Country.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Segmentation Event Definition

Security on the Search Page	***Security Governing Element Selection From Within the Component***

Country Security (which countries appear in prompt list):
 	
If User Rules Profile = *All Countries,* then
 	
User can work on any country in Absence Management.
 	
If User Rules Profile = *Specific Country,* then
 	
The only valid value is the Country that matches User Country. This value is defaulted in and the field is disabled.
	Element usage is based on Country of Event:
	
	Used By = *All Countries*
	
	Or
	
	Used By = *Specific Country,* and Country matches Event Country.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Triggers, Trigger Definition

Security on the Search Page	***Security Governing Element Selection From Within the Component***

Country Security (which countries appear in prompt list):
 	
If User Rules Profile = *All Countries,* then
 	
User can work on any country in Absence Management.
 	
If User Rules Profile = *Specific Country,* then
 	
The only valid value is the Country that matches User Country. This value is defaulted in and the field is disabled.
	In the Trigger Event ID field, the system shows only trigger event IDs that are valid for the country selected. In addition, for the trigger type of Segmentation and record = GP_PYE_OVRD, the user must select elements on the Trigger Definitions – Field Values page. Available elements are those with Used By = *All Countries* or Used By = the country of the trigger definition.

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, View Element Names, Element Name

Security for the View Element Names component is based on the User Rules Profile. If a user has access to *All Countries,* the user can see elements for all countries. If the user has access to a specific country only, the user can see elements for that country only or elements defined for *All Countries.*

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements - Element Name and View System Elements by Source

The View System Elements by Source component shows only system elements. Because these elements are always defined for *All Countries,* any user can view them.

Payee Security

This topic discusses payee security by HR and group.

Payee payroll data is sensitive information because it often contains pay-related information. Absence Management provides payee-level security that restricts the payees that a user can view.

HR Security

Absence Management delivers the standard HR security. Payee-level security affects all Absence Management reports as well as every component, search record or view, and prompt record and view that contains the EMPLID field. All components that are entered with an employee ID contain payee-level security.

A security tree is used to limit the payees that a user can view or report on.

The following tables indicate payee-level security by menus and components.

Global Payroll & Absence Mgmt, Payee Data, Create Overrides, Supporting Elements

Security on the Search Page	***Security Governing Element Selection From Within the Component***
Payee-level security applies.	Element Usage (based on Country of Payee which is based on Pay Entity associated with Pay Group) To determine Payee Country, the system first retrieves the Pay Group for the Payee from the JOB record. Then the system retrieves the Pay Entity that is associated with this Pay Group and looks at the Country. If a JOB row cannot be found, the country associated with the user that has logged in is used. This is the country in the User Rules Profile data for that user. Used By = All Countries Or Used By = Specific Country, and Country matches Payee Country. Payee Override also needs to be selected on the Element Name page.

Group Security

Absence Management utilizes HR Direct Reports security to grant managers access in order to request absence, view absence history, and view absence balances on behalf or direct reports. Time and Labor utilizes group security to grant managers and administrators access in order to report, approve, process and view time entries for a defined group of employees. If you are using Absence Management and Time and Labor self service applications, it is important to maintain consistency between setup of HR Direct Reports and Time and Labor's Group Security. This will provide consistency for managers when accessing the self service components in each application.

See the product documentation for *PeopleTools: Security Administration*.

Related Links

"Understanding Static and Dynamic Groups *(PeopleSoft HCM 9.2: Time and Labor)*"

Chapter 35

Viewing Delivered Elements and System Data

Understanding the Delivered System Data

Absence Management delivers a set of system data consisting of predefined rules that you can use when configuring your system. You do not need to define these rules. They are part of the Absence Management core application and can be used wherever you need them.

Note: All system elements are delivered and are considered to be system data.

See Working with System Elements.

Warning! Do not modify this system data. Many Absence Management calculations assume that the value of the system data remains consistent. Modifying them can jeopardize the integrity of the system.

This table lists the delivered system data:

Element Type	***Element Name***	***Description***	***Comments***
Array	GP AR PSLP GRP ID	Payslip message group ID.	
Array	GP AR PSLP MSG PBD	Payslip message active.	Array to read PLSP_MSGs managed in GP that are active.
Array	GP AR PSLP PLIST	Payslip message HR group list.	
Count	GP WORK DAY COUNT	Work day count.	Counts the number of workdays. Used with the standard proration element GP PRORATE WRK DAY. For this count element, a day is considered a workday if scheduled hours are greater than zero.
Count	GP WORK HRS COUNT	Work hours count.	Counts the number of workdays. Used with the standard proration element GP PRORATE WRK HRS. For this count element, count the number of scheduled hours.
Duration	GP YEARS OF SVC	Years of service.	Calculates the years of service based on the hire date through the calendar period end date.

Element Type	***Element Name***	***Description***	***Comments***
Duration	GP MONTHS OF SVC	Months of service.	Calculates the months of service based on the hire date through the calendar period end date.
Duration	GP DAYS OF SVC	Days of service.	Calculates the days of service based on the hire date through the calendar period end date.
Duration	GP AGE IN YEARS	Age in years.	Calculates the age of person in years from the birth date through the calendar period end date.
Duration	GP AGE IN MONTHS	Age in months.	Calculates the age of person in months from the birth date through the calendar period end date.
Duration	GP AGE IN DAYS	Age in days.	Calculates the age of person in days from the birth date through the calendar period end date.
Duration	GP CAL DAYS SLICE	Calendar days in slice.	Calculates the number of calendar days in the slice. Used in the proration element GP PRORATE CAL DAYS.
Duration	GP CAL DAYS SEG	Calendar days in segment.	Calculates the number of calendar days in the segment.
Duration	GP CAL DAYS PERIOD	Calendar days in period.	Calculates the number of calendar days in the calendar period. Used in the proration element GP PRORATE CAL DAYS.
Date	GP ABS BGN DT - 1	Absence begin date - 1.	
Date	GP PMNT DT EXTR	Payment date, date extract.	Returns three variable elements (GP PMNT DATE YR, GP PMNT DATE MO, GP PMNT DATE DY) that will resolve to the year, month, and day of the Calendar Payment Date.
Date	GP PRD BGN DT EXTR	Period begin date, date extract.	Returns three variable elements (GP PRD BGN DATE YR, GP PRD BGN DATE MO, GP PRD BGN DATE DY) that will resolve to the year, month, and day of the Calendar Period Begin Date.

Element Type	***Element Name***	***Description***	***Comments***
Date	GP SLICE END DT +1	Slice end date, plus one day.	Returns the slice end date, plus one day. Used in a duration element GP CAL DAYS SLICE that calculates the number of calendar days in a slice.
Date	GP SEG END DT +1	Segment end date, plus one day.	Returns the segment end date, plus one day. Used in a duration element GP CAL DAYS SEG that calculates the number of calendar days in a segment.
Date	GP SEG END DT EXTR	Segment end date, date extract.	
Date	GP SLI BGN DT EXTR	Slice begin date, date extract.	
Date	GP SLI END DT EXTR	Slice end date, date extract.	
Date	GP PRD END DT +1	Period end date, plus one day.	Returns the period end date, plus one day. Used in a duration element GP CAL DAYS PERIOD that calculates the number of calendar days in a calendar period.
Date	GP PRD END DT EXTR	Period end date, date extract.	Returns three variable elements (GP PRD END DATE YR, GP PRD END DATE MO, and GP PRD END DATE DY) that resolve to the year, month, and day of the calendar period end date.
Date	GP SEG BGN DT EXTR	Segment begin date, date extract.	
Error message	MSG PIN	Call Error Message	Triggers the writing of a message, when entered in a Formula element. Before executing this element, the same formula must populate other system elements, such as MSG_NBR, MSG_SET_NBR, and MSG_PAYMENT_ERR.
Formula	GP JANUARY	January.	Returns True if the month of the calendar period is January; otherwise False.
Formula	GP FEBRUARY	February.	Returns True if the month of the calendar period is February; otherwise False.

Element Type	***Element Name***	***Description***	***Comments***
Formula	GP MARCH	March.	Returns True if the month of the calendar period is March; otherwise False.
Formula	GP APRIL	April.	Returns True if the month of the calendar period is April; otherwise False.
Formula	GP MAY	May.	Returns True if the month of the calendar period is May; otherwise False.
Formula	GP JUNE	June.	Returns True if the month of the calendar period is June; otherwise False.
Formula	GP JULY	July.	Returns True if the month of the calendar period is July; otherwise False.
Formula	GP AUGUST	August.	Returns True if the month of the calendar period is August; otherwise False.
Formula	GP SEPTEMBER	September.	Returns True if the month of the calendar period is September; otherwise False.
Formula	GP OCTOBER	October.	Returns True if the month of the Calendar Period is October; otherwise False.
Formula	GP NOVEMBER	November.	Returns True if the month of the calendar period is November; otherwise False.
Formula	GP DECEMBER	December.	Returns True if the month of the calendar period is December; otherwise False.
Formula	GP COUNT WORK DAYS	Workday count.	Returns True if scheduled hours are greater than zero; otherwise False. Used in the count element GP WORK DAY COUNT to count the number of workdays.
Formula	GP COUNT WORK HRS	Work hour count.	Returns the number of work hours for a day. Used in the count element GP WORK HRS COUNT to count the number of work hours.

Element Type	***Element Name***	***Description***	***Comments***
Formula	GP CHECK 1ST SEG	Check if first segment.	Returns True if you are in the first segment of a calendar for a payee; otherwise False. Determined by checking the value of the system element FIRST SEGMENT.
Formula	GP CHECK LST SEG	Check last segment.	Returns True if you are in the last segment of a calendar for a payee; otherwise False. This is determined by checking the value of the system element LAST SEGMENT.
Formula	GP CHK 1ST ACT SEG	Check first active segment.	Returns True if you are in the first active segment of a calendar for a payee; otherwise False. This is determined by checking the value of the system element FIRST ACT SEGMENT.
Formula	GP CHK LST ACT SEG	Check last active segment.	Returns True if you are in the last active segment of a calendar for a payee; otherwise False. This is determined by checking the value of the system element LAST ACT SEGMENT.
Formula	GP FM PSLP AR	Payslip messages duration.	(Duration formula). Calls GP FM PSLP SEL (population) when duration criteria is met.
Formula	GP FM PSLP SEL	Payslip messages duration.	(Population formula). Writes to the writable array If the EmplID meets the population criteria in the Message Definition. The message definition may have specified that a custom formula will be used to determine the criteria.
Formula	GP RETRO OVERRIDE	Retro process override formula.	

Element Type	***Element Name***	***Description***	***Comments***
Generation Control	GP QTR END ONLY	Quarter end only.	Checks generation control based on the quarter-end date. The quarter-end date is based on a predefined generation control frequency of QTR END (which references a frequency with a factor of 4). **Note:** For generation control frequency to be True, enter the matching generation control frequency on any calendar for which you want generation control to be True.
Generation Control	GP YEAR END ONLY	Year end only.	Checks generation control based on the year-end date. The year-end date is based on a predefined generation control frequency of YEAR END (which references a frequency with a factor of 1). **Note:** For generation control frequency to be True, you must enter the matching generation control frequency on any calendar for which you want generation control to be True.
Generation Control	GP APPLY 1ST SEG	Apply once - first segment.	Checks generation control based on whether the calculation is in the first segment (in a calendar). Generation control is True if you are in the first segment or False if you are not.
Generation Control	GP APPLY LST SEG	Apply once - last segment.	Checks generation control based on whether the calculation is in the last segment (in a calendar). Generation control is True if you are in the last segment or False if you are not.
Generation Control	GP APPLY LST A SEG	Apply once - last active segment.	Checks generation control based on whether the calculation is in the last active segment (in a calendar). Generation control is True if you are in the last active segment or False if you are not.

Element Type	***Element Name***	***Description***	***Comments***
Generation Control	GP APPLY 1ST A SEG	Apply once - first active segment.	Checks generation control based on whether the calculation is in the first active segment (in a calendar). Generation control is True if you are in the first active segment or False if you are not.
Proration Rule	GP PRORATE CAL DAY	Proration based on calendar days.	Provides basic proration logic based on calendar days.
Proration Rule	GP PRORATE WRK DAY	Proration based on workdays.	Provides basic proration logic based on workdays.
Proration Rule	GP PRORATE WRK HRS	Proration based on work hours.	Provides basic proration logic based on work hours.
Rounding Rule	GP ROUND NEAR 0DEC	Round to nearest zero decimal places.	Rounds to nearest (up if greater than or equal to 5; otherwise down) zero decimal places.
Rounding Rule	GP ROUND NEAR 2DEC	Round to nearest two decimal places.	Rounds to nearest (up if greater than or equal to 5; otherwise down) two decimal places.
Rounding Rule	GP ROUND UP 0DEC	Round up to zero decimal places.	Rounds up to zero decimal places.
Rounding Rule	GP ROUND UP 2DEC	Round up to two decimal places.	Rounds up to two decimal places.
Rounding Rule	GP ROUND DOWN 0DEC	Round down to zero decimal places.	Rounds down (truncates) to zero decimal places.
Rounding Rule	GP ROUND DOWN 2DEC	Round down to two decimal places.	Rounds down (truncates) to two decimal places.
Variable	GP TEMP001 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP002 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP003 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP004 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).

Element Type	***Element Name***	***Description***	***Comments***
Variable	GP TEMP005 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP006 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP007 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP008 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP009 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP010 CHAR	Temporary variable - character.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP001 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP002 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP003 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP004 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP005 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP006 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP007 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP008 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).

Element Type	***Element Name***	***Description***	***Comments***
Variable	GP TEMP009 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP010 NUM	Temporary variable - number.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP001 DATE	Temporary variable - date.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP002 DATE	Temporary variable - date.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP003 DATE	Temporary variable - date.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP004 DATE	Temporary variable - date.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP TEMP005 DATE	Temporary variable - date.	For use in formulas as a *temporary* variable (to calculate intermediate results).
Variable	GP PRD END DATE YR	Period end date - year.	Stores the calendar period year if the date element GP PRD END DT EXTR is resolved. **Note:** The date element GP PRD END DT EXTR extracts the year from the calendar period and populates the variable GP PRD END DATE DY. For this date extract and corresponding variable to be resolved, either put this date element directly on the process list (include it in a section) or reference it in another element that is being resolved.

Element Type	***Element Name***	***Description***	***Comments***
Variable	GP PRD END DATE MO	Period end date - month.	Stores the calendar period month if the date element GP PRD END DT EXTR is resolved. **Note:** The date element GP PRD END DT EXTR extracts the month from the calendar period and populates the variable GP PRD END DATE DY. For this date extract and corresponding variable to be resolved, either put this date element directly on the process list (include it in a section) or reference it in another element that is being resolved.
Variable	GP PRD END DATE DY	Period end date - day.	Stores the calendar period day, if the date element GP PRD END DT EXTR is resolved. **Note:** The date element GP PRD END DT EXTR extracts the day from the calendar period and populates the variable GP PRD END DATE DY. For this date extract and corresponding variable to be resolved, either put this date element directly on the process list (include it in a section) or reference it in another element that is being resolved.
Variable	GP TRUE	True.	Default is 1. Can be used in conjunction with formulas to set a value that is equal to True, which can then be used to validate against generation control or other checks.
Variable	GP FALSE	False.	Default is 0. Can be used in conjunction with formulas to set a value to False, which can then be used to validate against generation control or other checks.

Element Type	***Element Name***	***Description***	***Comments***
Variable	GP ACTIVE	Active.	Default is A (active). Can be used in conjunction with formulas to check and compare with an active or inactive status that is retrieved from a different table.
Variable	GP GL AFF INTRA1	Affiliate Intra 1 - Chartfield	
Variable	GP GL AFF INTRA2	Affiliate Intra 2 - Chartfield	
Variable	GP GL AFFILIATE	Affiliate - Chartfield	
Variable	GP GL ALT ACCOUNT	Alternate Account - Chartfield	
Variable	GP GL BUDGET REF	Budget Reference - Chartfield	
Variable	GP GL CHARTFIELD1	Chartfield 1 - Chartfield	
Variable	GP GL CHARTFIELD2	Chartifeld2 - Chartfield	
Variable	GP GL CHARTFIELD3	Chartfield 3 - Chartfield	
Variable	GP GL CLASS	Class Field - Chartfield	
Variable	GP GL DEPT	GL Department - Chartfield	
Variable	GP GL FUND	Fund Code - Chartfield	
Variable	GP GL OP UNIT	Operating Unit - Chartfield	
Variable	GP GL PRODUCT	Product - Chartfield	
Variable	GP GL PROGRAM	Program Code - Chartfield	
Variable	GP GL PROJECT	Program Code - Chartfield	
Variable	GP NULL DATE	Null Date	Used within rules when a reference to a 'null' date needs to be checked (or initialized).
Variable	GP PMNT DATE DY	Payment Date - Day	Stores the Calendar Payment Date 'Day' - if the Date GP PMNT DT EXTR is resolved. Note: The Date element GP PMNT DT EXTR will extract the 'day' from the Calendar Period and populate the variable GP PMNT DATE DY.

Element Type	*Element Name*	*Description*	*Comments*
Variable	GP PMNT DATE MO	Payment Date - Month	Stores the Calendar Payment Date 'Month' - if the Date GP PMNT DT EXTR is resolved. Note: The Date Element GP PMNT DT EXTR will extract the 'month' from the Calendar Period and populate the Variable GP PMNT DATE MO.
Variable	GP PMNT DATE YR	Payment End Date - Year	Stores the Calendar Payment Date 'Year' - if the Date GP PMNT DT EXTR is resolved. Note: The Date Element GP PMNT DT EXTR will extract the 'year' from the Calendar Period and populate the Variable GP PMNT DATE YR.
Variable	GP PRD BGN DATE DY	Period Begin Date - Day	Stores the Calendar Period Begin Date 'Day' - if the Date GP PRD BGN DT EXTR is resolved. Note: The Date Element GP PRD BGN DT EXTR will extract the 'day' from the Calendar Period and populate the Variable GP PRD BGN DATE DY.
Variable	GP PRD BGN DATE MO	Period Begin Date - Month	Stores the Calendar Period Begin Date 'Month' - if the Date GP PRD BGN DT EXTR is resolved. Note: The Date Element GP PRD BGN DT EXTR will extract the 'month' from the Calendar Period and populate the Variable GP PRD BGN DATE DY.
Variable	GP PRD BGN DATE YR	Period Begin Date - Year	Stores the Calendar Period Begin Date 'Year' - if the Date GP PRD BGN DT EXTR is resolved. Note: The Date Element GP PRD BGN DT EXTR will extract the 'year' from the Calendar Period and populate the Variable GP PRD BGN DATE DY.
Variable	GP PSLP ASOF	Payslip Message Duration As Of	Message definition - if using date for duration- date is as of what?
Variable	GP PSLP CAL RUN	Payslip Message Calendar Run	Message definition calendar run only populated if Duration of message = Calendar

Element Type	Element Name	Description	Comments
Variable	GP PSLP EMPLID	Payslip Message Employee ID	Message definition EmplID only populated if Population criteria is EmplID.
Variable	GP PSLP FM NUM	Payslip Message	Message definition FM NUM only populated if population criteria is 'custom formula'
Variable	GP PSLP FROM DT	Payslip Message From Date	Message definition From Date only populated if duration of message is as of a date
Variable	GP PSLP GP	Payslip Message Assign Method	Message definition - Assignment Method
Variable	GP PSLP GRP ID	Payslip Message Group ID	Message definition Group ID only populated if GP Group Build is Population criteria.
Variable	GP PSLP MSG CTRY	Payslip Message Country	Country of message definition (key to message definition)
Variable	GP PSLP MSG NBR	Payslip Message Number	Message number from payslip definition (key to message definition)
Variable	GP PSLP PLIST	Payslip Message HR Group List	Message definition HR Group List only populated if HR Group List is Population criteria.
Variable	GP PSLP SEL	Payslip Message Select	Message definition - population selection criteria
Variable	GP PSLP STATUS	Payslip Message Status	Status of message "active or inactive"
Variable	GP PSLP TO DT	Payslip Message To Date	Message definition To Date optionally populated if duration of message is as of a date
Variable	GP SEG BGN DATE DY	Segment Begin Date - Day	
Variable	GP SEG BGN DATE MO	Segment Begin Date - Month	
Variable	GP SEG BGN DATE YR	Segment Begin Date - Year	
Variable	GP SEG END DATE DY	Segment End Date - Day	
Variable	GP SEG END DATE MO	Segment End Date - Month	
Variable	GP SEG END DATE YR	Segment End Date - Year	
Variable	GP SLI BGN DATE DY	Slice Begin Date - Day	

Element Type	***Element Name***	***Description***	***Comments***
Variable	GP SLI BGN DATE MO	Slice Begin Date - Month	
Variable	GP SLI BGN DATE YR	Slice Begin Date - Year	
Variable	GP SLI END DATE DY	Slice End Date - Day	
Variable	GP SLI END DATE MO	Slice End Date - Month	
Variable	GP SLI END DATE YR	Slice End Date - Year	
Writable Array	GP WA GUIDE	WA Segmentation Guide	Used for integration with EPM. To use it, just add the WA to any section. The writable array will not cause the resolution of the system elements defined in the Writable Array Fields grid.
Writable Array	GP WA PSLP MSG	Payslip Messages	Payslip Messages writable array

Legend

This table lists the legend for the following tables listing system elements:

Abbreviation	***Description***
DU	Could be use during duration element process.
DB	The value of the Day Before is available (name = System Element + DB).
DA	The value of the Day After is available (name = System Element + DA).
OS	What day does the system element value correspond: Current day being processed in the beginning balance offset period Current day being processed in the beginning balance offset period.
PA	These system elements will only be populated when processing a take element that was created from the negative balance take with other absence rule (redirected to), or was created by the mapped to functionality.
OR	Represent the overridden system elements related work schedule and alternate work schedule.

System Elements Related to Work Schedule

This table lists system elements that are related to a work schedule:

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
DAY OF WEEK	Day of the Week	Character	X	X	X	X			Represents the day of the week, Sunday through Saturday. The value of this system element is calculated each day absent and therefore could be different each day. Valid Values: Character '1' through '7' (Sunday through Saturday).
DAY STATUS	Day Status	Character	X	X	X	X			Represents whether the day has been processed ('P') or not ('U'). Valid Values: Character 'P' & 'U' ('P' = Processed / 'U' = Unprocessed).
SCHED DFNx	Schedule define x	Decimal	X	X	X	X	X	X	Represents the primary work schedule's x user defined field. The value of this system element could vary each day.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
SCHED HRS	Scheduled Hours	Decimal	X	X	X	X	X	X	Represents the overridden work schedule's x user defined field from the daily work schedule override of the primary workday ID. The value of this system element could vary each day.
SCHED HRS OR	Scheduled Hours	Decimal	X	X	X	X	X		Represents the overridden scheduled work hours from the daily work schedule override of the primary workday ID. The value of this system element could be different each day of the event.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
SCHED HRS WK	Sched Hours without Overrides	Decimal	X	X	X	X	X		Represents the scheduled work hours from the primary work schedule. The value of this system element could be different each day of the event.
SCHED ID	Work Schedule	Character	X						Represents the primary work scheduled ID. The value of this system element could be different each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
SCHED OVER IND	Schedule Over. Ind	Character	X	X	X	X	X		This system element equals 'Y' (Yes), if the day of the event being processed has a daily work schedule override for the primary work day ID, else the system element equals 'N' (No). The value of this system element is calculated each day absent and therefore could be different each day. Valid Values: Character 'Y' &'N' ('Y' = Yes/'N' = No).
WORK DAY ID	Work day ID	Character	X	X	X	X	X	X	Represents the workday ID of the primary work schedule. The value of this system element could be different each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
WORKDAY ID OR	Work day ID	Character	X	X	X	X	X		Represents the primary workday ID of the daily work schedule override. The value of this system element could be different each day of the event.

System Elements Related to Alternate Work Schedule

This table lists system elements that are related to an alternate work schedule:

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
SCHED DFx1 ALT	Schedule define x	Decimal	X	X	X	X	X	X	Represents the alternate work schedule's x user defined field. The value of this system element could vary each day.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
SCHED HRS ALT	Scheduled Hours Alternate	Decimal	X	X	X	X	X	X	Represents the overridden work schedule's x user defined field from the daily work schedule override of the alternate workday ID. The value of this system element could vary each day.
SCHED HRS ALT OR	Scheduled Hours Alternate	Decimal	X	X	X	X	X		Represents the overridden scheduled work hours from the daily work schedule override of the alternate workday ID. The value of this system element could be different each day of the event.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
SCHED HRS ALT WK	Sched Hours Alt s/o Overrides	Decimal	X	X	X	X	X	X	Represents the scheduled work hours from the alternate work schedule. The value of this system element could be different each day of the event.
SCHED ID ALT	Alternate Work Schedule	Character	X						Represents the alternate work scheduled ID. The value of this system element could be different each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
SCHED OVER ALT IND	Schedule Alt. Over. Ind	Character	X	X	X	X	X		This system element equals 'Y' (Yes), if the day of the event being processed has a daily work schedule override for the alternate work day ID, else the system element equals 'N' (No). The value of this system element is calculated each day absent and therefore could be different each day. Valid Values: Character 'Y' &'N' ('Y' = Yes/'N' = No).
WORK DAY ID ALT	Work day ID	Character	X	X	X	X	X	X	Represents the workday ID of the alternate work schedule. The value of this system element could be different each day of the event.

System Elements Related to Holidays

This table lists system elements that are related to holidays:

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
HOLIDAY HRS	Holiday Hours	Decimal	X	X	X	X	X		Represents the public holiday hours from the HR holiday table. The value of this system element could be different each day of the event.
HOLIDAY SCHEDULE	Holiday Schedule	Character	X	X	X	X	X		Represents the holiday schedule code from the HR holiday table. The value of this system element could be different each day of the event.
HOLIDAY TYPE	Holiday Type	Character	X	X	X	X	X		Represents the public holiday type from the HR holiday table. The value of this system element could be different each day of the event.

System Elements Related to Take Definition

This table lists system elements that are related to take definitions:

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
ABSENCE REASON	Absence Reason	Character	X	X	X	X	X	X	Represents the absence reason for the absence event. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.
ABSENCE TYPE	Absence Type	Character	X	X	X	X	X	X	Represents the absence type of the Take associated with the absence event. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
TAK CONFIGx PARENT	Take Configx of Parent	Character	X						Represents the x user defined field associated with the Take element of the absence event being processed. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
TAKE CONFIGx	Take Config x	Character	X	X	X	X	X		Represents the x user defined field associated with the Take element of the absence event being processed. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Elements Related to the Absence Event Entry

This table lists system elements that are related to absence event entry:

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
ABS BGN DATE	Absence Begin Date	Date	X	X	X	X	X		Represents the absence event begin date. The value of this system element will be the same for all days within each event.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
ABS END DATE	Absence End Date	Date	X	X	X	X	X		Represents the absence event end date. The value of this system element will be the same for all days within each event.
ABSENCE DATE	Absence Date	Date	X	X	X	X	X		Represents the calendar date of the day of the event being processed. The value of this system element is calculated each day absent and therefore is different each day.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
BGN DAY IND	Begin Day Indicator	Character	X	X	X	X	X		This system element equals '1' (Yes), if the 1st day of the event is being processed, else the system element equals '0' (No). The value of this system element is calculated each day absent and therefore could be different each day. Valid Values: Character '1' &'0' ('1' = Yes/'0' = No).

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
BGN DAY IND HLF	Begin Half Day Indicator	Character	X	X	X	X	X		This system element equals the value entered on the absence event entry component for this event. The employee was absent a half a day on the first day of the event. What day does the system element value correspond: Current day being processed. Valid Values: Character 'Y' &'N' ('Y' = Yes/'N' = No).

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
END DAY IND	End Day Indicator	Character	X	X	X	X	X		This system element equals '1' (Yes), if the 1st day of the event is being processed, else the system element equals '0' (No). The value of this system element is calculated each day absent and therefore could be different each day. Valid Values: Character '1' &'0' ('1' = Yes/'0' = No).

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
END DAY IND HLF	End Half Day Indicator	Character	X	X	X	X	X		This system element equals the value entered on the absence event entry component for this event. The employee was absent a half a day on the last day of the event. What day does the system element value correspond: Current day being processed. Valid Values: Character 'Y' &'N' ('Y' = Yes/'N' = No).

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
EVENT ADJUST-MENT	Event Adjustment (override)	Decimal	X	X	X	X	X		Represents the adjustment to the 'per absence' entitlement balance associated with the Absence Take of the absence event being processed. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
EVENT ENTITLE-MENT	Event entitlement (override)	Decimal	X	X	X	X	X		Represents the override to the 'per absence' entitlement units for the absence event being processed. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
EVT CONFIGx CH	Event Config	Character	X	X	X	X	X		Represents the absence event entry's first user defined character field for the absence event being processed. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
EVT CONFIGx CH UPD	Event Configx Character Update	Character	X						Represents the first daily absence user defined character field that can be assigned a value and then stored on the absence daily results. The value of this system element will be retrieved and stored on the absence daily results only if the system element is entered in the User Defined Result Fields grid of the Absence Take definition. It is a daily system element. A common place to assign a value to this system element is the absence take day formula or the absence take unit formula. A different value

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
									could be stored each day on the absence daily results depending upon what value is assigned to the system element each day. The stored value can then be used in a take element offset formula via the system element EVT CONFIG CHx OS, or in a duration element via the system element EVT CONFIG CHx DU.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
EVT CONFIGx DC	Event Configx	Decimal	X	X	X	X	X		Represents the absence event entry's first user defined character field for the absence event being processed. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
EVT CONFIGx DC UPD	Event Configx Decimal Update	Decimal	X						Represents the first daily absence user defined character field that can be assigned a value and then stored on the absence daily results. The value of this system element will be retrieved and stored on the absence daily results only if the system element is entered in the User Defined Result Fields grid of the Absence Take definition. It is a daily system element. A common place to assign a value to this system element is the absence take day formula or the absence take unit formula. A different value

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
									could be stored each day on the absence daily results depending upon what value is assigned to the system element each day. The stored value can then be used in a take element offset formula via the system element EVT CONFIG DCx OS, or in a duration element via the system element EVT CONFIG DCx DU.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
EVT CONFIGx DT	Event Config x	Date	X	X	X	X	X		Represents the absence event entry's first user defined character field for the absence event being processed. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
EVT CONFIGx DT UPD	Event Configx Date Update	Date	X						Represents the first daily absence user defined character field that can be assigned a value and then stored on the absence daily results. The value of this system element will be retrieved and stored on the absence daily results only if the system element is entered in the User Defined Result Fields grid of the Absence Take definition. It is a daily system element. A common place to assign a value to this system element is the absence take day formula or the absence take unit formula. A different value

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
									could be stored each day on the absence daily results depending upon what value is assigned to the system element each day. The stored value can then be used in a take element offset formula via the system element EVT CONFIG DTx OS, or in a duration element via the system element EVT CONFIG DTx DU.

System Element Name	*Description*	*Format*	*DU*	*DB*	*DA*	*OS*	*PA*	*OR*	*Comments*
EVT CONFIGx MN	Event Config x	Monetary	X	X	X	X	X		Represents the absence event entry's first user defined character field for the absence event being processed. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
EVT CONFIGx MN UPD	Event Configx Monetary Update	Monetary	X						Represents the first daily absence user defined character field that can be assigned a value and then stored on the absence daily results. The value of this system element will be retrieved and stored on the absence daily results only if the system element is entered in the User Defined Result Fields grid of the Absence Take definition. It is a daily system element. A common place to assign a value to this system element is the absence take day formula or the absence take unit formula. A different value

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
									could be stored each day on the absence daily results depending upon what value is assigned to the system element each day. The stored value can then be used in a take element offset formula via the system element EVT CONFIG MNx OS, or in a duration element via the system element EVT CONFIG MNx DU.
ORIG BEGIN DATE	Original Begin Date	Date	X	X	X	X	X		Represents the absence event original begin date. The value of this system element will be the same for all days within each event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
PARTIAL HOURS	Partial Hours	Decimal	X	X	X	X	X		Represents the partial hours if any for the day of the absence event being processed. Partial hours can be entered for each event via the absence event entry component for the begin day of the event, or for the end day of the event. Partial hours can also be entered for all days of the event. The value of this system element is calculated each day absent and therefore could be different each day.
PIN TAKE NUM	Absence Take Element	Pointer	X	X	X	X	X		Represents the PIN (element) number of the Take element for the day.

System Elements Calculated during the Absence Processing

This table lists system elements that are calculated during absence processing:

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
ABS BEGIN ENTL BAL	Absence Begin Entitl Balance	Decimal	X	X	X	X	X	X	Represents the entitlement period balance as of the beginning of the day. The value of this system element is calculated each day absent and therefore could be different each day.
ABS BEGIN WAIT BAL	Absence Begin Wait Balance	Decimal	X	X	X	X	X	X	Represents the wait period balance as of the beginning of the day. The value of this system element is calculated each day absent and therefore could be different each day.
ABS CUM EVT WAIT	Absence Cum Event Wait	Decimal	X	X	X	X	X	X	Represents the entitlement balance as of the beginning of the day. The value of this system element is calculated each day absent and therefore could be different each day.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
ABS CUM LINK WAIT	Absence Cum Linked Wait	Decimal	X	X	X	X	X	X	Represents the sum of the wait count of each day of the absence event through the day of the absence event being processed including the wait counts of previously linked absence events. The value of this system element is calculated each day absent and therefore could be different each day.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
ABS CUM PARTIAL HR	Absence Cum Partial Hours	Decimal	X	X	X	X	X	X	Represents the sum of the partial hours of Absence Takes for the same day being processed including the current Absence Take. This system element is only available when duplicates are allowed for that Absence Take. The value of this system element is calculated each day absent and therefore could be different each day.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
ABS ELIG DATE	Absence Eligible Date	Date	X	X	X	X	X	X	The Take element's eligibility date resolves once at the beginning of each absence event. The resulting value of the eligibility date is available via this system element. The employee is not eligible to be paid prior to this date (all daily units will be considered unpaid). The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
ABS ELIG IND	Absence Eligible Indicator	Character	X	X	X	X	X	X	This system element equals 'Y' (Yes), if the day of the event being processed is greater than or equal to the eligibility date, else the system element equals 'N' (No). (See ABS _ELIG_ DATE) The value of this system element is calculated each day absent and therefore could be different each day. Valid Values: Character 'Y' &'N' ('Y' = Yes/'N' = No).

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
ABS END ENTL BAL	Absence End Entitl Balance	Decimal	X	X	X	X	X	X	Represents the entitlement balance as of the end of the day. The value of this system element is calculated each day absent and therefore could be different each day.
ABS END WAIT BAL	Absence End Wait Balance	Decimal	X	X	X	X	X	X	Represents the wait period balance as of the end of the day. The value of this system element is calculated each day absent and therefore could be different each day.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
ABS LINK IND	Absence Link Indicator	Character	X	X	X	X	X	X	This system element = 'Y' (Yes) if the event is linked to a prior event. If the current absence event is not linked, the system element will equal 'N' (No). This system element can be used in your rules to share a linked entitlement balance, or to share a linked waiting period. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event. Valid Values: Character 'Y' &'N' ('Y' = Yes/'N' = No).

System Element Name	*Description*	*Format*	*DU*	*DB*	*DA*	*OS*	*PA*	*OR*	*Comments*
ABS LINK PRD	Absence Link Period	Decimal	X	X	X	X	X	X	The Take element's link period duration between two absences is resolved once at the beginning of each event. The resulting value of this period of time is available via this system element. This is used to help determine whether or not the current event is linked to a previous event. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
ABS MAP ELEMENT	Absence Map Element Number	Pointer	X	X	X	X	X	X	Represents the Take element's mapped to Take element. This system element will be populated for each day of the current event that is mapped (a mapped to Take element is generated). The value of this system element is resolved each day and therefore could have a different value each day.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
ABS MIN IND	Absence Minimum Indicator	Character	X	X	X	X	X	X	This system element = 'Y' (Yes) if this event satisfies the minimum number of calendar days the absence must span before the event is eligible to be paid else the system element equals 'N' (No). The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event. Valid Values: Character 'Y' &'N' ('Y' = Yes/'N' = No).

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
ABS MIN PRD	Absence Minimum Period	Decimal	X	X	X	X	X	X	Represents the Take Element's minimum period or the minimum number of calendar days the absence must span to be considered a valid absence event. If the absence event spans fewer calendar days than the minimum period, the event is not eligible to be paid and will not be considered for linking (a future dated event will never link to this event). The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
ABS NEG ELEMENT	Absence Negative Element Number	Pointer	X	X	X	X	X	X	Represents the Take element's negative balance rules, take with other absence. This system element will be populated when the amount of the entitlement balance drops below zero (the day is redirected to another take element). The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
ABS SOURCE ELEMENT	Absence Source Element Number	Pointer	X	X	X	X	X	X	Represents the PIN number of the Take element from which this Absence Take was mapped or redirected. The value of this system element could vary each day.
ABS WAIT COUNT	Absence Wait Count	Decimal	X	X	X	X	X	X	The Take element's wait count formula resolves each day if the wait per absence indicator is checked on. The resulting value of the wait count formula is available via this system element each day (the unit representa- tion for each day). The value of this system element is calculated each day absent and therefore could be different each day.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
DAY COUNT	Day Count	Decimal	X	X	X	X	X	X	The Take element's Day Formula resolves each day. The resulting value of the Day Formula is available via this system element each day (the unit representa-tion for each day). The value of this system element is calculated each day absent and therefore could be different each day.
DAY COUNT UNP	Day count unpaid	Decimal	X	X	X	X	X	X	This system element equals the number of unpaid units (the unpaid portion of the day count). The value of this system element is calculated each day absent and therefore could be different each day.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
FIRST DATE LINK	First Date Link	Date	X						Represents the begin date of the earliest absence event linked to the absence event begin processed. If the event is not linked it represents the begin date of the absence event being processed. The value of this system element will be the same for all days within each event.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
FIRST EVT BGN DT	First Event Begin Date	Date	X	X	X	X	X		Represents the begin date of the earliest absence event linked to the absence event begin processed. If the event is not linked it represents the begin date of the absence event being processed. The value of this system element will be the same for all days within each event.

System Element Name	***Description***	***Format***	***DU***	***DB***	***DA***	***OS***	***PA***	***OR***	***Comments***
LINK YES-NO	Link Yes-No	Character	X						This system element = 'Y' (Yes) if the event is linked to a prior event. If the current absence event is not linked, the system element will equal 'N' (No). This system element can be used in your rules to share a linked entitlement balance, or to share a linked waiting period. The value of this system element is resolved once prior to the 1st day of each event and therefore will be the same value each day of the event. Valid Values: Character 'Y' &'N' ('Y' = Yes/'N' = No).

System Element Name	*Description*	*Format*	*DU*	*DB*	*DA*	*OS*	*PA*	*OR*	*Comments*
TOTAL ABS BY DAY	Total Absence hours by day	Decimal	X						Represents the sum of the partial hours of Absence Takes for the same day being processed including the current Absence Take. This system element is only available when duplicates are allowed for that Absence Take. The value of this system element is calculated each day absent and therefore could be different each day.

System Elements Related to the Forecasting Process

This table lists system elements related to the forecasting process:

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
TXN ID	Transaction Identifier	Character	X						Represents the transaction ID of either the Absence Forecasting or Balance Inquiry transaction being processed. When is it Available: This system element is resolved during Absence Forecasting or Balance Inquiry. It is only available during the Absence Forecasting or Balance Inquiry transaction processing. The value of this system element will not change during the processing of the transaction.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
TXN RSLT OPTN	Transaction Result Option	Character	X						Represents the transaction result option of either the Absence Forecasting or Balance Inquiry transaction being processed. When is it Available: This system element is resolved during Absence Forecasting or Balance Inquiry. It is only available during the Absence Forecasting or Balance Inquiry transaction processing. The value of this system element will not change during the processing of the transaction. Valid Values: Character Value. 'T' - Use Temporary Tables, 'N' - Do not write results.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
FCST ASOF DT	Forecast As Of Date	Date	X						Represents the as of date for which the absence balance of the specified Take element will be calculated. When is it Available: This system element is resolved during the Balance Inquiry. It is only available during the Balance Inquiry transaction processing. The value of this system element will not change during the processing of the transaction.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
FCST BGN DT	Forecast Begin Date	Date	X						Represents the Forecast Period Begin Date for which either Absence Forecasting or Balance Inquiry being processed. When is it Available: This system element is resolved during Absence Forecasting or Balance Inquiry. It is only available during the Absence Forecasting or Balance Inquiry transaction processing. The value of this system element will not change during the processing of the transaction.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
FCST END DT	Forecast End Date	Date	X						Represents the Forecast Period End Date for which either Absence Forecasting or Balance Inquiry being processed. When is it Available: This system element is resolved during Absence Forecasting or Balance Inquiry. It is only available during the Absence Forecasting or Balance Inquiry transaction processing. The value of this system element will not change during the processing of the transaction.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
PIN FCST TAKE NUM	Forecast Pin Number	Pointer	X						Represents the Take element for which the absence balance will be calculated. When is it Available: This system element is resolved during the Balance Inquiry. It is only available during the Balance Inquiry transaction processing. The value of this system element will not change during the processing of the transaction. Valid Values: PIN Number.

System Element Name	Description	Format	DU	DB	DA	OS	PA	OR	Comments
ABS EVT FCST VAL	Absence Event Forecast Value	Character	X	X	X	X	X	X	Represents the value of the Take element's Forecast Element resolved for an absence event during Absence Forecasting. When is it Available: This system element is resolved during Absence Forecasting. It is only available during the batch Absence Take element processing. It is a daily system element. The value of this system element will be the same for each day of the event.

Viewing the Delivered Elements

This topic provides an overview of the GP_ELEMENTS query and discusses how to:

- Access the GP_ELEMENTS query.
- Run the GP_ELEMENTS query.

Page Used to Access and Run the GP_ELEMENTS Query

Page Name	***Definition Name***	***Navigation***	***Usage***
Query Manager	QRY_SELECT	Reporting Tools, Query, Query Manager To access the GP_ ELEMENTS query, enter *GP _ELEMENTS* in the Search By Query Name field on the Query Manager page and click the Search button.	Access the GP_ELEMENTS query.
GP_ELEMENTS – Global Payroll Elements	QRY_SELECT	Click the HTML link under Run to HTML on the Query Manager page, or click the Excel link under Run to Excel on the Query Manager page for the GP_ELEMENTS query.	Generate query results using the GP_ELEMENTS query.

Understanding the GP_ELEMENTS Query

Use the GP_ELEMENTS query to view a list of elements that are defined for your system. You can view elements defined for all countries or a specific country, view elements by category or name, or a combination of these criteria. If you are using the query to view system elements, the query retrieves information about the purpose of each system element and how and when it is resolved.

Query Manager Page

Use the Query Manager page (QRY_SELECT) to access the GP_ELEMENTS query.

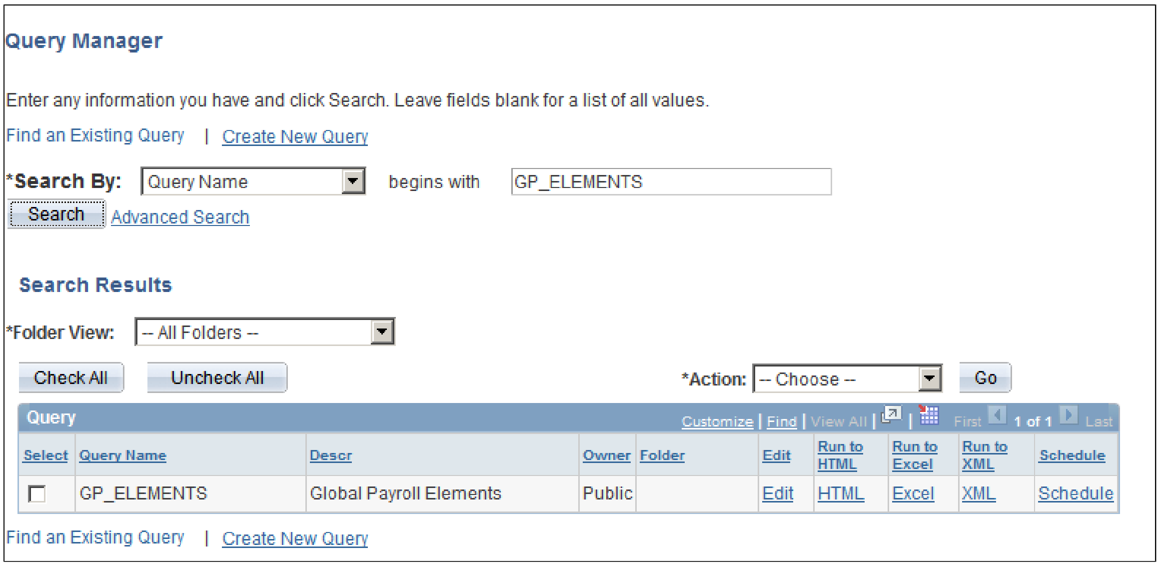
Navigation

Reporting Tools, Query, Query Manager

To access the GP_ELEMENTS query, enter *GP_ELEMENTS* in the Search By Query Name field on the Query Manager page and click the Search button.

Image: Query Manager page

This example illustrates the fields and controls on the Query Manager page.



Edit

Click to edit field properties and sort order for your query.

Run to HTML

Click to run the query and generate an online view of the delivered elements. Once you've defined your search criteria for the GP_ELEMENTS query, in addition to viewing results online, you also have the option of downloading the results into a Microsoft Excel spreadsheet or a CSV text file.

Run to Excel

Click to run the query and publish the results in a Microsoft Excel spreadsheet.

Note: If you cannot see the comment field for an element in Excel, change the format of the field, or view the output in html.

Schedule

Click to define criteria for scheduling a query.

See the product documentation for *PeopleTools: PeopleSoft Query*

GP_ELEMENTS – Global Payroll Elements Page

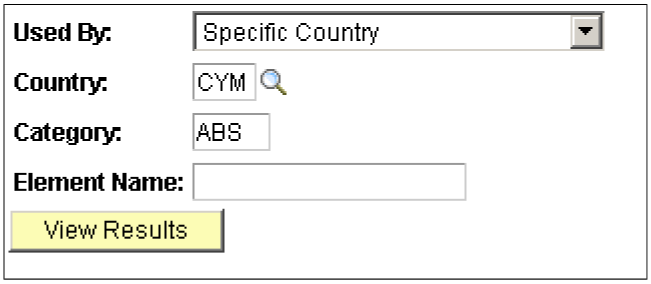
Use the GP_ELEMENTS – Global Payroll Elements page (QRY_SELECT) to generate query results using the GP_ELEMENTS query.

Navigation

Click the HTML link under Run to HTML on the Query Manager page, or click the Excel link under Run to Excel on the Query Manager page for the GP_ELEMENTS query.

Image: GP_ELEMENTS query

This example illustrates the fields and controls on the GP_ELEMENTS query.



To run the query, enter your search criteria and click the View Results button. Modify the query using the criteria described below.

Used By

Identify whether you want to view elements for *All Countries* or *Specific Country.*

Country

If you select *All Countries* in the Used By field, enter *ALL* in the Country field. If you select *Specific Country* in the Used By field, enter the country code for which you want to view elements.

Category and Element Name

To narrow your results, you can enter a functional category code, such as ABS, for absences. You can also enter part of or all of an element name.

Note: For information about category and element naming conventions, see the country extension documentation.

View Results

Click to view the results online or download the results to a Microsoft Excel file.

See the product documentation for *PeopleTools: Security Administration*.

Chapter 36

Generating Report Data

Understanding Report Data Generation

This topic discusses:

- The data reporting process.
- Filters.
- Report data and segmentation.
- Output table definitions.
- User-defined parameter definition.
- Batch processing setup.
- Real-time processing setup.
- Building a transaction that uses report data.

The Data Reporting Process

Using the report data generation process, you can easily read absence results tables and use this data to populate your own reports.

The report data generation process enables you to create reports that contain:

- Retroactivity.
- Segmentation, retro-segmentation, and segmentation cancelled by retroactivity.
- Reverse calculations.
- Absence Management status, indicators, and other technical fields.
- Pay group, pay entity, and payment key changes resulting from corrective retroactivity.
- Calculation results stored in earnings, deductions, balance accumulators, accumulators stored with each calculation, absence daily data, generated positive input, supporting elements stored with each calculation, and specific result tables (writable arrays).
- Multiple selections by process run.
- Data based on a calendar group or a period of time.
- Results from finalized and unfinalized calendars.

- Payees selected from any table at the EMPLID level, adhering to HCM security.
- Appropriate absence segments.
- Selected elements.
- Any and all slices.

Steps for Creating Reports Using the Report Data Generation process

To create reports using the report data generation process:

1. Assign output and input tables for the report on the Define Report Data page.
2. Define the rules used to create the output table on the Define Report Data page.
3. Map fields and create filters used to generate the output table on the Report Data Process Details page.

Selecting Absence Results and Populating Output Tables

After you set up the input and output table details using the Define Report Data page, and map fields and define filters on the Report Data Process Details page, the system completes the following steps to select the absence results and populate the output tables:

1. Select calendar groups.
2. Select eligible payees using payee lists, group builds, security, and payee filter. If a payee filter was created, it is applied here.
3. Join the payee process status table (GP_PYE_PRC_STAT) and the payee segment status table (GP_PYE_SEG_STAT).
4. Select the original segments. If a process filter was created it is applied here.
5. Insert the original, recalc, prior, and last version/revision segments into the worktable (GP_RPTW_TMP). The worktable now contains rows by payee for selected segments, recalculations, prior segments, and last version/revision segments. If a segment filter was created it is applied here.
6. Join the worktable, the primary input table, and the link table (the additional input table joined with the primary input table) according to the data on the Report Data Process Details page. The results are posted to the output table. Only the results derived from the worktable or the primary input table are populated. If an input filter was created it is applied here.

7. Update the output table with data from the additional input tables.

Image: Overview of Generating Report Data 1

This diagram illustrates how the system generates the report data Worktable.

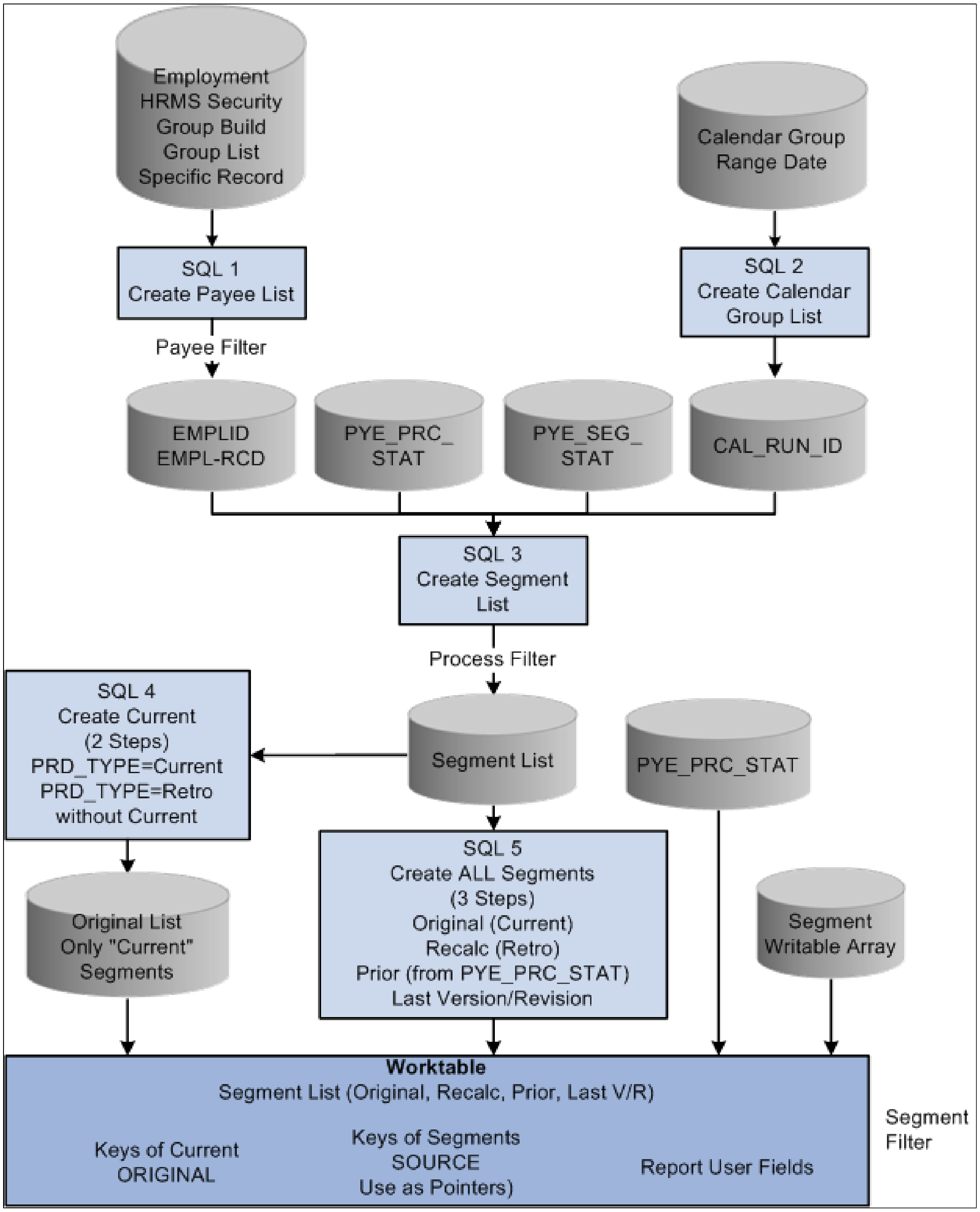
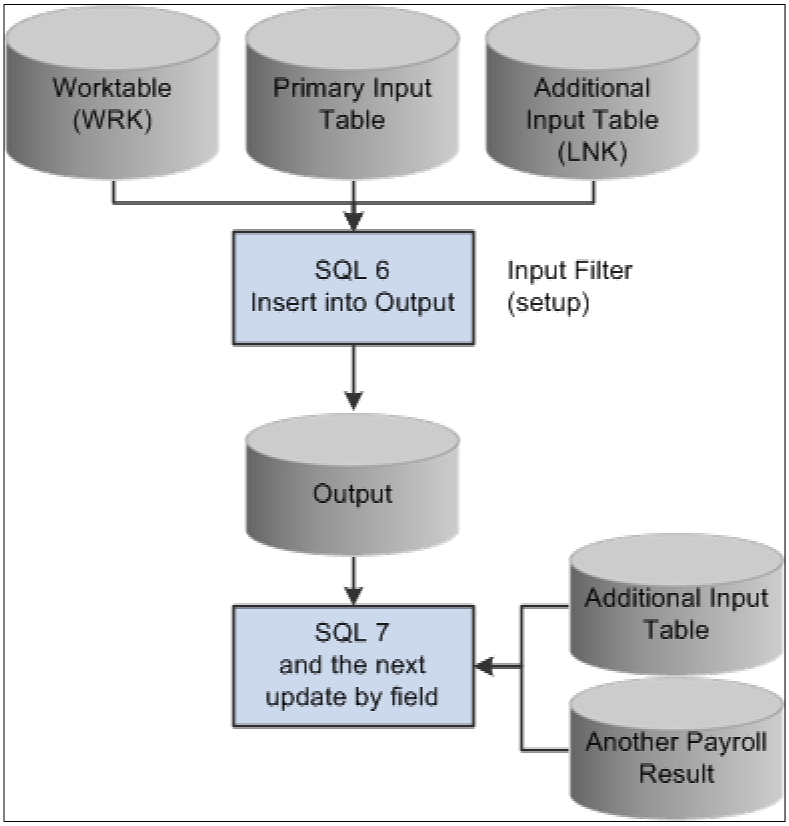


Image: Overview of Generating Report Data 2

This diagram illustrates how the system combines the data in the Worktable with the data from the Primary Input Table and Additional Input Table in the process of generating report data.



Filters

Four levels of filters exist: payee, process, segment, and input.

- Payee Filter

  This SQL parameter is used to filter the population. It is applied when the selection is based on a specific record or employment table.

- Process Filter

  This SQL parameter is used to filter the entire process in the original segments only. It can be based on any field in the payee process status or payee segment status tables. For example, "and COUNTRY = 'USA'" selects only U.S. absence results.

- Segment Filter

  This field parameter is used to create a filter for every step of the process in every segment. It can be based on any field in the payee process status, the payee segment status, or the segment writable array table (if defined in the setup). For example, COMPANY 'GBI' makes a selection on the company GBI if COMPANY is stored in a segment writable array.

- Input Filter

This SQL filter is defined in the setup for each step used to filter the primary input table, the additional input table joined with the primary input table (the link table), or the worktable. Input filters can be used as a filter or as an additional join condition. For example, "and PRI.CALC_RSLT_VAL>0" selects only the positive results.

Report Data and Segmentation

The Report Data feature manages four kinds of segments:

- Original segments

  Original segments correspond to all segments for version 1 revision 1 (V1R1) for a period. In this kind of segment, there is also a virtual segment. The virtual segment is created when there is corrective retroactivity but the pay group, run type, or payment key of the current period does not match the recalculated period.

- Recalculated segments

  Recalculated segments correspond to all segments other than V1R1 that were created during a calendar group run.

- Prior segments

  Prior segments correspond to the previous version/revision of all recalculated or reversal segments.

- Last version/revision

Here is how the system interprets the following situations:

- If a payee has only one calendar and only one segment, then the payee has one original segment.
- If a payee has one calendar and two segments, then the payee has two original segments.
- If a payee has two calendars and one segment, then the payee has two original segments.
- If a payee has one calendar and one segment for the current period, and a corrective retro back to the twelve previous periods (with the same pay group and two different payment keys), then the payee has two original segments even if Absence Management creates only one segment for the current period.

Related Links

Understanding Retroactive Processing

Output Table Definitions

Output tables must be defined to store your selected results. These tables must include the following key structure:

Field Name	*Type*	*Length*	*Key*	*Required*
PROCESS_ INSTANCE	Num	10	KA	N

Field Name	Type	Length	Key	Required
EMPLID	Char	11	KA	Y
CAL_RUN_ID	Char	18	KA	Y
EMPL_RCD	Num	3	KA	N
GP_PAYGROUP	Char	10	KA	Y
CAL_ID	Char	18	KA	Y
ORIG_CAL_RUN_ID	Char	18	KA	Y
RSLT_SEG_NUM	Num	4	KA	Y
GP_RPT_KEY	Char	22	KA	Y
SEQ_NUM	Num	3	KA	Y

User-Defined Parameter Definitions

The user-defined parameters are defined when setting up the input filter on the Report Data Process Details page . They must follow this syntax:

%PARM.<function>.<parameter>

Consider the following example using the filter *And PRI.STATE in (%PARM.REPORT.STATE)* and these parameters:

Parameter 1	Parameter 2	Parameter 3
REPORT	STATE	CA
REPORT	STATE	OR

In this example, the generated SQL statement would include: And PRI.STATE IN ('CA','OR'). Below is an example of how you would use these user-defined parameters in the program:

```
&reportBatch.AddParamChar("REPORT", "STATE", "CA");
&amp_reportBatch.AddParamChar("REPORT", "STATE", "OR");
```

Batch Processing Setup

The batch process provides a public section called "EXTRACT" that can be called by an application engine process that prepares the absence results for reporting. You must prepare the list of parameters. Then the EXTRACT section generates the SQL requests based on the parameters and executes the requests.

A section called "MAIN" is provided for testing purposes. The MAIN section is used by the delivered run control Validate Report Data. The parameters are managed by the delivered application classes via an object &reportBatch defined at the component level:

```
import GP_RPT_DATA:ReportDataClasses:*;
Component ReportDataAE &reportBatch;
```

Section	***Step***
Main	1. Prepare the list of parameters based on the run control GP_RC_RPT_DTL. 2. Call EXTRACT.
EXTRACT (public)	1. Initialization. 2. Print the parameters log file. 3. Generate the requests (call to .GenerateSQL). 4. Loop on the requests. Call to EXECUTE.
EXECUTE	1. Print a message in the log file. 2. Execute a request. 3. Print a message in the log file.

The application engine is based on the state record GP_RPT_AET and includes the following dedicated temporary tables: GP_RPTC_TMP, GP_RPTO_TMP, GP_RPTE_TMP, GP_RPTS_TMP, and GP_RPTW_TMP.

Below is an example of the batch processing setup:

```
import GP_RPT_DATA:ReportDataClasses:*;
Component ReportDataAE &reportBatch;
&reportBatch.AddParamChar("EXTPRC", "COUNTRY", "USA");
&reportBatch.AddParamChar("EXTPRC", "NAME", "GP_REPORT");
&reportBatch.AddParamChar("EXTPRC", "TYPE", "P");
&reportBatch.AddParamChar("SELPYE", "SECUR", "Y");
&reportBatch.AddParamChar("SELCAL", "CALGRPID", GP_REGISTER_AET.CAL_RUN_ID);
&reportBatch.AddParamChar("SELCAL", "FROMDT", GP_REGISTER_AET.FROM_DT);
&reportBatch.AddParamChar("SELCAL", "TODT", GP_REGISTER_AET.TO_DT);
```

The call section name is EXTRACT, and the program ID is GP_EXT_AE.

Real-Time Processing Setup

Below is an example of real-time processing setup:

```
import GP_RPT_DATA:ReportDataClasses:*;
Component ReportDataReal &report;
Local number &instance;
&report = create ReportDataReal();
&report.AddParamChar("EXTPRC", "COUNTRY", "USA");
&report.AddParamChar("EXTPRC", "NAME", "GP_REPORT");
&report.AddParamChar("EXTPRC", "TYPE", "P");
&report.AddParamChar("SELPYE", "SECUR", "Y");
&report.AddParamChar("SELCAL", "CALGRPID", GP_REGISTER_AET.CAL_RUN_ID);
&report.AddParamDate("SELCAL", "FROMDT", GP_REGISTER_AET.FROM_DT);
&report.AddParamDate("SELCAL", "TODT", DERIVED_GP.TO_DT);
&instance = &report.GetInstance();
```



```
&report.ExecuteNow();

/* selection from the output tables (using &instance) can be done here
 in order to display results */
```

Building a Transaction That Uses Report Data

When building a transaction that uses report data, you should follow these guidelines:

- Design one or more temporary tables for transaction purposes using the same key structure as the batch process. The tables are keyed by process instance.
- The user transaction should contain inquiry parameters such as EMPLID or CAL_RUN_ID.
- Create a push button or similar feature to launch a PeopleCode program to access the report data. It should run as follows:
    - The class ReportDataReal is initiated.
    - The PeopleCode transforms the inquiry parameters into report data parameters using the method .AppParamChar/Date/Num().
    - The method .GetInstance() is triggered. This method generates a process instance number using a table designed for report data.
    - The method .ExecuteNow() is triggered.
    - The PeopleCode can then load data from the temporary tables into the page buffers (using, for example, the process instance number returned by method .GetInstance()).
    - The content of the temporary tables must then be deleted using the process instance number.
- If two users run the same transaction simultaneously, the system generates two different process instance numbers.

Common Elements Used to Generate Report Data

Output Table	Name of the table to be populated.
Primary Input Table	The functional name of a Absence Management result table. For example, GP_RSLT_ERN_DED would be referred to as the Result Table for Earnings and Deductions.
Original Segment	The segment represented by version 1 and revision 1.
Recalculated Segment	The segment that is not version 1 and revision 1.
Prior Segment	The segment that the Absence Management application used to calculate deltas.

Defining Report Data

This topic discusses how to:

- Select output tables and primary input tables.
- Map fields.
- Create input filters.

Pages Used to Define Report Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Define Report Data	GP_RPT_TBL	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Define Report Data, Define Report Data	Assign the output table, writable array, primary input table type, and segment options.
Report Data Process Details	GP_RPT_DTL_SEC	Click the Details link on the Define Report Data page.	Map fields and create filters used to generate the output table.

Define Report Data Page

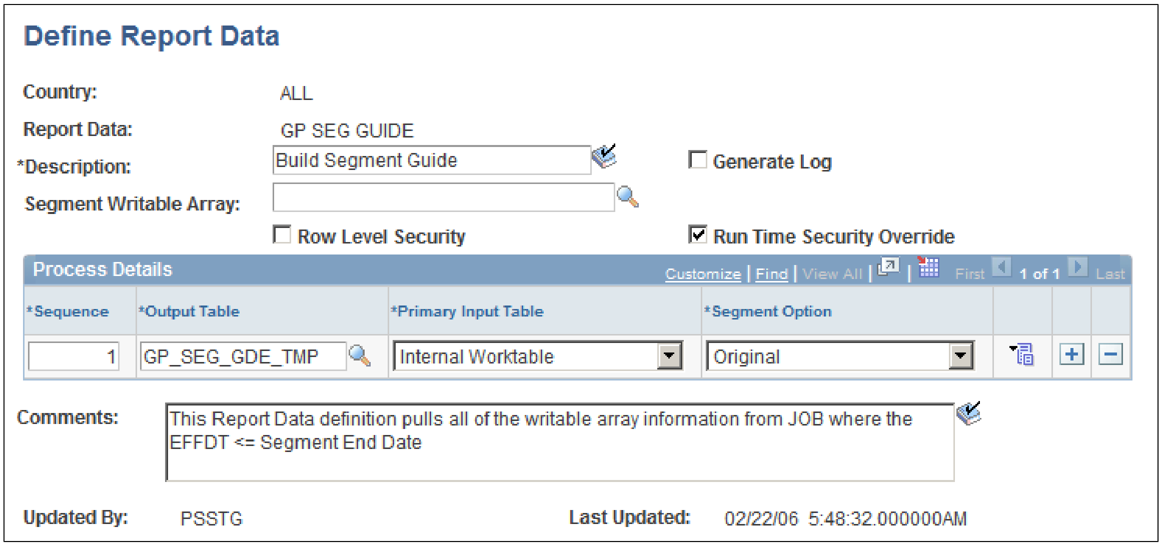
Use the Define Report Data page (GP_RPT_TBL) to assign the output table, writable array, primary input table type, and segment options.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Define Report Data, Define Report Data

Image: Define Report Data page

This example illustrates the fields and controls on the Define Report Data page.



Report Data

Displays the identification code for the report data setup.

Generate Log

Select to generate log details when you run the report.

Segment Writable Array

Enter a writable array segment. The corresponding writable array table can be used throughout the report data generation process in two ways. First, any field on this writable array table can be included in the field map. Thus it is used to populate fields in the output tables. Second, any field on this writable array table can be used as a filter for the process (using the parameter "SEGFILTER" on the Validate Report Data page). For example, for a writable array that contains the Company and Establishment fields, a process can be run for a single company or establishment.

Row Level Security

Select to enable row level security for the report. When row level security is enabled, the Report Data process selects payee records from EMPL_SRCH_GBL where the Row Security class equals the one defined for the user.

Run Time Security Override

Select to allow the Row Level Security value to be overridden on the run control page of the report.

Process Details

Sequence

Enter the sequence number. The same input and output tables may be used repeatedly.

Warning! The report data generation process uses this sequence number when generating output tables. The output table must have a SEQ_NUM field to hold the sequence number value.

Output Table

Enter the record name of the output table.

Primary Input Table

Select the primary table to be read for data selection. The Primary Input Table and the Output Table have a one to one relationship; for each row selected in the Primary Input Table there will be one row selected in the Output Table. The options available are:

- *Absence Daily Data* (GP_RSLT_ABS).
- *Accumulators* (GP_RSLT_ACUM).
- *Earnings and Deductions* (GP_RSLT_ERN_DED).
- *Internal Worktable* (GP_PYE_PRC_STAT joined with GP_PYE_SEG_STAT and a segment writable array).
- *Positive Inputs* (GP_RSLT_PI_DATA).
- *Supporting Elements* (GP_RSLT_PIN).
- *Writable Array Table* (any writable array table).

Writable Array Table

When the Primary Input Table is *Writable Array,* enter the table name here. This writable array is not the same as the value in the Segment Writable Array field, which applies to the entire process.

Segment Option

Select which data will be selected if the process encounters retroactive information. Options are:

- *Original:* Select only original segment information (no retroactive information).
- *Original and Retro:* Select information coming from recalculated segments and prior segments in addition to the original segments.
- *Last Version/Revision:* Select only the segments with the latest version and revision numbers.
- *User Defined:* Select this option to manually choose the segment. Selecting this field displays the Last, Retro (Prior), Retro (Recalculated), and Original Calc fields.

Mapping Fields

Use the Report Data Process Details page (GP_RPT_DTL_SEC) to map fields and create filters used to generate the output table.

Navigation

Click the Details link on the Define Report Data page.

Image: Report Data Process Details page (1 of 2)

This example illustrates the fields and controls on the Report Data Process Details page (1 of 2).

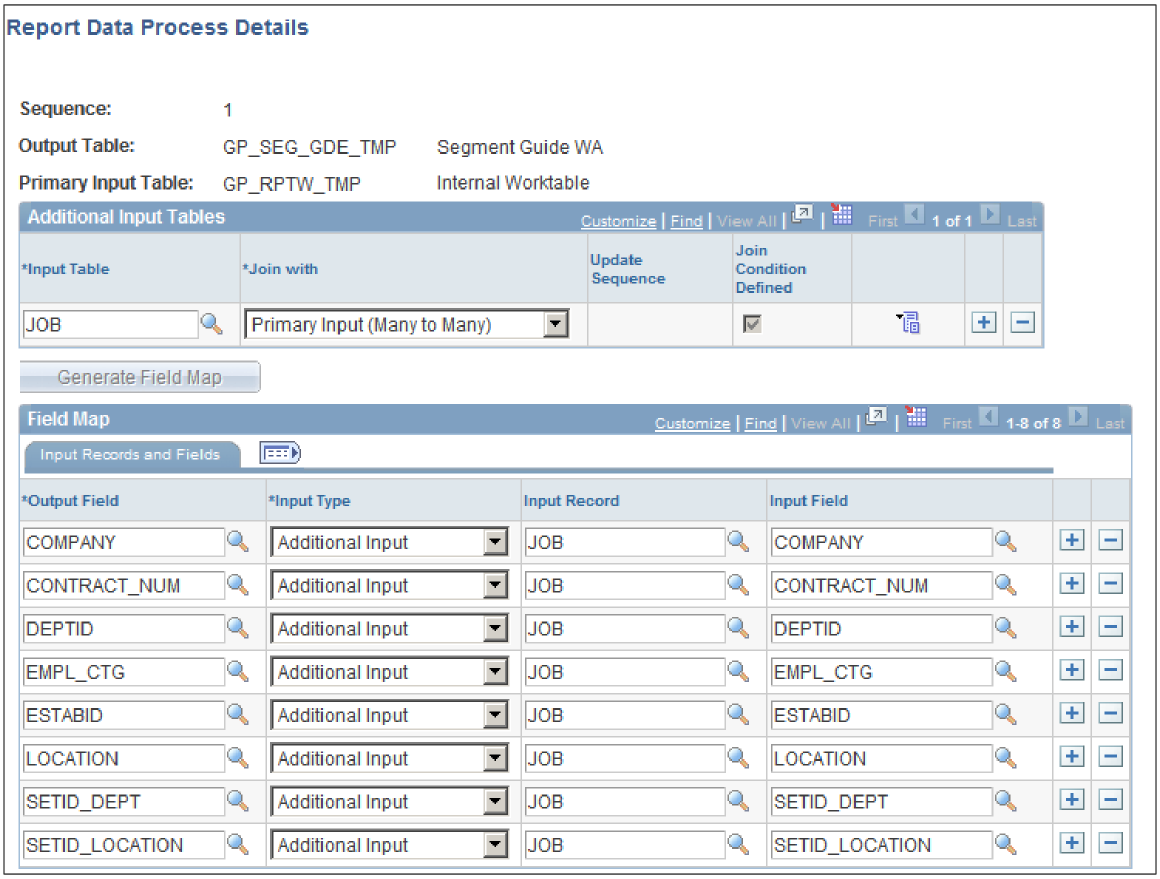
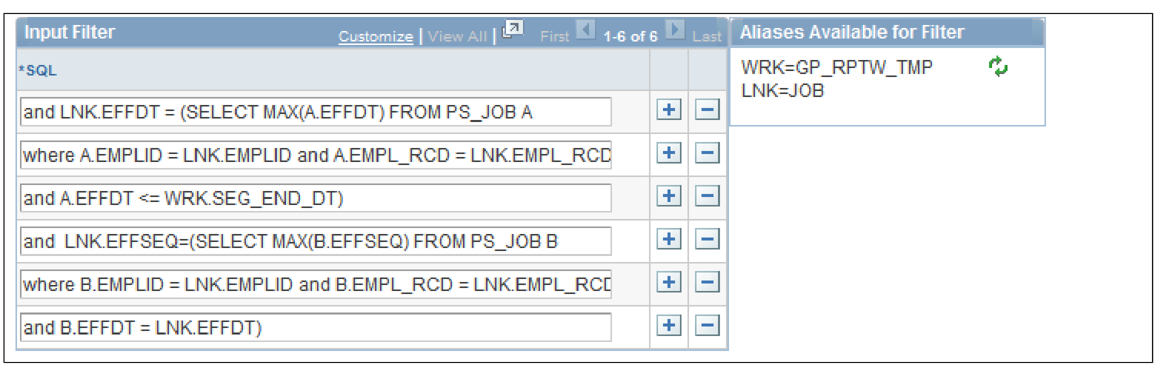


Image: Report Data Process Details page (2 of 2)

This example illustrates the fields and controls on the Report Data Process Details page (2 of 2).



Additional Input Tables

Additional input tables can be used in addition to the Primary Input Table. To use additional tables in the process, a linking relationship must be defined on this page in order to retrieve the data. The relationship can be defined with either the primary input table or the output table.

Input Table

Enter an input table. Once a table is defined as an additional input, any of its fields can be used to populate a field in the output table.

Join with

Select one of the following options:

- *Output Table:* This creates a one to one relationship. The additional input table will be read after the output table has been populated from the primary input table. Then the selected fields from the additional input table will be used in an update statement on the output table.
- *Primary Input:* This creates a many to many relationship. The additional input table will be read during the selection of the primary input table. A join is made between these tables and thus the selected fields from the additional input table will be used in an insert statement on the output table.

Note: Only one additional input table can be joined with the primary input table. This additional input table is called the link table and it can be filtered with an input filter.

Update Sequence

You must enter a sequence number when joining an input table with an output table. This sequence number determines the order of the different accesses to the additional input tables that are triggered by some update statements. There is one update statement per additional input table. For example, the field UNION_CD is populated with data from JOBCODE_TBL based on the SETID and JOBCODE defined in the output table. Then the field DISABILITY_INS is populated with data from UNION_TBL based on the UNION_CD. In this case the JOBCODE_TBL must have an Update Sequence value of *1* and the UNION_TBL must have an Update Sequencevalue of *2.*

Join Condition Defined

The system uses this field to indicate that a join condition is defined between the additional input table and the primary input table or the additional input table and the output table, depending on the value in the Join with field. This field is read-only.

Generate Field Map

Use this push button to generate a field mapping based on the output table definition, the primary input table, the additional input tables, the writable array segment and the worktable. Once the field mapping has been generated, the user can change it using the Field Map group box.

Field Map

Once you have clicked the Generate Field Map button, the system populates this group box. You may then alter these fields.

Field Map Input Record and Field Tab

Output Field

Displays the field name of the output table. The fields of the output table are not required. You cannot select the fields that define the mandatory key structure.

Input Type

The following options are available:

- *Primary Input:* A field from the primary input table populates the output field.
- *Internal Worktable:* A field from the worktable populates the output field. Any field from GP_PYE_PRC_STAT and GP_PYE_SEG_STAT can be selected.
- *Additional Input:* A field from a specific record populates the output field.
- *Element:* An element populates the output field. The as of date can be specified in the As of Field field (field present in the output table).
- *Writable Array:* A field from a writable array populates the output field. The as of date is the segment retro period.
- *Period Accum:* A balance accumulator element populates the output field. The balance period is defined under Period Accum.
- *Writable Array Segment:* The field is populated by the corresponding field present in the segment writable array, if one is defined.

Input Record

Enter a record name if Input Type is *Additional Input* or *Writable Array.* For other input types, the records' technical names appear.

Input Field

Displays the field name of the primary input, additional input, the worktable, the writable array segment, or a writable array.

Reverse Sign

Indicates if the field must take the opposite sign (+/-) when the result is attached to a prior amount. Usually, this field is selected for all the fields that can be summed. This option should not be selected for fields that do not contain values, such as PIN_NUM or INSTANCE.

Field Map Element Tab

The following fields are required if the Input Type is *Element.*

Entry Type

Select from: *System Element, Variable, Formula, Bracket, Earning, Deduction, Auto-Assigned, Accumulator, Count,* and *Duration.*

Element

This field is required if the Input Type is *Element.* Be sure to use the correct Country field.

Field Map Element Options Tab

Element Source

Required if the Input Type is *Element* or *Writable Array.* Determines how the element is read, in the case of retroactivity.

- *Original:* Read in the original segment.
- *Recalculated:* Read in the recalculated segment.

As of Field

Required if the Input Type is *Element* and the Element Source is *Original.* The field name is used for the As of Date to find the element. This field is populated by the output table.

Period Accumulator Type

Required if the Input Type is *Period Accumulator.* Values are: *MTD Amount, MTD Unit, PTD Amount, PTD Unit, QTD Amount, QTD Unit, YTD Amount,* and *YTD Unit.*

Creating Input Filters

Access the Report Data Process Details page.

SQL

Write a where clause to execute during the selection of the primary input table. Aliases are available. For example:

- To filter only positive amounts: "and PRI.CALC_RSLT_VAL>0".
- To filter for one country: "and WRK.COUNTRY='USA'".
- To filter on a field stored in an additional input table (if joined with the primary input table): "and LNK.PIN_TYPE='ER'".

Aliases available for Filter

This legend shows that the aliases that can be used in the SQL field. Use the button to refresh the legend. Aliases are as follows:

- WRK: Represents the worktable.
- PRI: Represents the primary input table.
- LNK: Represents the record used as the additional input table that is joined with primary input table.

Note: You can use specific words in your SQL where clause. For example: "and WRK.PAY_ENTITY in (%PARM.PRMARG.1)". In this statement, the report data process will replace %PARM.PRMARG.1 with the appropriate value.

Validating Report Data

This topic discusses how to validate report data.

Page Used to Validate Report Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Validate Report Data	GP_RC_RPT	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Validate Report Data, Validate Report Data	Enter report data parameters. Run the report data generation process in batch mode or real time. Generate SQL requests.

Report Validation

The Validate Report Data page enables you to test a defined report with specific parameters so that you can validate the results. With this page you can:

- Run the report data generation process in batch mode.
- Run the report data generation process in real time.
- Generate SQL requests.
- View generated report data.

Validate Report Data Page

Use the Validate Report Data page (GP_RC_RPT) to enter report data parameters.

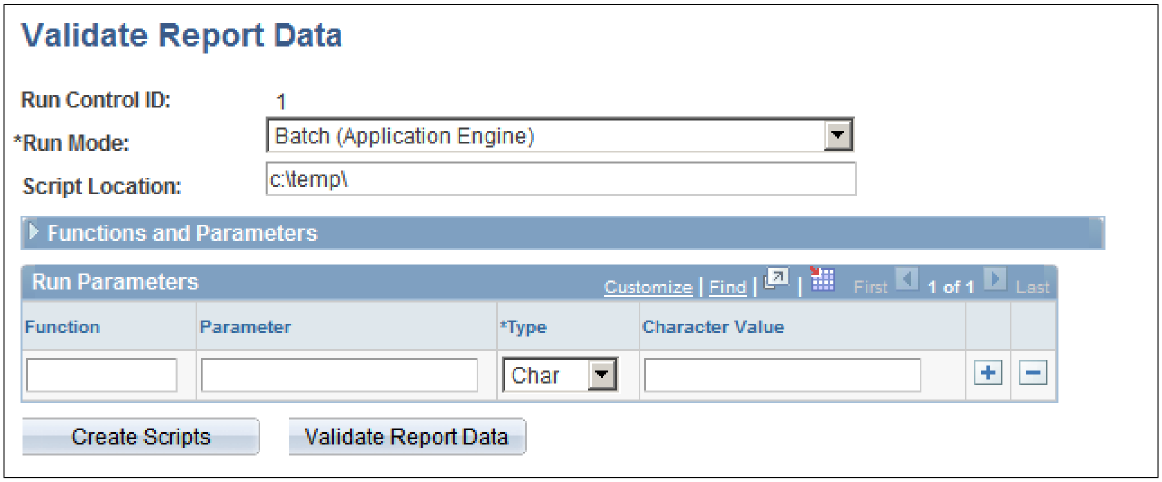
Run the report data generation process in batch mode or real time. Generate SQL requests.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Validate Report Data, Validate Report Data

Image: Validate Report Data page

This example illustrates the fields and controls on the Validate Report Data page.



Run Mode

Select one of three options:

- *Batch (Application Engine)*
- *Real Time (PeopleCode)*
- *Script (Data Mover)*

The Run Mode determines how the SQL statements are applied.

Script Location

Enter the location of the script. Data Mover can execute the script only if you selected *Script (Data Mover)* in Run Mode. Otherwise the generated scripts can be used to debug the SQL statements.

Function and Parameter

Enter the functions and parameter that the system will use to select data for the report. For example, by entering SELCAL/ CALGRPID you can then select which calendar group ID data to use in the report. Defined values are listed in the expandable Functions and Parameters group box.

Note: You can also create user-defined functions and parameters to use in the input filter.

Type

Indicate the field type of the Parameter. Select either *Char, Date, Numeric,* or *SQL.*

Character Value

Enter the value of the Function or Parameter.

Create Scripts

Click to create a .dms containing the SQL statements and to display them on the page. The script includes a list of parameters used to generate the statements. If a parameter is not used in the process (because of a syntax error or a missing definition) the words "Not used" appear in the list.

Validate Report Data

Select this option to validate the report data. The process used depends on your Run Mode selection:

- *Batch (Application Engine):* The system launches an Application Engine that runs the process in batch mode via process scheduler.
- *Real Time (PeopleCode):* The system launches a PeopleCode function that runs the process in real-time.
- *Script (Data Mover):* The system launches a Data Mover process that runs the process in batch mode via process scheduler.

Structuring Parameters

Below is a list of predefined function and parameter values.

Function	***Parameter***	***Parameter Value***	***Comment***
EXTPRC	COUNTRY	Country Code	This parameter is required.
EXTPRC	NAME	Report Data	This parameter is required
EXTPRC	TYPE	P or A or B	Select one of the following: • P: Payroll extraction process. • A: Absence extraction process. • B: Both payroll and absence process.
SELPYE	SECUR	Y/N	Use this parameter to apply security to payee selection.
SELPYE	RECORD	Record Name	Payee selection is based on this record. It must include EMPLID and EMPL_RCD.
SELPYE	SQL	SQL Statement	When the parameter value field is not long enough, the user can repeat the same parameter. The system will concatenate the different values.

Function	***Parameter***	***Parameter Value***	***Comment***
SELPYE	GRPBUILD	Group Build Code	
SELPYE	GRPVER	Group Build Version	
SELPYE	GRPLST	Group List Name	
SELPYE	STREAM	Stream Number	Use this parameter to tell the system whether it must use EMPL_FROM/TO.
SELPYE	EMPLID	Employee ID	The same parameter can be repeated.
SELPYE	EMPL_RCD	Employee Record Number	
SELCAL	CALGRPID	Calendar Group ID	
SELCAL	DATE	1, 2, 3, or 4	Select one of the following: • 1: Period Begin Date. • 2: Period End Date. • 3: Payment Date. • 4: Period Begin Date >= FROMDT and Period End Date <= TODT. If this parameter is not defined, the system uses the period end date.
SELCAL	FROMDT	From Date	
SELCAL	TODT	To Date	
SELCAL	CYCLE	1, 2, or 3	Select one of the following: • 1: All Cycles (Default). • 2: Off Cycle Only. • 3: On Cycle Only.
SELSEG	SQL		This is the process filter.

Function	*Parameter*	*Parameter Value*	*Comment*
SELSEG	BALANCES	1 or 2	Select one of the following: • 1: Payee Level • 2: Job Level
SELSEG	REPLACE	Y/N	Use this parameter to determine whether replacements are considered original.
SEGFILTER	Any field name on the worktable and the segment writable array (if a segment writable array is defined)	Any Value	This is the segment filter. The process adds WRK.fieldname to the report.

Using Report Data

Absence Management delivers two reports that use the Report Data feature to extract results data:

- Absence Results Register

  See "Reporting Payroll Data *(PeopleSoft HCM 9.2: Global Payroll)*".

- Generic Reports

  See Running Generic Reports.

Chapter 37

Setting Up and Running Generic Reports

Understanding Generic Reports

Absence Management provides the framework for you to define your own generic reports of basic absence results. With generic reports, you can set up result table queries that best suit your needs. These queries are useful for quickly viewing data. They are not a substitute for the SQRs used to create final, publishable reports.

There are three types of generic reports that show different views of the same information:

- Element List

  A list of absence elements for each employee for a period. Define each column as a set of numeric elements, which are accumulated.

- Summary

  A list of user-defined absence elements for the absence periods between two dates for each employee. Define each row as a set of numeric elements, which are accumulated. On the run control page you define each column with a From Date and a To Date.

- Accumulator

  Displays totals of selected accumulators for each employee. On the run control page, you define the absence calendars for which the report should be printed.

All of these reports enable you to select sort options and break levels. If you define break levels, the system prints a total for each break, as the break occurs, and prints a grand total at the end of the report. If no breaks are defined, no totals are printed for the report. Depending on the break levels, an employee can appear more than once on a single report (the same employee but with different segment numbers).

For all three report types, the maximum number of columns is 12.

Break Levels

Break levels are a tool for sorting results. Use them to organize the information on the report. You can include up to three break levels in a report. For example, the first level might sort employees into business units; the second might sort members of each business unit into departments; and the third might sort the members of each department into establishments. When you select the break levels for a report, you can print each section on a separate page.

System data supplies the following standard break levels:

- Department
- Company

- Establishment

Setting Up Generic Reports

This topic discusses how to:

- Define break levels.
- Define generic report parameters.
- Define generic report rows and columns.

Pages Used to Set Up Generic Reports

Page Name	***Definition Name***	***Navigation***	***Usage***
Generic Report Break Levels	GP_GENRPT_BRK_LVLS	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Generic Report Break Levels, Generic Report Break Levels	Define break levels.
Definition	GP_GENRPT_SETUP	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Generic Reports, Definition	Define the report ID and parameters.
Rows or Columns	GP_GENRPT_ROW	Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Generic Reports, Rows or Columns	Define rows or columns and the elements that are to be reported.

Generic Report Break Levels Page

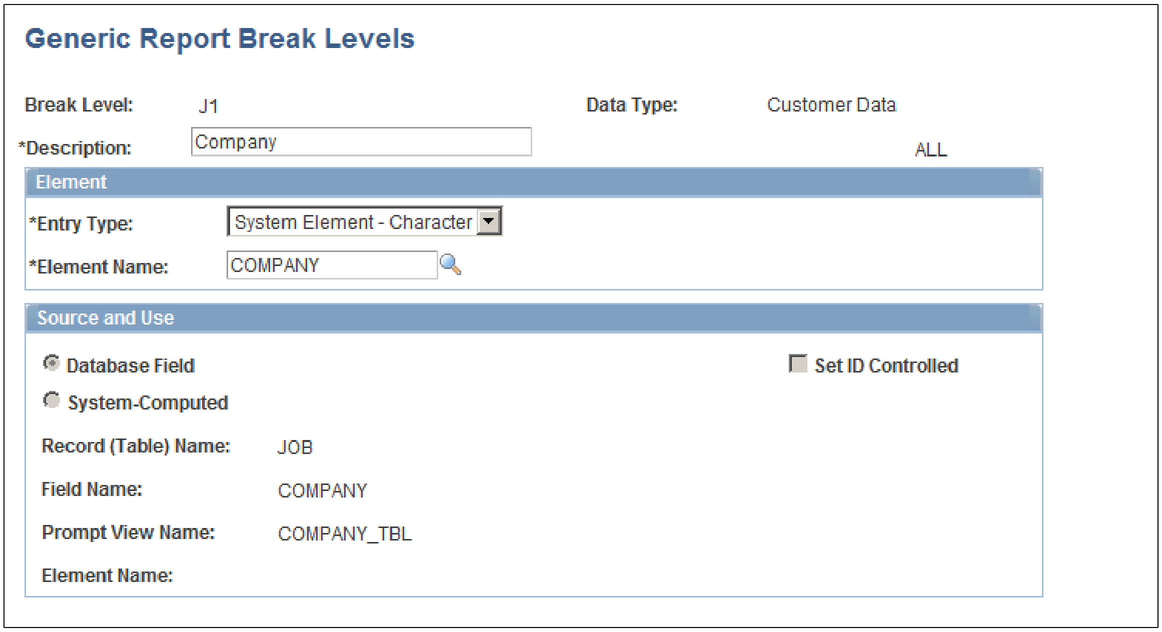
Use the Generic Report Break Levels page (GP_GENRPT_BRK_LVLS) to define break levels.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Generic Report Break Levels, Generic Report Break Levels

Image: Generic Report Break Levels page

This example illustrates the fields and controls on the Generic Report Break Levels page.



Note: If you sort by Department break level, we recommend that you sort by Business Unit first and then by Department.

Break Level A number and/or code that identifies the break level.

Data Type Values are:

System Data: For a PeopleSoft-delivered break level.

Customer Data: For all other break levels.

Description A meaningful description for the break level. This is the heading for the break data that will appear on your report.

Element

Entry Type Select the entry type of the element that you're associating with the break level. Values are *System Element - Character* and *Variable - Character.*

Element Name Select the system element or variable that you're associating with the break level. For example, if you define pay group as the break level, select the GP PAYGROUP element.

Note: Any element selected must be resolved and stored.

Record (Table) Name

If you select *Variable - Character* as the Entry Type, enter the name of the record from which the variable was originally populated.

Field Name

If you select *Variable - Character* as the Entry Type, in addition to entering the name of the record from which the variable was originally populated, you must also specify the field on the record.

Source and Use

If you select a system element, information contained on the Source and Use page of GP_PIN appears in this group box.

Related Links

Working with System Elements

Generic Reports - Definition Page

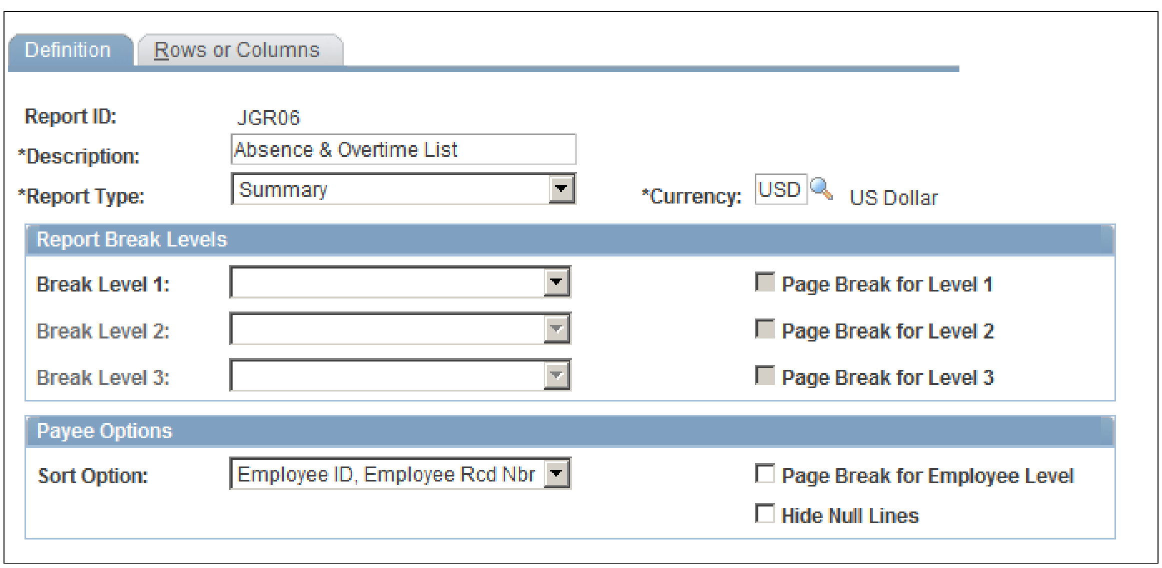
Use the Generic Reports - Definition page (GP_GENRPT_SETUP) to define the report ID and parameters.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Generic Reports, Definition

Image: Generic Reports - Definition page

This example illustrates the fields and controls on the Generic Reports - Definition page.



Report Type

Values are *Summary, List* (element list), and *Accumulators.*

Currency

Define the default currency for the report. Amounts are converted to this currency before processing. You can change the currency on the Create Generic Reports run control page.

Generic reports provide a maximum of 14 print positions for currency amounts. The system changes the number of decimal places, depending on the currency code. Amounts are truncated to 1, 2, or 3 decimal places, depending on the currency. If the currency does not use decimal places, all 14 print positions are available to display amounts.

Report Break Levels

Break Level 1, Break Level 2, and Break Level 3

You can use up to three break levels. If you use multiple break levels, the system sorts first by break level 1, then by break level 2, and last by break level 3. Select from the break levels that you set up on the Break Levels page.

Page Break for Level 1, Page Break for Level 2, and Page Break for Level 3

Select to have a page break at the selected break level on the printed report.

Payee Options

Sort Option

Select a default method for sorting by employee. You can sort by the employee ID and employee record number or by the name and employee record number. When you run the report, you can change the sort option on the run control page.

Page Break for Employee Level

(Summary type only) Select to print a separate page for each employee.

Hide Null Lines

(List and Summary type only). Select to prevent the printing of lines that have a value of 0.

Rows or Columns Page

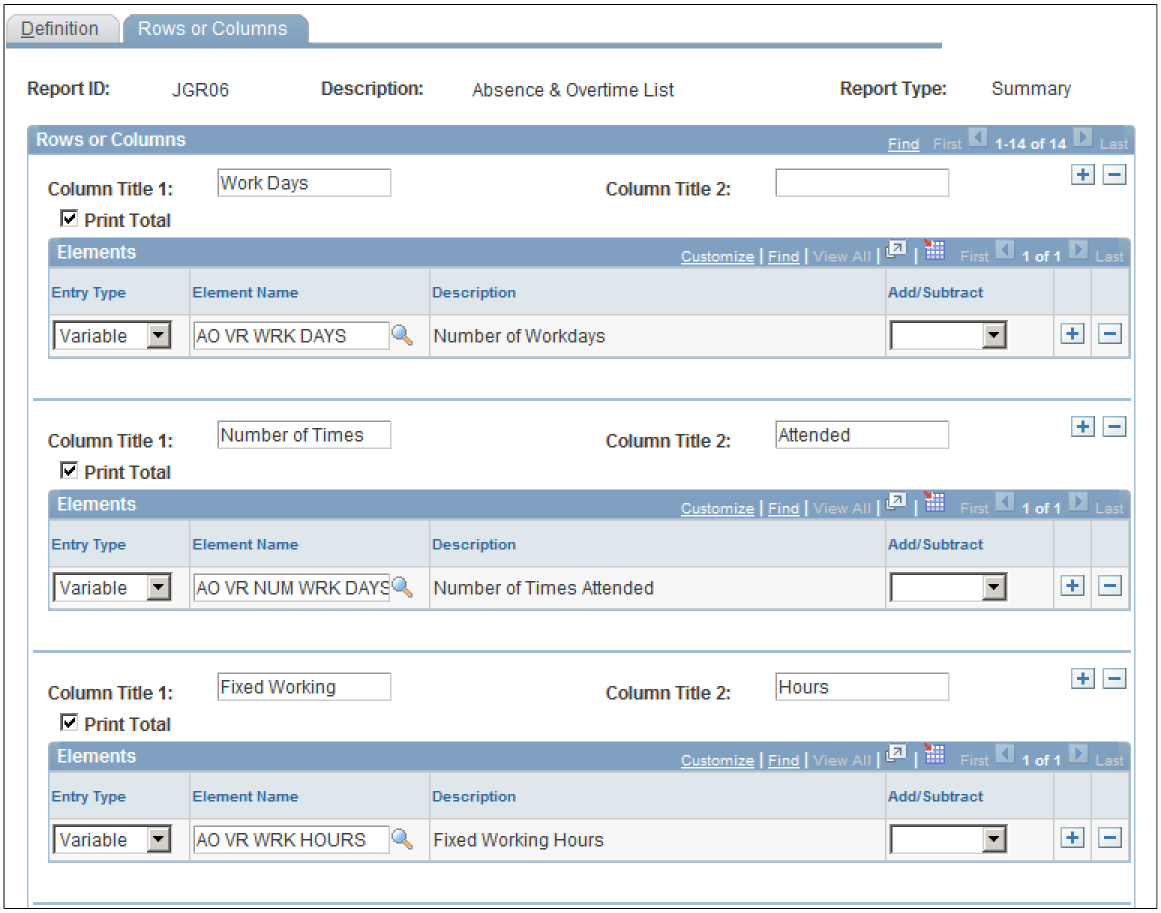
Use the Rows or Columns page (GP_GENRPT_ROW) to define rows or columns and the elements that are to be reported.

Navigation

Set Up HCM, Product Related, Global Payroll & Absence Mgmt, Reports, Generic Reports, Rows or Columns

Image: Rows or Columns page

This example illustrates the fields and controls on the Rows or Columns page.



Different fields appear on this page depending on the report type that you selected on the Generic Reports - Definition page. For all report types, the Column Title, Print Total, Element Name, and Description fields appear.

The following additional fields appear for the specified report type:

List and Summary	***Accumulators***
Entry Type	User Key
Add/Subtract	Label Column
	Label (if Label Column is selected)
	Do not print row if results equal zero
	Print Calendar ID

Rows or Columns

The following table summarizes the type of data in the rows and columns for each report type.

Report Type	*Columns*	*Rows*
List	Element or group of elements	Payees
Summary	Date ranges	Element or elements
Accumulator	Accumulators	Payees

Column Title Define the title for each column. Each title can be two lines with up to 30 characters in each line.

User Key (Accumulator type only) Select a user key for the accumulator. A column is either a user key or an element.

Print Total Select to print totals before a page break.

Print Field Label This check box appears only for Accumulator report types and only for columns that are not user keys. Select to print a label instead of the values for an element in the column. The system prints the text from the Label field.

Do not print row if results equal zero This check box appears only for Accumulator report types and for columns that are not user keys. Select the check box to suppress rows where an accumulator does not have an end date and therefore forwards zero results into each new calendar. Selecting this check box will prevent unwanted and meaningless rows from displaying on the report.

Print Calendar ID This check box appears only for Accumulator report types and only for columns that are not user keys. Select this check box to print the calendar ID of the result row, thereby increasing the readability of the report for calendar groups in which retroactive processing has occurred.

Elements

Select the elements that are to be reported in each row or column.

Entry Type Select the entry type of the element. Values are *Auto Assgn* (auto assigned), *Bracket, Deduction, Earnings, Formula, SystemElem* (system element), and *Variable.*

Element Name Select the element name.

Label Replaces the Description field only for the accumulator report type when you select the Label Column check box for a column that is not a user key or calendar ID. Enter the label that is to be

	printed in the column when the associated element is other than 0.
Add/Subtract	Select whether the element should be added to or subtracted from the total for the column or row.

Note: For Accumulator report types, some precision may be needed. The system obtains all the user keys from the accumulator result table for all the accumulators that are defined in the setup. It then prints the user keys and selects the accumulator results starting from those keys.
In addition, there are cases where accumulators continue to carry forward after an event has completed because the accumulators have not been defined with an end date. In such cases, it may be necessary to identify an accumulator where the results always carry forward as zero and use the Do not print row if results equal zero check box. The above also applies in cases where accumulators have been defined with a storage option of "All Calculations" and the calendar run has encountered retroactive processing. Use the Do not print row if results equal zero check box to suppress the extra unwanted rows.

Running Generic Reports

This topic discusses how to run generic reports.

Run the report after selecting additional run time parameters such as summary or detail payee data, sorting, and begin and end dates.

The run control page triggers:

- The GP_GENRPT Application Engine program. This program prepares parameters for Report Data, which extracts the results for the GPGENRPT SQR process based on the specified run control options and setup.
- The GPGENRPT SQR program. This program reads the absence results from the extracted Report Data results and formats the report.

Selecting Payees and Periods for List and Summary Reports

The List and Summary reports can cover multiple periods. Using the Period ID, the system establishes date and payee parameters. The system will select and report on all payees that have a segment record with the matching Period IDs. When multiple periods are selected for the List Report, the system will sum the results of all segments selected.

Selecting Payees and Periods for Accumulators

The accumulator report covers a single period. Using the Calendar Group ID, the system establishes date and payee parameters. The Calendar Group ID may contain only one period. However, if the Calendar Group has experienced retroactive processing, then additional rows may appear on the report. For this reason we recommend you select the Print Calendar ID check box to help identify any retroactive row.

Page Used to Run a Generic Report

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Generic Reports	GP_GENRPT_RC	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports, Create Generic Reports, Create Generic Reports	Run generic reports.

Running Generic Reports

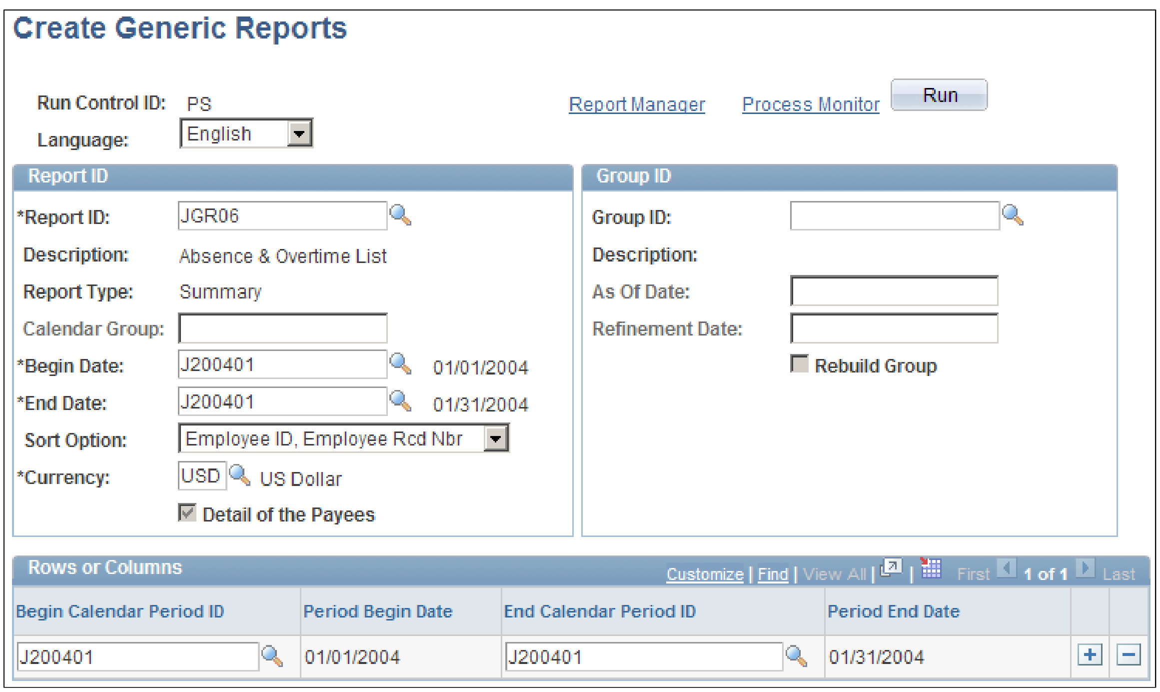
Use the Create Generic Reports page (GP_GENRPT_RC) to run generic reports.

Navigation

Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports, Create Generic Reports, Create Generic Reports

Image: Create Generic Reports page

This example illustrates the fields and controls on the Create Generic Reports page.



To run the report, you must first specify the calendar to include. This is done by either entering Begin and End Dates (for the List and Summary report), or entering the Calendar Group ID (for the accumulator report). Because the List and Summary reports can cover multiple periods of time, enter Period IDs.

Report Type	This field affects the other fields available on this page.
Begin Date	Use this field in combination with the End Date field to construct the report's time frame. The period defined by these

dates must match the dates of a defined absence period. Some report types use the Group ID instead.

End Date Use this field in combination with the Begin Date field to construct the report's time frame. The period defined by these dates must match the dates of a defined pay period. Some report types use the Group ID instead.

Sort Option This field displays the sort option defined on the Generic Reports-Definition page. You can override this value here.

Currency This field displays the currency defined on the Generic Reports-Definition page. You can override this value here.

Detail of the Payees Select to report the details of each payee. If this option is not selected, the report includes only summaries by break level. If you do not define breaks for the report, this option is not available.

Group ID You may select a subset of payees by using the Group ID section and entering a specific Group ID. This Group ID is defined on the Group Build pages in PeopleSoft HR.

As Of Date Specify the effective-date version of the group to report on.

Refinement Date If the group definition includes effective-dated records, enter the date for which you want the records run. For example, to run a group with an effective date of January 1, 1990 and run the effective-dated rows in the group as of February 15, 1998, select an As of Date of January 1, 1990 and a Refinement Date of February 15, 1998.

If you leave this field blank, the system runs the group as of the current date.

Rebuild Group Select to recreate the group before running the generic report.

The Rows and Columns group box appears only for a Summary Type report. The system creates a set of columns for the first 12 months in the reporting period that you define in the Report ID group box. It enters the first and last days of each month in the From Date and the To Date columns. You can manually define different columns for your summary report, up to 12 columns total.

Appendix A

Absence Management Reports

Absence Management Reports: A to Z

The table in this topic lists the PeopleSoft Absence Management reports, sorted by report ID.

For more information about running these reports, refer to:

- The corresponding topic in this product documentation.
- *PeopleTools: PeopleSoft Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft*.
- *PeopleTools: SQR Language Reference for PeopleSoft*

For samples of these reports, see the Report Samples that are published with this online documentation.

Note: The following reports apply only to PeopleSoft Global Payroll: Payroll Results Register (GP000001) and Payroll Results Summary report (GP00003).

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
GP000002 Absence Results Register	Displays, by payee, the results of absence calculations. Reports results by segment. Produce after you calculate or finalize an absence run.	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports, Absence Results Register, Absence Results Register	GP_GPSQR01_PNL
GP000004 Payee Messages	Displays any messages generated from an absence run.	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports, Payroll Messages, Payroll Messages	GP_GPSQR04_PNL
GPGENRPT User-designed generic report, no standard report name.	Define additional runtime parameters and run generic reports.	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports, Create Generic Reports, Generic Report	GP_GENRPT_RC

Related Links

Creating a Results Report

Payroll Messages Page