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# PeopleSoft HCM 9.2: Human Resources Administer Workforce

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## Alpha and Beta Draft Documentation Notice

# Contents



 

# 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.<br><br>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.<br><br>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 Application Fundamentals

*PeopleSoft Human Resources Administer Workforce* provides you with implementation and processing information for your PeopleSoft Human Resources Administer Workforce system.

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft HCM 9.2: Application Fundamentals*. Each PeopleSoft product line has its own version of this documentation.

*PeopleSoft HCM 9.2: Application Fundamentals* consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HCM product line. No matter which PeopleSoft HCM products you are implementing, you should be familiar with the contents of this central. It is the starting point for fundamentals, such as setting up control tables and administering security.

 

## 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

## Contact Us

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 Administer Workforce

## Human Resources Administer Workforce Overview

PeopleSoft Human Resources (HR) Administer Workforce provides the foundation for your human resource management system. The data entered into the Administer Workforce business process is available to all of the Human Resources business processes as well as the other applications in the PeopleSoft HVCM suite.

The Administer Workforce business process includes five basic steps:

1. Setting up the basic codes and formats needed for the business process.

   Before you begin tracking worker data, it's helpful to set up codes to help you streamline human resource processes for such areas as visas and permits, salary classifications, unions, banking, employment contracts, and checklists. Setting up these codes simplifies data entry and helps ensure that you have consistent information in records across all functions of your human resources system—from recruitment to benefits. If you're managing a workforce in Australia, Belgium, Canada, France, Germany, Hong Kong, Italy, Japan, Malaysia, Mexico, The Netherlands, New Zealand, Singapore, Spain, Switzerland, the United Kingdom, or the United States, you'll also set up any codes necessary for administering your workers in those countries.

2. Adding a person's human resources record into the system.

   When you bring a new person into your organization, create a record that includes this information:

   - Personal data, such as name, address, personal relationships, and organizational relationships, such as employee or contingent worker.
   - Job data, such as supervisor, department, job code, and compensation details.

3. Entering additional data into the record.

   In addition to the data that you enter when you add a new record, the data you can track includes:

   - Tenure with your organization.
   - Prior work experience.
   - Company property and credit cards issued to the employee.
   - Business expenses.
   - Emergency contact information.
   - Visas, passports, and other identification data.
   - Driver's license information.

- Bank accounts.
- Volunteer activities.
- Employee membership in unions, works councils, or labor agreements.
- Country-specific information for workers in Australia, Belgium, Brazil, Canada, France, Germany, Hong Kong, India, Italy, Japan, Malaysia, Mexico, The Netherlands, New Zealand, Singapore, Spain, Switzerland, the United Kingdom, or the United States.

4. Updating the record.

   Over time, you'll need to enter changes to a person's human resources record, such as changes of name, address, marital status, and organizational status; promotions; transfers; and leaves of absence. You can also track employee grievances and disciplinary actions imposed on employees by your organization.

5. Viewing and reporting on worker data.

   You can view summary information about your workers and run a variety of different reports to review and analyze your workforce.

### Related Links

"Understanding Manage Labor Administration *(PeopleSoft HCM 9.2: Manage Labor Administration)*"

"Base Compensation and Budgeting *(PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)*"

## Human Resources Administer Workforce Business Processes

PeopleSoft HR Administer Workforce provides these business processes:

- Administer adding a person to the workforce.
- Manage workforce data.
- Administer country-specific functionality.
- Manage country-specific workforce data.
- (USF) Administer Personnel Action Requests and automatic actions.
- (USF) Manage leave.
- Manage workforce reporting.

We discuss these business processes in the business process topics in this documentation.

# Human Resources Administer Workforce Integrations

PeopleSoft HR Administer Workforce integrates with these PeopleSoft applications:

- All PeopleSoft HCM applications.
- Other PeopleSoft applications.
- Other third-party applications.

We discuss integration considerations in the implementation topics in this documentation.

# Human Resources Administer Workforce 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.

PeopleSoft HR Administer Workforce also provides component interfaces to help you load data from your existing system into the Administer Workforce business process tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

| ***Component*** | ***Component Interface*** | ***References*** |
| --- | --- | --- |
| CHKLST_ITEM_TBL | CI_CHKLST_ITEM_TBL | See Creating Checklists. |
| CNT_CLAUSE_TABLE | CNT_CLAUSE_TABLE | See Tracking Workforce Contracts. |
| SALARY_PLAN_TABLE | SALARY_PLAN | See "Setting Up Salary Plans, Grades, and Steps *(PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)*". |

## 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

*PeopleTools: PeopleSoft Setup Manager*

and *PeopleTools: PeopleSoft Component Interfaces*

## Related Links

*PeopleSoft HCM 9.2: Application Fundamentals*

Chapter 2

# Setting Up the Administer Workforce Business Process

## Defining Personnel Actions and Reasons

To set up the Personnel Actions and Reasons tables, use the Actions (ACTION_TBL), FPS Action (FPMACTION_PNL2), Action Reasons (ACTION_REASON_TBL), and Action Reason Report (RUN_PER710) components.

These topics provide an overview of personnel action reasons and discuss how to:

- Define or review personnel actions.
- Define personnel action reasons.

## Understanding Personnel Action Reasons

In the course of maintaining information in the Administer Workforce business process, you'll enter changes to worker data resulting from such activities as promotions, transfers, terminations, salary increases, and leaves of absence. Each of these activities is called a *personnel action,* and you use them to enter and update employee data on the Job Data - Work Location page and the Data Control page. The codes classifying the types of personnel actions that you'll perform are stored in the Actions table.

You'll often have different reasons for performing the same type of personnel action for workers. For example, you could enter the action *leave of absence* for one person for maternity or paternity leave, for another person because of military service obligations, and for yet another person for health reasons.

So that you can easily identify the causes of changes made to worker data, you can designate reasons for taking personnel actions. The Human Resources system already contains some reasons for actions, but you'll probably want to add others that apply specifically to your company. To do so, use the Action Reasons page.

**Note:** The PeopleSoft application delivers various actions and action reason codes. You should be familiar with the rules associated with the action and take into consideration the benefit statuses associated with in the action reasons when determining which action and reason codes are best for your organization.

**Note:** To view a complete list of all actions and reasons already defined within the system, generate the Action Reason Table report (PER710).

### Positions and Action Reasons

If you're driving part or all of PeopleSoft Human Resources by position, you'll want to enter reasons for changes to position data also (on the Position Data 1 page). For example, you might enter a personnel action of *Position Change* because of a reorganization of your company; a change in position title; a job reclassification; or, when you transfer employees to other positions, you need to change the position numbers (and related data) assigned to them.

To add action reasons pertaining to position change actions, use the action code *POS* (position change).

### Global Assignments and Action Reasons

If you send workers on global assignments, you'll probably want to identify reasons for the assignments (on the Home/Host Data page). For example, you might process some assignments that are due to a transfer of skills and others due to a local shortage of skilled personnel. To track assignment types more easily, you'll find it helpful to specify reasons for them.

To set up reasons specific to global assignments, use the action codes *ASG* (assignment) and *ASC* (assignment completion).

## Pages Used to Define Personnel Actions and Personnel Action Reasons

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Actions | ACTION_TBL_GBL | Set Up HCM, Product Related, Workforce Administration, Actions, Actions | Define or review a personnel action code and its values. |
| Reason Summary | ACTION_TBL2 | Set Up HCM, Product Related, Workforce Administration, Actions, Reason Summary | Display the list of reasons for a specific action code. |
| FPS Action | FPMACTION_PNL2 | Set Up HCM, Product Related, Workforce Administration, Actions, FPS Action | (French Public Sector). This page displays if you have French Public Sector selected on the Installation table. Use this page to assign the FPS components that can use the action code. This page is discussed in the PeopleSoft HR: Manage French Public Sector *(PeopleSoft HCM 9.2: Human Resources Manage French Public Sector)*. |
| Action Reasons | ACTRSN_TBL_GBL | Set Up HCM, Product Related, Workforce Administration, Action Reasons, Action Reasons | Define personnel action reasons or modify existing action reasons. |
| Action Reason Table | RUN_PER710 | Set Up HCM, Product Related, Workforce Administration, Action Reason Report, Action Reason Table | Run the Action Reason Table report (PER710). This report lists the reason codes for each personnel action code and arranges them alphabetically by action. |

# Actions Page

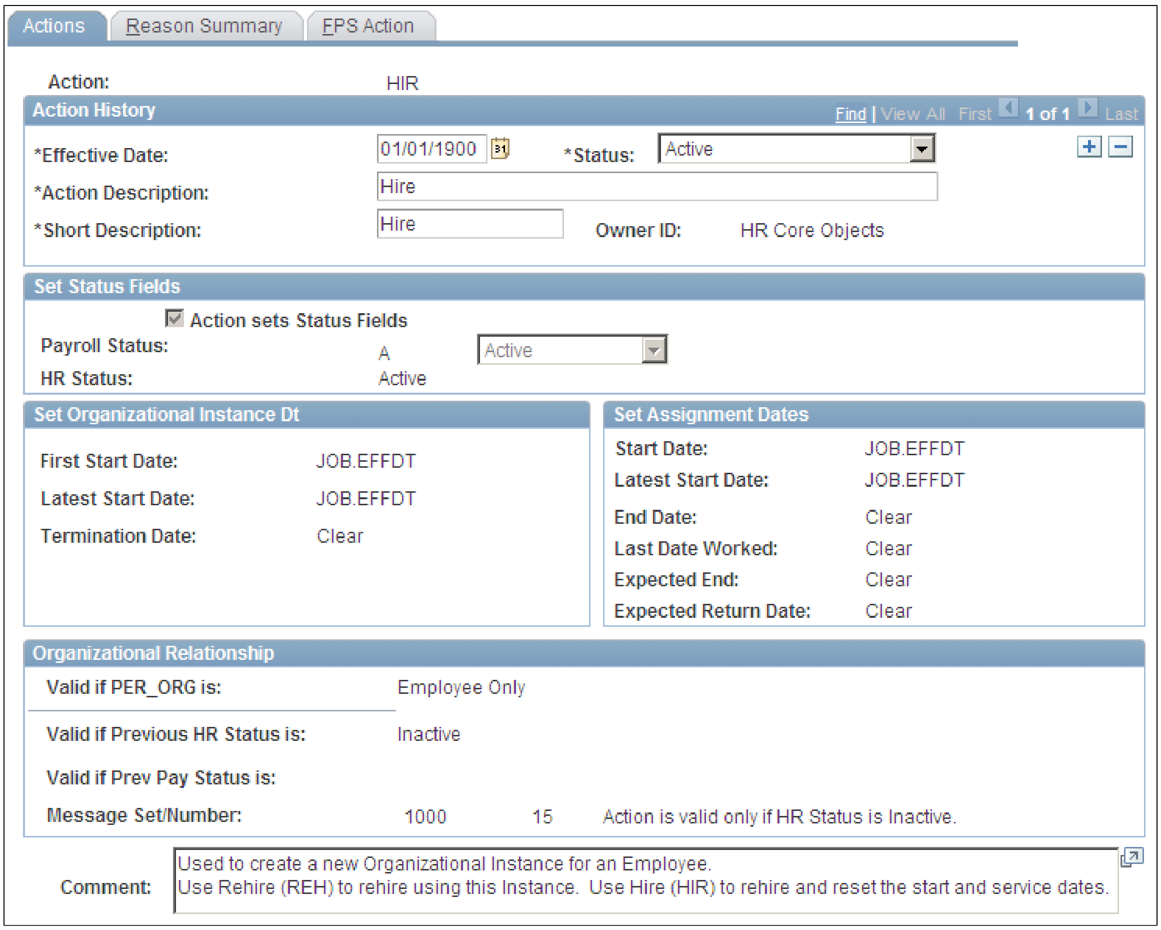
Use the Actions page (ACTION_TBL_GBL) to define or review a personnel action code and its values.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Actions, Actions

**Image: Actions page**

This example illustrates the fields and controls on the Actions page. You can find definitions for the fields and controls later on this page.




## Set Status Fields

**Action sets Status Fields**

Select this check box to identify actions that cause changes to Status and Date fields for the person receiving this action. When this check box is selected, the Set Organizational Instance Dt and Set Assignment Dates regions, as well as the other fields in the Set Status Fields region, are displayed.

**Payroll Status**

Select the payroll status (EMPL_STATUS) of the person receiving this action. Values are: *Active, Deceased, Leave With Pay, Leave of Absence, Retired, Retired With Pay, Retired-Pension Administration, Short Work Break, Suspended,* *Terminated, Terminated Pension Pay Out,* and *Terminated With Pay.*

**HR Status** Identifies the status of the person receiving this action for HR purposes.

### Set Organizational Instance Dt (Set Organizational Instance Date)

**First Start Date andLatest Start Date** Select the action table value to use when this action causes the job record for a person to be updated. The First Start Date is the first date that this instance is active for a person receiving this action. For example, in an employee relationship, this is the Hire Date. The Latest Start Date is the latest date that this instance was renewed. For example, in an employee relationship, this is the re-hire date. The HIR or ADD actions modifies both the First Start Date and the Latest Start Date to the effective date of the Job row. On a Rehire or Renew action, only the Latest Start Date is changed. These dates are only captured on the organizational instance level, not for additional assignments. The values are: *JOB.EFFDT* and *No Action.*

**Termination Date** Select the action table value used to determine how to set the termination date for an assignment. The values are: *Clear, JOB. EFFDT-1,* and *No Action.*

### Set Assignment Dates

**Start Date** Select the action table value used to determine how to set the date on which an individual assignment starts. The Hire (HIR), Add Contingent Worker (ADD), and Add Person of Interest (POI) actions, as well as the Additional Job (ADL) and Assignment (ASG) actions, set this value

The values are: *JOB.EFFDT* and *No Action.*

**Latest Start Date** Select the action table value used to determine how to set the date on which an individual assignment is restarted. The Rehire (REH) and Renewal (RNW) actions, as well as all the actions that set the start date, set this value.

The values are: *JOB.EFFDT* and *No Action.*

**End Date** Select the action table value used to determine when an assignment is stopped. The values are: *Clear, JOB.EFFDT-1,* and *No Action.*

**Last Date Worked** Select the action table value used to determine the last date that the person was actively working prior to a termination or a leave action. The values are: *Clear, JOB.EFFDT-1,* and *No Action.*

**Expected End** Select whether or not to clear the expected end date on the job record. The values are: *Clear* and *No Action.*

**Expected Return Date**

Select whether or not to clear the expected return date on the job record. For example, when a person goes on temporary leave. When the person returns from leave, the expected return date should be cleared. The values are: *Clear* and *No Action.*

### Organizational Relationship

**Valid if PER_ORG is**

Indicate whether this action is valid only for certain organizational relationships. Values are: *Contingent Worker Only, Contingent Worker or POI, EMP, CWR, or POI, Employee Only, Employee or Contingent Worker,* or *Person of Interest Only.*

**Valid if Previous HR Status is**

Indicate that this action is only valid if the job assignment is in the selected HR status. For example, an action of HIR cannot be entered if the prior HR Status is Active. The values are: *Active*and *Inactive.*

**Valid if Prev Pay Status is (Valid if Previous Pay Status is)**

Indicate that this action is only valid if the job assignment is in the selected status. For example, a return from leave action can only be entered if the previous pay status in a Leave status. The values are: *P/L – Any Leave, P/L – Disability Leave, S – Suspended,* and *W – Short Work Break.*

**Message Set/Number**

Choose the Message Set Number and Message Number to determine the error message used for the Valid if Previous HR Status is or Valid if Prev Pay Status is settings.

## Action Reasons Page

Use the Action Reasons page (ACTRSN_TBL_GBL) to define personnel action reasons or modify existing action reasons.

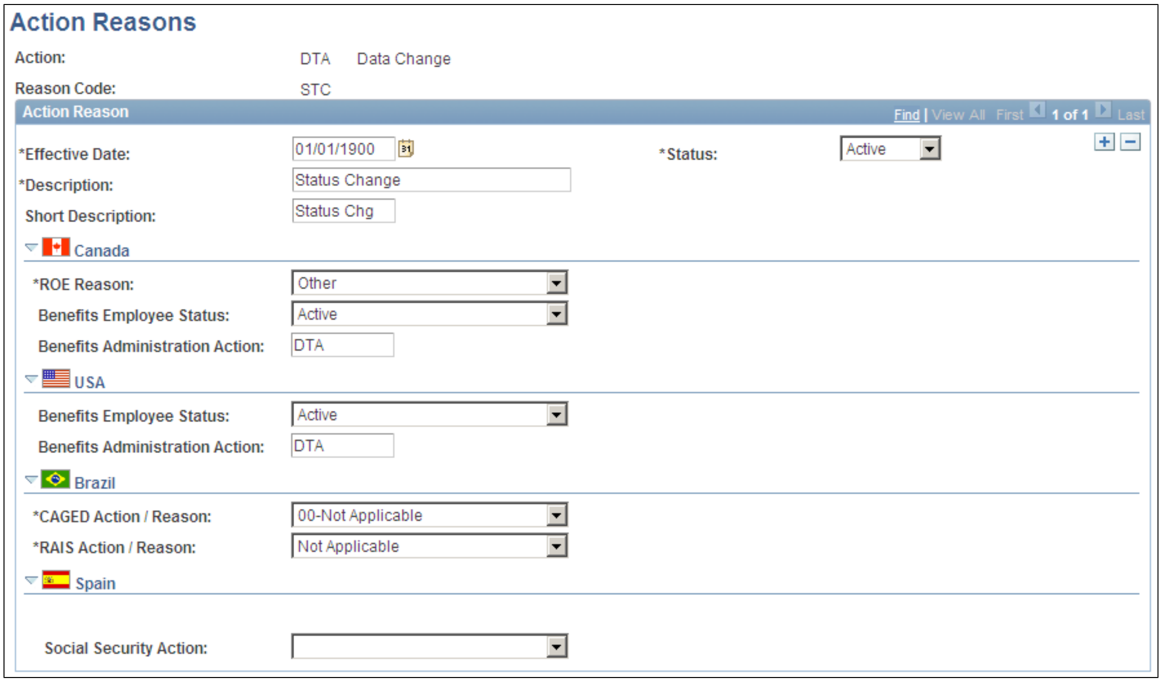
 

### Navigation

Set Up HCM, Product Related, Workforce Administration, Action Reasons, Action Reasons

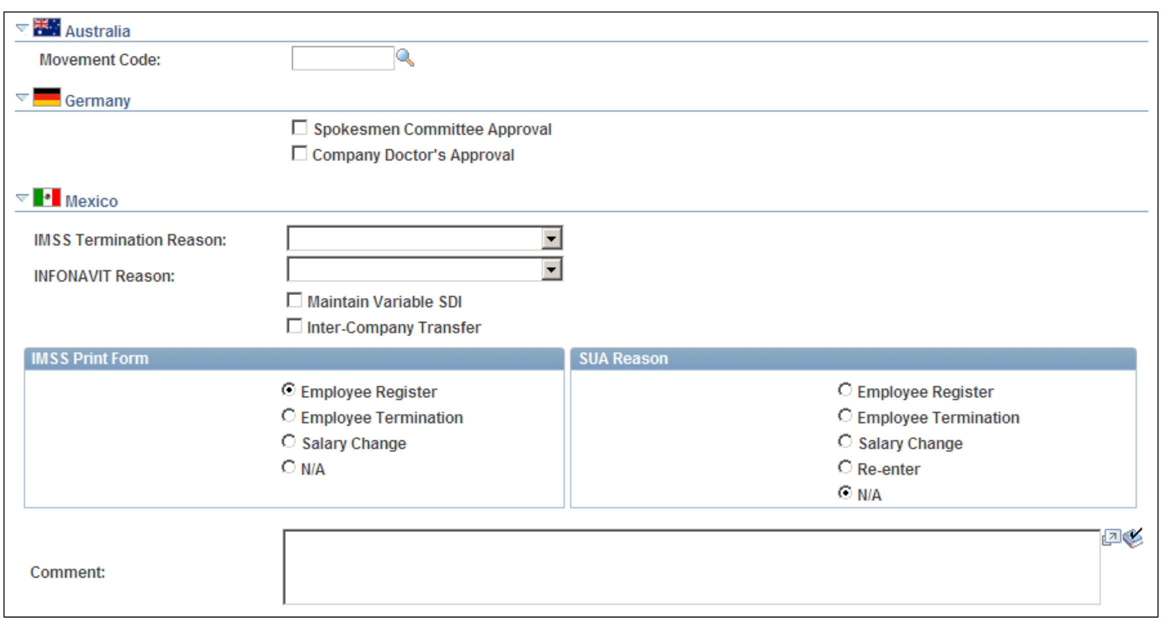
### Image: Action Reasons page (1 of 2)

This example illustrates the fields and controls on the Action Reasons page (1 of 2). You can find definitions for the fields and controls later on this page.




### Image: Action Reasons page (2 of 2)

This example illustrates the fields and controls on the Action Reasons page (2 of 2). You can find definitions for the fields and controls later on this page.



**Note:** Effective-dated fields include the description and status as well as country-specific sections for Canada, USA, Brazil, and Spain. Other fields on this page, including the comments and the sections for Australia, Germany, and Mexico are not effective dated.

## (CAN) Canada

| | |
|---|---|
| **Canadian ROE Reason (Canadian record of employment reason)** | Select a Canadian ROE reason, such as *Return to School* or *Pregnancy.* Valid values are defined by the Canadian government. |
| **Benefits Employee Status** | Select the status associated with this action. |
| **Benefits Administration Action** | If a particular action and reason code combination affects benefits in some way, enter the PeopleSoft Benefits Administration event classification for that combination in the Benefits Administration Action field. The Benefits Administration process will use this information to determine what rules to apply when evaluating eligibility for, and availability of, benefit option changes in response to this personnel action. |

## (USA) United States

| | |
|---|---|
| **Benefits Employee Status** | Select the status associated with this action. |
| **Benefits Administration Action** | If a particular action and reason code combination affects benefits in some way, enter the PeopleSoft Benefits Administration event classification for that combination in the Benefits Administration Action field. The Benefits Administration process will use this information to determine what rules to apply when evaluating eligibility for, and availability of, benefit option changes in response to this personnel action. |

## (BRA) Brazil

| | |
|---|---|
| **CAGED Action / Reason (Cadastro Geral de Empregados e Desempregados action/reason)** | Enter the type of CAGED entry to report for actions with this reason. |
| **RAIS Action / Reason (Relação Anual de Informações Sociais action/ reason)** | Enter the type of action to report to RAIS for actions with this reason. |

## (ESP) Spain

| | |
|---|---|
| **Social Security Action** | Select the social security action associated with this action reason. |

## (AUS) Australia

| | |
|---|---|
| **Movement Code** | Select the appropriate Public Service Merit Protection Commission (PSMPC) movement code for the employment status change. |

## (DEU) Germany

| | |
|---|---|
| **Spokesmen Committee Approval** | Select this check box as an action reason, if applicable. |
| **Company Doctor's Approval** | Select this check box, if relevant, for this action reason. |

## (MEX) Mexico

IMSS requires a notification for every hire, termination, and salary rate change. Once you've defined the details, these notifications are generated automatically by the system.

| | |
|---|---|
| **IMSS Term** | Select the reason for termination. Values are: *Agreement, Collective Termination, Employee Death, Employee Transfer, Inability, Lay-off, Leave, Mental or Physical Disability, N/A, Pension-Off, Retirement, Voluntary Renounce,* and *Work Risk Disability.* |
| **INFONAVIT Reason** | Select a reason to indicate to INFONAVIT why the INFONAVIT loan payments will stop. Values are: *Death, Disability, Disengage, Never Work, Other, Retirement,* and *Transfer.* |
| **Maintain Variable SDI** | Select this check box to maintain variable SDI. |
| **Inter-Company Transfer** | Select this check box to indicate that the action and reason code combination is valid for processing of inter-company transfers in Global Payroll for Mexico. The Inter-Company Transfer Application Engine process (GPMX_INTERC) triggers for processing only the action and reason code combinations that you indicate by selecting this check box. |
| **IMSS Print Form** | Select the reason for a change in a worker's information. This is done to notify IMSS when an person is hired, rehired, terminated, or has a salary change. Values are: *Employee Register, Employee Termination, Salary Change,* and *N/A* (not applicable). |
| **SUA Reason** | Select the reason that gets printed on the SUA notification. Values are: *Employee Register, Employee Termination, Salary Change, Re-enter,* and *N/A* (not applicable). |

## Related Links

*PeopleSoft HCM 9.2: Manage Labor Administration*

# (USF) Defining Award Actions

To set up the (USF) Award Actions tables, use the Award Actions (GVT_AWD_ACTN), and Award Type Table (RUN_FGPER810) components.

This topic discusses how to set up award actions.

## Pages Used to Define Award Actions

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Award Actions | GVT_AWD_ACTN | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Award Actions, Award Actions | Define award codes for monetary and nonmonetary awards types. |
| Award Type Table | PRCSRUNCNTL | Workforce Administration, Job Information, Reports, Award Action (USF), Award Type Table | Run the Award Type table report (FGPER810). |

## Award Actions Page

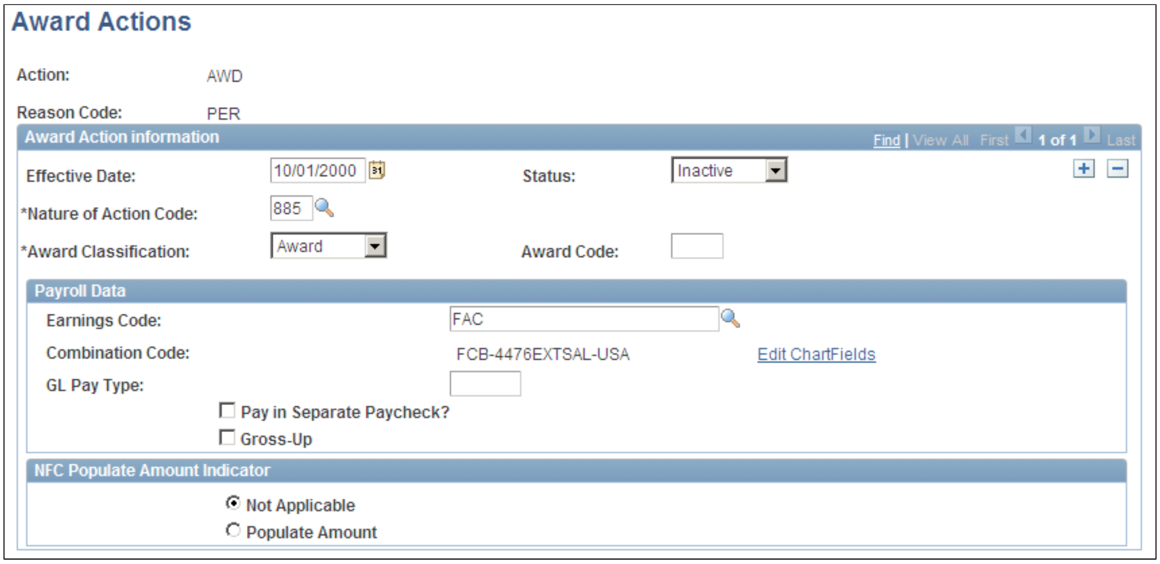
Use the Award Actions page (GVT_AWD_ACTN) to define award codes for monetary and nonmonetary awards types.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Award Actions, Award Actions

### Image: Award Actions page

This example illustrates the fields and controls on the Award Actions page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Nature of Action Code** | Enter the reason associated with this award action. |
| **Award Classification** | Select the award classification, either *Award* or *Bonus.* |
| **Award Code** | Enter the NFC-defined code that identifies the bonus or award. The entry in this field becomes the default value on the Award Data page for this action reason and is read only. |

## Payroll Data

| | |
|---|---|
| **Earnings Code** | Select an earnings code to associate with this award action. |
| **Combination Code andEdit ChartFields** | Displays the key that defines a combination of ChartFields. Click the Edit ChartFields link to access the ChartFields Details page. |
| **GL Pay Type (general ledger pay type)** | Select the pay type to associate with this award action. |
| **Pay in Separate Paycheck?** | Select if this award action should be paid in a separate check. |
| **Gross-Up** | Select to indicate the award or bonus amount must be grossed-up for payroll purposes. |

### NFC Populate Amount Indicator

| | |
|---|---|
| **Not Applicable orPopulate Amount** | The default selection is Not Applicable.<br><br>Select Populate Amount to define a relocation or recruiting bonus that is granted to an employee though a personnel action:<br><br>• For a relocation bonus, this setting triggers the system to populate the *GVT_NFC_RELBON_AMT* NFC-specific export field with the award amount when the action code is *BON* (bonus) and the reason code is *REL* (relocation).<br><br>• For a recruiting bonus, this setting triggers the system to populate the *GVT_NFC_RECBON_AMT* NFC-specific export field with the award amount when the action code is *BON* (bonus) and the reason code is *REF* (referral).<br><br>**Note:** These fields are not visible to the user. |

### Related Links

Award Data Page

## Setting Up Smart HR Templates

To set up Smart HR templates, use the Template Record/Field (HR_TBH_RECDEFN), Template Section (HR_TBH_SECDEFN), Template Transaction Type (HR_TBH_TXN_TBL), Copy Transaction Type (HR_TBH_COPY_TXN), Template Creation (HR_TBH_CREATION), Copy Template (HR_TBH_COPY), and Template Category Table (HR_TBH_CTG_TBL) components.

These topics provide an overview of Smart HR Templates, list common elements used to setup up Smart HR templates, and discuss how to:

- Define template records and fields.
- Set up template sections.
- Define template section field configurations.
- Define template categories.
- Define template transaction types.
- Identify components that should be updated by a template.
- Specify label details.
- Specify sections that should be available for a template.
- Copy a template transaction.
- Create a Smart HR template.

- Configure a Smart HR template.
- Set up the Smart HR template pages.
- Identify the Smart HR Transactions page tab names.
- Set up Smart HR template sections.
- Configure the fields for a section.
- Set up Smart HR template person rules.
- Copy a Smart HR template.

## Understanding Smart HR Templates

Smart HR templates are a simplified and streamlined approach to completing various transaction processes, such as hiring, updating a person’s personal or job data, or managing a person’s profile data. Smart HR templates are created and configured by the template administrator, someone who is very familiar with your organization's HR transaction processes. After the template administrator has created and tested templates, line managers or human resources (HR) representatives can use these templates for hiring, managing personal or job data or maintain profile information. Access to the various Smart HR transaction templates is based on the security rules that you establish.

The template administrator determines the following aspects of each transaction template:

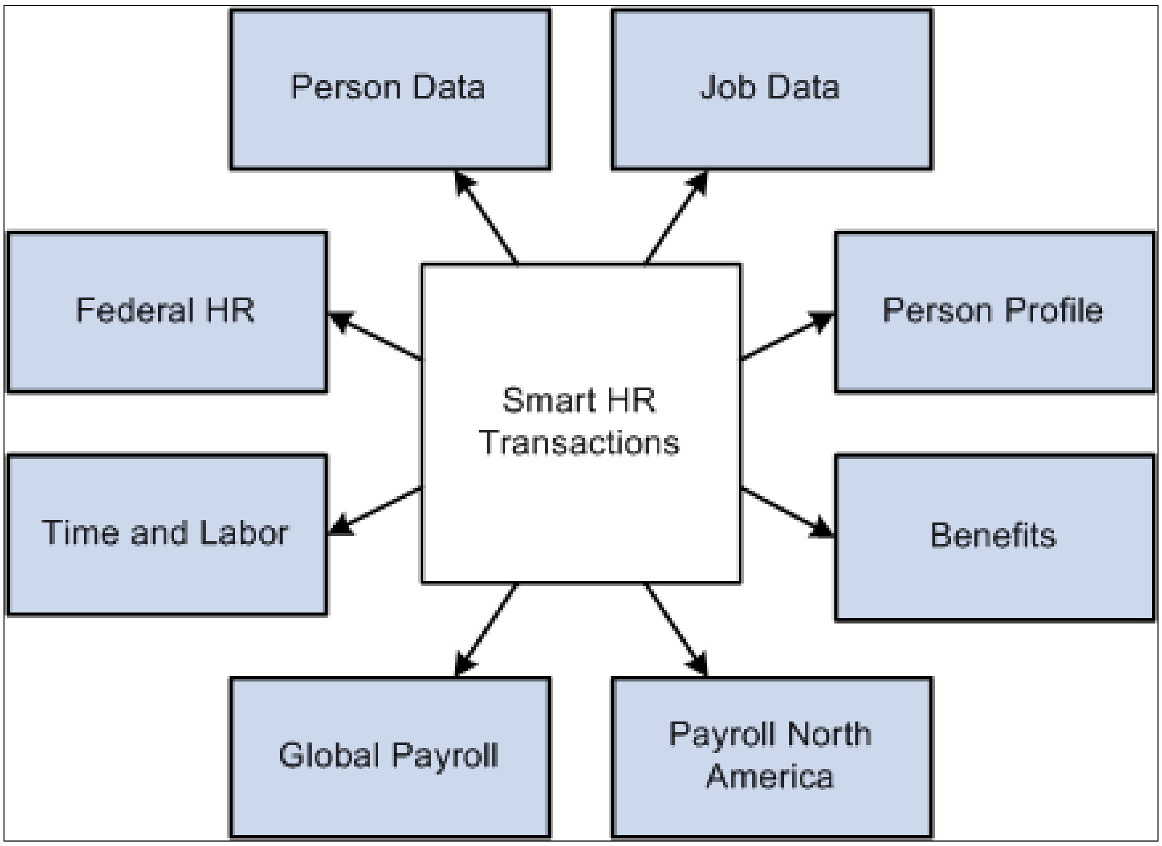
- The sections, or logical groupings of fields, that are included in a transaction type and template, as well as the sequence in which the sections appear of the template pages.
- The sequence of fields within a section.
- Default values for fields.
- Hidden fields.
- Display-only fields.
- If data entered by the end user can be directly submitted for processing or must be reviewed by an HR administrator.

The template administrator can test a template by performing a mock transaction, like a hire, without actually applying the transaction to the system.

**Image: Smart HR Integration**

This diagram shows the integration between the Smart HR template process and other products. Template administrators can create templates that enable the user to enter or update person, job, or profile data. This data populates the person, job, and profile records in the core HR and federal HR systems, and it provides default values for the PeopleSoft Benefits, Global Payroll, Payroll for North America, and Time and Labor applications:




## Smart HR Template Security

Implement security for the Smart HR template and transaction components using PeopleTools permission lists and roles. This table lists the role, permission list, and components:

| ***Role*** | ***Permission List*** | ***Components*** |
| --- | --- | --- |
| HR Template Setup | HCCPHR3321 | HR_TBH_RECDEFN<br>HR_TBH_SECDEFN<br>HR_TBH_TXN_TBL<br>HR_TBH_COPY_TXN |

**Note:** The template setup components have no row-level security.

Implement security for using the Smart HR templates through the existing Human Capital Management row-level security. Smart HR templates use the following fields for security: Template ID, Organizational Relationship *(Employee* or *Contingent Worker),* Transaction Type, Country, and Category.

See Understanding Smart HR Templates.

See "Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Delivered Smart HR Template Sections

The fields available for templates are grouped into sections, like group boxes. For example, you may have a Work Location - Job Fields section that includes fields to enter a company, department, and location code. You can determine which sections and the order in which the sections should be presented to the end user when creating a Smart HR template. Sections and their fields are delivered as system data. Sections are maintained in the Template Section component (Set Up HCM, Product Related, Workforce Administration, Smart HR Templates, Template Section). These delivered sections can be modified within your templates to suit your organization's needs for hiring.

The following table lists the delivered Personal Data sections used for template creation:

| ***Section Number*** | ***Section Name*** | ***Countries with Country Specific Sections*** |
|---|---|---|
| 10 | Name | BEL, BRA, CHE, CHN, DEU, ENG, ESP, FRA, HKG, ITA, JPN, MEX, and NLD |
| 20 | Birth Information | |
| 40 | Data Protection | |
| 50 | Gender | |
| 60 | Education | |
| 70 | Person Marital Status | |
| 80 | Language | |
| 85 | Person Student Status | |
| 90 | Alternate ID | |
| 100 – 108 | National ID | AUS, BEL, BRA, CAN, CHE, CHN, DEU, ESP, FRA, GBR, HKG, IND, IRL, ITA, JPN, MEX, MYS, NLD, SGP, THA, and USA |

| ***Section Number*** | ***Section Name*** | ***Countries with Country Specific Sections*** |
|---|---|---|
| 120 – 121 | Address | AUS, BEL, BRA, CAN, CHE, CHN, DEU, ESP, FRA, GBR, HKG, IND, ITA, JPN, MEX, MYS, NLD, NZL, SGP, and USA<br>GBL (global address) |
| 125–128 | IM Chat | |
| 130 – 133 | Personal Phone | |
| 135 – 136 | E-mail Address | |
| 140 | Ethnic Group | AUS, CHN, MYS, NZL, SGP, and THA |
| 145 | Religion | AUS, CHN, MYS, NZL, SGP, and THA |
| 147 | Person Hukou Data – China | CHN |
| 148 | Person Working Life – China | CHN |
| 150 | Person Smoker Status | CAN, JPN, and USA |
| 210 | General Registration – Brazil (Registro Geral) | BRA |
| 211 | CTPS – Carteira de Trabalho e Previdencia Social | BRA |
| 212 | Voter Registration – Brazil | BRA |
| 213 | Military Registration – Brazil | BRA |
| 214 | PIS/PASEP | BRA |
| 220 | Diversity | CAN |
| 221 | Health Care | CAN |
| 230 | Guardianship | CHE |
| 231 | Place of Origin | CHE |
| 240 | HR Responsibility | DEU |
| 241 | Military Status | DEU |
| 242 | Nationality | DEU |

| **_Section Number_** | **_Section Name_** | **_Countries with Country Specific Sections_** |
|---|---|---|
| 260 | Personal Data – France | FRA |
| 270 | Diversity | GBR |
| 280 | Diversity | IND |
| 290 | Military Status | ITA |
| 300 | Honseki Prefecture | JPN |
| 310 | Personal Data – Mexico | MEX |
| 320 | Diversity | USA |
| 330 | Personal Data – United States | USA |

The following table lists the delivered Job Data sections used for template creation:

| **_Section Number_** | **_Section Name_** | **_Countries with Country Specific Sections_** |
|---|---|---|
| 400 | Work Location – Job Indicator | |
| 410 | Work Location – Position Data | |
| 420 | Work Location – Expected Job End Date | |
| 430 | Work Location – Job Fields | |
| 431 | Work Location – Spain | ESP |
| 432 | Work Location – Japan | JPN |
| 435 | Work Location – Military | |
| 440 | Job Information – Job Code | |
| 450 | Job Information – Reporting Information | |
| 460 | Job Information – Status | |
| 470 | Job Information – Employee Classification | |
| 480 | Job Information – Shifts | |
| 490 | Job Information – Standard Hours | |

| ***Section Number*** | ***Section Name*** | ***Countries with Country Specific Sections*** |
|---|---|---|
| 500 | Job Information – Contract | |
| 505 | Job Information – Military | |
| 510 | Job Information | AUS, BEL, BRA, DEU, ESP, FRA, GBR, ITA, MEX, MYS, NLD, and USA |
| 511 | Job Information – Australian Higher Education | AUS |
| 520 | Job Labor – Bargaining Unit and Labor Agreement | |
| 530 | Job Labor – Employee Categories | |
| 540 | Job Labor – Union Code | |
| 550 | Job Labor – Exemptions | |
| 560 | Job Labor | DEU, ESP, FRA, IND, and ITA |
| 570 | Payroll – Payroll System | |
| 580 | Job – Absence System (Payroll) | |
| 590 | Payroll – Payroll Information | |
| 600 | Job – Global Payroll/Absence Information | |
| 610 | Payroll – Balance Group Number | AUS, HKG, MYS, NZL, and SGP |
| 620 | Job – Salary Plan | |
| 625 | Military (Salary Plan) | |
| 630 | Job Compensation – Payroll Currency and Frequency | |
| 640 | Job Compensation – Auto Calc Premium | |
| 650 | Job Compensation – Pay Components | |
| 655 | Oracle Workforce Scheduling – Job Flag | |
| 660 | Employment Information – Original Start Date | |

| ***Section Number*** | ***Section Name*** | ***Countries with Country Specific Sections*** |
|---|---|---|
| 670 | Employment Information – Organizational Assignment Data | |
| 675 | Employment Information – Military | |
| 680 | Employment Information – Additional Data | |
| 690 | Employment Information | BEL, BRA, CAN, JPN, NLD, and USA |
| 690 | Festive Advance | MYS and SGP |
| 691 | Employment Information – E & G | CAN and USA |
| 700 | Benefit Program – Benefit Record Number | |
| 710 | Benefit Program – Benefit Status | |
| 720 | Benefit Program – Ben Admin Eligibility | |
| 730 | Benefit Program – Participation | |
| 740 | Time Reporter Status | |
| 750 | Time Reporter Type | |
| 760 | Time Reporter IDs | |
| 770 | Time Reporter Type – Rule Elements | |

(USF) The following table lists the delivered Federal sections used for template creation:

| ***Section Number*** | ***Section Name*** | ***Industry Specific Section Type*** |
|---|---|---|
| 10 | Data Control Dates & Action | Federal |
| 20 | Data Control Codes | Federal |
| 30 | Data Control PAR Request | Federal |
| 40 | Data Control PAR Remarks | Federal |
| 41 | Data Control PAR Remarks | Federal |
| 42 | Data Control PAR Remarks | Federal |

| ***Section Number*** | ***Section Name*** | ***Industry Specific Section Type*** |
|---|---|---|
| 43 | Data Control PAR Remarks | Federal |
| 44 | Data Control PAR Remarks | Federal |
| 50 | Tracking Data | Federal |
| 60 | Name | Federal |
| 70 | Gender and Other Personal Data | Federal |
| 80 | Citizenship Status | Federal |
| 90 | National ID | Federal |
| 100 | Additional Birth Information | Federal |
| 110 | Home Address | Federal |
| 111 | Mailing Address | Federal |
| 121 | Personal Phone Number 01 | Federal |
| 122 | Personal Phone Number 02 | Federal |
| 123 | Personal Phone Number 03 | Federal |
| 124 | Personal Phone Number 04 | Federal |
| 130 | Veterans Information | Federal |
| 140 | Marital Information | Federal |
| 150 | Education Details | Federal |
| 160 | Position Number | Federal |
| 170 | Job Data | Federal |
| 180 | Position Data | Federal |
| 190 | Compensation | Federal |
| 200 | Compensation - Quoted Pay | Federal |
| 210 | Other Pay Information | Federal |
| 220 | Accounting Information | Federal |

| ***Section Number*** | ***Section Name*** | ***Industry Specific Section Type*** |
|---|---|---|
| 230 | Dates | Federal |
| 240 | Expiration Dates | Federal |
| 250 | Appointment Data | Federal |
| 260 | Service Computation Dates | Federal |
| 270 | Service Conversion Dates | Federal |
| 280 | Within-Grade Increase Data | Federal |
| 290 | Union Data | Federal |
| 300 | Permanent Data RIF | Federal |
| 310 | Probation Dates | Federal |
| 320 | Retained Grade Expires | Federal |
| 330 | Non-Pay Data | Federal |
| 340 | Security Information | Federal |
| 350 | Benefits System | Federal |
| 360 | Benefits Control | Federal |
| 370 | Benefits Administration Eligibility | Federal |
| 380 | FEHB Eligibility | Federal |
| 390 | FEHB Date | Federal |
| 400 | NFC Benefits Coverage | Federal |
| 410 | FEGLI Data | Federal |
| 420 | Retirement Data | Federal |
| 430 | FICA Status | Federal |
| 440 | NFC Military Service Deposit | Federal |
| 450 | Time and Labor - Reporter Status | Federal |
| 460 | Time and Labor - Reporter Type | Federal |

| ***Section Number*** | ***Section Name*** | ***Industry Specific Section Type*** |
|---|---|---|
| 470 | Time and Labor - Reporter Ids | Federal |
| 480 | Time and Labor - Rule Elements | Federal |

The following table lists the delivered Manage Profile sections used for template creation:

| ***Section Number*** | ***Section Name*** | ***Countries with Country Specific Sections*** |
|---|---|---|
| 805 | JPM Competencies | |
| 806 | JPM Responsibilities | |
| 810 | JPM Honors and Awards | FRA |
| 811 | JPM Language Skills | |
| 812 | JPM Licenses and Certifications | |
| 813 | JPM Memberships | |
| 814 | JPM Tests | |
| 815 | JPM School Education | |
| 816 | JPM Degrees | AUS, DEU, and JPN |
| 817 | JPM Areas of Study | |
| 818 | JPM Special Projects | E&G |
| 819 | JPM Current Location | |
| 820 | JPM Location Preferences | |
| 821 | JPM Geographic Preferences | |
| 822 | JPM International Preferences | |
| 823 | JPM Travel Preferences | |

As the template administrator, you can use the section label name listed, or create a text catalog entry for those fields in which you want to change the label.

## Required and Recommended Sections within a Hire Template

These sections are required when creating a hire template:

- NAME_01_*xxx* (Names) - where *xxx* is the country code.
- BIRTH_INFO (Birth Information)
- GENDER (Gender)
- JOB_PAYROLL_SYSTEM (Payroll System)

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**Note:** The Name, Birth Information, and Gender sections are sequentially listed before the National ID section. Oracle highly recommends that you keep this order in the PeopleSoft Smart HR template for the National ID validations to work properly for certain countries.

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Oracle recommends that these sections be included in the PeopleSoft Smart HR hire template:

- WORK_LOC_JOB_FLDS (Work Location - Job fields)
- JOB_ABSENCE_SYSTEM (Absence System)
- JOB_PAYROLL_INFO (Payroll Information)
- JOB_COMP_PAY_CMPNT (Job Compensation - Pay Components) or JOB_SALARY_PLAN (Job - Salary Plan)
- BEN_PROG_BEN_STAT (Benefit Status)

## Multiple Instances of an Element in a Template

The Template Record Setup table contains one row for each table currently included in the core hire process with at least one enterable field. However, there are some tables with multiple instances, such as phone numbers, email, addresses, and so forth, where more than one row exists. The system supports the use of these multiple elements in hiring templates. This way you are able to maintain more than one address section in a hiring template for different countries or multiple pay elements.

---

**Note:** If you need to have multiple instances of information in a template, such as names, addresses, or compensation, you need to specify a unique record alias for each additional instance.
For example, to add multiple pay components, rather than adding multiple copies of the same compensation section in a template, you must first create a new record and record alias, such as COMPENSATION1, and then add the fields from the original compensation record to your newly created record.
In addition, each template section must use a unique record alias. For example, if you need two address sections in your hiring template, one for addresses in Australia and another section for addresses in Brazil, selecting ADDRESS_01_AUS and ADDRESS_01_BRA can cause errors since both template sections use the ADDRESSES_01 record alias. In this example you should use a different address alias selection, such as ADDRESS_01_AUS and ADDRESS_02_BRA.
An alternative to creating multiple sections with different record instances, the section on the template can be specified as a grid section. On the grid section, the record instances will automatically be added behind the scenes and will correspond to the row number.

---

## Troubleshooting Templates

During a Smart HR transaction of a hire, if a hire transaction for a person uses a past effective date and the hire fails, check the Default Benefit Program and default Pay Group values for the organization and make sure they are the correct. When the benefit system is Base Benefits or Benefits Administration, the benefits code invoked during a hire requires a default benefit program to be set on the Pay Group Table.

1. Check the Default Benefit Program value on the Pay Group table and make sure it has the correct value.

2. Check the Pay Group value on the Company table and make sure it has the correct default Pay Group value.

## Common Elements Used to Set Up Smart HR Templates

**Template** — A pre-configured template that enables end users to enter a subset of the data required for a transaction, such as a hire, update to personal data, or update to a profile. Other data is pre-entered by the template administrator during the template creation process.

**End user** — For the Smart HR Template process, the end user is typically a line manager or HR (Human Resources) representative in the field. This person is usually not familiar with the details of the hiring process. Whenever complex issues arise, the process is handed over to a centralized HR administrator.

**HR administrator** — The HR administrator is somebody who knows the hiring process very well and can easily deal with any level of complexity. This person reviews the data entered by end users and takes over the hiring process whenever errors occur or issues arise.

**Template administrator** — The person in your organization who knows the hiring process very well (may be an HR administrator). The person assigned this role sets up and maintains hiring templates to be made available to end users.

**Implementer** — For the Smart HR Template process, the implementer is typically an IT (Information Technology) specialist who works closely with the HR administrator and template administrator to review the delivered template records/fields and sections and modifies them, if necessary.

**Template section (or section)** — The fields available for the templates will be grouped into sections. For example, the Work Location section will include the following fields (all on the Job record): Regulatory Region, Company, Business Unit, Department, Department Entry Date, Location, and Establishment ID. Sections are the building blocks for creating templates, not the individual records/fields. PeopleSoft delivers these sections as system data, but the implementer can modify them, delete them, or add new sections.

**Template page (or pages)** — The dynamically generated data entry page visible to the end user, consisting of one or more template sections. The template administrator decides whether the sections are displayed in one long page or divided into smaller pages.

**Template Transaction Type** — The template administrator assigns each template to a template transaction type. Template transaction types identify the

| | |
|---|---|
| | function of a template and the application class ID and path to specify the location of the implementation code for the transaction type. Transaction types can also be used to determine which users have security access to a template. |
| **Person/Job Indicator** | |
| **Template category** | The template administrator assigns each template to a category. The category provides row-level security for a template and can be used to group templates. A category may represent a specific department, location, business unit, region, and so forth. |
| **Auto-updates** | Determines whether data entered by the end user can be directly submitted for processing (auto-updating is turned on) or will need to be reviewed by an HR administrator (auto-updating is turned off). This auto-update functionality is set by the template administrator (the end user is not able to change it). |
| **Search match parameters** | The template administrator can associate a search match rule with a template to determine if the person already exists in the system. This search is done in the background and the results are displayed using the Search Match Results page. |

## Pages Used to Set Up Smart HR Templates

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Template Record/Field | HR_TBH_RECDEFN | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Record/Field, Template Record/Field | Set up and maintain the records and fields to be used in the Smart HR transaction templates. The records/fields that should be available to be included in the templates will be stored in the Template Record Setup Table (HR_TBH_RECDEFN) and Template Field Setup Table (HR_TBH_RECDTL). The Template Record Setup Table contains one row for each table currently included in the core Hire process with at least one enterable field (except for tables with multiple instances, such as phone numbers, email addresses, and so forth, where more than one row exists). It also contains views of the Profile Management tables. |
| Template Section | HR_TBH_SECDEFN | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Section, Template Section | Identify and configure sections, and list and configure the fields contained in a section. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Template Section Field Configuration | HR_TBH_SECDTL | Click the Field Configuration link on the Template Section page. | Add additional user exit information for field changes and field prompts. |
| Template Category Table | HR_TBH_CTG_TBL | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Category Table, Template Category Table | Set up template categories for grouping templates and for row-level security. |
| Template Transaction Type - Transaction Type | HR_TBH_TXN_TBL | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Transaction Type, Transaction Type | Define template transaction types that identify the function of a template and the application class ID and path to specify the location of the implementation code for the transaction type.<br><br>Transaction types can also be used to determine which users have security access to a template. |
| Template Transaction Type - Components | HR_TBH_TXN_CMP | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Transaction Type, Components | Identify which components will be updated when the end user or HR administrator saves the data to HR during the Smart HR Transactions process. |
| Transaction Component Details | HR_TBH_TXN_SEC | Select the Label Details link on the Template Transaction Type - Components page. | Specify label details related to a component. The Manage Hire and Manage Transactions Details pages display the labels you enter on this page for the HR administrator to manage transactions that require attention. |
| Template Transaction Type - Sections | HR_TBH_TXN_SCT | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Transaction Type, Sections | Define which sections should be available to a template when it uses this transaction type. Valid values come from the Template Section table. |
| Copy Transaction Type | HR_TBH_COPY_TXN | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Copy Transaction Type, Copy Transaction Type | Copy a template transaction type. |
| Template Creation | HR_TBH_TMPL_HDR | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Template Creation | Create and modify templates. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Configuration | HR_TBH_TMPL_CFG | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Configuration | Set up general options and the search page configuration for a template. |
| Section Field Label Override | HR_TBH_TMPL_FLDL | • Click the Change Label link for a field on the Configuration page.<br>• Click the Change Label link for a field on the Template Section Configuration page. | Change a field label by selecting another text ID for the field. |
| Section Field Default Value | HR_TBH_TMPL_FLDC | • Click the Change Value link for a field on the Configuration page.<br>• Click the Change Value link for a field on the Template Section Configuration page. | Identify a default value for the field that will appear for the end user to assist with data entry for fields that would often use the same value. |
| Maintain Text Catalog | HR_SSTEXT_TEXT | • Click the Maintain Text Catalog link on the Configuration page.<br>• Click the Maintain Text Catalog link on the Section Field Label Override page.<br>• Click the Maintain Text Catalog link on the Pages page.<br>• Click the Maintain Text Catalog link on the Define Tab Detail page.<br>• Click the Maintain Text Catalog link on the Template Section Configuration page. | Define text catalog entries, and define the values for context-sensitive keys. |
| Pages | HR_TBH_TMPL_PAG | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Pages | Set up the page number order and tab names that should appear on the Smart HR Transaction pages. |
| Define Tab Detail | HR_TBHTAB_DTL_SEC | Click the Change Title link on the Pages page. | Identify the page names on the Smart HR Transaction pages. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Sections | HR_TBH_TMPL_SEC | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Sections | Add and configure template sections. |
| Template Section Configuration | HR_TBH_TMPL_FLDS | Click the Section Configuration link on the Sections page. | Configure the fields for a section within the template. |
| Person Rules | HR_TBH_TMPL_PER | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Person Rules | Enable or disable Search Match functionality for a template and define options for handling existing person data and employment instances in the database. |
| Copy Template | HR_TBH_COPY | Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Copy Template, Copy Template | Copy a Smart HR template and make modifications to the new template. |

## Template Record/Field Page

Use the Template Record/Field page (HR_TBH_RECDEFN) to set up and maintain the records and fields to be used in the Smart HR templates.

The records/fields that should be available to be included in the templates will be stored in the Template Record Setup Table (HR_TBH_RECDEFN) and Template Field Setup Table (HR_TBH_RECDTL). The Template Record Setup Table contains one row for each table currently included in the core Hire process with at least one enterable field (except for tables with multiple instances, such as phone numbers, email addresses, and so forth, where more than one row exists). It also contains views of the Profile Management tables.

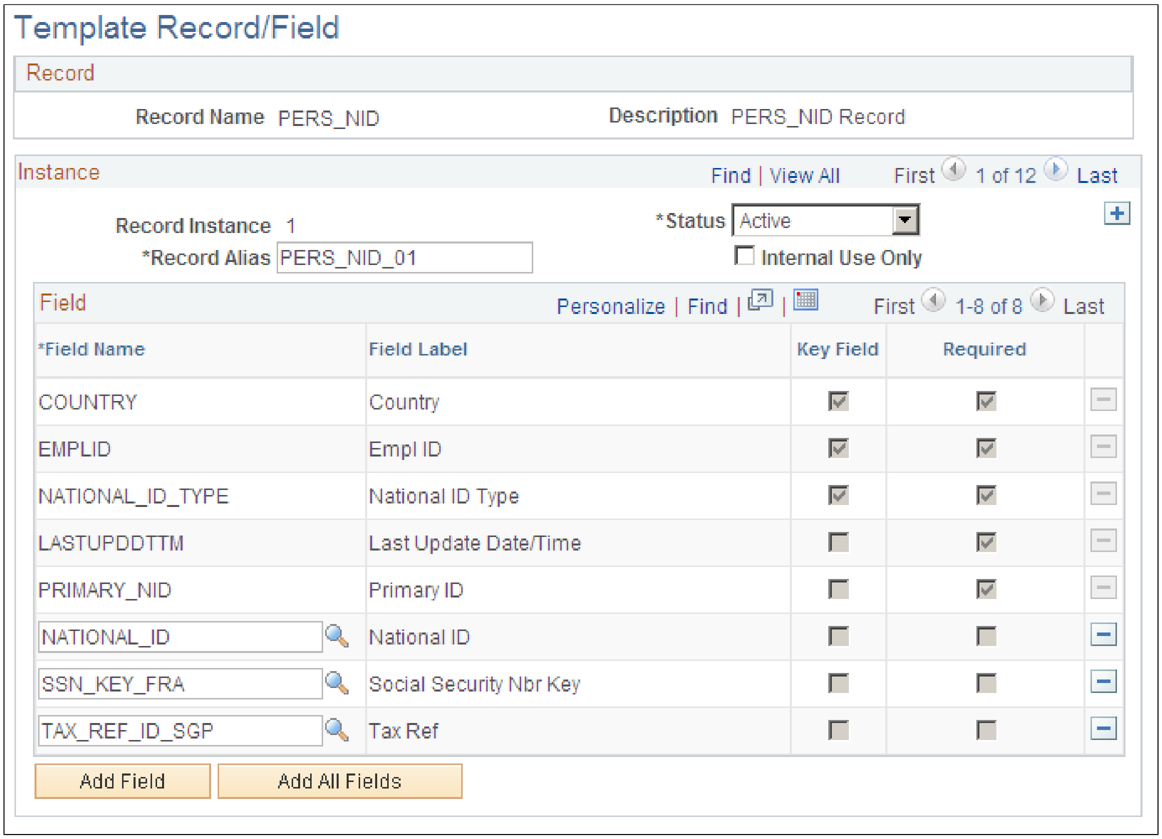
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Record/Field, Template Record/Field

**Image: Template Record/Field page**

This example illustrates the fields and controls on the Template Record/Field page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Record Name** | Indicate the name of the table to be included. (Prompted from the same field in the PeopleTools Record Definition table.) |
| **Record Instance** | Displays the instance number of the record. Defaults to 1. Use for records with more than one instance, such as phone numbers, email addresses, and so forth. |
| **Record Name Alias** | Enter the alternative name of the table to be included. Defaults to the Record Name value. This field enables the implementer to differentiate between two different instances of the same record. For example, business address (ADDRESSES_1) from mailing address (ADDRESSES_2). This is the prompt shown for the record when adding a new record/field to a section. |
| **Internal Use Only** | Select this check box to designate fields that are used in the Smart HR process but are not passed to the Services/CI. |
| **Key Field** | This check box is selected (in PeopleCode) if the field is defined as a key field at the system level (in the PeopleTools Record |

Field table PSRECFIELD). This field cannot be changed by the Implementer (display-only).

**Required** This check box is selected by default (in PeopleCode) and is based on the PeopleTools Record Field table PSRECFIELD. This field cannot be changed by the implementer (display-only).

## Template Section Page

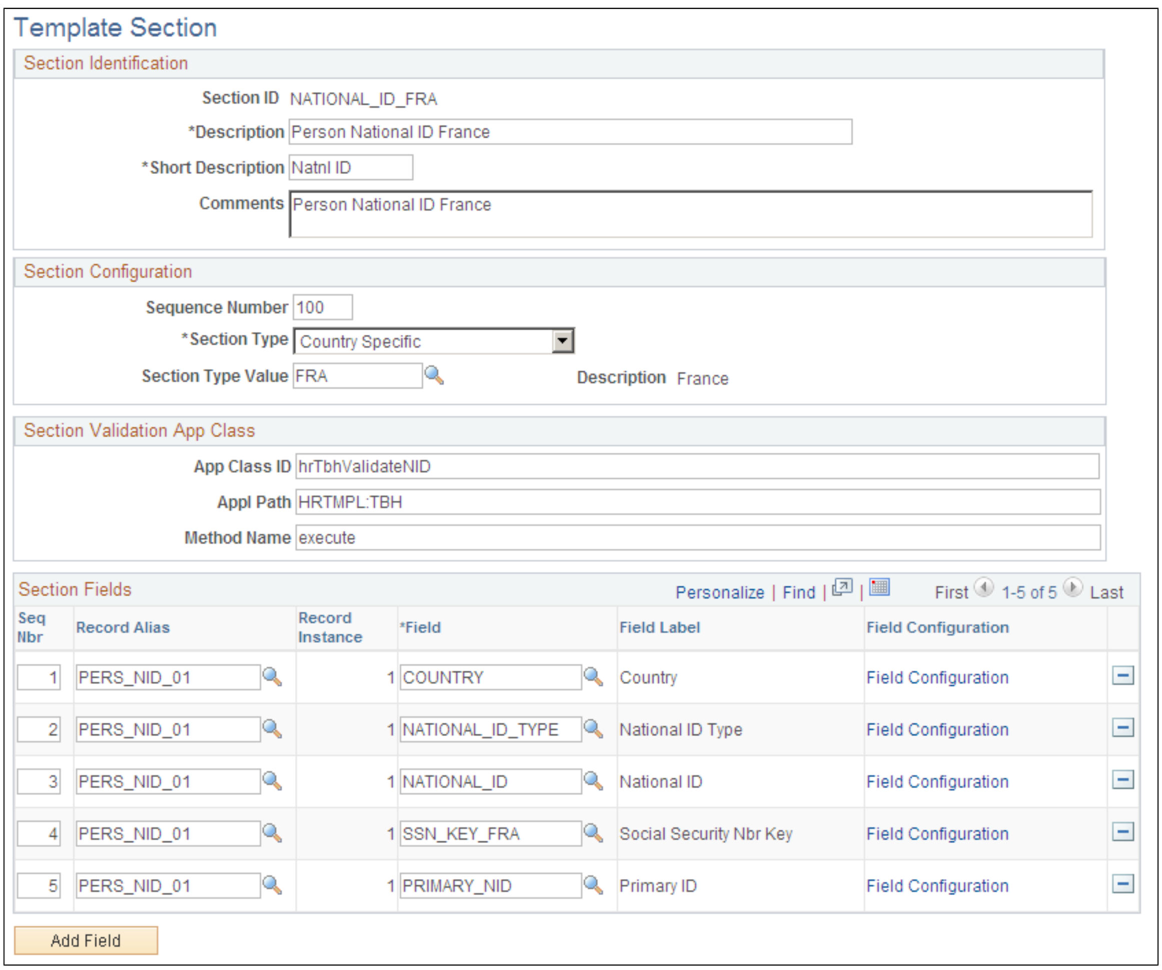
Use the Template Section page (HR_TBH_SECDEFN) to identify and configure sections, and list and configure the fields contained in a section.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Section, Template Section

**Image: Template Section page**

This example illustrates the fields and controls on the Template Section page. You can find definitions for the fields and controls later on this page.



Template Section

Section Identification

Section ID NATIONAL_ID_FRA
*Description Person National ID France
*Short Description Natnl ID
Comments Person National ID France

Section Configuration

Sequence Number 100
*Section Type Country Specific
Section Type Value FRA Description France

Section Validation App Class

App Class ID hrTbhValidateNID
Appl Path HRTMPL:TBH
Method Name execute

Section Fields Personalize | Find | First 1-5 of 5 Last

| Seq Nbr | Record Alias | Record Instance | *Field | Field Label | Field Configuration |
|---|---|---|---|---|---|
| 1 | PERS_NID_01 | 1 | COUNTRY | Country | Field Configuration |
| 2 | PERS_NID_01 | 1 | NATIONAL_ID_TYPE | National ID Type | Field Configuration |
| 3 | PERS_NID_01 | 1 | NATIONAL_ID | National ID | Field Configuration |
| 4 | PERS_NID_01 | 1 | SSN_KEY_FRA | Social Security Nbr Key | Field Configuration |
| 5 | PERS_NID_01 | 1 | PRIMARY_NID | Primary ID | Field Configuration |

Add Field

**Sequence Number**

Enter the number to determine the order of sections on the end user data entry page.

**Section Type**

Specify a type that defines the section. Valid values are *General, Country, Name, Address,* and *Federal.*

---

**Note:** (USF) U.S. Federal customers will only see National Finance Center (NFC) interface fields if the database is federalized and Payroll Interface is selected on the HR Installation table.

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

**Section Type Value**

Enter the value for the section type you specified. For *Name* sections, this field stores the name format code. For the *Country* and *Address* sections, this field stores the appropriate country code. The field is empty for *Federal* and *General* sections. For *JPM* sections, the category type is stored here.

**Add Field**

Click this button to add additional fields in the Section Fields grid area.

### Section Validation App Class

A user-exit is provided for each section for validation that might be required by your organization. These are implemented as application class methods routines and appear in the App Class ID, App Class Path, and Method Name fields. There are three section validation methods delivered as system data: National IDs, Addresses, and Names.

## Template Section Field Configuration Page

Use the Template Section Field Configuration page (HR_TBH_SECDTL) to add additional user exit information for field changes and field prompts.

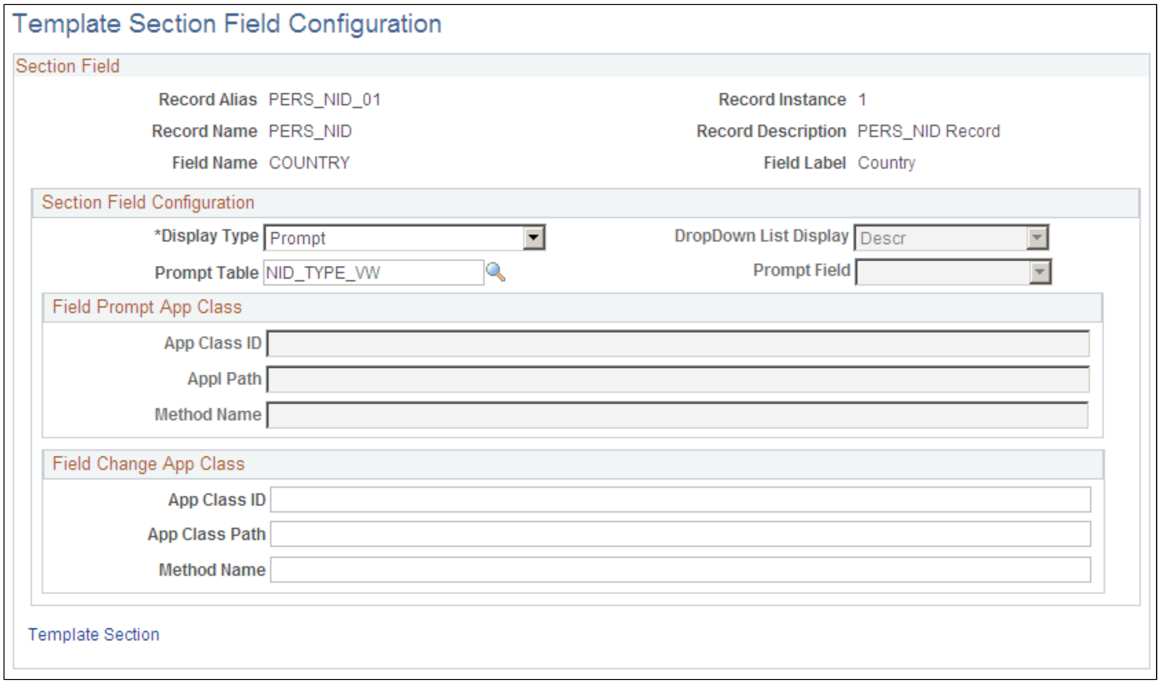
 

**Navigation**

Click the Field Configuration link on the Template Section page.

**Image: Template Section Field Configuration page**

This example illustrates the fields and controls on the Template Section Field Configuration page. You can find definitions for the fields and controls later on this page.




## Section Field Configuration

**Display Type, DropDown List Display, Prompt Table, and Prompt Field**

Select how a field type should appear on the template to an end user and from which table it should retrieve valid values.

The Display Type value options depend upon the field selected. For example, a field may or may not require a prompt table, it may use a date field, require a yes and no response, or needs to display a push button. The prompt table fields are disabled for all but the fields with a prompt table.

## Field Change App Class

The Field Change App Class provides a user exit for field change code to be added. Some delivered section fields include field change code. For example, the Company field on the Work Location - Job Fields section has field change code that builds prompt lists for other fields in the section, such as Location and Establishment ID.

---

**Note:** Oracle recommends that any validation methods added to the PeopleSoft application at implementation be stored in a customer-created application class.

---

## Template Category Table Page

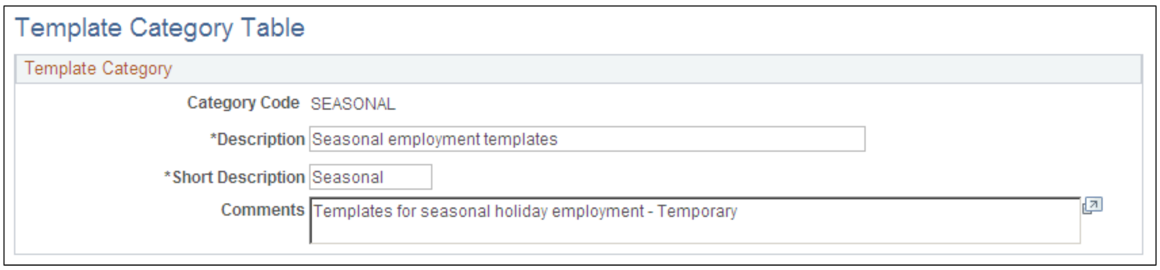
Use the Template Category Table page (HR_TBH_CTG_TBL) to set up template categories for grouping templates and for row-level security.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Category Table, Template Category Table

**Image: Template Category Table page**

This example illustrates the fields and controls on the Template Category Table page. You can find definitions for the fields and controls later on this page.




When you create your templates, you will need to assign each template to a category. Template categories:

- Groups templates.

  Categories are helpful when a template administrator is trying to narrow their search results when looking for a particular template. On the Template Creation page, you can perform an advance search for existing templates by category, as well as by other defined fields.

- Provide row-level security for a template.

  End users will only see templates for which they have security access.

  **Note:** To set up row-level security for end users, you will need to enable the security set (TBHTMPL) and security access types for Smart HR Templates and set up security for the end user's permission list.

### Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Template Transaction Type - Transaction Type Page

Use the Template Transaction Type - Transaction Type page (HR_TBH_TXN_TBL) to define transaction types for your Smart HR templates.

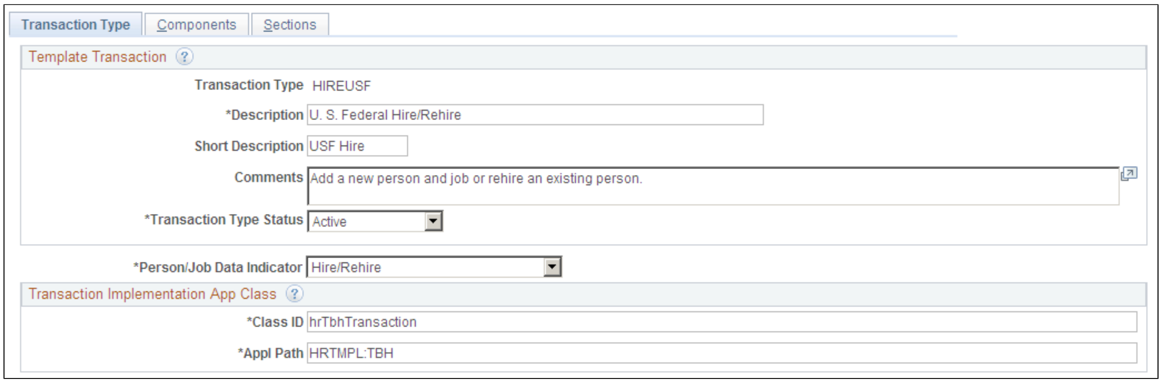
 

### Navigation

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Transaction Type, Transaction Type

### Image: Template Transaction Type - Transaction Type page

This example illustrates the fields and controls on the Template Transaction Type- Transaction Type page. You can find definitions for the fields and controls later on this page.




---

**Note:** You can use transaction types when determining which users have security access to a template.

---

**Transaction Type Status**

Defaults to *Test.* Valid values are *Active, Inactive,* and *Test.* You must change the status to *Active* in order for the transaction type to be available for selection on a Smart HR template.

You can set it to *Inactive* once a transaction type is no longer needed.

---

**Note:** Existing active templates that use a transaction type that has since been changed to inactive will still be valid. However, you cannot create new templates using a transaction type with an *Inactive* status.

---

**Person/Job Data Indicator**

Indicate if the transaction type will include changes to personal data, job data, both, or neither.

Valid values are *Hire/Rehire, Neither, Update Job, Update Person,* and *Update Person and Job.*

**U.S. Federal Transaction Type**

(USF) Select this check box to indicate that this is for a U. S. Federal transaction. When you select a transaction type in the Template Creation component that has been specified as U.S. Federal, the U.S. Federal Template check box on the Configuration page of the template will be selected automatically as display only.

This check box is only available when the Federal check box has been enabled on the Installation table.

**Class ID and Path**

Enter the application class ID and path to specify the location of the implementation code for the transaction type.

## Template Transaction Type - Components Page

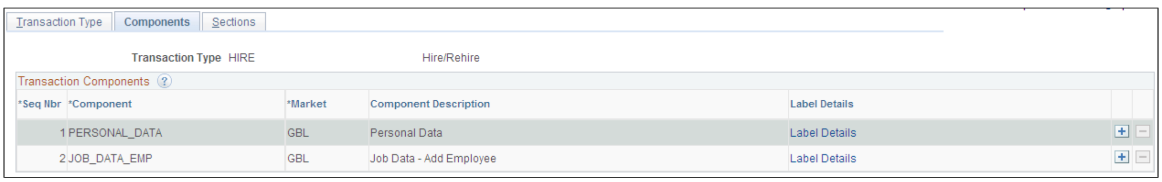
Use the Template Transaction Type Components page (HR_TBH_TXN_CMP) to identify which components will be updated when the end user or HR administrator saves the data to HR during the Smart HR Transactions process.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Transaction Type, Template Transaction Type Components

**Image: Template Transaction Type Components page**

This example illustrates the fields and controls on the Template Transaction Type Components page. You can find definitions for the fields and controls later on this page.




Identify the HR or other components that should be updated by a template. These components will be updated upon saving the data to HR during the Smart HR Transactions process.

**Seq Nbr (sequence number)**

Indicates the order in which the system will access the components. The first sequence number must start with 1 and all numbers must be consecutive, without gaps.

**Component**

Define at least one component for a transaction type. You can include up to 10 components.

The system automatically provides Personal Data or Job Data components by default based on the value you entered in the Person/Job Data Indicator field and the U.S. Federal Transaction Type check box field selection on the Transaction Type page. These components cannot be changed or deleted unless you change either of the previously mentioned field values, and then they will be replaced with the new default components that correspond to that indicator. Any existing non-defaulted components will be re-sequenced so that they follow the newly defaulted components.

When the Person/Job Data Indicator value is *Neither,* the system does not provide any components by default.

---

**Note:** The system will issue an error message if you add a Personal Data or Job Data-related component manually.

---

This list identifies the Personal Data or Job Data-related components that you cannot include manually:

- PERSONAL_DATA
- PERSONAL_DATA_ADD
- JOB_DATA
- JOB_DATA_EMP
- JOB_DATA_CONCUR
- JOB_DATA_CURRENT
- JOB_DATA_CWR
- JOB_DATA_POI
- JOB_DATA_CWR_SRCH
- JOB_DATA_EMP_SRCH
- EE_HIRE
- EE_HR_PROC
- EE_1ST_AUTH
- EE_2ND_AUTH
- EE_ADD_ORG_ASGN
- EE_APPROVAL
- EE_CANCELLATION
- EE_CONC_HIRE
- EE_CORRECTION

**Market** Identify the market for the component you selected.

**Label Details** Select this link to access the Transaction Component Details page and add label details for the selected component.

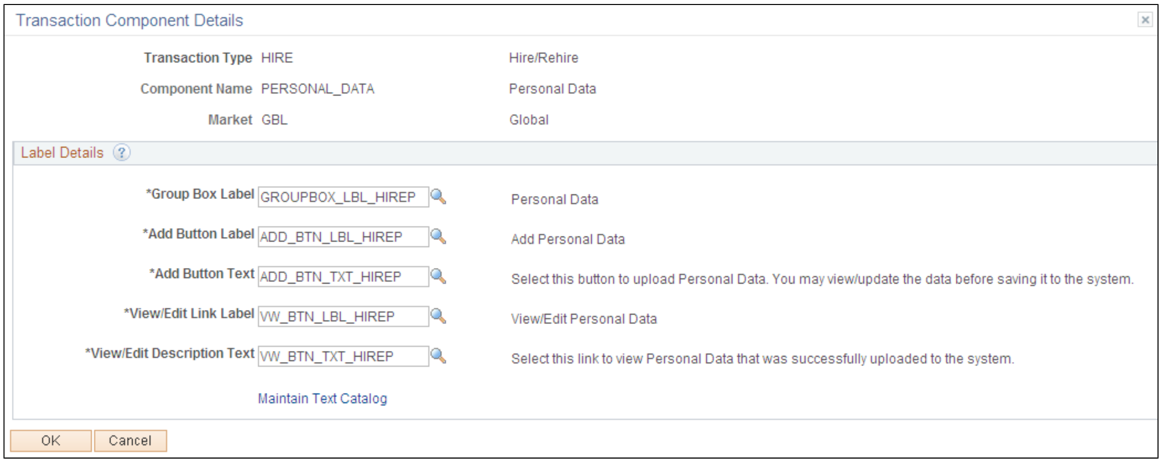
 

## Transaction Component Details Page

Use the Transaction Component Details page (HR_TBH_TXN_SEC) to specify label details related to a component.

**Image: Transaction Component Details page**

This example illustrates the fields and controls on the Transaction Component Details page. You can find definitions for the fields and controls later on this page.




When the HR administrator is required to review or complete a Smart HR transaction, he or she will access the transaction using the Manage Hire or Manage Transaction Details pages. Each component associated with a transaction will appear on these pages as a group box, with corresponding links and buttons to either view, edit, or add information to the component.

Use the Transaction Component Details page to configure the group-box, add button, and view/edit labels and text for the component you selected. For each field, select labels and text IDs from the Text Catalogue specific to your business processes. Valid values for Smart HR templates are text IDs that have *Human Resources (HHR)* as the object owner and a sub ID of *TBH.*

**Group Box Label**

Identify a header for the group box that identifies the component you will update or view.

**Add Button Label and Add Button Text**

Enter text information related to the Add button that appears on the page for the HR administrator to add information to the person's Smart HR transaction. The system displays the Add button when no data for the respective component has been saved to the system.

Select a text ID that introduces the button in the Add Button Text field, such as text that says to select the button to add Personal Data.

Select text that will appear on the button in the Add Button Label field, such as *Add Personal Data.*

**View/Edit Link Label and View/Edit Description Text**

Enter text information related to viewing and editing data that was added during the Smart HR transaction. The system displays the view and edit field labels when data was successfully uploaded to the system during the Smart HR transaction. Although the data was saved successfully during the Smart HR transaction process, the HR administrator can select the link to review and update the user's entry.

Select a text ID that introduces the link in the View/Edit Description Text field, such as text that says to select the link to view Personal Data.

Select text that will appear as a link in the View/Edit Link Label field, such as View or Edit Personal Update.

**Maintain Text Catalog** — Select this link to access the Maintain Text Catalog page to add or update a text message.

### Related Links

"Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Template Transaction Type - Sections Page

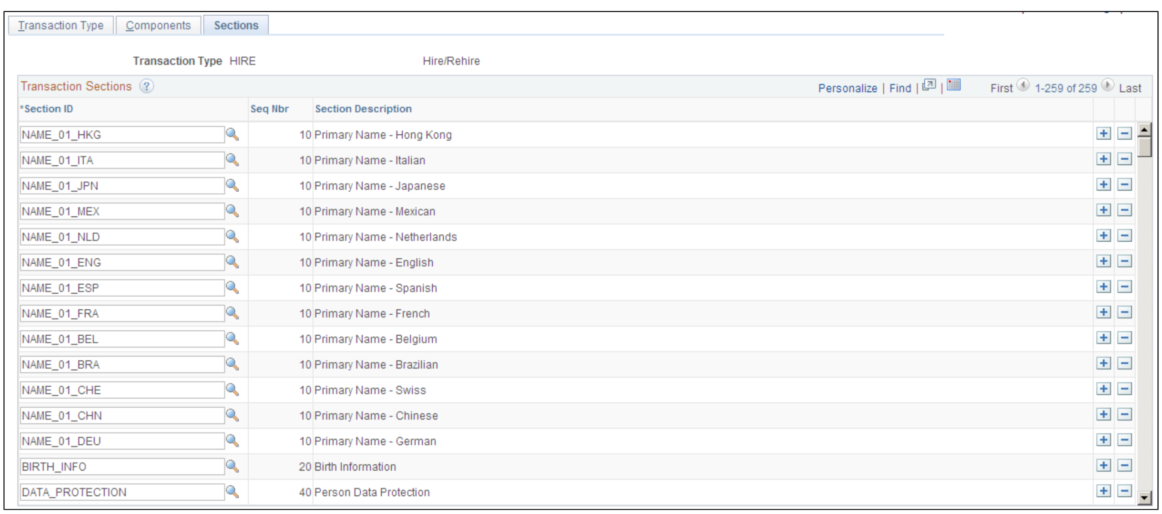
Use the Template Transaction Type Sections page (HR_TBH_TXN_SCT) to define which sections should be available to a template when it uses this transaction type.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Transaction Type, Template Transaction Type Sections

**Image: Template Transaction Type Sections page**

This example illustrates the fields and controls on the Template Transaction Type Sections page. You can find definitions for the fields and controls later on this page.




**Section ID** — Identify sections that are part of this transaction type. At least one section must be defined for a transaction type. Valid values are defined on the Template Section Page.

---

**Note:** Personal data sections are required for all transaction types, even if there are no updates to Personal Data, so that a person can be found in the system using the Search Match process. These should be the sections which include data typically used in Search Match (defined in the Search/Match Rules and Search/Match Parameters components) such as name, address, national ID, birth date and gender.

---

Templates associated with this transaction type can contain only those sections you define here. For example, if for addresses you associate only the *Person Address - Canada* section to this transaction type, you will not be able to associate other person address sections, such as *Person Address - United States,* to the templates that use this transaction type. Use the Load/Reload Sections button on the Template Creation - Sections Page to have the system populate the template with all the sections defined for the transaction type. You can delete those sections that are not applicable to a template but you cannot add sections that are not defined for the transaction type.

**Seq Nbr (sequence number) and Section Description**: Displays the sequence number and description defined on the Template Section page.

## Copy Transaction Type Page

Use the Copy Transaction Type page (HR_TBH_COPY_TXN) to copy a template transaction type.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Copy Transaction Type, Copy Transaction Type

**Image: Copy Transaction Type page**

This example illustrates the fields and controls on the Copy Transaction Type page. You can find definitions for the fields and controls later on this page.


When you access the Copy Transaction Type, select an existing transaction type you want to copy. Enter the new transaction type information and click Save. The system will open the Template Transaction Type - Transaction Type Page where you can update the appropriate information for the new transaction type.

## Template Creation Page

Use the Template Creation page (HR_TBH_TMPL_HDR) to create and modify templates.

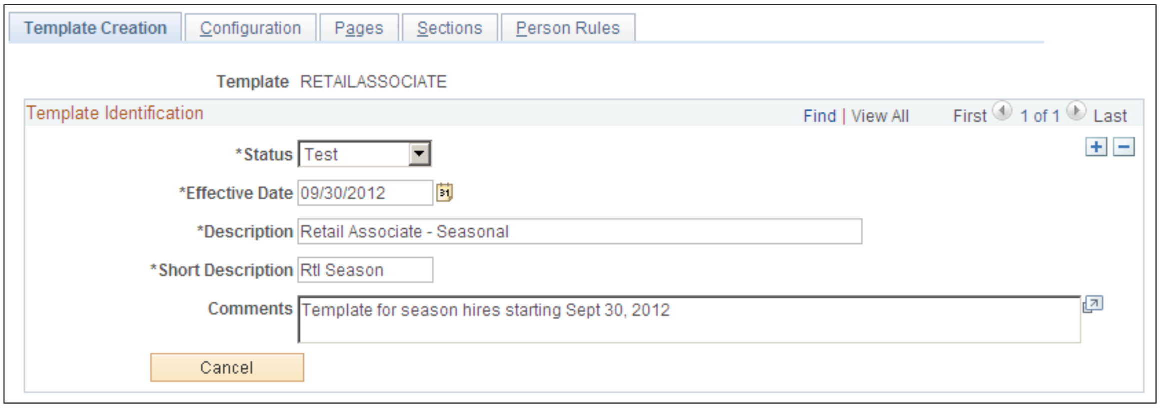
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Template Creation

**Image: Template Creation page**

This example illustrates the fields and controls on the Template Creation page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Template** | Enter a template name that defines this template. |
| **Status** | Select a status. The default option for this field is *Test* when creating a new template. You can change the value to *Active* when it's time to be published, or *Inactive* when the template is no longer necessary. Only active templates are available to the end user. |
| **Effective Date** | Determine the effective date of a template. The default value for this field is today's date. |

## Configuration Page

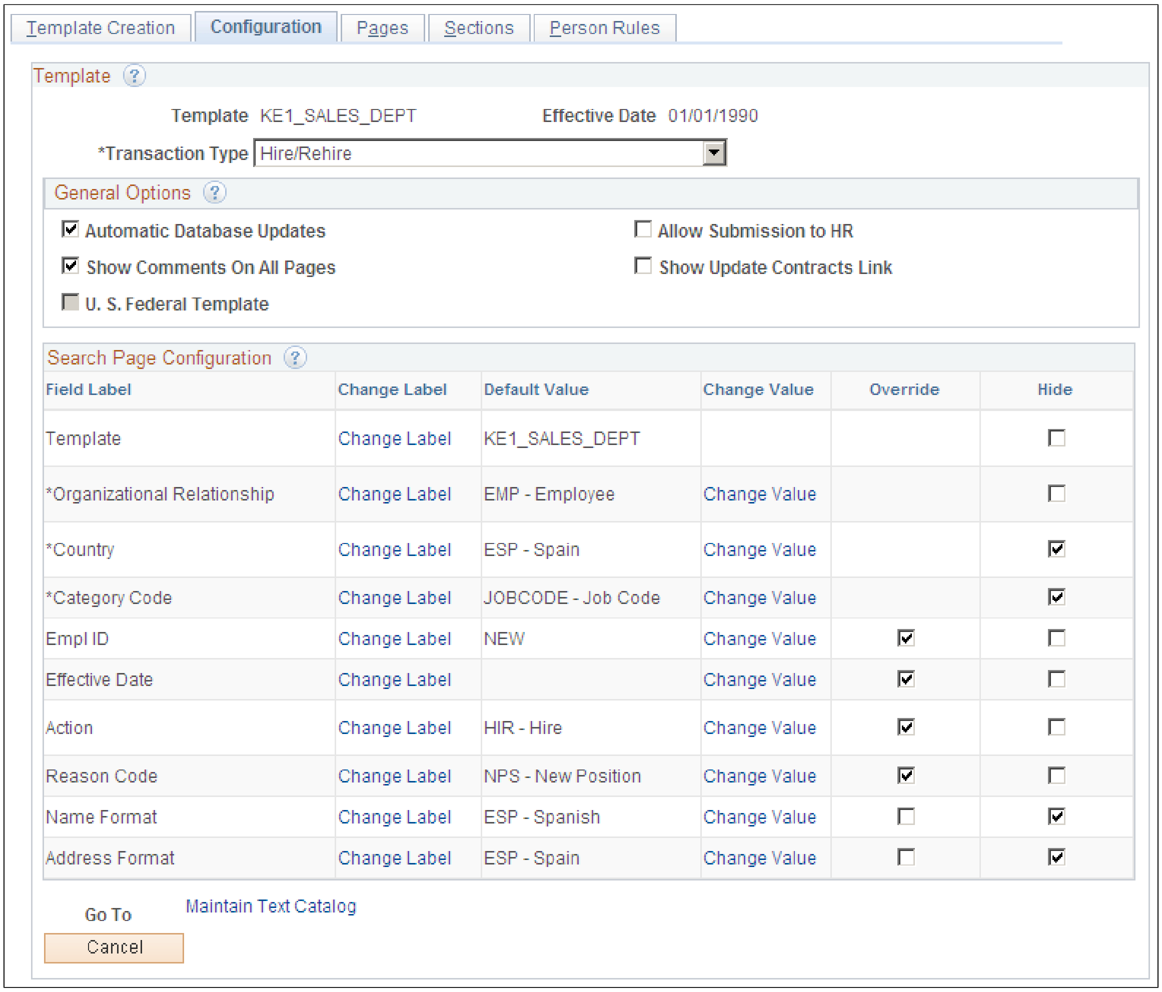
Use the Configuration page (HR_TBH_TMPL_CFG) to set up general options and the search page configuration for a template.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Configuration

### Image: Template Creation - Configuration page

This example illustrates the fields and controls on the Template Creation -Configuration page. You can find definitions for the fields and controls later on this page.




The system uses Transaction Type, Template ID, Org Relationship, Country, and Category Code fields as part of row-level security. Use these fields to determine to which templates end users will have access.

**Transaction Type**

Select a transaction type that will identify how the template will be used and determines which components will be updated. For example, a transaction type of *Change Job Data* may update the Job Data component only, while a *Hire/Rehire* type will update both Job Data and Personal Data. The transaction type also defines which sections will be available on the Sections page when creating a template. This information is defined in the Template Transaction Type component.

When creating or working with a Smart HR transaction, the user can use the Transaction Type field as a filter to search for a specific template or transaction.

When you change a transaction type, the system will clear the Action and Reason Code fields, if previously populated, and display a warning message to indicate that the sections for the template will need to be updated to ensure that the sections are valid for the transaction type.

**Automatic Database Updates**

Select this check box to have the data entered by the end user automatically update the database.

Deselect this check box to have the data entered by the end user sent to an HR administrator for final processing.

**Allow Submission to HR**

Select this check box if the end user does not have all the required data, such as a National ID, and needs to submit the transaction request to HR to complete. This check box is only available when the Automatic Database Updates check box is selected.

If Automatic Database Updates is selected, the following applies:

- The Submit to HR button appears on the Smart HR Transactions pages. This enables the end user to submit incomplete data to HR without entering all the required fields (although first name and last name are required). When the end user clicks this button, the transaction request is sent to HR in *HR Action Required* status for HR to complete final processing.
- The Save and Submit button appears on the Smart HR Transactions pages. When the end user clicks this button, data is automatically updated to the database (if no errors are encountered).

**Show Comments On All Pages**

Select to have a Comments edit box appear at the bottom of each page of the Smart HR Transactions component when an end user performs a Smart HR transaction.

Deselect to have the Comments edit box appear at the bottom of only the last page of the Smart HR Transactions component when an end user performs a Smart HR transaction. If there is only a single page, the Comments box will appear on that page.

**Show Update Contracts Link**

Select to have the Update Contracts link to the Contracts component appear on the Confirmation page after performing a Smart HR transaction. This enables users to update contract information for a person. This link appears on the Confirmation page when Automatic Database Updates is selected on the template and the transaction is saved successfully.

---

**Note:** Users of the template must have access to the Contract Data component.

---

**U.S. Federal Template**

(USF) Displays this check box as selected when the transaction type is defined as a U.S. Federal transaction type. This enables you to see the standard U.S Federal (USF) sections. This check box is only available when the Federal check box has been enabled on the Installation table.

---

**Note:** Do not use a U.S. Federal-defined transaction type when you are creating templates for U.S. Federal contingent workers.

---

## Search Page Configuration

Determine how you want to display these fields to the end user on the Enter Transaction Details page of the Smart HR Transactions component. Select the field label and select whether the end user should be able to override a default value, or if the field should be hidden from the user.

**Template**

Displays the template ID you entered for this template.

**Organizational Relationship**

Select an organizational relationship of the worker. The default option for this field is *Employee.* The other available option is *Contingent Worker.*

---

**Note:** *Person of Interest* is not an option.

---

**Country**

Enter a default country code for the template.

- The country you select impacts country defaults and what sections appear on the template.
- (USF) This field defaults to *USA* for U.S. Federal installations.

**Category Code**

Select a category code for template grouping and as part of the row-level security for this template. A category may represent a specific department, location, business unit, region, and so forth.

**Empl ID (employee ID)**

Accept the default value of *NEW* to have the system automatically assign the next ID or leave the field blank to have the end user manually enter the ID.

**Effective Date**

Specify a default effective date of a Smart HR transaction, if applicable. Usually you will select the Override check box for this field and set the default value to blank so the end user provides the actual transaction date. Some business processes require a fixed effective date, such as in the case of seasonal hiring.

**Action**

Enter the action of adding this employment instance.

When using a hire or rehire transaction type, values for an employee are *Hire* and *Rehire,* while values for adding a

| | |
|---|---|
| | contingent worker are *Add* and *Renewal.* For non-hiring transaction that update job data, all valid actions will be available except the ones listed for hires and rehires.<br><br>When using a personal or profile data transaction type that does not involve a change to job data, this row will be unavailable for entry. |
| **Reason Code** | Determine if you want to provide a default reason code, which is associated with the action.<br><br>When using a personal or profile data transaction type that does not involve a change to job data, this row will be unavailable for entry. |
| **Name Format** | Specify a name format that may be used during the Smart HR transaction. The name format that you select impacts the actual transaction page. You can hide this field from the end user if you do not want the end user to select a different name format. If you enable the end user to choose another name format, you must include at least two different name sections on the Sections page. |
| **Address Format** | Specify an country address format that may be used during the Smart HR transaction process. The country address format that you select impacts the actual transaction page. You may hide this field from the end user if you do not want the end user to select a different address format. If you enable the end user to choose another address format, you must include at least two different address sections on the Sections page. |
| **Change Label** | Click this link to open the Section Field Label Override page and use the Text Catalog to select another text ID to change the field label. |
| **Default Value and Change Value** | Click the Change Value link to open the Section Field Default Value page and define a default value for the field. The value you select displays in the Default Value field. |
| **Override** | Select this check box to enable the end user to change the default value when performing a Smart HR transaction. Deselect this check box when the end user is not allowed to change the value. When you select this check box, the system deselects the Hide check box so the end user has access to the field to edit the value. |
| **Hide** | Select this check box to hide this field and the default value from the end user when performing a Smart HR transaction. When you select this check box, the system deselects the Override check box. The end use will not be able to change the default value since the field is hidden. |
| **Maintain Text Catalog** | Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new |

browser window. Use the Maintain Text Catalog page to change or create labels.

### Related Links

"Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Template Creation - Pages Page

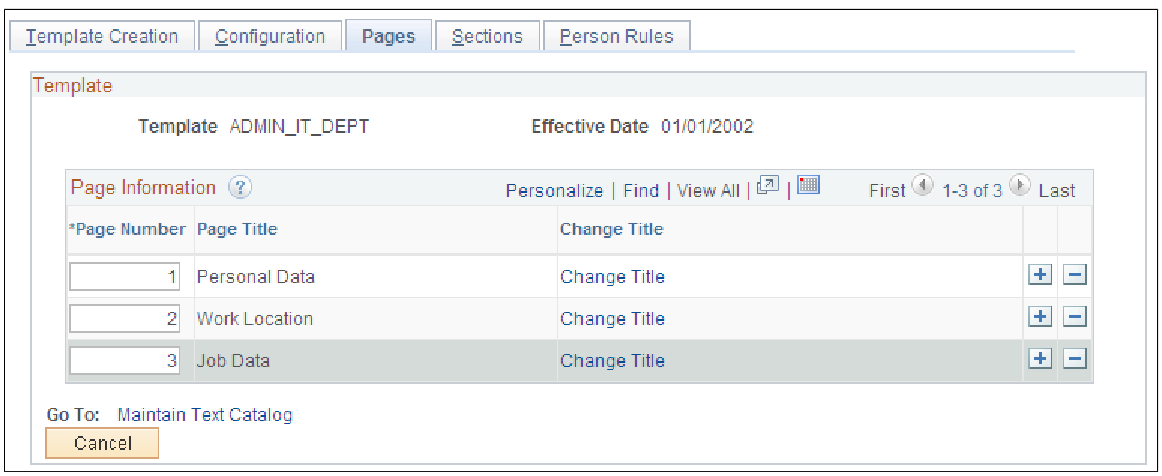
Use the Pages page (HR_TBH_TMPL_PAG) to set up the page number order and tab names that should appear on the Smart HR Transactions pages.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Pages

**Image: Pages page**

This example illustrates the fields and controls on the Pages page. You can find definitions for the fields and controls later on this page.




**Page Number**

Enter a number that will define the page tab order on the Smart HR Transactions - Enter Transaction Information page. On the Sections page, you will assign sections to one of these page numbers. This will group sections together or separate them onto different tabbed pages. The system will display these tab names when the end user or HR administrator is entering a transaction using the Smart HR Transactions - Enter Transaction Information page. For example, you may want to group all compensation and payroll information-related sections and fields within a page called Salary Data.

You can have all the sections appear on one page, by entering only one page number and label, or you can group the sections on different pages, by creating numerous page numbers and labels.

**Change Title**

Click this link to access the Define Tab Detail page and define how the tab label should appear on the Enter Transaction Information page during the Smart HR transaction process.

**Maintain Text Catalog**

Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change or create labels.

### Related Links

"Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Define Tab Detail Page

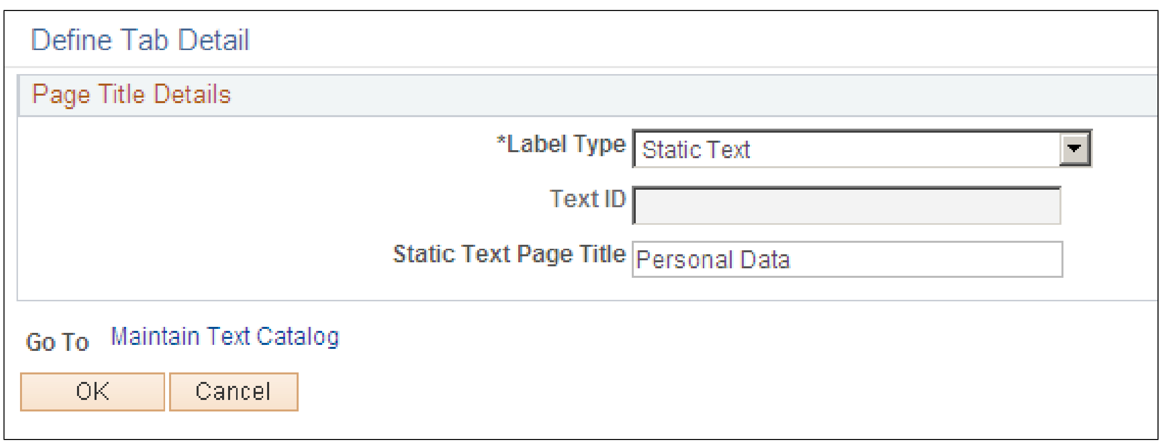
Use the Define Tab Detail page (HR_TBHTAB_DTL_SEC) to identify the tab names in the Smart HR Transactions component.

**Navigation**

Click the Change Title link on the Pages page.

**Image: Define Tab Detail page**

This example illustrates the fields and controls on the Define Tab Detail page. You can find definitions for the fields and controls later on this page.




**Label Type**

Select the type of label that you will use. Values are *Static Text* and *Text Catalog.*

**Text ID**

Select the text ID from the Text Catalog if you have selected *Text Catalog* in the Label Type field.

**Static Text Page Title**

Enter the tab label name if you have selected *Static Text* in the Label Type field.

**Maintain Text Catalog**

Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to add or change labels.

### Related Links

"Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Template Creation - Sections Page

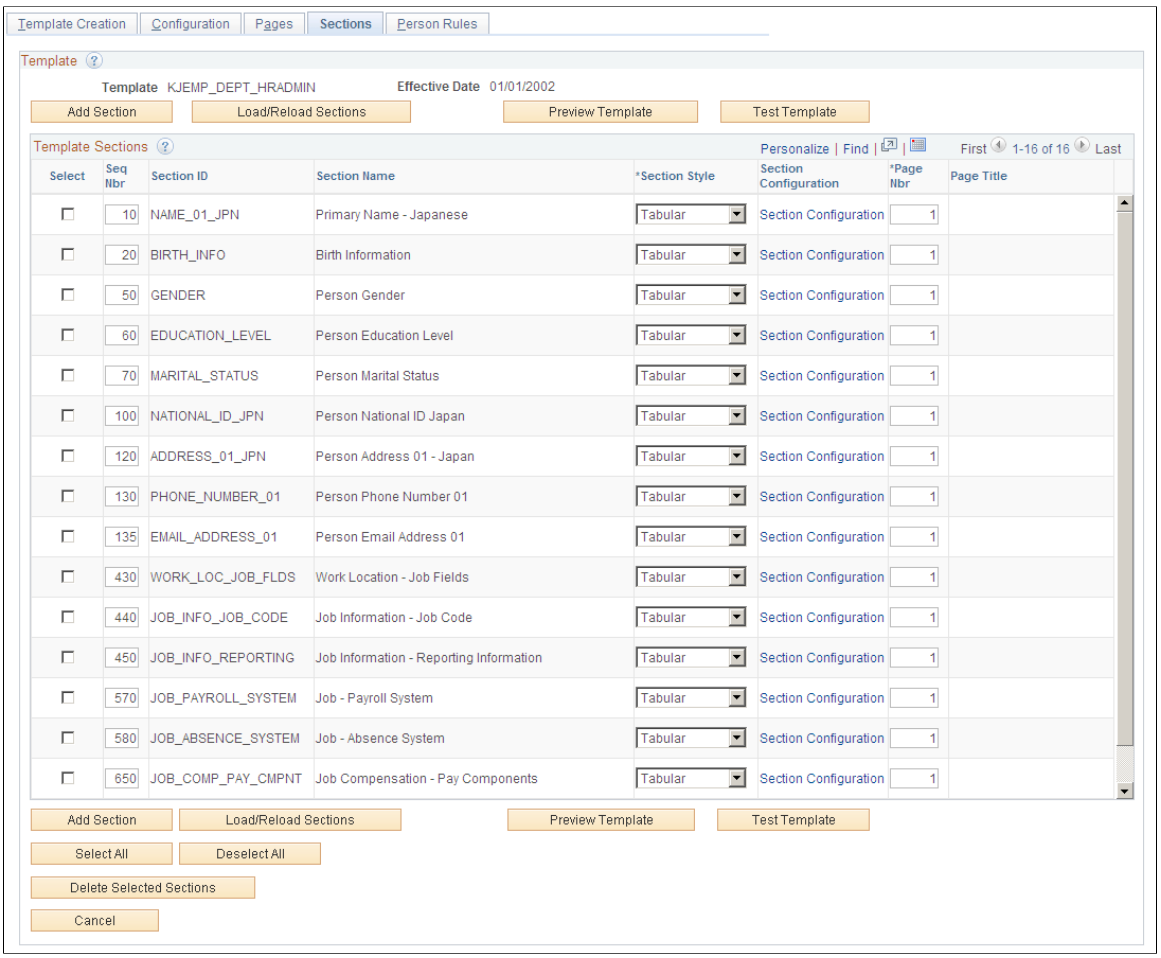
Use the Sections page (HR_TBH_TMPL_SEC) to add and configure template sections.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Sections

**Image: Template Creation - Sections page**

This example illustrates the fields and controls on the Template Creation - Sections page. You can find definitions for the fields and controls later on this page.



Template Creation | Configuration | Pages | Sections | Person Rules

Template

Template KJEMP_DEPT_HRADMIN Effective Date 01/01/2002

Add Section | Load/Reload Sections | Preview Template | Test Template

Template Sections — Personalize | Find | First 1-16 of 16 Last

| Select | Seq Nbr | Section ID | Section Name | *Section Style | Section Configuration | *Page Nbr | Page Title |
|---|---|---|---|---|---|---|---|
| ☐ | 10 | NAME_01_JPN | Primary Name - Japanese | Tabular | Section Configuration | 1 | |
| ☐ | 20 | BIRTH_INFO | Birth Information | Tabular | Section Configuration | 1 | |
| ☐ | 50 | GENDER | Person Gender | Tabular | Section Configuration | 1 | |
| ☐ | 60 | EDUCATION_LEVEL | Person Education Level | Tabular | Section Configuration | 1 | |
| ☐ | 70 | MARITAL_STATUS | Person Marital Status | Tabular | Section Configuration | 1 | |
| ☐ | 100 | NATIONAL_ID_JPN | Person National ID Japan | Tabular | Section Configuration | 1 | |
| ☐ | 120 | ADDRESS_01_JPN | Person Address 01 - Japan | Tabular | Section Configuration | 1 | |
| ☐ | 130 | PHONE_NUMBER_01 | Person Phone Number 01 | Tabular | Section Configuration | 1 | |
| ☐ | 135 | EMAIL_ADDRESS_01 | Person Email Address 01 | Tabular | Section Configuration | 1 | |
| ☐ | 430 | WORK_LOC_JOB_FLDS | Work Location - Job Fields | Tabular | Section Configuration | 1 | |
| ☐ | 440 | JOB_INFO_JOB_CODE | Job Information - Job Code | Tabular | Section Configuration | 1 | |
| ☐ | 450 | JOB_INFO_REPORTING | Job Information - Reporting Information | Tabular | Section Configuration | 1 | |
| ☐ | 570 | JOB_PAYROLL_SYSTEM | Job - Payroll System | Tabular | Section Configuration | 1 | |
| ☐ | 580 | JOB_ABSENCE_SYSTEM | Job - Absence System | Tabular | Section Configuration | 1 | |
| ☐ | 650 | JOB_COMP_PAY_CMPNT | Job Compensation - Pay Components | Tabular | Section Configuration | 1 | |

Add Section | Load/Reload Sections | Preview Template | Test Template

Select All | Deselect All

Delete Selected Sections

Cancel

The template administrator uses the Sections page to define which sections will appear in the template for the end user.

The template administrator has access to all commercial fields and U.S. Federal fields which can be entered as part of the Smart HR transaction process in the Personal Data, Job Data, and profile components. The administrator organizes the fields into sections, ranging from one field in a section to ten or more fields in a section, and determines which sections are hidden from the end user during the Smart HR transaction process for each template.

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**Note:** If a position number is selected on the template definition it will not populate values from Position Management. The administrator must hide fields that are populated by position number because they are overridden at the time the position number is loaded in Job Data and defaults are automatically entered. See the Manage Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)* documentation for a list of fields that are provided by default into Job Data (from Position Data—this does not include what may also be defaulted in the job code).

---

**Add Section**

Click this button to add a new row for another section.

**Load/Reload Sections**

Click this button to add all viable sections to the template. The system looks at the values that were entered for the transaction type, country, name format, address format, and at the U.S. Federal flag to determine which sections to load. The following actions occur when the load process adds or removes sections:

- If a section is already present, it is not overwritten.
- If you change the transaction type on a template, existing sections that are no longer valid are deleted and new sections corresponding to the new transaction type are loaded.
- If you change the country on a template, existing country-specfic sections are deleted and new country sections are loaded.
- If you change the name format or address format on a template, existing name and address format-specific sections are deleted and new sections are loaded.

**Select All and Deselect All**

Click the Select All button to easily select all the sections on this page for easy deletion or deselect all section rows to avoid deletion.

**Delete Selected Sections**

Click this button to have the system delete all selected section rows from this template.

**Preview Template**

Click this button to open a new browser window to preview the template. Preview mode displays each template page and the sections on those pages.

**Test Template**

Click this button to validate if the template is set up correctly.

---

**Note:** The template administrator is able to test the template only if Automatic Database Updates is selected on the Configuration page. Test mode is not available if Automatic Database Updates is deselected since the CI/Service is not called.

---

The Template Administrator clicks this button and the Smart HR Transactions - Enter Transaction Details pages displays in a new browser. The administrator then enters a person's data as an end-user would and then clicks the Test Template button on the last Smart HR Transactions page. If the template is set up correctly, the Test Confirmation page appears stating that your template configuration is successful. If the template is not set up correctly, the Test Confirmation page appears with a link to view the errors that the template encountered.

**Note:** Testing a template does not update any of the components associated with the template transaction's type.

### Template Sections

| | |
|---|---|
| **Seq Nbr (sequence number)** | Enter a sequential number to reorder sections. The lower numbered section will appear first on a page for the end user. Sequence numbers come from the Template Section page, but can be overridden here. |
| **Section Style** | Indicate whether the section should be displayed in *Tabular* format or *Grid* format. The Grid format is for multi-row sections such as Profile Management items, addresses, phone numbers, e-mails, and so forth. |
| **Section Configuration** | Select this link to open the Template Section Configuration page and use the Text Catalog to update fields values within a section. |
| **Page Nbr (page number) and Page Title** | Assign sections to a page number you defined on the Pages page. The page title will automatically display from either the Text Catalog value or static text you entered Define Tab Detail page. |

## Template Section Configuration Page

Use the Template Section Configuration page (HR_TBH_TMPL_FLDS) to configure the fields for a section within the template.

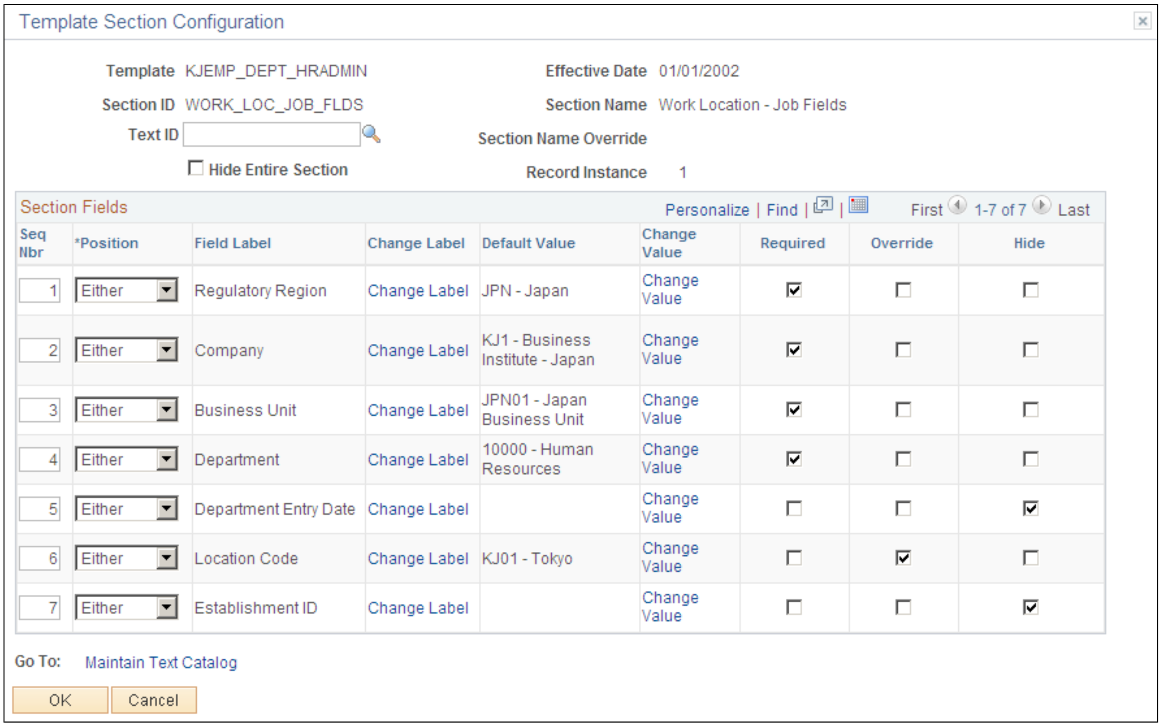
 

### Navigation

Click the Section Configuration link on the Sections page.

**Image: Template Section Configuration page**

This example illustrates the fields and controls on the Template Section Configuration page. You can find definitions for the fields and controls later on this page.


Template Section Configuration

Template KJEMP_DEPT_HRADMIN Effective Date 01/01/2002

Section ID WORK_LOC_JOB_FLDS Section Name Work Location - Job Fields

Text ID Section Name Override

Hide Entire Section Record Instance 1

Section Fields Personalize | Find | First 1-7 of 7 Last

| Seq Nbr | *Position | Field Label | Change Label | Default Value | Change Value | Required | Override | Hide |
|---|---|---|---|---|---|---|---|---|
| 1 | Either | Regulatory Region | Change Label | JPN - Japan | Change Value | ☑ | ☐ | ☐ |
| 2 | Either | Company | Change Label | KJ1 - Business Institute - Japan | Change Value | ☑ | ☐ | ☐ |
| 3 | Either | Business Unit | Change Label | JPN01 - Japan Business Unit | Change Value | ☑ | ☐ | ☐ |
| 4 | Either | Department | Change Label | 10000 - Human Resources | Change Value | ☑ | ☐ | ☐ |
| 5 | Either | Department Entry Date | Change Label | | Change Value | ☐ | ☐ | ☑ |
| 6 | Either | Location Code | Change Label | KJ01 - Tokyo | Change Value | ☐ | ☑ | ☐ |
| 7 | Either | Establishment ID | Change Label | | Change Value | ☐ | ☐ | ☑ |

Go To: Maintain Text Catalog

OK Cancel

The template administrator uses the Template Section Configuration page to determine which fields will appear in a section and determine if the field should be required, have a default value provided, and if the end user can change any values.

| | |
|---|---|
| **Text ID andSection Name Override** | Enter a different text ID to if you want to change the group box header on the Smart HR Transactions page. The new name displays in the Section Name Override field. |
| **Hide Entire Section** | Select this check box to hide this section from the end user when entering the Smart HR transaction. |

## Section Fields

| | |
|---|---|
| **Seq Nbr (sequence number)** | Enter a sequential number to reorder the fields in this section. The sequence number is defined on the Template Section page in the Section Configuration group box, but can be overridden here. |
| **Position** | Enter the location that the field should appear within the section. Values are *Either, Left,* and *Right.* By selecting *Either,* the system will place the field in the next logical order location, either left or right. |

| | |
|---|---|
| **Field Label and Change Label** | Click the Change Label this link to open the Section Field Label Override page and use the Text Catalog to select another text ID to change the field label. |
| **Default Value and Change Value** | Click the Change Value link to open the Section Field Default Value page and define a default value for the field. The system displays this value in the Default Value field. |
| **Required** | Select this check box if the end user is required to enter a value in the field. |
| **Override** | Select this check box to enable the end user to change the default value when performing a Smart HR transaction. Deselect this check box when the end user is not allowed to change the value. When you select this check box, the system deselects the Hide check box so the end user has access to the field to edit the value. |
| **Hide** | Select this check box to hide this field and default value from the end user when performing a Smart HR transaction. When you select this check box, the system deselects the Override check box. The end use will not be able to change the default value since the field is hidden. |
| **Maintain Text Catalog** | Click the Maintain Text Catalog link to open the Text Catalog - Maintain search page or Maintain Text Catalog page in a new browser window. Use the Maintain Text Catalog page to change the label sections. |

### Related Links

Understanding Smart HR Templates

"Configuring the Text Catalog *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Template Creation - Person Rules Page

Use the Person Rules page (HR_TBH_TMPL_PER) to enable or disable Search Match functionality for a template and define options for handling existing person data and employment instances in the database.

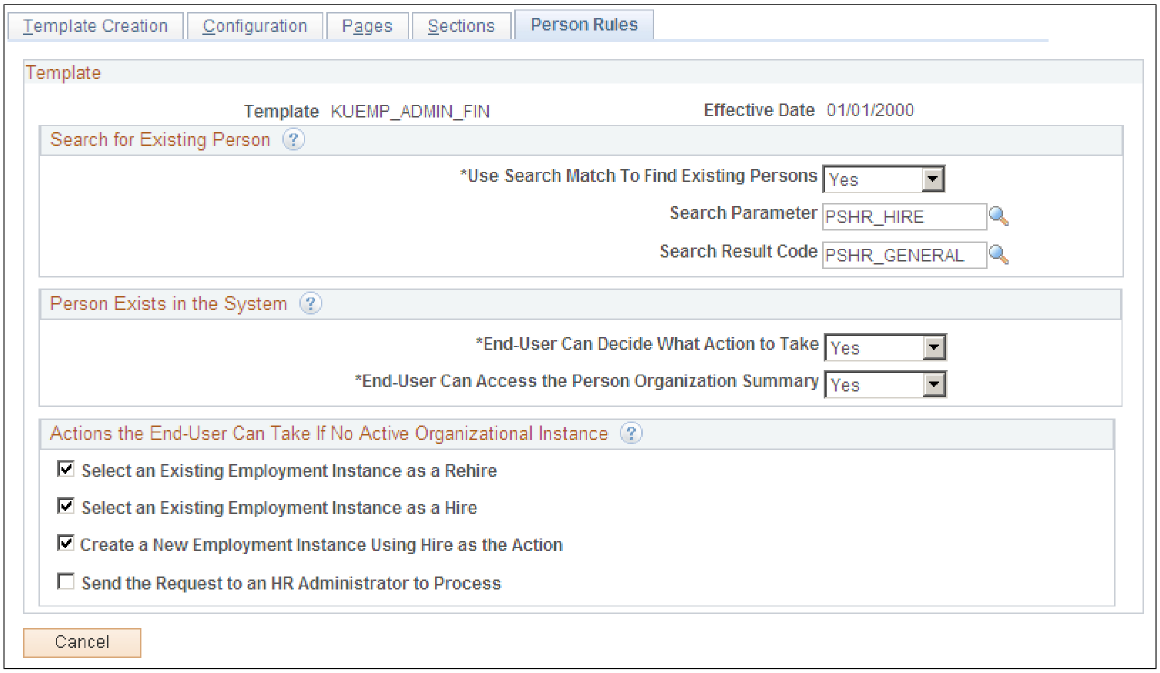
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Creation, Person Rules

**Image: Person Rules page**

This example illustrates the fields and controls on the Person Rules page. You can find definitions for the fields and controls later on this page.




## Search for Existing Person

Use these fields to enable or disable Search Match.

**Use Search Match To Find Existing Persons**

Select whether the Smart HR process should use the Search Match functionality. If you select:

- *Yes* - Search Match will run before the transaction can be saved or submitted, regardless if Automatic Database Updates is selected for this template on the Configuration page. Selecting the Save and Submit button during the transaction will trigger the Search Match process behind the scenes.
- *No* - the system will hide all other fields on this page and the Search/Match process will not run. After the end user clicks Save and Submit, the system will display the confirmation page.

For templates with a transaction type where the Person/Job Data Indicator field value is *not* equal to *Hire/Rehire,* the Use Search Match To Find Existing Persons field is automatically set to *Yes* and is grayed out so it cannot be changed. These transaction type templates require a person to already be in the system. Only the Search for Existing Person group box fields display on the page.

---

**Note:** When the Person/Job Data Indicator field for a template's transaction type :is set to *Update Job* or *Update Person and Job* and the template is configured for automatic database updates, the target person must have only one active job in the system. If not, the transaction will be routed to the HR Administrator to update the person model.

---

See Template Transaction Type - Transaction Type Page.

**Search Parameter**

Enter a search parameter, which contains a set of one or more search rules. The search parameters are what the users select prior to performing a search to determine the search fields that they are permitted to search on.

This field appears when you select *Yes* in the Use Search Match To Find Existing Persons field.

**Search Result Code**

Enter a search result code, which specifies the data that you want Search/Match to return in the grids on the Search Results page for the potential matching IDs that it finds.

This field appears when you select *Yes* in the Use Search Match To Find Existing Persons field.

See ."Understanding Search/Match *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Person Exists in the System

**End-User Can Decide What Action to Take**

Determine whether the end user decides what action to take when Search/Match is activated.

When you select *Yes,* the page displays the End-User Can Access the Person Organization Summary field and the Actions the End-User Can Take If No Active Organizational Instance Is Found group box.

When you select *No,* the page displays the Action to Take if Only One Inactive Employment Instance Is Found and Action to Take if More than One Inactive Employment Instance (or None) is Found group boxes.

**End-User Can Access the Person Organization Summary**

Determine whether the end user can view more information about a person by selecting either *Yes* or *No.* When you select *Yes,* a Per Org Summary link is made available to the user to view organization details about a person.

The End-User Can Access the Person Organization Summary field is available when you select *Yes* in the End-User Can Decide What Action to Take field.

---

**Note:** Depending on the Organizational Relationship value defined on the Configuration page of the Template, the field text will vary. An *Employee* relationship displays the text Employment Instance, where as a *Contingent Worker* relationship displays the wording Contingent Worker Instance. This applies to every instance of this wording on the Person Rules page.

---

### Actions the End-User Can Take If No Active Organizational Instance

When the template administrator selects *Yes* in the End-User Can Decide What Action to Take field, the page displays this group box.

Select one or more check boxes to enable functionality for the end user for the template. This group box appears when you select *Yes* in the End-User Can Decide What Action to Take field. Field selection options are:

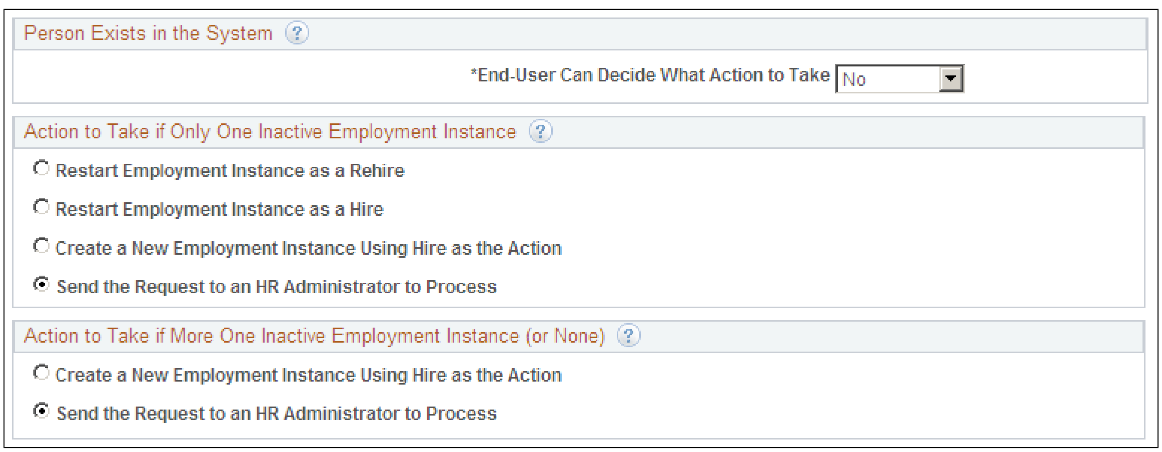
- Select an Existing Employment Instance as a Rehire.
- Select an Existing Employment Instance as a Hire.
- Create a New Employment Instance Using Hire as the Action.
- Send the Request to an HR Administrator to Process.

### Action to Take if Only One Inactive Employment Instance

When the template administrator selects *No* in the End-User Can Decide What Action to Take field, the page presents a set of different group boxes for inactive employment instance matches.

**Image: Person Rules page where the end user cannot decide what action to take when a person exists in the system**

This example illustrates the fields and controls on the Person Rules page where the end user cannot decide what action to take when a person exists in the system. You can find definitions for the fields and controls later on this page.




To define what action should occur if an inactive matching person is found during the transaction, select one of the options in this group box. Values are:

- Restart Employment Instance as a Rehire.
- Restart Employment Instance as a Hire.
- Create a New Employment Instance Using Hire as the Action.
- Send the Request to an HR Administrator to Process.

### Action to Take if More than One Inactive Employment Instance (or None)

Select one option the end user can perform during a template transaction when more than one inactive employment instance is found. This group box appears when you select *No* in the End-User Can Decide What Action to Take field. Values are:

- Create a New Employment Instance Using Hire as the Action.
- Send the Request to an HR Administrator to Process.

## Copy Template Page

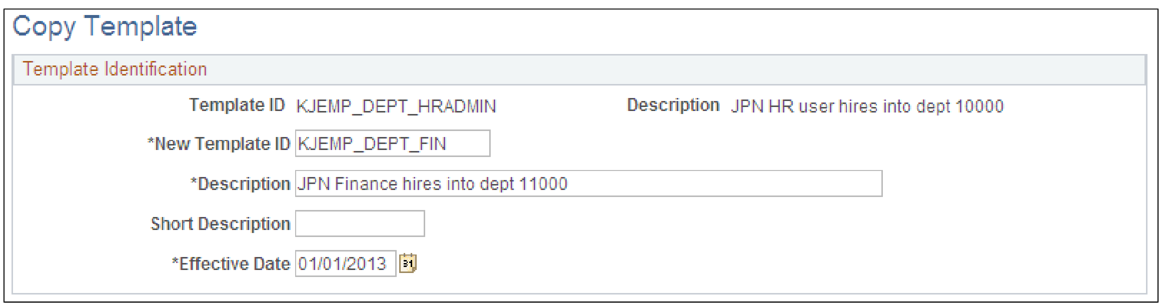
Use the Copy Template page (HR_TBH_COPY) to copy a Smart HR template and make modifications to the new template.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Copy Template, Copy Template

**Image: Copy Template page**

This example illustrates the fields and controls on the Copy Template page. You can find definitions for the fields and controls later on this page.




Enter the new template information and click Save. The system will open the Template Creation component where you can update the appropriate information.

### Country Changes

If you copy a country template and save it for another country, only the related country sections appear on the page. The original country sections and their defaults do not display. For example, if a template for France (FRA) is copied and you change the country for the new template to Spain (ESP), the FRA sections are removed; the ESP sections appear, are blank, and ready for input.

**Note:** You will need to access the Sections page and select the Load/Reload Sections button to update the template with the related country sections and delete the original country sections and their defaults.

# Defining Roles for Hire Notifications

To set up the hire notification roles table, use the Hire Notification (HR_HIRE_NOTIF) component.

This topic provides an overview of hire notifications and discusses how to define which roles will receive hire notifications.

## Understanding Hire Notifications

When a recruiter or user submits a hire request, the system uses the Hire Notification component to identify who should receive notification when someone is ready to be hired or there are errors in publishing the hire to HR.

Hire notification setup needs to be done for the administrator to receive email notifications that a person is ready to be hired or that errors occurred while processing the hire. The Hire Notifications page uses role queries to define who should receive notification of hire requests and errors. The delivered role query is ROLE_HIRE_NOTIF, however, you can define other role queries and add them on the Hire Notifications page.

The system enables hire notification emails:

1. Whenever a new hire request comes through the recruiting process.
2. Whenever there is an error in the push of profile data to HR once the applicant or person is hired.

The administrator can access the Manage Hires page to view pending hires and the status of each hire request to be processed.

## Pages Used to Define Roles for Hire Related Notifications

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
| --- | --- | --- | --- |
| Hire Notifications | HR_HIRE_NOTIF | Set Up HCM, Product Related, Workforce Administration, Hire Notification, Hire Notifications | Define which roles in Human Resources will receive hire related notifications. |

## Hire Notifications Page

Use the Hire Notifications page (HR_HIRE_NOTIF) to define which roles in Human Resources will receive hire related notifications.

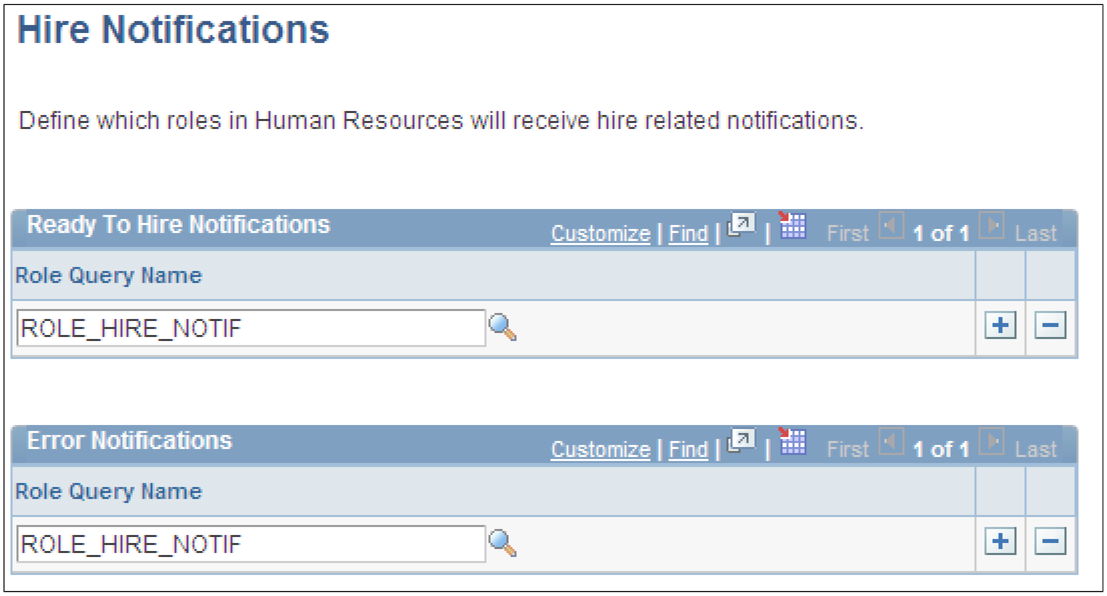
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Hire Notification, Hire Notifications

**Image: Hire Notifications page**

This example illustrates the fields and controls on the Hire Notifications page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Ready To Hire Notifications** | Enter any role query names that should receive a notification that a person is ready to be hired. The system comes with the delivered role query ROLE_HIRE_NOTIF. |
| **Error Notifications** | Enter any role query names that should receive a notification when there is an error in the push of profile data to HR. The system comes with the delivered role query ROLE_HIRE_NOTIF. |

You can define a query by navigating to Reporting Tools, Query, Query Manager.

## Defining Employee Identification

To set up the employee identification tables, use the Supporting Documents (SUPPORT_DOC_TABLE), Visa/Permits (VISA_PERMIT_TABLE), and Driver's License Type (DRIVE_LIC_TBL) components.

This topic discusses how to define visas and work permits.

## Pages Used to Define Employee Identification

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
| --- | --- | --- | --- |
| Supporting Documents | SUPPORT_DOC_TABLE | Set Up HCM, Common Definitions, Letters and Documents, Supporting Documents, Supporting Documents | Set up codes for the types of documents required to obtain visas and permits for employees and their dependents, such as birth certificates, letters of employment, and marriage certificates. |
| Visa/Permits | VISA_PERMIT_TABLE | Set Up HCM, Product Related, Workforce Administration, Visas/ Permits, Visa/Permits | Define visas, work permits, and associated supporting documents that governments require for noncitizens to work in the countries where your organization does business. |
| Driver's License Type | DRIVE_LIC_TBL | Set Up HCM, Product Related, Workforce Administration, Driver's License Type, Driver's License Type | Enter the types of licenses that you are tracking. |

## Visa/Permits Page

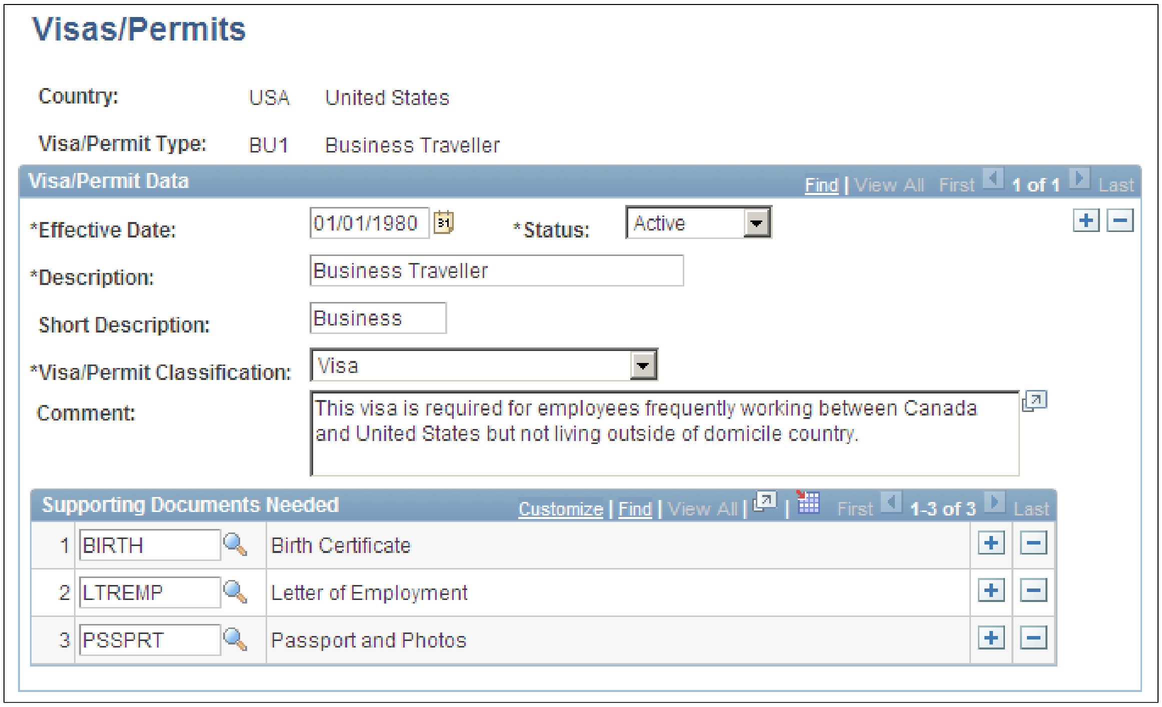
Use the Visa/Permits page (VISA_PERMIT_TABLE) to define visas, work permits, and associated supporting documents that governments require for noncitizens to work in the countries where your organization does business.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Visas/Permits, Visa/Permits

**Image: Visa/Permits page**

This example illustrates the fields and controls on the Visa/Permits page. You can find definitions for the fields and controls later on this page.




You must have previously defined the visa or permit classifications on the Supporting Documents Table page.

| | |
|---|---|
| **Visa/Permit Classification** | Select the appropriate visa or permit classification, if applicable. |
| **Supporting Documents Needed** | Select the appropriate supporting documents needed to obtain the visa or permit. |

# Setting Up Military Rank Structure

To set up military rank structure tables, use the Service Components (MIL_SVC_COMPONENT), Component Categories (MIL_CMP_CAT_DEFN), Military Service (MIL_SERVICE_DEFN), Worn Rank Types (MIL_WRN_TYPE_DEFN), and Skill Grades (MIL_SKL_GRD_DEFN) components.

These topics provide an overview of military ranking structure and discuss how to:

- Enter military service types.
- Create military component type categories.
- Establish military service details.

- Define service ranks.
- Associate grades with ranks.

## Understanding Military Ranking Structure

In a military organization, rank defines the hierarchy and organization of its personnel and represents seniority and command. Rank is also an attribute used to drive pay and is used in force planning, reporting, movement, and assignments. Once military functionality is enabled on the Installation table and the military tables set up in the PeopleSoft Human Resources system, you can associate military service and rank with jobs and positions or track the movement of service members between active (or inactive) duty, reserve call-ups, and so forth in Job Data.

PeopleSoft Human Resources provides the Military Service table to track the various services, ranks, and hierarchical structures for a country (for example, the U.S. has four services that have different ranks and structures). Within this table, military organizations can use sequence numbers and the National Atlantic Treaty Organization (NATO) rank codes to define a service structure's order for ranks. Rank structure is also broken down according to the following rank categories: Officers (OF), Other Ranks (OR), and Warrant Officers (WO). Within each of the three rank categories, ranks are graded numerically, as shown in this table:

| ***Rank Category*** | ***Numerical Grade*** | ***Details*** |
|---|---|---|
| Officers | OF-01 to OF-10 | |
| Other Ranks | OR–01 to OR–09 | Other Ranks may include a sub-categorization of Non-Commissioned Officer or Enlisted personnel. These sub-categorizations vary by country. For NATO purposes, rank grades OR-05 to OR-09 inclusive are considered to be Non-Commissioned Officers. |
| Warrant Officers | 1 to 4 | Typically represent a hierarchy between non-commissioned officers and commissioned officers. |

Military organizations use the general salary plan tables to set up the general salary structures, for example Officers, Warrant Officers, Enlisted salary and other structures. Once salary plans and grades are established in the system, an organization can assign different salary grades to a rank for the purpose of calculating pay and seniority. When an individual is assigned a rank in Job Data, only those salary grades associated with their rank or worn rank are eligible pay structures.

### Recording Rank Changes in Profile Management

PeopleSoft delivers the *RANK* content type to integrate a person's job with the Manage Profile feature. A profile integration update service, when set up accordingly in the Event Manager, updates a person's profile in Manage Profiles from Job Data when there's a rank change.

See "Understanding Profile Management *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

## Pages Used to Set Up Military Rank Structure

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Service Components | MIL_SVC_CMP_DEFN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Service Components, Service Components | Enter military service types (Regular, Active Reserve, Inactive Reserve or Emergency Reserve, or Guard, for example). |
| Component Categories | MIL_CMP_CAT_DEFN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Component Categories, Component Categories | Create military component type categories that further define service components (Supplemental, Weekend Training, or Permanent, for example). |
| Service Definition | MIL_SERVICE_DEFN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Service, Service Definition | Define military service details by associating service components and categories to a military service and country. |
| Service Ranks | MIL_SERVICE_RANKS | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Service, Service Ranks | Define service ranks that you will later associate with military service members. Identify the hierarchy and structure of the ranks within a specified military service. |
| Salary Grades - Military Ranks | MIL_RANK_GRADE_SEC | Select the Salary Grade link on the Service Ranks page. | Select the salary plans and grades that fit the pay attributes of a rank. |
| Worn Rank Types | MIL_WRN_TYPE_DEFN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Worn Rank Types, Worn Rank Types | Identify rank insignias that a service member is allowed to wear on his uniform while serving in a particular post. |
| Skill Grades | MIL_SKL_GRD_DEFN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Skill Grades, Skill Grades | Create skill grade levels for which a service member can be evaluated. Skill grades, along with ranks, may be components of someone's pay and relevant in some payroll processing systems. |

## Service Components Page

Use the Service Components page (MIL_SVC_CMP_DEFN) to enter military service types (Regular, Active Reserve, Inactive Reserve or Emergency Reserve, or Guard, for example).

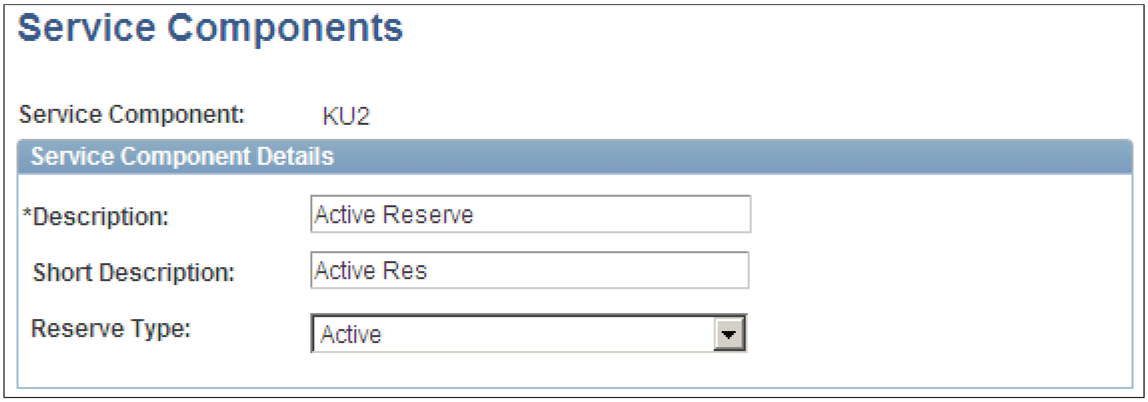
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Service Components, Service Components

**Image: Service Components page**

This example illustrates the fields and controls on the Service Components page. You can find definitions for the fields and controls later on this page.




**Reserve Type** Identify if this service component is part of a military reserve force. Valid values are *Active, Inactive,* or *Not Applicable.*

## Component Categories Page

Use the Component Categories page (MIL_CMP_CAT_DEFN) to create military component type categories that further define service components (Supplemental, Weekend Training, or Permanent, for example).

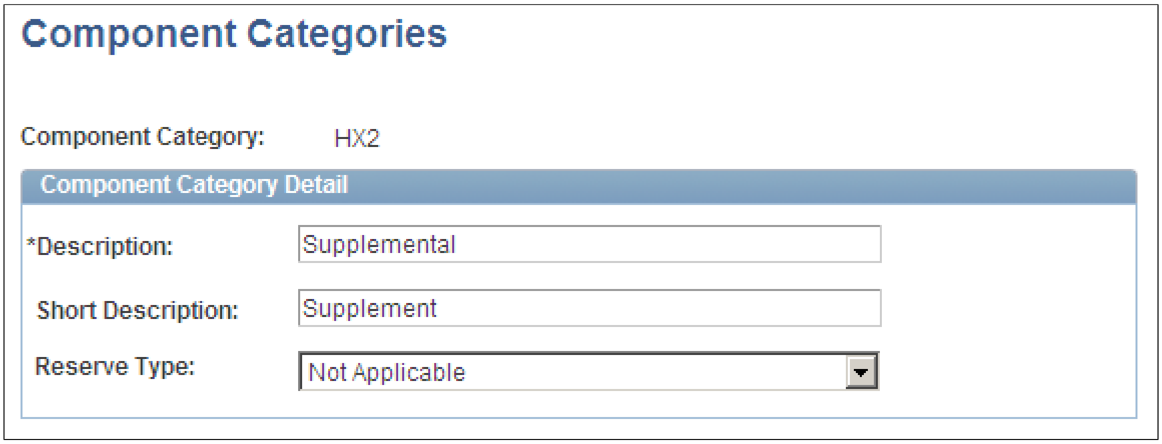
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Component Categories, Component Categories

**Image: Component Categories page**

This example illustrates the fields and controls on the Component Categories page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Reserve Type** | Identify if this service component category is part of a military reserve force. Valid values are *Active, Inactive,* or *Not Applicable.* |

## Military Service - Service Definition Page

Use the Service Definition page (MIL_SERVICE_DEFN) to define military service details by associating service components and categories to a military service and country.

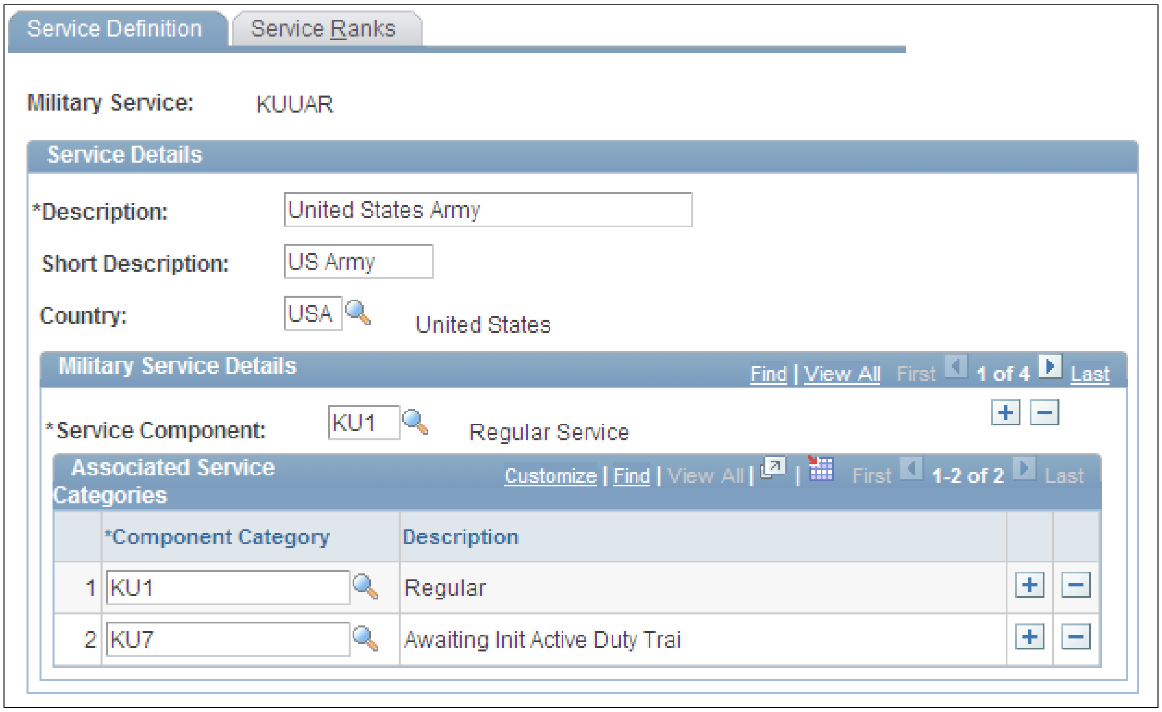
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Service, Service Definition

**Image: Service Definition page**

This example illustrates the fields and controls on the Service Definition page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Country** | Enter the country to which this military service applies. |
| **Service Component** | Select one or multiple service components related to this military service. When a user associates a military service with a position or military service member, only those service components associated with that military service are available to the user. |
| **Component Category** | Associate service categories to service components. When a user associates a service component with a military service member, only those component categories associated with that service component are available to the user. |

## Military Service - Service Ranks Page

Use the Service Ranks page (MIL_SERVICE_RANKS) to define service ranks that you will later associate with military service members. Identify the hierarchy and structure of the ranks within a specified military service.

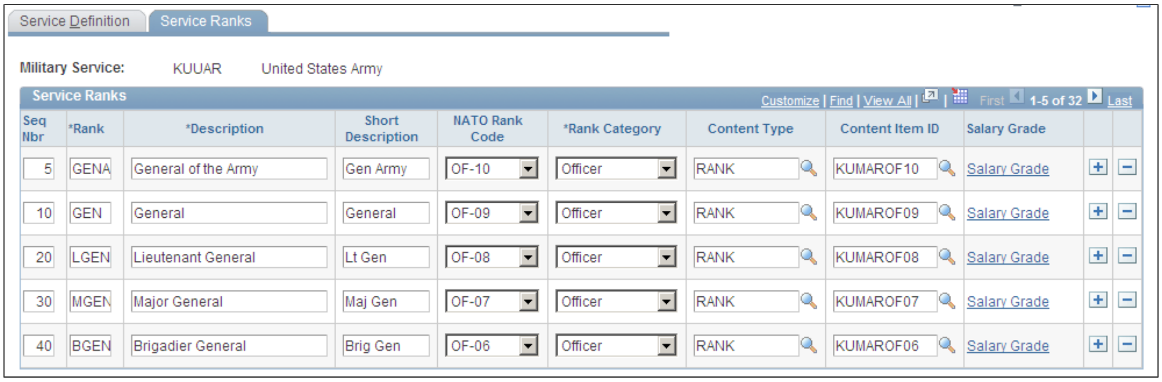
 

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Service, Service Ranks

### Image: Service Ranks page

This example illustrates the fields and controls on the Service Ranks page. You can find definitions for the fields and controls later on this page.




**Seq Nbr (sequence number)**

Specify the overall rank sort order to specify the military's hierarchical structure. This field enables users to sort rank codes where these service ranks have the same NATO ranks, such as the OF-1 (1st and 2nd Lieutenant ranks). This field also enables you to specify individual rank order sequences for military services that are not part of the NATO structure and hierarchy.

**Rank**

Define rank code designations specific to this military service.

**NATO Rank Code**

Select the NATO code associated with this rank, if available. Valid values are provided using translate values. This field is optional since it does not apply to all militaries, such as the US Warrant Officer rank categories.

The system displays a warning message upon saving if the NATO rank code is blank and the Military Rank Category is *Officer* or *Other Ranks.*

**Rank Category**

Categorizing ranks based on NATO's definitions. Valid values are *Officer, Other Ranks,* and *Warrant Officer.*

**Content Type**

Enter the content type that defines the rank (for example, rank, competency, degree). The PeopleSoft system delivers the content type *RANK* to record ranks.

When a military service member's rank is updated in Job Data, the system will update that person's profile, if an organization has set up the Event Manager accordingly.

See "Understanding the Content Catalog *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

| | |
|---|---|
| **Content Item ID** | Select a content item that further defines the RANK content type. The system uses this information to manage a person's job profile.<br><br>See ."Understanding the Content Catalog *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*" |
| **Salary Grade** | Click to access the Salary Grades - Military Ranks page and define which salary plans and grades fit the pay attributes of this respective rank code. |

## Salary Grades - Military Ranks Page

Use the Salary Grades - Military Ranks page (MIL_RANK_GRADE_SEC) to select the salary plans and grades that fit the pay attributes of a rank.

**Navigation**

Select the Salary Grade link on the Service Ranks page.

**Image: Salary Grades - Military Ranks page**

This example illustrates the fields and controls on the Salary Grades - Military Ranks page. You can find definitions for the fields and controls later on this page.


When a rank is associated with a service member, the system returns only those salary plans and grades that are applicable to the rank, as defined on this page.

# Setting Up Military Rank Change Notification and Documentation

To set up military rank change notification and documentation tables, use the Military Processing Definition (MIL_RANK_CHNG_PROC), Rank Change Status MIL (MIL_RANK_CHNG_STAT), Military Rank Change Template (MIL_RANK_CHNG_TMPL), and Clone Military Rank Template (MIL_RNK_CLONE_TMPL) components.

These topics provide an overview of the military change rank and notification process and discuss how to:

- Define military rank change processing rules.

- Specifying allowable actions for rank change processing.
- Create a military rank change template definition.
- Enter military rank change control criteria.
- Specify stakeholder notification details.
- Clone a military rank change template.

## Understanding the Military Change Rank and Notification Process

The Military Rank Change process enables you to track the various states of military service member rank changes, notify stakeholders that are involved in the process using Approval Framework, and generate official documentation. If your organization has elected to require approval processing using the Rank Change process, then upon completion of the last approval, and when the date of the rank change arrives, the system will insert a new row into the service member's Job Data to reflect the rank change using the component interface CI_JOB_DATA.

Since rank change requests often happen months in advance of the actual approval process, the system enables you to record military rank change requests, amendments, and cancellations without having enter this information in Job Data. When approval processing is enabled, the system will send out rank change transaction notifications on a predefined date to stakeholders; stakeholders can be identified as either reviewers or approvers. Approvers will then access the self service pages to approve or deny the request.

The PeopleSoft HR application delivers several setup tables to support the rank change approval and notification process. These tables are available through these components:

- Military Processing Definition

  Use this component to identify the method used to access the employee-manager reporting structure for determining the unit commander with final approval. Also, this is the location you can enable the approval and prenotification process. When the approval process is not enabled in this component, the rank changes will automatically be applied to Job Data without requiring approvals when the Rank Change Application Date arrives.

- Rank Change Status MIL

  Use this component to specify a subset of valid actions and related statuses that can be used in a rank change request, since the final rank change promotion or demotion will be written to Job Data and requires an Action value. You can also opt to include this action and status for prenotification or whether to apply it to Job Data. Here, the system can also calculate the Early Promotion Date that's written to the Job Data row. Only the actions specified in this component will appear as a rank change option.

- Military Rank Change Template and Clone Military Rank Template

  Use these components to create templates that enable users to default as much data as possible into the Rank Change MIL component for a service member rank change request. This ensures that entering data is a quick and easy process. Use the cloning component to copy an existing template to streamline the template creation process.

### Related Links

Managing Military Rank Change Requests

## Pages Used to Set Up the Military Rank Change and Notification Process

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Military Processing Definition | MIL_RANK_CHNG_PROC | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Processing Definition, Military Processing Definition | Define military rank change processing rules. Determine the service member unit commander, who will be used as the final approver in the rank change approval process. Use this page to turn on the approval process and enable prenotification of a rank change. |
| Rank Change Status MIL | MIL_RANK_CHNG_STAT | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Rank Change Status MIL, Rank Change Status MIL | Specify the allowable Action table values for change rank processing. Only those action and disposition status combinations defined here are available for military rank change templates and requests. |
| Template Definition | MIL_TMPL_DEFN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Definition | Create a military rank change template definition. Define the template name, description, and any comments that will help to describe when this template should be used. |
| Template Change Control | MIL_TMPL_CHNG_CNTL | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Change Control | Enter military rank change control criteria. This page enables you to define default specific personnel action and reason values as well as the rank change status values (New, Amendment, Cancel by Command, Cancel by Admin) to be associated with the template. Enter default values for the authorizing organization's business unit and department as well as the position or user role that should be used when determining the responsible career manager. The system will use these values to populate the Military Rank Change page fields in the Rank Change MIL component. |

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Template Notifications | MIL_TMPL_NOTIFY | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Notifications | Specify the stakeholder notification details such as default roles that should be associated with a template and indicate when to start the approval and notification process. |
| Clone Military Rank Template | MIL_RNK_CLONE_TMPL | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Clone Military Rank Template, Clone Military Rank Template | Clone a military rank change template by identifying an existing a rank change template to copy and entering the new template ID you wish to create. |

## Military Processing Definition Page

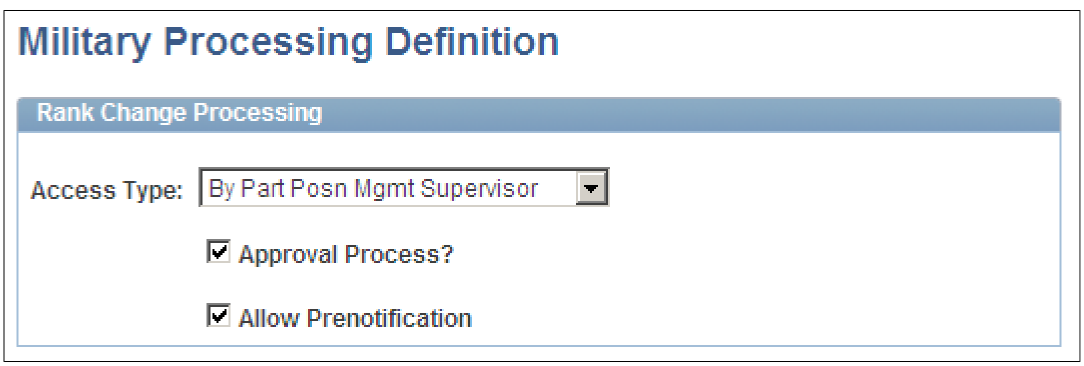
Use the Military Processing Definition page (MIL_RANK_CHNG_PROC) to define military rank change processing rules. Determine the service member unit commander, who will be used as the final approver in the rank change approval process. Use this page to turn on the approval process and enable prenotification of a rank change.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Processing Definition, Military Processing Definition

**Image: Military Processing Definition page**

This example illustrates the fields and contrsols on the Military Processing Definition page. You can find definitions for the fields and controls later on this page.




Use this page to identify how the system will determine the unit commander role for the approval and workflow notification process. When using the approval process, the unit commander is the final approver. You will also use this page to identify if you want the system to require approvals for rank change or use the prenotification process.

**Access Type** Select the access type that best fits how the unit commander structure for your organization is determined. This is the final approver for a service member's rank change.

Valid values are *By Department Manager ID, By Dept Security Tree* (by department security tree), *By Group ID, By Part Posn Mgmt Dept Mgr ID* (by partial position management department manager ID), *By Part Posn Mgmt Supervisor* ( by partial position management supervisor), *By Reports To Position,* and *By Supervisor ID.*

See "Setting Up Access to Direct Reports Data *(PeopleSoft HCM 9.2: Application Fundamentals)*", "Configuring Direct Reports Functionality *(PeopleSoft HCM 9.2: Application Fundamentals)*".

**Approval Process?**

Select this check box if the unit commander approval is needed to process a new or amended rank change and have the system apply these changes to Job Data. If approval is not required to process the rank change and update Job Data on the specified date, deselect this check box.

**Allow Prenotification**

Select this check box to enable the Prenotification process and have the system notify stakeholders in advance of a rank change being made to Job Data. This function provides stakeholders with another opportunity to review the service member's rank change before Job Data is updated. Coordination with the career manager and manual intervention would be required at this point to stop the system from processing the rank change.

The actual prenotification date is defined on the Stakeholder page of the Rank Change MIL component for the person receiving the rank change.

**Note:** If the Application Date field on the Military Rank Change page of the Rank Change MIL component is not populated, the prenotification date on the Stakeholder page will not be populated and therefore not picked up by the prenotification process.
Prenotification messages operate independently of Approval Framework, and it does not register an Approval Framework event. You can access the Prenotification for Mil Rank (MIL_NOTIFY_AE) Application Engine process by navigating to PeopleTools, Process Scheduler, System Process Requests.

See Rank Change MIL - Stakeholder Page.

## Rank Change Status MIL Page

Use the Rank Change Status MIL page (MIL_RANK_CHNG_STAT) to specify the allowable Action table values for change rank processing.

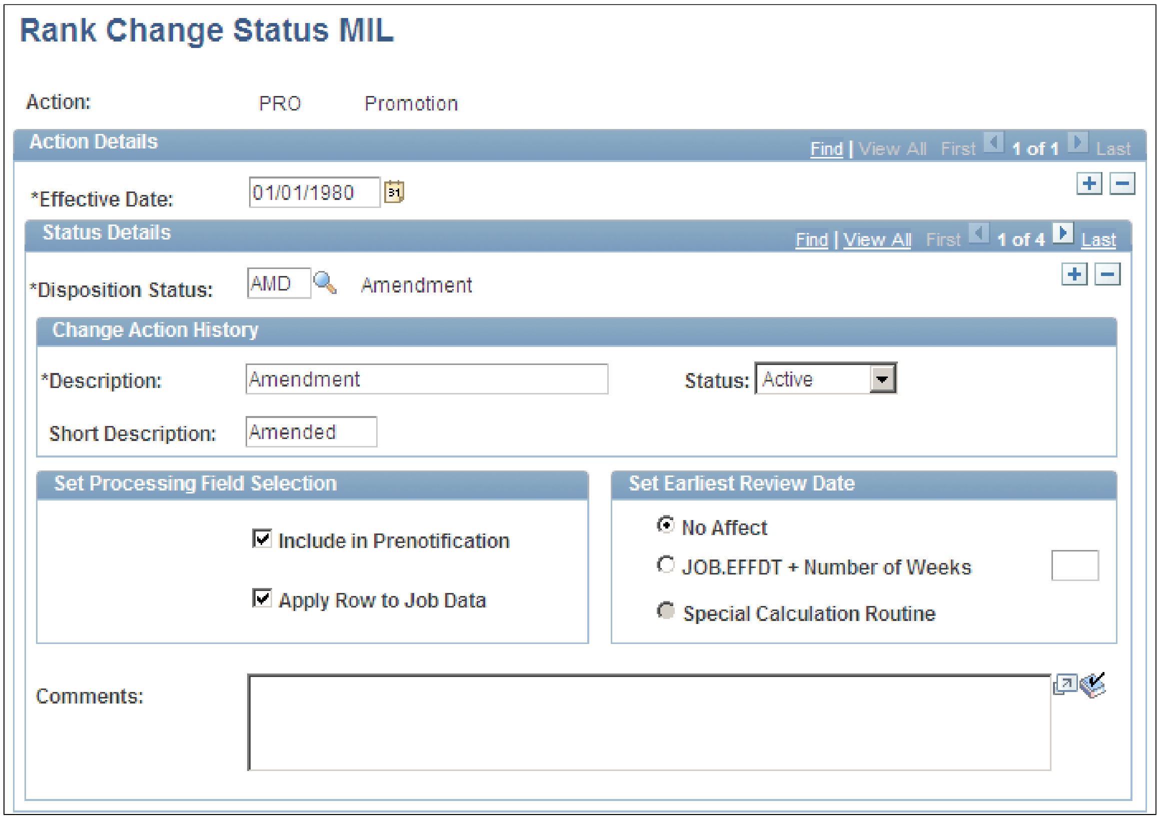
Only those action and disposition status combinations defined here are available for military rank change templates and requests.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Rank Change Status MIL, Rank Change Status MIL

### Image: Rank Change Status MIL page

This example illustrates the fields and controls on the Rank Change Status MIL page. You can find definitions for the fields and controls later on this page.




**Action**

Select a value from the Action table that can be used for military rank change requests.

**Disposition Status**

Enter the disposition statuses eligible for this action type. Only those action and rank change disposition status combinations defined here are available for selection in the Action and Disposition Status fields on the Template Change Control page for military rank change templates or Rank Change MIL page to record a service member's rank change request.

Valid values are *AMD* (Amendment), *CNA* (Cancel by Administrator), *CNC* (Cancel by Command), and *NEW* (new).

## Change Action History

Identify the rank change status descriptions that the system will display to a user during the Rank Change process. You can also activate or inactivate a specific disposition status for the action.

### Set Processing Field Selection

Use this section when configuring prenotification and the push of rank change requests to Job Data for an action and disposition status combination.

**Include In Prenotification** — Select this check box to generate a prenotification for stakeholders when a person has this action and disposition status combination. If this check box is not selected, prenotification will not be generated for stakeholders.

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**Note:** Prenotification must be enabled on the Military Processing Definition page in order for prenotification to occur.

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**Apply Row to Job Data** — Select this check box to have the system push the rank change request to Job Data. If this check box is not selected, the system will not apply the rank change to Job Data. For example, a cancellation of a rank change request would not need to be recorded in Job Data, and therefore would have this check box deselected.

### Set Earliest Review Date

Use this section to determine how the system should calculate the Early Promotion Date field value on the Job Data - Employment Information page use after the rank change row has been inserted into Job Data.

**No Affect** — Select this if there is no impact to the earliest review date when the Job Data row is inserted. This is the default value selection.

**JOB.EFFDT + Number of Weeks (job effective date plus number of weeks)** — Select this option to calculate a review date using the effective-date of the rank change row in Job Data plus the number of weeks specified here. If this option is selected, you must also enter the number of weeks (up to a 3-digit number) in the edit box after this field. The system uses this date to populate the Early Promotion Date on the Job Data - Employment Information page. In the case of a demotion or reversal, you may need to enter a negative number.

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**Note:** To use this option, you must enter an Application Date value on the Military Rank Change page.

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**Special Calculation Routine** — Select this option if your organization has created their own customized calculations. The PeopleSoft application does not deliver calculations for this field.

## Military Rank Change Template - Template Definition Page

Use the Template Definition page (MIL_TMPL_DEFN) to create a military rank change template definition.

Define the template name, description, and any comments that will help to describe when this template should be used.

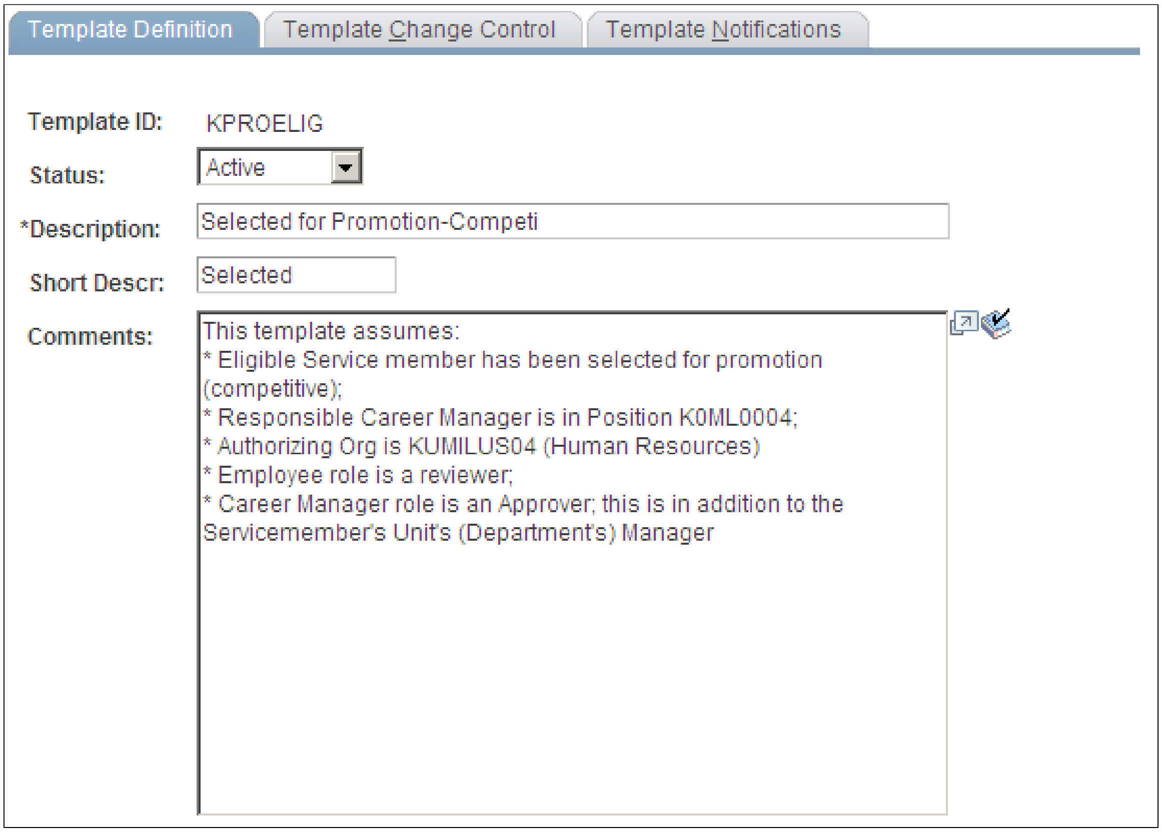
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Definition

**Image: Military Rank Change Template - Template Definition page**

This example illustrates the fields and controls on the Military Rank Change Template - Template Definition page. You can find definitions for the fields and controls later on this page.




**Template ID**

Enter an ID (up to 15-characters) to uniquely identify this template.

## Template Change Control Page

Use the Template Change Control page (MIL_TMPL_CHNG_CNTL) to enter military rank change control criteria.

This page enables you to define default specific personnel action and reason values as well as the rank change status values (New, Amendment, Cancel by Command, Cancel by Admin) to be associated with the template. Enter default values for the authorizing organization's business unit and department as well as the position or user role that should be used when determining the responsible career manager. The system will use these values to populate the Military Rank Change page fields in the Rank Change MIL component.

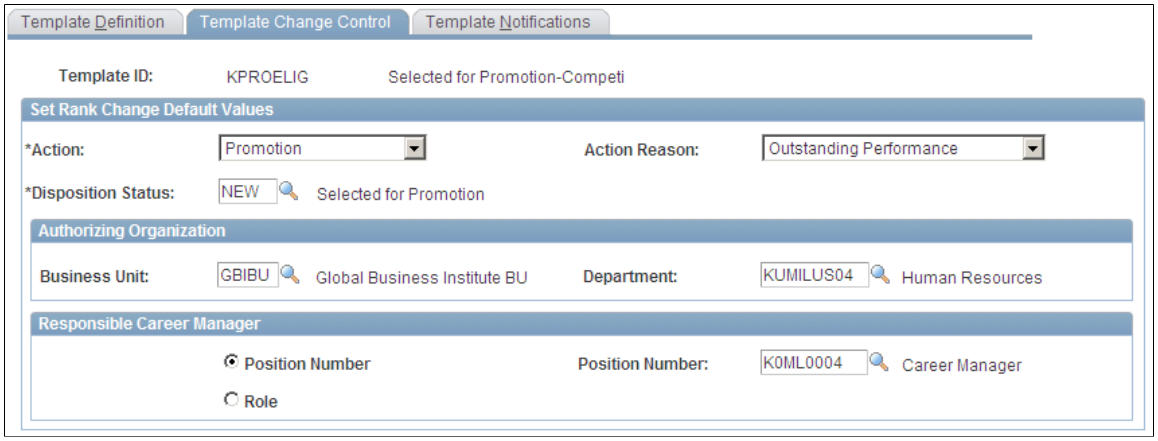
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Change Control

**Image: Template Change Control page**

This example illustrates the fields and controls on the Template Change Control page. You can find definitions for the fields and controls later on this page.




Use this page to define default values the system will use to populate fields in the Rank Change MIL component when creating a rank change request. The only required fields for defaulting are Action, Disposition Status, and the Responsible Career Manager selection.

**Action**

Select a default action value. Valid actions for rank changes are defined on the Rank Change Status MIL page.

**Reason**

Select a default reason that will be associated with the action, if applicable. Valid reasons for actions are defined in the Action Reasons table.

**Disposition Status**

Select the disposition status that will be provided by default when using this template. Valid values are defined on the Rank Change Status MIL page for an action.

**Business Unit andDepartment**

Enter the authorizing organization's business unit and department for this template.

## Responsible Career Manager

Use this selection to specify how the default career manager is derived. The system uses this information for notification purposes.

**Position Number andPosition Number**

Select this option if the career manager is decided by position. When you select this option, the Position Number field becomes available and you can enter the position number associated with the career manager for defaulting purposes or leave it blank.

**Role andRole Name**

Select this option if the career manager is decided by a role. When you select this option, the Role Name field becomes available and you can enter the name of the role associated with the career manager user ID for defaulting purposes or leave it blank.

## Military Rank Change Template - Notifications Page

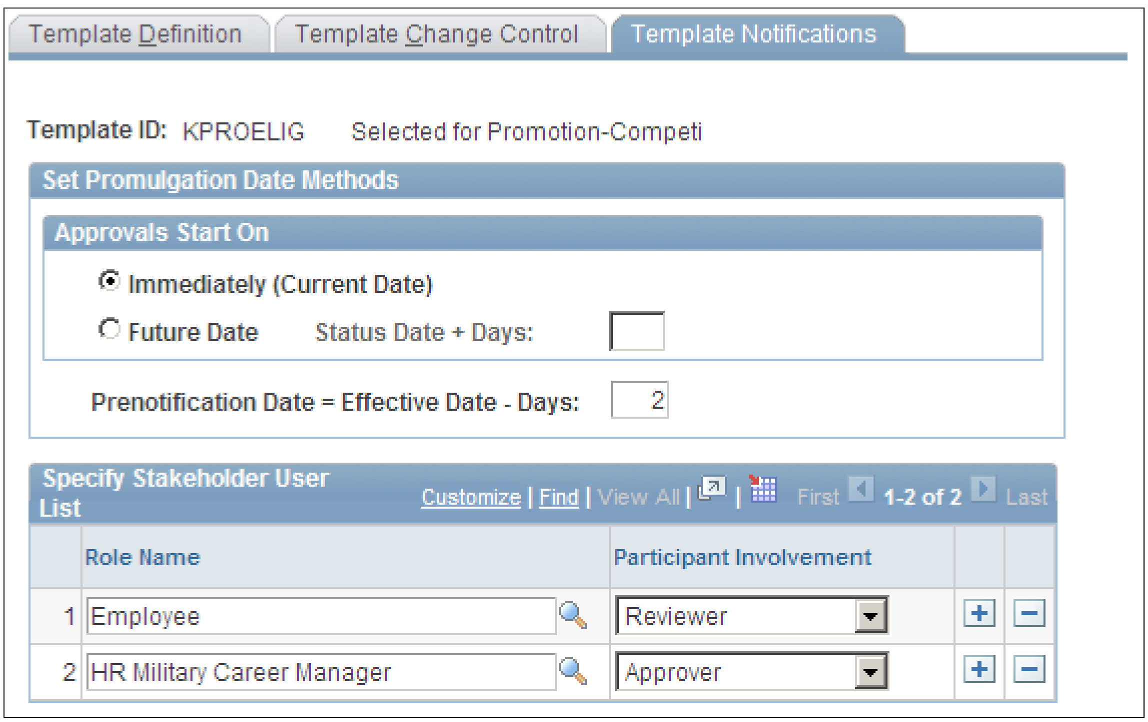
Use the Template Notifications page (MIL_TMPL_NOTIFY) to specify the stakeholder notification details such as default roles that should be associated with a template and indicate when to start the approval and notification process.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Military Rank Change Template, Template Notifications

**Image: Military Rank Change Template - Template Notifications page**

This example illustrates the fields and controls on the Military Rank Change Template - Template Notifications page. You can find definitions for the fields and controls later on this page.




Use this page of the template to configure for an immediate start of the approval process (when the rank change request is saved) or configure the approval process to start on a future date, to be calculated by the system. This page also enables the user to associate a prenotification date, which is essentially a final notification to stakeholder that the rank change is being applied to Job Data.

**Immediately (Current Date)**

Select this method to have the system populate the Start Approvals On field in the Rank Change MIL component with the system date. This will start the approval process upon saving the request in the Rank Change MIL component.

**Future Date andStatus Date + Days**

Select this method to have the system populate the Start Approvals On field in the Rank Change MIL component with a future date based on the Status Date field value in the Rank Change MIL component.

When you select this option, the Status Date + Days field becomes available. Enter the number of days (up to two digits) the system should wait before sending out the approval notices.

For example, you create a template indicating that approvals should be sent out on a future date. You enter 14 in the Status Date + Days field. Later, the HR manager enters a request for an employee rank using this template with a Status Date value of September 1. The system automatically populates the Start Approvals On field with the date of *September 15* on the Stakeholder page of the Rank Change MIL component, 14 days after the status date of this request. The HR manager can accept this default value or override this value with another date.

**Prenotification Date = Effective Date - Days**

Enter the number of days prior to the rank change being applied to the person's Job Data record that the stakeholders should be notified of the change being made in the system. The system calculates the prenotification date using the Application Date value on the Military Rank Change page in the Rank Change MIL component minus the number of days entered in this field. The system then enters this date in the Prenotification Date field on the Stakeholder page of the Rank Change MIL component. The HR manager can accept this default value or override this value with another date when creating the rank change request.

**Note:** Prenotification must be enabled on the Military Processing Definition page in order for prenotification to be performed.

**Role Name**

Identify the roles, or stakeholders, that should be notified in the rank change notification process.

**Participant Involvement**

Identify the level of involvement of the stakeholder. Values are *Approver* or *Reviewer.*

## Clone Military Rank Template Page

Use the Clone Military Rank Template page (MIL_RNK_CLONE_TMPL) to clone a military rank change template by identifying an existing a rank change template to copy and entering the new template ID you wish to create.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Clone Military Rank Template, Clone Military Rank Template

**Image: Clone Military Rank Template page**

This example illustrates the fields and controls on the Clone Military Rank Template page. You can find definitions for the fields and controls later on this page.


Use this page to copy an existing military rank template by selecting the existing template and then enter the new template ID, action, and disposition status. After saving, the system will open the Military Rank Change Template component, where you can then update fields related to this template.

# Defining Additional Employment Setup Data

To set up the additional employment setup data tables, use the Ethnic Groups (ETHNIC_GROUP_GBL), Non-Employee Provider (NEE_PROVIDER_TBL), Religions (RELIGION_TBL_GBL), Supervisor Levels (SUPVSR_LVL_TBL), Temporary Duties (TEMP_DUTIES_TBL), Volunteer Organizations (VOLUNTEER_ORG_TBL), and Employee Class (EMPL_CLASS_TABLE) components.

These topics provide and overview of supervisor levels and discuss how to define ethnic groups.

## Pages Used to Define Additional Employment Data

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Ethnic Groups | ETHNIC_GROUP_TBL | Set Up HCM, Product Related, Workforce Administration, Ethnic Groups, Ethnic Groups | Define ethnic groups.<br><br>Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Non-Employee Provider | NEE_PROVIDER_TBL | Set Up HCM, Product Related, Workforce Administration, Non-Employee Provider, Non-Employee Provider | Define the provider, agency, or employer of a contingent worker. Link this information to a worker on the Employment Information page or Contract Data page. |
| Religions | RELIGION_TBL | Set Up HCM, Product Related, Workforce Administration, Religions, Religions | Define religions. |
| Supervisor Levels | SUPVSR_LVL_TBL | Set Up HCM, Product Related, Workforce Administration, Supervisor Levels, Supervisor Levels | Add and modify supervisor level data. |
| Temporary Duties | TEMP_DUTIES_TBL | Set Up HCM, Product Related, Workforce Administration, Temporary Duties, Temporary Duties | Define or modify duty types for temporary assignments. This field only appears on the Job Code page of Job Data when the action is Temporary Assignment (TAS) and the Installation table has Auto Job Suspend selected. The value can indicate what type of duties are included in the assignment. |
| Volunteer Organizations | VOLUNTEER_ORG_TABL | Set Up HCM, Product Related, Workforce Administration, Volunteer Organizations, Volunteer Organizations | Add volunteer organization data that your company recognizes or sponsors. |
| Employee Class | EMPL_CLASS_TABLE | Set Up HCM, Product Related, Workforce Administration, Labor Administration, Employee Class, Employee Class | Set up employee classes to further categorize your workforce. Employee classes are assigned on the Job Data - Job Information page (JOB_ DATA_JOBCODE).<br><br>(GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification for workers. If your organization submits this report, you must use the required employee classes for the report to work correctly. |

## Understanding Supervisor Levels

Supervisor levels are a class of position such as Division Manager and Section Chief. They represent levels of some managerial or supervisory significance that bear responsibility for work above a certain level in order to achieve the organization's management goals.

The concept of employees' supervisor level is a central one in some places, such as Japanese companies' human resources management. It may or may not be related to an employee's "job." Companies usually use supervisor level as another type of employee identifier. Companies that do not use capability grades (or Job Management) may still require the tracking of supervisor levels. Many companies pay employees a component of pay related to their supervisor level.

Supervisor levels usually combine with departments to define positions or posts within an organization, as shown in this sequence of three tables:

### Table 1: Supervisor Levels

This table lists the supervisor levels and their descriptions.

| ***Supervisor Level*** | ***Description*** |
|---|---|
| 01 | Director |
| 02 | Senior Manager |

### Table 2: Departments

This table lists the department IDs and their descriptions.

| ***Department ID*** | ***Description*** |
|---|---|
| 100 | Development |
| 102 | Development Section One |
| 200 | Sales |
| 210 | Sales - West Division |

### Table 3: Position, Supervisor Level, and Departments

This table lists the positions or posts and their corresponding supervisor levels and department IDs.

| ***Position or Post*** | ***Supervisor Level*** | ***Department ID*** |
|---|---|---|
| Director of Development | 01 | 100 |
| Senior Manager of Development Section One | 02 | 102 |
| Director of Sales | 01 | 200 |
| Senior Manager of Sales - West Division | 02 | 210 |

When you create or update employee Job records, you can enter the supervisor levels that you set up in the Supervisor Level table on the Job Information page. And, because supervisor level is an employee identifier just like job code, position, or manager level, it appears throughout the system. You can view it or enter it on many of the pages on which you can also view or enter job codes, positions, and manager levels. You can also view it on Job Summary and throughout the Plan Careers and Successions and Track Global Assignments business processes.

## Ethnic Groups Page

Use the Ethnic Groups page (ETHNIC_GROUP_TBL) to define ethnic groups.

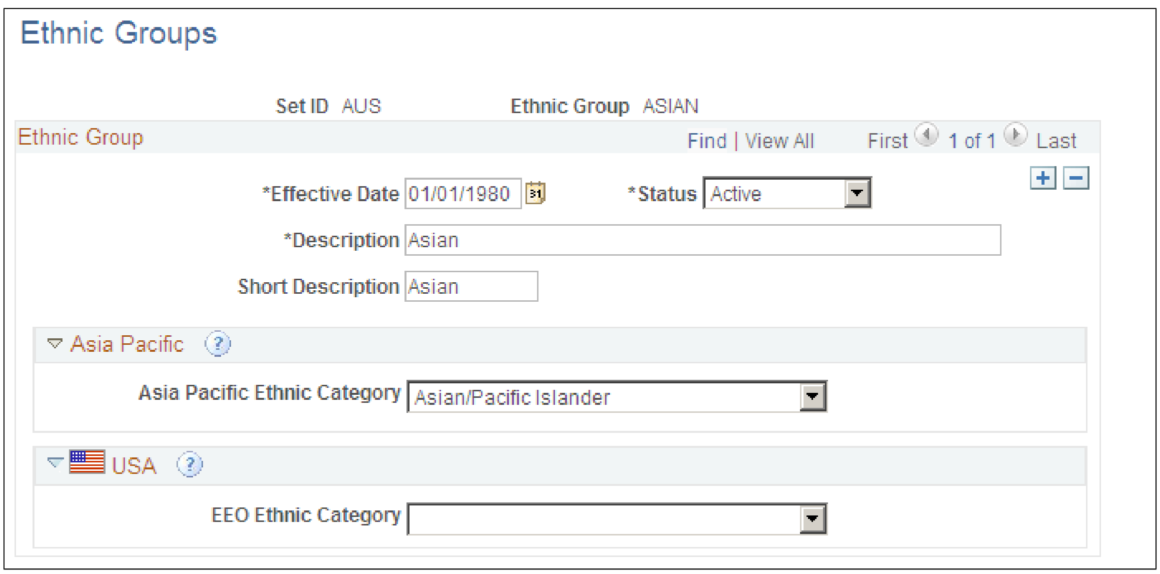
Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Ethnic Groups, Ethnic Groups

**Image: Ethic Groups page**

This example illustrates the fields and controls on the Ethnic Groups page. You can find definitions for the fields and controls later on this page.




**Asia Pacific Ethnic Category**

Select a category if the ethnic group is for Australia, New Zealand, Malaysia, Hong Kong, or Singapore. Valid values are:

- *Aboriginal Origin*
- *Aboriginal/Torres Strait Islnd*
- *American Indian/Alaskan Native*
- *Asian/Pacific Islander*
- *Black*
- *Chinese*
- *Eurasian*

- *Hispanic*
- *Indian*
- *Irianese*
- *Malay*
- *Maori*
- *Not Applicable*
- *Pacific Islander*
- *Torres Strait Islander Origin*
- *White*

**EEO Ethnic Category**

(USA) Select the category for this ethnic group. You may select one or more categories for each ethnic group.

Values include:

- *American Indian/Alaska Native*
- *Asian*
- *Black/African American*
- *Hispanic/Latino*
- *Native Hawaiian/Oth Pac Island* (other Pacific Island)
- *Not Specified*
- *White*

# Setting Up Security Clearance Types

To set up the security clearance types, use the Security Clearance Type (SEC_CLR_TYP_TBL) component.

This topic discusses how to define security clearance types.

## Page Used to Set Up Security Clearance Types

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Security Clearance Type | SEC_CLR_TYP_TBL | Set Up HCM, Product Related, Workforce Administration, Security Clearance Type, Security Clearance Type | Define security clearance types. |

## Security Clearance Type Page

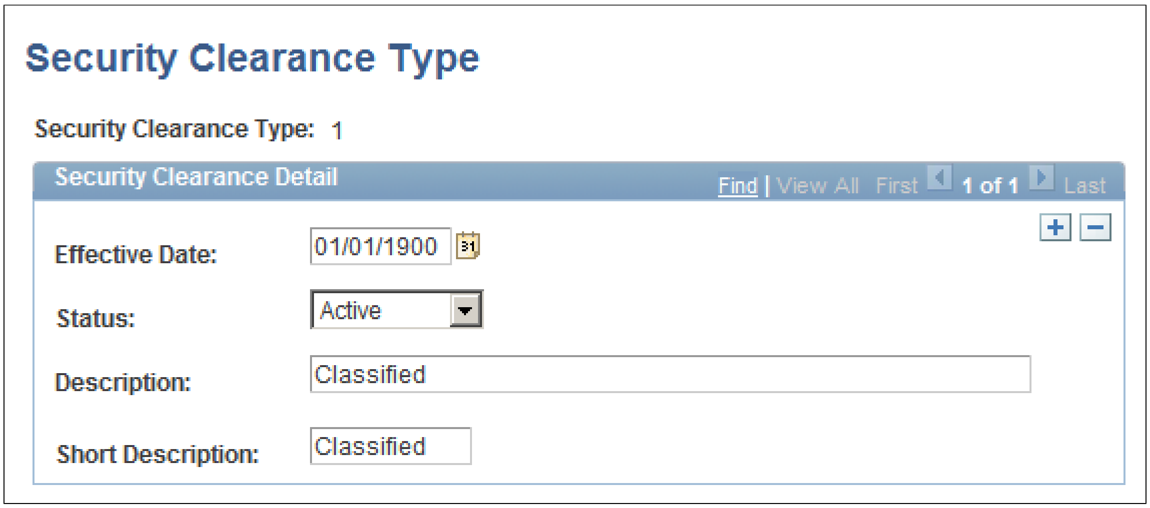
Use the Security Clearance Type page (SEC_CLR_TYP_TBL) to define security clearance types.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Security Clearance Type, Security Clearance Type

**Image: Security Clearance Type page**

This example illustrates the fields and controls on the Security Clearance Type page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Effective Date** | The date the security clearance type becomes effective. |
| **Status** | Provide the status of the security clearance. Valid values are *Active* or *Inactive.* |
| **Description** | Provide the long description of the security clearance type. |
| **Short Description** | Provide the short description of the security clearance type. |

# Creating Checklists

To set up the checklists tables, use the Checklist Items (CHKLST_ITEM_TBL), Checklist (CHECKLIST_TABLE), and Dynamic Link (DL_LINK_TBL) components.

These topics provide an overview of checklists and discuss how to set up standard checklists.

## Understanding Checklists

PeopleSoft HR enables you to make checklists to help you remember all the details associated with adding workers or handling other Administer Workforce tasks.

Use standard checklists as they are or use them as the basis for creating new checklists for particular workers. Make the items as general or specific as you want them to appear in checklists. For example, to gather health records, you could set up one code for all health data. Or, you might want to create separate items for all the elements of health records, such as physical exams, immunizations, and tests.

To make a checklist:

1. Define links to PeopleSoft pages that you may want to associate with a checklist item using the Dynamic Link page.

2. Create checklist items using the Checklist Items page.

3. Create a checklist by adding items to a checklist using the Checklist page.

## Pages Used to Create Checklists

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Checklist Items | CHKLST_ITEM_TABLE | Set Up HCM, Common Definitions, Checklists, Checklist Items, Checklist Items | Create items to include in checklists. |
| Checklist | CHECKLIST_TABLE | Set Up HCM, Common Definitions, Checklists, Checklist | Create checklists for the various types of processing you do in the Administer Workforce business process. |
| Dynamic Link | DL_LINK_TBL | Set Up HCM, Common Definitions, Checklists, Dynamic Link, Dynamic Link | Define dynamic links used in worklist items. |

## Checklist Page

Use the Checklist Items page (CHKLST_ITEM_TABLE) to create items to include in checklists.

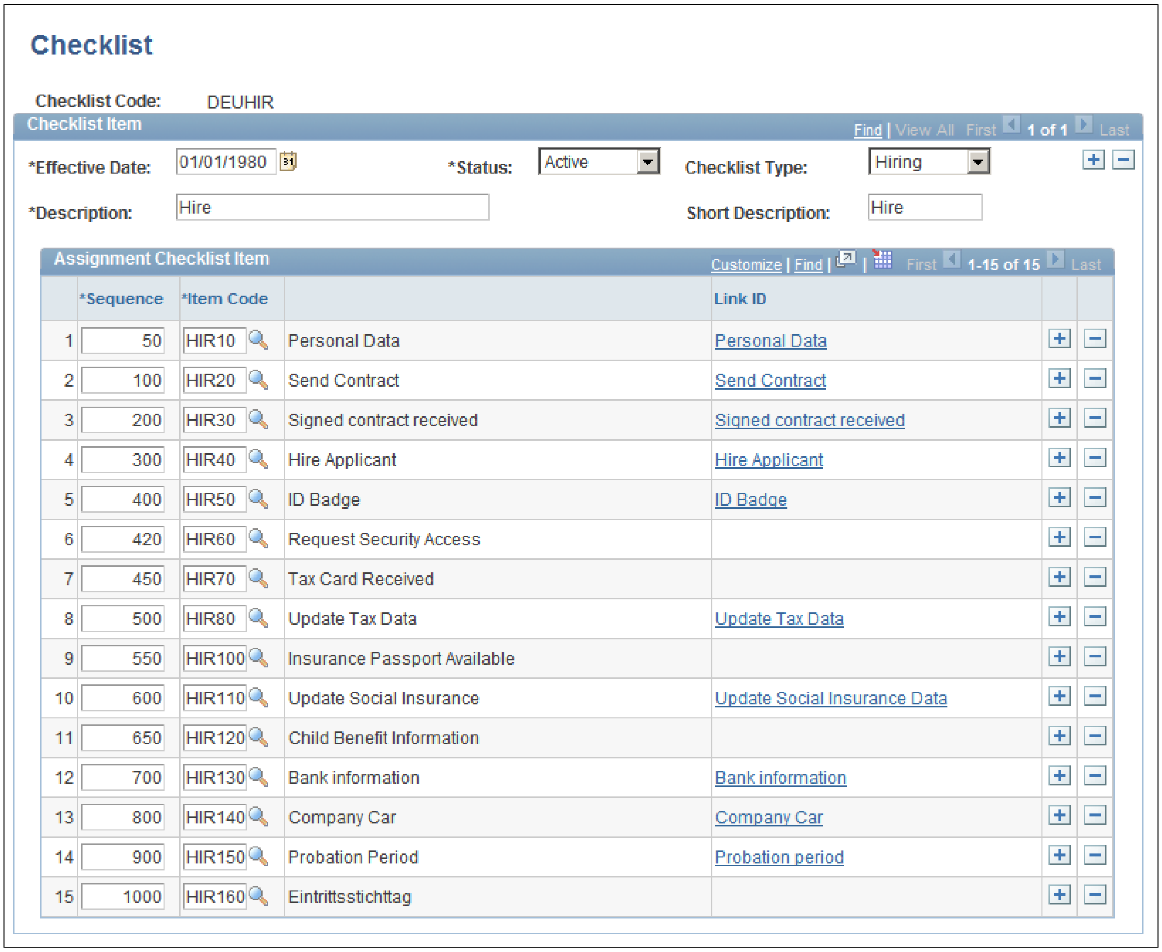
 

### Navigation

Set Up HCM, Common Definitions, Checklists, Checklist Items, Checklist Items

### Image: Checklist page

This example illustrates the fields and controls on the Checklist page. You can find definitions for the fields and controls later on this page.




**Checklist Type**

Select the type of checklist that you want to create. Values include Hiring, Transfer, Terminate, Org Instance, Training, Medical, and Other.

**Sequence andItem Code**

The system automatically sequences the item codes in multiples of 100. When you insert a data row for a new item, the system automatically assigns the next multiple of 100, such as 400.

To rearrange the order in which the items appear, change the sequence numbers to the numerical order you want. For example, to reverse the order of *Outline Office hours/holidays (100)* and *Outline job responsibilities (200),* assign a lower number to *Outline job responsibilities* (such as *150)* and a higher number to *Outline Office hours/holidays* (such as *175).* When you save your changes, the system automatically displays the items in the new order.

# Setting Up Workforce Contracts

To set up contracts for your workforce, use the Define Contract Types (CONTRACT_TYPE_TBL), Contract Type Groups (CNTRCT_TYPE_GRP), Contract Clause Table (CNT_CLAUSE_TABLE), and Define Contract Templates (CNT_TEMPLATE_TABLE) components.

These topics discuss how to:

- Define contract types.
- Set up standard contracts.

### Related Links

"Understanding Contract Pay Processing *(PeopleSoft HCM 9.2: Payroll for North America)*"
"Setting Up Contract Pay *(PeopleSoft HCM 9.2: Payroll for North America)*"
"Entering Employee Contract Pay Settings *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Pages Used to Set Up Workforce Contracts

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Define Contract Types | CONTRACT_TYPE_TBL | Workforce Administration, Job Information, Contract Administration, Define Contract Types, Define Contract Types | Define contract types. |
| Contract Type Groups | CNTRCT_TYPE_GRP | Set Up HCM, Product Related, Workforce Administration, Contract Administration, Contract Type Groups, Contract Type Groups | Group contract types together. |
| Contract Clause Table | CNT_CLAUSE_TABLE | • Set Up HCM, Product Related, Workforce Administration, Contract Administration, Contract Clause Table, Contract Clause Table<br>• Workforce Administration, Job Information, Contract Administration, Define Contract Clauses, Contract Clause Table | Define special languages and riders that can be added to the main body of a workforce contract. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Define Contract Templates | CNT_TEMPLATE_TABLE | • Set Up HCM, Product Related, Workforce Administration, Contract Administration, Define Contract Templates, Define Contract Templates<br>• Workforce Administration, Job Information, Contract Administration, Define Contract Templates, Define Contract Templates | Set up all of your organization's standard workforce contracts. Use the information that you define here when you assign contracts to employees and contingent workers in your organization. |

## Define Contract Types Page

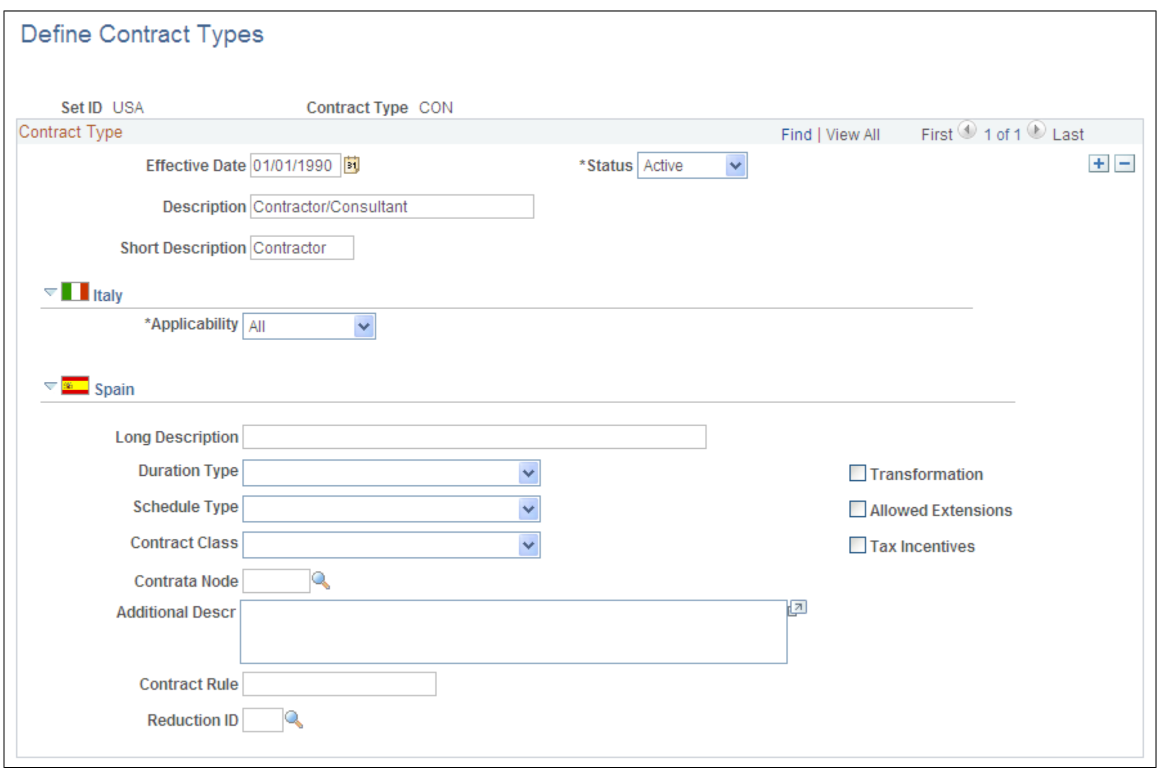
Use the Define Contract Types page (CONTRACT_TYPE_TBL) to define contract types.

**Navigation**

Workforce Administration, Job Information, Contract Administration, Define Contract Types, Define Contract Types

**Image: Define Contract Types page**

This example illustrates the fields and controls on the Define Contract Types page. You can find definitions for the fields and controls later on this page.



## (ITA) Italy

| | |
|---|---|
| **Applicability** | Select whether this contract type is applicable to employees, contingent workers, or both. |

## (ESP) Spain

**Long Description**

Enter a description for this type of contract.

**Duration Type**

Select the duration to be associated with this type of contract. The values available are:

- *Fix Duration*
- *Permanent*
- *Temporary*

**Schedule Type**

Select the type of schedule followed by this type of contract. The values available are:

- *Full Time*
- *Part Time*
- *Permanent Intermitent*

**Contract Class**

Select the employee class to which this type of contract is applicable. The values available are:

- *Disabled People*
- *Employment Promotion*
- *Insertion*
- *Interinity*
- *Partial Retirement*
- *Production*
- *Regular*
- *Relieve*
- *Service*
- *Training*

**Contrata Node**

Select the XML starting node that you want to associate with this contract type.

**Additional Descr**

Enter any additional details you want to specify for this contract type.

**Contract Rule**

Enter the number of the law that governs this kind of contracts. A typical law number includes the type of law, law number, and year—for example, RD 3290/1997 or Ley 22/1995.

The system doesn't edit your entry.

**Reduction ID**

This field is active only if PeopleSoft Global Payroll for Spain is installed. Select the reduction ID that corresponds to the contract type. The reduction ID identifies the specific reduction definition or rule that applies to an employer. In certain limited cases—such as when a company hires employees with disabilities, or hires workers older than 45 years of age—the employer may qualify for a reduction in the amount of social security contributions.

**Transformation**

Select this check box to permit transformation for this type of contracts. This check box is visible only if you have selected *Permanent* in the Duration Type field.

**Allowed Extension**

Select this check box to permit extensions to be added to this type of contracts This check box will not be visible if you have selected *Permanent* in the Duration Type field.

**Tax Incentives**

Select this check box if tax incentives are applicable for this type of contracts.

## Define Contract Templates Page

Use the Define Contract Templates page (CNT_TEMPLATE_TABLE) to set up all of your organization's standard workforce contracts.

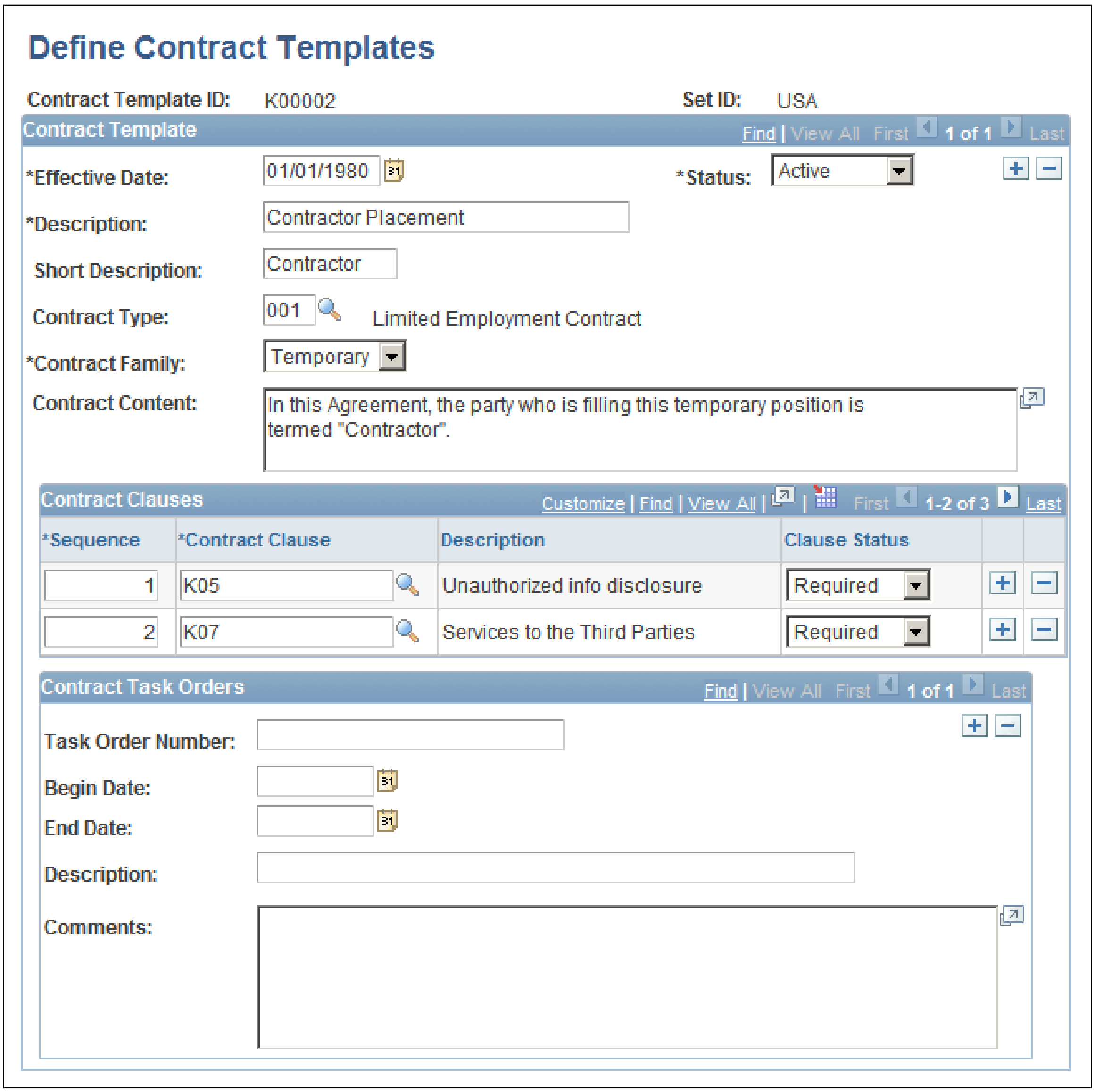
Use the information that you define here when you assign contracts to employees and contingent workers in your organization.

**Navigation**

- Set Up HCM, Product Related, Workforce Administration, Contract Administration, Define Contract Templates, Define Contract Templates
- Workforce Administration, Job Information, Contract Administration, Define Contract Templates, Define Contract Templates

**Image: Define Contract Templates page**

This example illustrates the fields and controls on the Define Contract Templates page. You can find definitions for the fields and controls later on this page.




**Contract Type**

Select the contract type for this template from the contract types you have set up on the Contract Type Table page.

**Contract Family**

Enables you to group a class of contracts. For example, you may have one contract family for regular employee contracts and another for contingent worker contracts. Tying contracts to a contract family helps you narrow your search criteria when you select a contract template.

### Contract Clauses

Use this group box to define any special contract clauses that should be attached as riders to this contract template.

**Sequence**
Enter the order in which to add the contract clauses to the contract.

**Contract Clause**
Select a contract clause from among those you've defined on the Contract Clause Table page. For example, a contract for a limousine driver requires that the employee have a driver's license.

**Clause Status**
Indicate if the clause is *Optional* or *Required.*

## Setting Up the Org Chart Viewer

To set up the Org Chart Viewer tables, use the Job Tree Builder (HR_TREEBLD_RNCTL), Structure and Content (PORTAL_FLDR_ADM), Web Profile Configuration(WEB_PROFILE.), Chart and Profile Field Map (HRCD_SETUP_FLD_MAP), Additional Contact Types (HRCD_ADDTL_CNTCT), Chart and Profile Settings (HRCD_SETUP), and Matrix Teams (HRMH_MATRIX_SETUP) components.

These topics provide an overview of the Org Chart Viewer features and functionality, hierarchical reporting structures, related actions and self service transactions, permission lists and roles, Org Chart Viewer setup steps, web profiles and a logo for PeopleSoft mobile company directory application, list common terms and elements, viewing matrix teams, and discuss how to:

- Define hierarchal reporting structures using the Tree Builder process.
- Update the portal folder definition for the Company Directory.
- Disable public access to the PeopleSoft mobile application.
- Define the org chart and profile field page mappings.
- Define additional contact types for the org chart viewer.
- Access the setup pages for each org chart view type.
- Define general settings for the org chart view types.
- Identify fields on the Company Directory - Profile page.
- Identify fields on the Company Directory - Org Chart page.
- Define matrix team details.
- Associate Manager Self-Service transactions to a matrix.

- Assign transaction access to matrix owners and leads.

## Understanding the Org Chart Viewer Features and Functionality

The Org Chart Viewer enables your employees and managers to search for people across the organization, to see a visual representation of the organization based on your defined hierarchical structures, and to enable self service actions from the visualization. Users can collaborate with co-workers by selecting the communication methods available within the organization including email, instant messaging (IM), telephone options, links to social networks, and a free form text field to add additional personalized information. A user can also add the Company Directory application to the tablet and smartphone home screens to easily invoke the application while on the go.

Org Chart Viewer

Setting Up the PeopleSoft Mobile Company Directory

PeopleSoft Mobile Company Directory

This organizational visualization and navigation directory offers functionality beyond a typical organization chart by supporting worker collaboration, identifying direct-line and dotted-line reporting chains, and enabling users to initiate employee and manager self service transactions from the organizational view.

See Using the Org Chart Viewer.

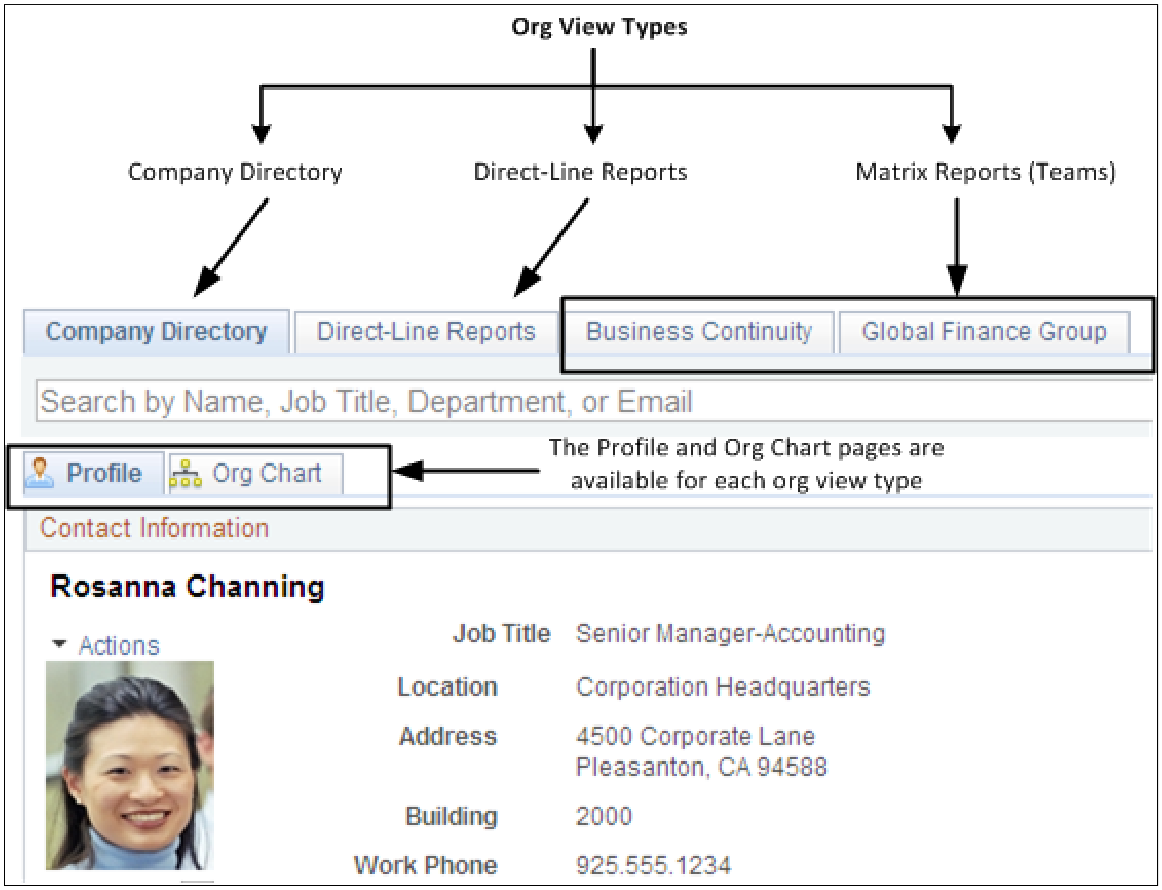
 

## The Org Chart Viewer Component Structure

**Image: Org Chart Viewer folder tab and page structure**

The Org Chart Viewer component has three primary org view types, which display as folder tabs across the top of the component: Company Directory, Direct-Line Reports, and matrix report pages. Each of these top-level folder tabs are made up of two sub-pages (tabs) that correspond to the parent folder tab.

This example illustrates the tab organization of the Org Chart Viewer component. You can find definitions for the types of org view type tabs later on this page.




This table explains the different org view types:

| ***Org View Type*** | ***Usage*** |
|---|---|
| Company Directory | Includes the organization's hierarchical structure. Use the Company Directory page of the Org Chart Viewer (first tab) to access this org view type information. This page is available to all employees and managers. |
| Direct-Line Reports | Includes employees that report up to the user. Use the Direct-Line Reports page of the Org Chart Viewer (typically the second tab, if available) to access this org view type information. This page displays content for managers with direct reports. This tab may not be available to a person without direct reports. |

| ***Org View Type*** | ***Usage*** |
|---|---|
| Matrix Reports<br><br><matrix team name> | Represents a reporting chain or hierarchy that is not a traditional direct-line reporting relationship and is sometimes referred to as dotted-line reporting or teams. Use the subsequent tabs that may display in the Org Chart Viewer component (typically the third and later tabs when all org view types are available) to access this org view type information. Each tab name reflects a matrix team name.<br><br>A matrix team tab appears at the top of the Org Chart Viewer component for each matrix team with which a user is associated. If a user is not associated with any teams, matrix reports tabs will not display at the top of the Org Chart Viewer component. |

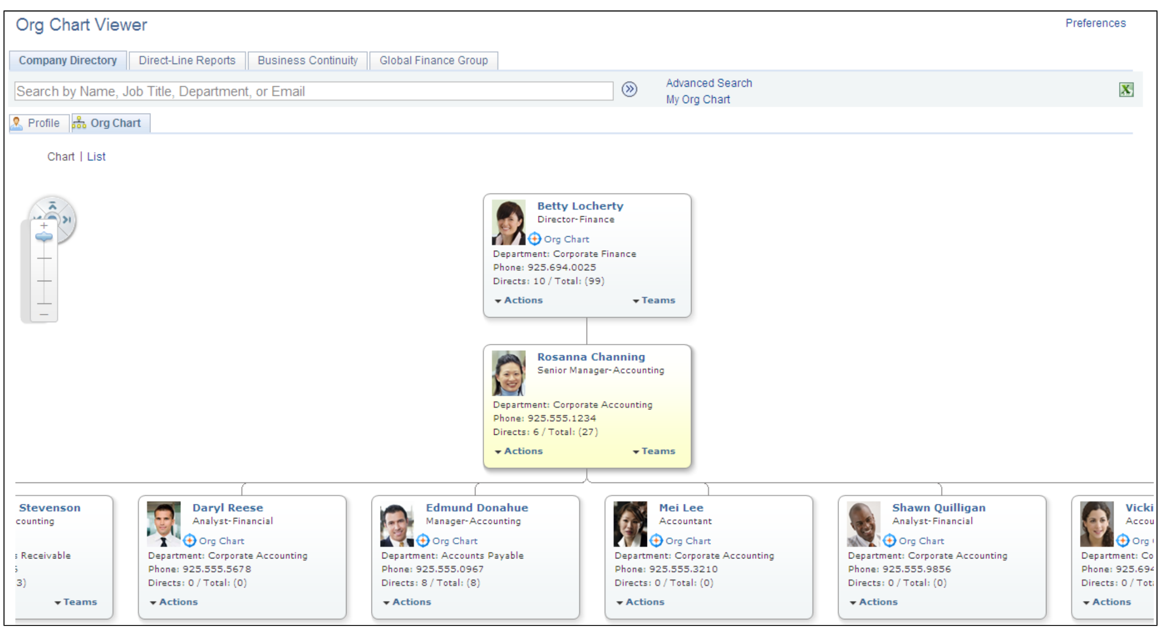
---

**Note:** Access to the Org Chart Viewer component must be granted to users in order to access these pages. The roles are *Org Viewer User - Employee* and *Org Viewer User - Manager.* To grant access to the mobile Company Directory, use the role and permission list *Company Directory Mobile User.*
For information on granting security access, see the product documentation for *PeopleTools: Security Administration*.

---

**Image: Example of the Org Chart Viewer component where the user has access to the Company Directory folder tab, Direct-Line Reports folder tab, and several team matrix folder tabs.**

This example illustrates the Org Chart Viewer component where the user has access to all the different folder tabs.




Within each org view type folder tab of the Org Chart Viewer there are also two page tab views:

| ***Pages within Each Org View Type*** | ***Usage*** |
|---|---|
| Org Chart | Displays a person within a three-tiered graphical representation of the reporting structure. The hierarchies rendered by the organization chart can be built manually, using access types, or trees. The chart focuses on a person and where he or she fits within the reporting structure. |
| Profile | Displays information about the focus person. The page shows up to five group boxes of information: two company related group boxes on the left side and three personalized group boxes on the right. The Profile page provides additional information about a person, such as his or her job details; links to other people with whom he or she is associated, such as direct reports, peers, and the manager; as well as personalized sections, which enable the employee to enter additional contact details, personal links, and free from text. |

## Understanding Hierarchical Reporting Structures

The Org Chart Viewer uses many methods for grouping individuals and creating hierarchical reporting structures. This table lists the ways the system enables you to create or view groups within the Org Chart Viewer pages:

| ***Org View Type*** | ***Grouping or Reporting Structure*** |
|---|---|
| Company Directory | Tree-based hierarchy (COMPANY_DIRECTORY tree structure) |
| Direct-Line Reports | Access Type (using the Direct Reports API) |
| Matrix Reports (Teams) | • Manual (where the owner is at the top of the node)<br>• Access Type (using the Direct Reports API)<br>  • By Department Manager ID<br>  • By Department Security Tree<br>  • By Group ID<br>  • By Part Posn Mgmt Dept Mgr ID<br>  • By Part Posn Mgmt Supervisor<br>  • By Reports To Position<br>  • By Supervisor ID<br>• Tree-based hierarchy (MATRIX_BY_JOB tree structure) |

These topics discuss:

- Tree-based hierarchies.

- Non-tree-based hierarchies.

### Tree-Based Hierarchies

Trees from Tree Manager provide the hierarchical structure for the Company Directory and for Matrix Teams configured using a tree. Search results, direct reports, and peers are derived from the Company Directory tree. You can manually create or modify a tree using the Tree Manager. Or, use the Job Tree Builder, a delivered PeopleSoft batch process that leverages the Direct Reports API, as an automated means of creating a tree of persons based upon their job data.

This will enable you to:

- Effective date each version of the hierarchy you want to expose via the Org Chart Viewer pages.
- Enforce a very strict hierarchy that is predetermined through your tree setup.
- Have improved performance at runtime and eliminate the necessity of fetching data from transactional tables (primarily PS_JOB) to derive the reporting relationships. With a Tree, the hierarchy will already exist in the database and not need to be derived at runtime from transactional data.

---

**Note:** The Company Directory use trees with the tree structure ID of *COMPANY_DIRECTORY* only. Matrix Teams use trees with the tree structure ID of *MATRIX_BY_JOB* only.

---

**Note:** The mobile version of the Company Directory leverages the same tree as the desktop version; both use the tree assigned to the Company Directory folder.

---

### Non-Tree-Based Hierarchy

The Direct Reports UI/API determines the hierarchical structures of persons for the Direct-Line Reports org view type and for Matrix Teams defined by access type. The Direct Reports API also generates the SmartNavigation across the top of the page and the org chart.

The Direct Reports API is a common HCM data service used for obtaining a list of employees (including contingent workers and persons of interest) who report to a specific employee job or position number. This data service is primarily leveraged for determining a manager’s security to specific employee jobs and as the data source for rendering org charts based on a selected employee (Job).

For better performance, the PeopleSoft application provides the Direct Reports Table Build, a framework for creating flattened views of reporting structures so that they can be accessed easily. Each access type has its own table that carries the data needed to search and maintain it. These tables are kept up to date using Event Manager as well as a nightly process to update future dated rows that are now current.

For more information, see the product documentation for *PeopleTools: PeopleSoft Tree Manager*, *PeopleTools: Portal Technology*, and *PeopleTools: PeopleSoft Applications User's Guide*.

### Related Links

"Configuring Direct Reports Functionality *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Setting Up Access to Direct Reports Data *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Understanding Related Actions and Self Service Transactions

When an individual views his or her content, whether from the Org Chart tab or the Profile tab within the Org Chart Viewer pages, he or she can be granted the ability to access HCM related self service transactions using the Actions menu drop-down list. The manager can also be granted the ability to access HCM related manager self service transactions using the Actions menu link for his or her subordinates.

PeopleSoft delivers a number of related actions for Manager Self Service as well as Employee Self Service for different modules. All or a subset of these related actions are being initiated from Org Chart Viewer, Manager Dashboard, Talent Summary and Application Search.

See *PeopleTools: PeopleTools Portal Technologies,* "Developing and Configuring Related Content Services".

This table lists the delivered actions for the Org Chart Viewer for the employees and managers:

| ***Self Service Menu*** | ***Employee Self Service Actions*** | ***Manager Self Service Actions*** |
|---|---|---|
| Time Reporting or Time Management | Time Reporting<br>• Request Absence<br>• View Absence Balances<br>• View Absence History<br>• Request Extended Absence<br>• View Extended Absence History<br>• Donate Leave<br>• Receive Donated Leave<br>• Return Unused Leave<br>• Terminate Participation in Program<br>• View Leave Transfer Request History<br>• Timesheet<br>• Overtime Request<br>• Mass Time<br>• View Monthly Schedule<br>• Payable Time Summary<br>• View Exceptions<br>• View Payable Time Detail<br>• View Compensatory Time<br>• View Time and Labor Launch Pad<br>• Time and Labor User Preferences | Time Management<br>• Request Absence<br>• View Absence Balances<br>• View Absence History |

| ***Self Service Menu*** | ***Employee Self Service Actions*** | ***Manager Self Service Actions*** |
|---|---|---|
| Job and Personal Information | • View Personal Info Summary<br>• Update Home/Mailing Address<br>• Update Emergency Contacts<br>• Update Marital Status<br>• Change Name<br>• Review Ethnicity Details | • View Employee Personal Info<br>• Request Reporting Change<br>• Transfer Employee<br>• Promote Employee<br>• Request Location Change<br>• Change Full/Part Time Status<br>• Retire Employee<br>• Terminate Employee |
| Compensation and Stock | • View My Total Rewards<br>• View Compensation History<br>• View Stock Option Summary | • Request Ad Hoc Salary Change<br>• View Total Rewards<br>• View Compensation History<br>• View Employee Stock Option Summary |
| Payroll | • View Paycheck<br>• Maintain Direct Deposit<br>• Change W-4 Tax Information<br>• Maintain Voluntary Deductions<br>• Indicate W-2/W-2c Consent<br>• Indicate T4/T4A Consent<br>• View W-2/W-2c Forms<br>• View T4/T4A Slips<br>• Request W-2 Reissue<br>• View Payslip<br>• View Payslip UK<br>• Maintain Personal Bank Accounts<br>• Maintain Net Pay Distribution<br>• Update Year End Adjustment Data Japan | N/A |
| Benefits | • View Benefits Summary<br>• View Dependent and Beneficiary Info | N/A |

| ***Self Service Menu*** | ***Employee Self Service Actions*** | ***Manager Self Service Actions*** |
|---|---|---|
| Development | • View My Current Profile<br>• View My Historical Profile<br>• View My Job Profiles<br>• View My Interest List | • View Current Team Profiles<br>• View Team Historical Profiles<br>• View Team Interest Lists |
| Performance Management | • Create My Performance Document<br>• Create My Development Document | • Create Performance Document<br>• Create Development Document<br>• View Performance Document<br>• View Development Document |
| Career Planning | View My Career Progression Chart | • Manage Career Plans<br>• View Career Progression Chart |
| Succession Planning | N/A | • Manage Succession Plans<br>• View Succession 360 |

**Note:** When security access is granted, managers can also select the View in Talent Summary list item when viewing actions for a direct or indirect report. Managers with access can also use the Manager Dashboard link at the top of the Direct-Line Reports org view type page to view a set of management related pagelets that enables managers to quickly and easily view and update human resource information as needed from one page.

## Understanding Org Chart Viewer Permission Lists and Roles

The PeopleSoft HCM application delivers these permission lists in order to grant access to the Org Chart Viewer tab pages:

| ***Permission List*** | ***Usage*** |
|---|---|
| HCCPSS2215 - Org Viewer Company Directory | Provides the user access to Company Directory tab and pages within the Org Chart Viewer. |
| HCCPSS2220 - Org Viewer Direct-Line | Provides the user access to the Direct-Line Reports tab and pages within the Org Chart Viewer.<br><br>**Note:** It is possible for a user to have security access and still not see the Direct-Line Reports tab. For example, this might occur when the user does not have direct-line reports for the access type as defined in Configure Direct Report UI for the component named HRCD_CO_DIRECTORY. |

| ***Permission List*** | ***Usage*** |
|---|---|
| HCCPSS2225 - Org Viewer Dotted-Line | Provides the user access to Matrix tabs and pages within the Org Chart Viewer.<br><br>**Note:** It is possible for a user to have security access and still not see a particular matrix tab folder. For example, the user may not be a member or owner of the matrix, the matrix definition may be inactive, or the matrix may not be available for viewing. |

The following content references are associated in the Related Content Framework,  Manage Related Content Services component for the Org Chart Viewer:

- *PeopleTools 8.51:* HC_HRCD_TREE_DTL_GBL (Company Directory Tree Detail)
- *PeopleTools 8.52 or higher:* the related content is associated via the CREF HC_HRCD_CO_DIRECTORY_GBL (Company Directory).

## Understanding the Org Chart Viewer Setup Steps

In order to use the Org Chart Viewer functionality, you need to perform these tasks:

1. Build a job tree.

   The system administrator will needs to build trees, either manually or through the Job Build Tree Run Control page, using the proper tree structure. This will support the organizational charts that show the hierarchies of people according to their job information.

   **Note:** If you build a tree manually, you still need to run the Job Tree Builder with a Build Action of *Update Process Tables Only.*

   See Understanding the Org Chart Viewer Setup Steps.

   See Tree Builder Run Control Page.

2. Update the Company Directory (HC_COMPANY_DIRECTORY) folder definition to ensure the tree name is equal to the tree created in step 1. This information is used for the Org Chart Viewer, Company Directory folder.

   **Note:** This step needs to be performed any time the tree name is changed.

   See Folder Administration Page.

   See *PeopleSoft HCM 9.2: HCM Portal Pack*.

3. Set up the Org Chart Viewer pages.

   The system administrator will need to set up the rules for the organizational chart and profiles, both of which are presented in all of the Org Chart Viewer pages.

   a. (Optional, since many fields are delivered) Map fields for the org chart and profile pages.

      See Chart and Profile Field Map Page.

b. (Optional, since many contact types are delivered) Define additional contact types.

See Additional Contact Types Page.

c. Set up the org chart and profile settings for each org view type—*Company Directory , Direct-Line Reports, Matrix Reports, Company Directory - Mobile,* and *Company Directory - Tablet.*

See Chart and Profile Settings Page.

4. Establish the hierarchy for the Direct-Line Reports tab by configuring the Access Type value for the HRCD_CO_DIRECTORY component. Do this by navigating to Set Up HCM, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI.

5. Create matrix teams.

   See Matrix Team Page.

The combined setup pages enable you to configure the hierarchies and information you want to display on each of the pages.

## Understanding the Steps to Building a Job Tree

This topic lists the steps to build a Job tree.

1. Analyze Your Organization.

   a. Determine the population.

      The first step to building a job tree is to determine the population of employees who should be included in the tree. For example, do you want to include the entire company, or only a particular division? This is key to determining which person (job) should be the root, or top node, of your job tree.

   b. Determine reporting relationships.

      Next, you will need to understand the reporting structure, or hierarchy, of your organization. In other words, how do the jobs in the organization relate to each other? How are the reporting relationships defined? For example, your organization may use the reports to position in Position Management as your reporting structure, or maybe you enter the supervisor's ID directly into the person's Job Data record.

   c. Determine the appropriate effective date.

      Finally, determine the point in time you want to capture these job relationships. Should the hierarchy always be based on current information? Do you need to capture future relationships? Should the tree represent past job relationships?

2. Build the Tree.

   Once you have a good understanding of the organization you want to represent in your job tree, it is time to build the tree. The approach you take for building the tree depends upon how closely the reporting structure of your organization matches one of these Build Method types:

   - *By Department Manager ID*

- *By Department Security Tree*
- *By Partial Position Management and Department Manager ID*
- *By Partial Position Management and Supervisor ID*
- *By Report To Position (Number)*
- *By Supervisor ID*

If your organization's reporting structure exactly matches one of the types listed above, then you can use the Job Tree Builder to build your tree automatically.

If your organization's reporting structure mostly matches one of the types previously listed, then you can use the Job Tree Builder to build your initial version of the tree, then manually update the tree (by adding, moving, or deleting nodes) using Tree Manager. The Job Tree Builder also supports partial updates to existing trees using the build action *Update Existing Tree-From Node.* This allows a selected section of the tree to be created using a different Build Method value.

If your organization's reporting structure does not closely match one of the build methods, then you will build a job tree using the following two steps.

a. Populate the Source Tree Data

   First you will need to populate a table with all current and future active Jobs as of the system date. As part of this step, the Job data is assigned a new key value that is compatible with Tree Manager. This step is performed by the Job Tree Builder using any of the Build Action values. If you only want to perform this step, select the Build Action option *Update Process Tables Only.*

b. Build the Tree and Tree Nodes

   This step uses the data created in the previous step to build the tree. Depending on how closely your organization's reporting structure matches one of the delivered build methods determines if the Job Tree Builder is used for this step, or if this is a manual task in Tree Manager.

See Tree Builder Run Control Page.

3. Review the Tree in Tree Manager.

   After you have created any tree, you should review it using Tree Manager to ensure that the tree appropriately represents the organization's reporting structure. You can make changes directly to the tree in Tree Manager, if desired, or use the Job Tree Builder to refresh the tree or portions of the tree. Remember that trees in Tree Manager are effective dated and can also be saved as draft trees or made inactive.

   See *PeopleTools: PeopleSoft Tree Manager*

4. Determine Update Frequency.

   Trees in PeopleSoft are effective-dated and static. Your job tree will represent a reporting hierarchy as of a given point in time. Changes to employee job data will not automatically be reflected in a job tree. This means that your organization will need to determine how often and by which means the tree will be updated. For example, will your organization update the tree nightly by a scheduled run of the Job Tree Builder? Are manual updates required? Since the Job Tree Builder is a standard run control page, it can be used to schedule your tree refreshes or partial updates according to a defined frequency. If your tree contains a large number of manual updates, you will need to consider your plan for tree refreshes carefully.

Regardless of how often or by which means your job tree is updated, PeopleSoft recommends that your organization use a regularly scheduled process that performs the build action process of *Update Process Tables Only.* This will ensure that all newly active jobs (new hires, for example) are available in the tree's source data table.

For more information, see the product documentation for *PeopleTools: PeopleTools Portal Technologies,*, "Working With Navigation Pages".

### Related Links

Tree Builder Run Control Page

"Configuring Direct Reports Functionality *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Understanding and Viewing Matrix Teams

You will use the Matrix Teams component to define your matrix (dotted-line) hierarchies and teams. This includes specifying the employee reporting relationships and, optionally, assigning Manager Self-Service transaction permissions to managers and leads among these matrices. The matrix relationships can be automatically built using trees tied to existing direct reports access types (including sub-sets of these trees) or manually.

Matrix reports or teams may be available through two means within the Org Chart Viewer component. A matrix team may be visible to a user in either of the following formats:

- A <matrix reports name> folder or tab

  Appears at the top of the Org Chart Viewer or in the menu drop-down navigation for users associated with a matrix team and granted the appropriate access.

- As a Teams or Other Teams drop-down menu link item

  These links appear on the Profile page or an Org Chart page node and display the teams associated with a person, where enabled. These teams are viewable to all users.

### Granting Access

To have a matrix available in the Org Chart Viewer pages, you will need to:

1. Change the matrix ID status to *Active* when creating a matrix team.

   See Matrix Team Page.

2. Select the appropriate Org View Type check boxes in the Display Options group box to make the matrix public within that particular feature.

   See Matrix Team Page.

3. Select the Display Matrix Teams check box on the General Settings page for each of the org view types that should display this matrix ID.

   See Chart and Profile Settings - General Settings Page.

## Displaying a Matrix Team Folder for the Owner Versus All Team Members

You will use the Show in View for Owner Only check box on the Matrix Team setup page to determine whether all team members *and* the owner have access to the matrix team folder or if just the owner has access to the team folder.

The Show in View for Owner Only check box selection determines who has access to a specific matrix team folder:

- *Selected* - Just the owner of the matrix team you are defining can view the <matrix team name> folder tab and SmartNavigation.
- *Deselected* - All team members and the owner of the matrix team you are defining can view the <matrix team name> folder tab and SmartNavigation.

See Matrix Team Page.

## Displaying a Person's Team Within the Org View Type Pages to All Users

This table indicates when and where a person's matrix team is listed under the Teams or Other Teams menu link for all users based on the three Allow Display Across Features check box selections on the Matrix Team setup page:

| ***Org View Type Pages That Display a Person's Team To All Users:*** | ***Company Directory Check Box*** | ***Direct-Line Reports Check Box*** | ***Matrix Reports Check Box*** |
|---|---|---|---|
| Not available on any of the Org Chart Viewer pages | | | |
| Company Directory | Selected | | |
| Company Directory<br>Direct-Line Reports. | Selected | Selected | |
| Company Directory<br>Direct-Line Reports<br>Matrix Reports | Selected | Selected | Selected |
| Company Directory<br>Matrix Reports | Selected | | Selected |
| Direct-Line Reports | | Selected | |
| Direct-Line Reports<br>Matrix Reports | | Selected | Selected |
| Matrix Reports | | | Selected |

See Matrix Team Page.

## Understanding Web Profiles and a Logo for PeopleSoft Mobile Company Directory Application

The mobile Company Directory functionality is similar to the desktop version of the PeopleSoft Company Directory. It uses the same setup pages to configure the Company Directory pages. With mobile Company Directory, you also have the option of implementing a mobile sign in page, which enables you to configure the appearance and character of the web profile, and add a logo in the header of the application.

### Implementing a Web Profile

To implement a web sign in page, access the Web Profile Configuration - Look and Feel page (PeopleTools, Web Profile, Web Profile Configuration, Look and Feel) and make the necessary changes.

---

**Note:** Using the mobile sign in page is optional, users do not need to use a mobile sign in page. They can run the mobile application by using the regular sign in page. Therefore, it is not required that you change the web profile on the Look and Feel page.

---

See *PeopleTools Portal Technologies,* “Configuring the Portal Environment”.

### Customizing the Home Page Logo

The mobile Company Directory enables you to add an image definition, or logo, in the header of the application.

**Image: Example of a company logo in the header**

This example illustrates the use of a company logo in the header of the application.

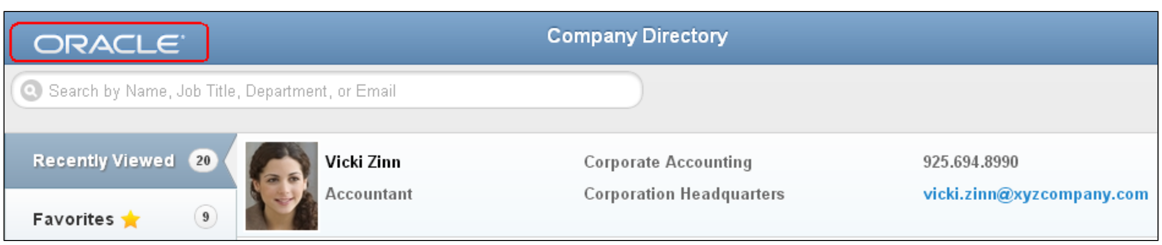



Image definitions are image files that you import, store, and manage using PeopleSoft Application Designer. After you create image definitions, you can associate them with page controls and reference them in code as often as you want.

To customize the logo that appears at the top of the Company Directory home page, perform the following steps:

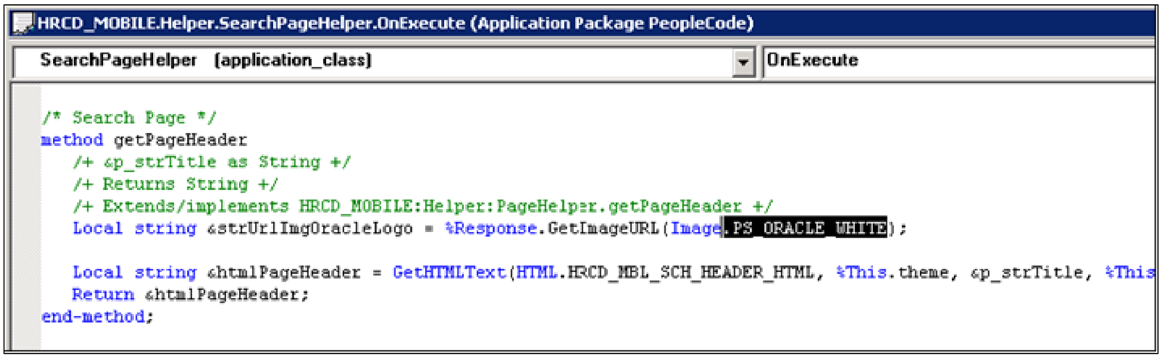
1. Create an image in PeopleSoft Application Designer (134 x 29 pixels).

2. Modify the code as shown below in the application class to replace image name PS_ORACLE_WHITE with the new image name.

**Image: Modifying the logo code for the mobile Company Directory**

This example illustrates how to modify the logo code for the mobile Company Directory.




For information on how to create or update the logo that appears at the top of the Company Directory home page, see *PeopleTools: PeopleSoft Application Designer Developer's Guide,* "Creating Image Definitions".

## Common Terms and Elements Used When Working with the Org Chart Viewer

**access type**

Defines the reporting relationship used in the Org Chart Viewer for a user and is configured in the Direct Reports API. The Direct Reports API is a common HCM data service that obtains a list of employees (including contingent workers and persons of interest) who report to a specific employee job or position number. This data service determines a manager’s row-level security to individual employees and validates that the user has security access to the employee.

See "Configuring Direct Reports Functionality *(PeopleSoft HCM 9.2: Application Fundamentals)*".

See "Setting Up Access to Direct Reports Data *(PeopleSoft HCM 9.2: Application Fundamentals)*".

**org view type**

Denotes the type of organizational view the system will present to the user when in the Org Chart Viewer. These views are company directory, direct-line reports, and matrix teams.

**IM (Instant Messaging)**

A form of real-time direct text-based communication between people using shared clients.

**matrix reports or matrix team**

A reporting chain or hierarchy that is not a traditional direct-line reporting relationship. Sometimes referred to as dotted-line reporting relationships.

**matrix owner** The person responsible for a matrix team. This may be the person in the top node of a team org chart or it may be a person that needs to administer the team.

**matrix managers or leads** Employees that have dotted-line reports. These are defined when creating matrix teams.

## Pages Used to Set Up the Org Chart Viewer

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Tree Builder Run Control | HR_TREEBLD_RNCTL | • Set Up HCM, Common Definitions, Org Chart Viewer, Tree Builder Run Control<br>• Set Up HCM, System Administration, Utilities, Job Tree Builder, Tree Builder Run Control | Run the Job Tree Builder process to create or rebuild an entire tree, update a portion of a tree starting from a specific node, or update the tree's source data table without making any alterations to an existing tree. |
| Folder Administration | PORTAL_FLDR_ADM | PeopleTools, Portal, Structure and Content<br>Click the Edit link for the Company Directory folder. | Update the portal folder definition for the Company Directory. |
| Web Profile Configuration – Security | WEB_PROF_SECURITY | PeopleTools, Web Profile, Web Profile Configuration, Security | Disable public access to the PeopleSoft mobile application. |
| Chart and Profile Field Map | HRCD_SETUP_FLD_MAP | Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Field Map, Chart and Profile Field Map | Define the org chart and profile field page mappings. Maintain or add additional fields that should be available on the Org Chart and Profile pages of the Org Chart Viewer. |
| Org View Mapping | HRCD_FLDMAP_SEC | Click the Assign to Feature link on the Chart and Profile Field Map page, Mapping tab. | Select the org view types that can use this field. |
| Additional Contact Types | HRCD_ADDTL_CNTCT | Set Up HCM, Common Definitions, Org Chart Viewer, Additional Contact Types, Additional Contact Types | Define additional contact types that will be available to the user on the Profile, Edit Additional Contacts page of the Company Directory. |
| General Settings | HRCD_SETUP_GENERAL | Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings, General Settings | Define default startup page content and layout settings for each org view type. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Profile Content | HRCD_SETUP_PROFILE | Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings, Profile Content | Select the contact information, HR details, and employee personalization field options that should appear on the Profile page for each org view type. |
| Org Chart Content | HRCD_SETUP_OC_NODE | Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings, Org Chart Content | Select the organization chart field options that should appear on the Org Chart page for each org view type. |
| Matrix Team | HRMH_MATRIX_DEFN | • Set Up HCM, Common Definitions, Org Chart Viewer, Matrix Teams, Matrix Team<br>• Workforce Administration, Define Matrix Team, Matrix Team | Define matrix team details such as the matrix ID, effective date, status, and description. Create your own or use an existing reporting relationship for the team. |
| Action Assignments | HRMH_TRAN_ASSIGN | Set Up HCM, Common Definitions, Org Chart Viewer, Matrix Teams, Action Assignment | Associate Manager Self-Service transactions to a matrix owner or other managers or leads that are part of the matrix reporting relationship. |
| Assign Transaction Access | HRMH_TRAN_LEAD_ASN | Click the View/Edit Assign button on the Action Assignments page. | Assign transaction access to matrix owners and leads. |
| Assign Same Transaction Access | HRMH_TRN_ASN_MULT | Click the Assign Same Access button on the Action Assignments page. | Assign the same transaction access for multiple components to matrix owners and leads. This page setup is the same as the Assign Transaction Access page.<br>This page uses the same setup as the Assign Transaction Access page. |

## Tree Builder Run Control Page

Use the Tree Builder Run Control page (HR_TREEBLD_RNCTL) to run the Job Tree Builder process to create or rebuild an entire tree, update a portion of a tree starting from a specific node, or update the tree's source data table without making any alterations to an existing tree.

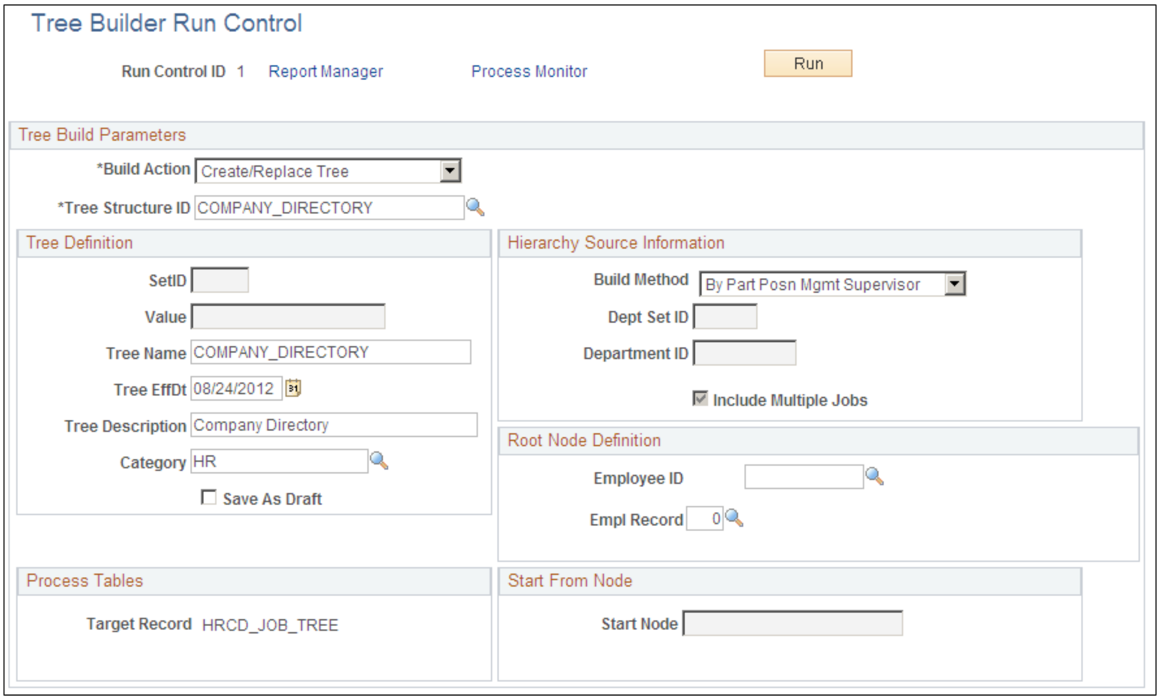
 

### Navigation

- Set Up HCM, Common Definitions, Org Chart Viewer, Tree Builder Run Control
- Set Up HCM, System Administration, Utilities, Job Tree Builder, Tree Builder Run Control

### Image: Tree Builder Run Control page

This example illustrates the fields and controls on the Tree Builder Run Control page. You can find definitions for the fields and controls later on this page.




Use the Job Tree Builder (HR_TREEBLD_RNCTL) component to create trees. You can use trees to define your reporting structures for the Company Directory and Matrix Teams configured to use a tree.

The Job Tree Builder Run Control page executes the HR_TREEBLD Application Engine process. This process creates trees of jobs using the selected Build Method option.

---

***Warning!*** Certain characters are inappropriate for use in a URL and should not be used in the names of trees that you use.
For a list of these characters, see *PeopleTools: PeopleSoft Tree Manager,* "Creating Trees," Understanding Steps to Create Trees, Characters Not Used in Tree Name, SetID, Set Control Value, and Tree Branch

---

See Understanding the Org Chart Viewer Setup Steps.

| | |
|---|---|
| **Build Action** | Indicate whether you want to create or rebuild an entire tree, update a portion of a tree starting from a specific node or location on a tree, or update the trees source data table without making any alterations to an existing tree. Valid values are:<br>• *Create/Replace Tree* |

Creates a new tree or, if a tree exists for the Tree Definition parameters entered on this page, deletes and recreates the tree.

- *Update Existing Tree-From Node*

  Updates an existing tree from a tree node identified in the Start Node field. The start node cannot be a root node from an existing tree. All nodes under the selected tree node will be refreshed according to the hierarchy Build Method selected.

- *Update Process Tables Only*

  No tree processing occurs. The target table is updated, enabling you to manually add new Jobs added by the process to the tree using Tree Manager.

The following table represents the fields within each group box that are available, depending on the Build Action value that is selected:

| ***Group Box*** | ***Create/Replace Tree*** | ***Update Existing Tree-Form Node*** | ***Update Process Tables Only*** |
|---|---|---|---|
| Tree Definition | • SetID<br>• Set Control Value<br>• Tree Name<br>• Tree EffDt<br>• Tree Description<br>• Category<br>• Save As Draft | • SetID<br>• Set Control Value<br>• Tree Name<br>• Tree EffDt<br>• Save As Draft | N/A |
| Hierarchy Source Information | Build Method | Build Method | N/A |
| Root Node Definition | • Employee ID<br>• Empl Record | N/A | N/A |
| Start From Node | N/A | Start Node | N/A |

**Note:** N/A indicates that a field availability is not applicable for this method and group box.

**Tree Structure ID**

Select a tree structure ID. The value selected in Tree Structure ID field determines the fields that are required to uniquely identify a tree and it tells the process which type of tree it should build when the process is run.

For example, Matrix Teams use the *MATRIX_BY_JOB* tree structure ID and Company Directory trees use the *COMPANY_DIRECTORY* tree structure ID.

---

**Note:** If you are building a job tree for the Company Directory or Matrix Teams, you must enter the corresponding Tree Structure ID values.

---

The system uses the HR_JOBTREE_META table to retrieve meta-data from the tree structure ID to auto-populate the following fields on this page: Set ID, Tree Name, Tree EffDt, Tree Description, Category, Target Record, and Exception Table. The tree structure ID also determines the fields that are required in the Tree Definition group box.

## Tree Definition

Many of the fields in this group box are available when the Build Action values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

**Set ID and Set Control Value**

Enter the set ID and set control value of the tree, if applicable. Availability of this field depends on the configuration of the tree structure ID.

For example, these fields are not available when using the *COMPANY_DIRECTORY* or *MATRIX_BY_JOB* tree structures required by the Org Chart Viewer, Company Directory or Matrix Teams features.

**Tree Name**

Enter the name of the tree.

This field is available when the *Create/Replace Tree* and *Update Existing Tree-From Node* Build Action values are selected.

---

**Note:** For the Company Directory to work properly, you need to update the portal definition to use the same tree name you have identified here.

---

**Tree EffDt (tree effective date)**

Enter an effective date for the tree. If a date is not provided, the process will use the system date when creating the tree. This enables you to leave this field blank and set up the run control as a recurring process.

This field is required for the *Update Existing Tree-From Node* build action. When updating an existing tree, you must point the process to a unique tree, so an effective date is required. When you select the *Update Existing Tree-From Node* build action option, this field provides by default the current tree for the SetID, Set Control Value, and Tree Name field values you entered on this page. SetID and Set Control Value field values may not be required for all tree structure IDs.

This field is available when the Build Action values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

**Tree Description**

Enter the description of this tree.

This field is available when the Build Action value *Create/Replace Tree* is selected.

**Category**

Enter the tree category for a tree.

This field is available when the Build Action value *Create/Replace Tree* is selected.

**Save As Draft**

Select this check box when you want to save the tree in draft mode. To change the status of the tree, run the process again with the Save As Draft check box deselected or save the draft as a valid tree through Tree Manager.

This field is available when the Build Action values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

## Hierarchy Source Information

Use this group box to specify how the system should define the hierarchical structure of the tree. The fields in this group box are available when the Build Action values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

**Build Method**

Select the method the process will use for deriving reporting relationships based on Job Data.

This field is available when the Build Action values *Create/Replace Tree* and *Update Existing Tree-From Node* are selected.

Valid Build Method options are:

- *By Department Manager ID*
- *By Part Posn Mgmt Dept Mgr ID*
- *By Part Posn Mgmt Supervisor*
- *By Report To Position (Number)*
- *By Supervisor ID*

  For the first five build methods listed here, the Job Tree Builder process uses the existing Direct Reports API data service to determine the reporting structure for building the job tree. This data service is capable of navigating an organization structure and returning a list of workers that report to a particular manager.

  Also, for these build methods, the process uses Employee ID/Empl Record entered on the Tree Builder Run Control page to set the root node of the job tree. The process then determines the jobs reporting to the root node by making a request to the Direct Reports API data service using the Build Method, Employee ID/Empl Record, and Tree EffDt entered on the run control page. Nodes are created for all jobs returned by the data service. This process is repeated down the reporting chain for every job in the hierarchy.

See "Configuring Direct Reports Functionality *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- *By Dept Security Tree*

  The method is available only with the build action *Create/ Replace Tree.*

  This build method does not use the Direct Reports API to determine a reporting structure. Instead, this build method uses the department security tree and the manager information for the departments to determine the reporting structure.

  To build the job tree, the process traverses the specified department security tree starting from the department node specified. For each department node in the department security tree, the process determines the node's manager, and then creates a tree node for each of the department managers. For each manager node, the process creates nodes for the department members reporting to the appropriate department manager. If an employee reports to a department that is not assigned to an active manager, then the process assigns that employee to the next manager up the tree.

  Departments can have the following manager types: Manager ID, Manager Position, or not be assigned to a manager.

  If Position Management is being used, a department may be assigned to a Manager Position that could be associated to multiple active incumbents.

  See "Maintaining Departments *(PeopleSoft HCM 9.2: Application Fundamentals)*".

  **Note:** When creating trees using *By Dept Security Tree,* it is recommended that you audit the source Dept Security tree and run the Repair Tree utility on the source Dept Security Tree to correct any invalid level numbers. For this build method, the Job Tree Builder assumes the level numbers for the nodes to be correct.

  See *PeopleTools: PeopleSoft Tree Manager,* "Auditing and Repairing Trees" for more information on the Repair Tree utility.

**Dept Set ID (department set ID) and Department ID**

Enter the department set ID and department code when you select the Build Method option *By Dept Security Tree.* The batch process will start from this department in the Dept Security tree and work downwards from that node.

When you enter or change the Dept Set ID value, the Department ID field provides the root node of the Dept Security tree as a default value and the Root Node Definition fields default the employee ID associated with the department of the root node. If the department is assigned to a manager position, the Employee ID field will provide by defaulted the lowest employee ID of the active incumbents of that position.

**Include Multiple Jobs**

Indicates if the tree is to include nodes for both primary and non-primary jobs. If this field is not selected, only nodes for active primary jobs will be included in the tree.

For the tree structure ID *COMPANY_DIRECTORY,* this value comes from the Chart and Profile Settings - General Settings page and the check box is not available on this page.

---

**Note:** For the tree structure ID *COMPANY_DIRECTORY,* if you have selected the Display Multiple Jobs check box on the Chart and Profile Settings - General Settings page, the system will allow additional jobs in the search only when these jobs are present in the tree. Therefore, if you change the Display Multiple Jobs setting on the Chart and Profile Settings - General Settings page, you should run the Job Tree Builder process to ensure that all jobs are captured on the tree.

---

## Root Node Definition

The fields in this group box are available when the Build Action value *Create/Replace Tree* is selected.

**Employee ID and Empl Record (employment record number)**

Enter the employee ID and his or her employment record number that should serve as the topmost node, or root node, of the tree.

## Start From Node

The field in this group box is available when the Build Action value *Update Existing Tree-From Node* is selected.

**Start Node**

Select a node from the tree specified in the Tree Definition group box of the page.

The Job Tree Builder process will delete any nodes reporting directly or indirectly to the start node specified. Then it will create nodes based on the Build Method value selected.

---

**Note:** Depending on how the existing tree was created, an employee may have multiple nodes in the existing tree. For example, this can occur when:
- The employee has or had multiple jobs.
- The employee reports to a position that has or had multiple incumbents.
- The employee is or was assigned to a department with multiple managers (Manage Positions with multiple incumbents). If the prompt list shows multiple nodes for the same person, then review the tree in Tree Manager to ensure that you are selecting the appropriate start node.

---

### Process Tables

The Target Record field is display only. This field is populated based on the Tree Structure ID value. The target record refers to the table containing the source data for all trees created using the selected Tree Structure ID.

### Identifying Company Directory Tree Node Queries

PeopleSoft delivers the following Company Directory queries that you can use to analyze the nodes and data for your tree:

| ***Query Name*** | ***Purpose*** |
|---|---|
| Active Employees not in Tree<br><br>(HRCD_ACTIVE_EMPS_NOT_IN_TREE) | Lists active employees (by business unit) who are not in the tree name for which the query is being run.<br><br>**Note:** Results depend on the user's row level security settings to employee data. |
| Co. Directory Batch Exceptions<br><br>(HRCD_BATCH_EXCEPTIONS) | Reports the rows in the exceptions table populated by the Job Tree Builder utility for trees based on the *COMPANY_ DIRECTORY* tree structure ID. The batch process populates the exceptions table with active jobs that were not added to the tree (by the batch process). The batch process requires a build hierarchy method and starting employee ID to determine the basis for the node structure in the tree.<br><br>It is possible that not all employees fit within the structure set for the batch process. For example, if the build hierarchy method determines reporting relationships by (Job) supervisor ID, any active jobs without a supervisor ID will not be added to the tree during the batch process. This query will help identify employees that may need to be added to the tree manually or by an additional run of the batch process.<br><br>**Note:** Results displayed depend on the user's row level security settings to employee data. |

| ***Query Name*** | ***Purpose*** |
| --- | --- |
| Nodes reporting to secondary<br><br>(HRCD_JOB_RPT_TO_NON_PRIM_JOBS) | Returns a list of nodes representing jobs that report to non-primary (additional) job nodes in the Tree. |
| Nodes for Inactive Jobs<br><br>(HRCD_NODES_WITH_INACTIVE_JOBS) | Returns nodes that represent currently inactive jobs for a given tree name and as of date. These nodes will remain in the tree until the tree is updated manually using Tree Manager or the tree is refreshed using the Job Tree Builder.<br><br>**Note:** The nodes reported by this query may have other (child) nodes reporting to them.<br><br>**Note:** Results displayed depend on the user's row level security settings to employee data. |
| All non-primary job nodes<br><br>(HRCD_NON_PRIMARY_JOBS_IN_TREE) | Returns a list of all nodes representing non-primary ( additional) jobs in the tree. |

## Folder Administration Page

Use the Folder Administration page (PORTAL_FLDR_ADM) to update the portal folder definition for the Company Directory.

The portal folder HC_COMPANY_DIRECTORY is delivered to use the tree name *COMPANY_DIRECTORY.* If your organization uses another name, you will need to update the portal folder definition in order for the Company Directory to work properly to match the tree name you entered when creating your tree.

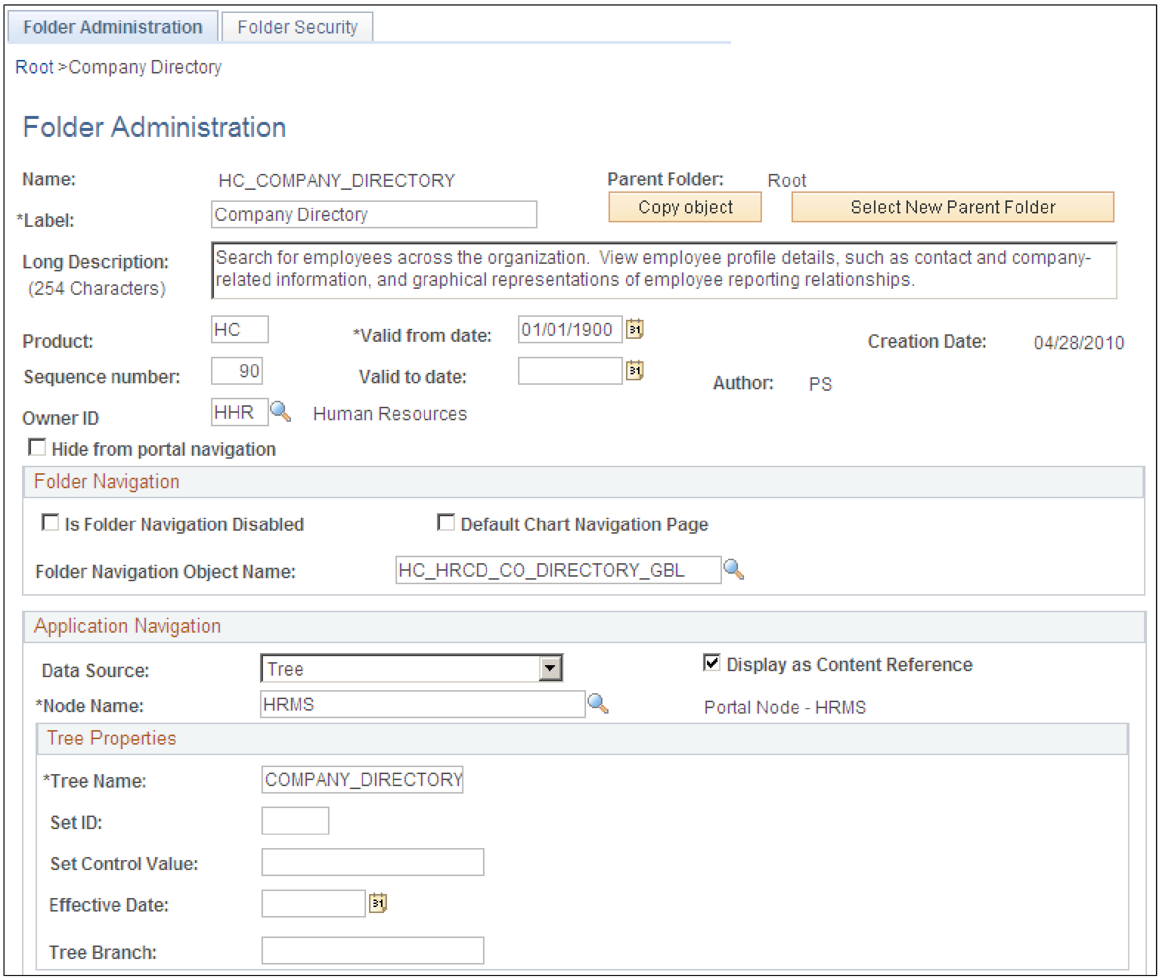
**Navigation**

PeopleTools, Portal, Structure and Content

Click the Edit link for the Company Directory folder.

**Image: Folder Administration page for the Company Directory**

This example illustrates the fields and controls on the Folder Administration page. You can find definitions for the fields and controls relevant to the Company Directory later on this page.




| | |
|---|---|
| **Element Definition** | Enter the tree name you used when building the tree for the Company Directory. This tells the Company Directory where to find the structure for the portal breadcrumbs and org chart.<br><br>For trees based on the tree structure ID of *COMPANY_DIRECTORY,* the system uses the required Tree Name field to uniquely identify a tree. The delivered field value is *COMPANY_DIRECTORY,* but the Company Directory will work with any tree name as long as you created the tree based on the *COMPANY_DIRECTORY* tree structure ID. |
| **Effective Date** | (Optional) Enter the effective date for the tree. |

If this field is populated, the Company Directory uses the effective date of the Tree Name value identified on the Folder Administration page.

If this field is blank, the Company Directory uses the current effective dated tree identified in Tree Name field.

Leaving this field blank enables you to run a nightly process that creates a new effective-dated version of the tree. If the Effective Date field is left blank, you do not need to make any changes to the Folder Administration page because the Company Directory will always use the current tree.

For more information and details on setting up and working with the portal folders, see *PeopleTools: PeopleTools Portal Technologies,* "Administering Portals," Understanding Folder Administration, SmartNavigation.

## Web Profile Configuration - Security Page

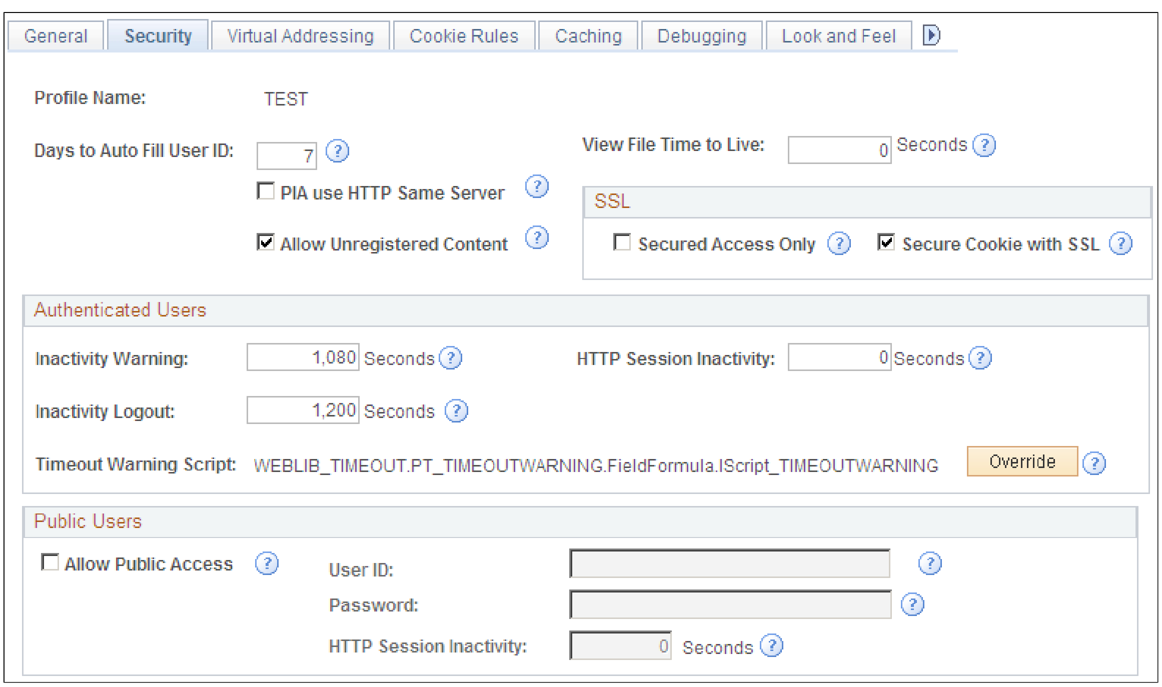
Use the Web Profile Configuration - Security page (WEB_PROF_SECURITY) to disable public access to the PeopleSoft mobile application.

**Navigation**

PeopleTools, Web Profile, Web Profile Configuration, Security

**Image: Web Profile Configuration - Security page**

This example illustrates the fields and controls on the Web Profile Configuration - Security page. You can find definitions for the fields and controls relevant to disable public access to the mobile Company Directory later on this page.




**Allow Public Access**

Deselect this check box to indicate that the system should prompt users to sign on when they select a direct link to a page.

The system authenticates the user with the values specified in the User ID and Password fields. A public access user is defined as a user who did not provide an ID and password on the sign-in page.

## Chart and Profile Field Map Page

Use the Chart and Profile Field Map page (HRCD_SETUP_FLD_MAP) to define the org chart and profile field page mappings.

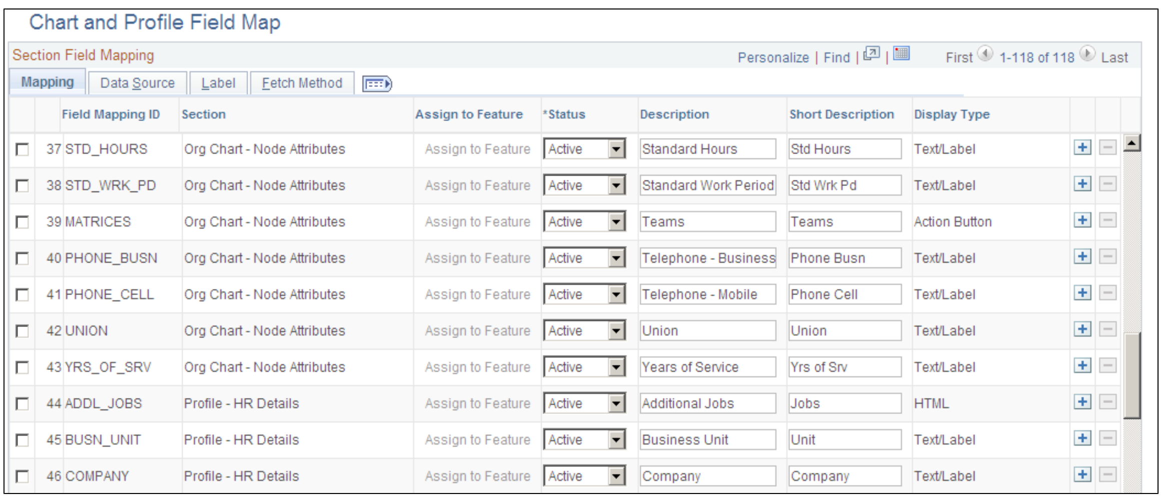
Maintain or add additional fields that should be available on the Org Chart and Profile pages of the Org Chart Viewer.

**Navigation**

Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Field Map, Chart and Profile Field Map

**Image: Chart and Profile Field Map page: Mapping tab**

This example illustrates the fields and controls on the Chart and Profile Field Map page: Mapping tab. You can find definitions for the fields and controls later on this page.




Use the Chart and Profile Field Map component to define the data elements that are configured in the Chart and Profile Settings pages as well as the Talent Summary setup pages. This component has four tabs that you use to define the rules for fetching and displaying each data element.

### Mapping Tab

Use this tab to map the data elements.

The delivered data that appears on this tab cannot be modified except for Status, Description, and Short Description.

**Section** Enter the section that is located on the various pages to which this field should be mapped. Valid values are *Profile - HR Details*, *Profile - Contact Information*, *General,* and *Org Chart - Node Attributes*.

---

**Note:** The *General* field option is used for the Talent Summary feature.

---

| | |
|---|---|
| **Assign to Feature** | Click this link to open the Org View Mapping page and identify which org view types will have access to use this field. If an org view type is not selected, this field will not be available in the Chart and Profile Settings component. |
| **Status** | Indicate if this field is *Active* or *Inactive. Inactive* fields will not be available for selection on the setup pages. |
| **Description and Short Description** | Enter the field description that should display in the drop-down list of the setup pages. You select which description to use on the Label tab. |
| **Display Type** | Specify the field format the system should use on the Org Chart Viewer pages. Values are:<br>• *Action Btn*<br>• *Drop-Down*<br>• *Email Link*<br>• *HTML*<br>• *Hyperlink*<br>• *Text*<br>• *Text/Label*<br>The values are specific only to system data rows:<br>• *Action-Btn*<br>• *Drop-Down* |

## Data Source Tab

Use this tab to identify the source record information specific to the data element.

**Image: Chart and Profile Field Map page: Data Source tab**

This example illustrates the fields and controls on the Chart and Profile Field Map page: Data Source tab. You can find definitions for the fields and controls later on this page.

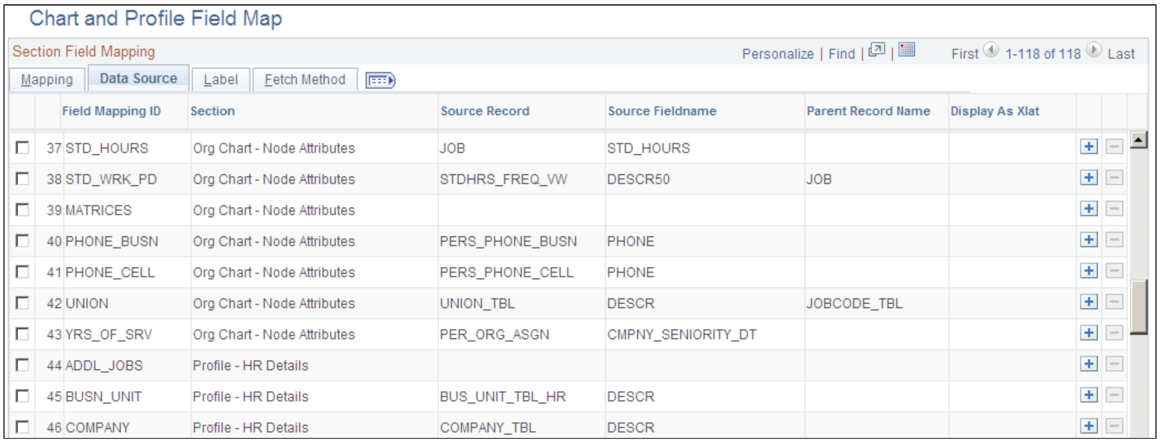


Chart and Profile Field Map

Section Field Mapping | Personalize | Find | First 1-118 of 118 Last

Mapping | Data Source | Label | Fetch Method

| | Field Mapping ID | Section | Source Record | Source Fieldname | Parent Record Name | Display As Xlat |
|---|---|---|---|---|---|---|
| 37 | STD_HOURS | Org Chart - Node Attributes | JOB | STD_HOURS | | |
| 38 | STD_WRK_PD | Org Chart - Node Attributes | STDHRS_FREQ_VW | DESCR50 | JOB | |
| 39 | MATRICES | Org Chart - Node Attributes | | | | |
| 40 | PHONE_BUSN | Org Chart - Node Attributes | PERS_PHONE_BUSN | PHONE | | |
| 41 | PHONE_CELL | Org Chart - Node Attributes | PERS_PHONE_CELL | PHONE | | |
| 42 | UNION | Org Chart - Node Attributes | UNION_TBL | DESCR | JOBCODE_TBL | |
| 43 | YRS_OF_SRV | Org Chart - Node Attributes | PER_ORG_ASGN | CMPNY_SENIORITY_DT | | |
| 44 | ADDL_JOBS | Profile - HR Details | | | | |
| 45 | BUSN_UNIT | Profile - HR Details | BUS_UNIT_TBL_HR | DESCR | | |
| 46 | COMPANY | Profile - HR Details | COMPANY_TBL | DESCR | | |

The delivered data in this tab cannot be modified.

| | |
|---|---|
| **Source Record** | Indicate the record from which the field element is derived. |
| **Source Fieldname** | Indicate the field name of the source record from which the field element value is derived. |
| **Parent Record Name** | Identify the intermediate record needed to get from the Org Chart Viewer to the data to be displayed by the respective data element class. This is not necessarily the source record's parent record. |
| **Display as Xlat** | If the source field is defined to use the Translate Table, then specify if the field should display the long or short name. |

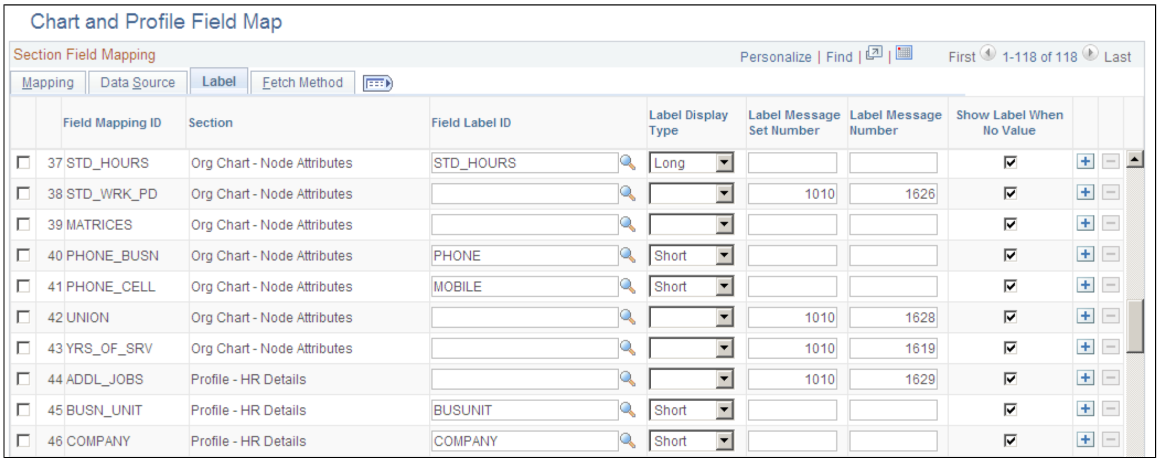
 

## Label Tab

Set label information for the data element that will display in the Org Chart Viewer.

**Image: Chart and Profile Field Map page: Label tab**

This example illustrates the fields and controls on the Chart and Profile Field Map page: Label tab. You can find definitions for the fields and controls later on this page.




The delivered data that appears on this tab can be modified.

**Field Label ID**

Enter the field label ID that should be used to display on the Org Chart Viewer pages. For example, the *PHONE_CELL* field would use the Field Label ID *MOBILE* to differentiate it from other phone types, such as work phone.

**Label Message Set Number and Label Message Number**

Enter the message number for this field mapping. Enter the number that will identify the label that should be used for the field on the Org Chart Viewer pages.

Do not use these fields if you have entered a value in the Field Label ID field.

**Show Label When No Value**

Select to display the field label even when there is no value to display. For example, If an employee does not have peers, the peers label will still display but with no names listed after it on the Profile page.

### Fetch Method Tab

The tab is used to assign the code used for fetching and displaying the data element.

**Image: Chart and Profile Field Map page: Fetch Method tab**

This example illustrates the fields and controls on the Chart and Profile Field Map page: Fetch Method tab. You can find definitions for the fields and controls later on this page.

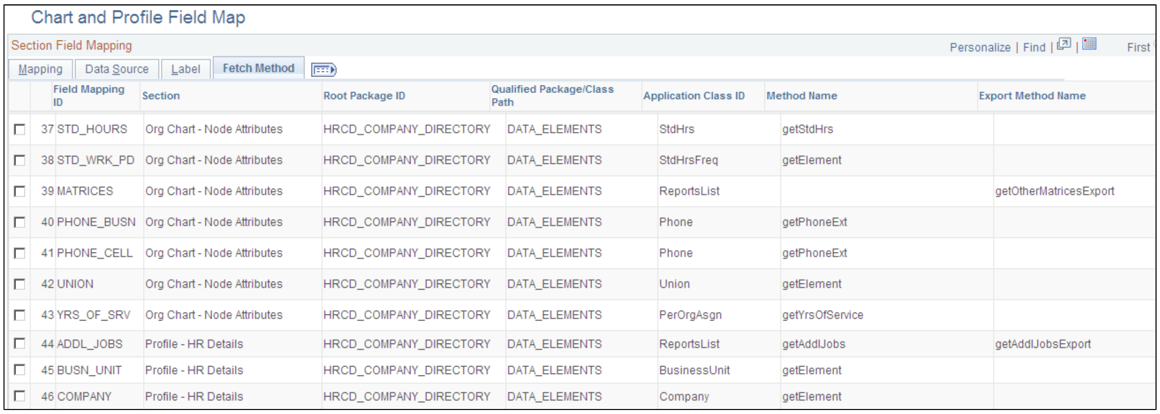


Chart and Profile Field Map

Section Field Mapping — Personalize | Find | First

Mapping | Data Source | Label | Fetch Method

| | Field Mapping ID | Section | Root Package ID | Qualified Package/Class Path | Application Class ID | Method Name | Export Method Name |
|---|---|---|---|---|---|---|---|
| ☐ | 37 STD_HOURS | Org Chart - Node Attributes | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | StdHrs | getStdHrs | |
| ☐ | 38 STD_WRK_PD | Org Chart - Node Attributes | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | StdHrsFreq | getElement | |
| ☐ | 39 MATRICES | Org Chart - Node Attributes | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | ReportsList | | getOtherMatricesExport |
| ☐ | 40 PHONE_BUSN | Org Chart - Node Attributes | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | Phone | getPhoneExt | |
| ☐ | 41 PHONE_CELL | Org Chart - Node Attributes | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | Phone | getPhoneExt | |
| ☐ | 42 UNION | Org Chart - Node Attributes | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | Union | getElement | |
| ☐ | 43 YRS_OF_SRV | Org Chart - Node Attributes | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | PerOrgAsgn | getYrsOfService | |
| ☐ | 44 ADDL_JOBS | Profile - HR Details | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | ReportsList | getAddlJobs | getAddlJobsExport |
| ☐ | 45 BUSN_UNIT | Profile - HR Details | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | BusinessUnit | getElement | |
| ☐ | 46 COMPANY | Profile - HR Details | HRCD_COMPANY_DIRECTORY | DATA_ELEMENTS | Company | getElement | |

The delivered data in this tab cannot be modified, but new rows can be added.

**Qualified Package/Class Path** — Displays the qualified package/class in the root package ID that resolves the field mapping element value.

**Application Class ID** — Displays the application class ID in the qualified package/class path that resolves the field mapping element value.

> **Note:** Any class assigned here must be inherited from HRCD_COMPANY_DIRECTORY:DATA_ELEMENTS: DataElementBase.

**Method Name** — Displays the method name in the application class ID that resolves the field mapping element value.

> **Note:** Field mapping IDs that are configured to use a method name *getElement* are using the logic inherited from the base class.

**Export Method Name** — Displays the method name in the application class ID that resolves the export data for the field mapping element. An export method is only required when if the logic in the class assigned to method name is not also compatible with export.

## Additional Contact Types Page

Use the Additional Contact Types page (HRCD_ADDTL_CNTCT) to define additional contact types that will be available to the user on the Profile, Edit Additional Contacts page of the Company Directory.

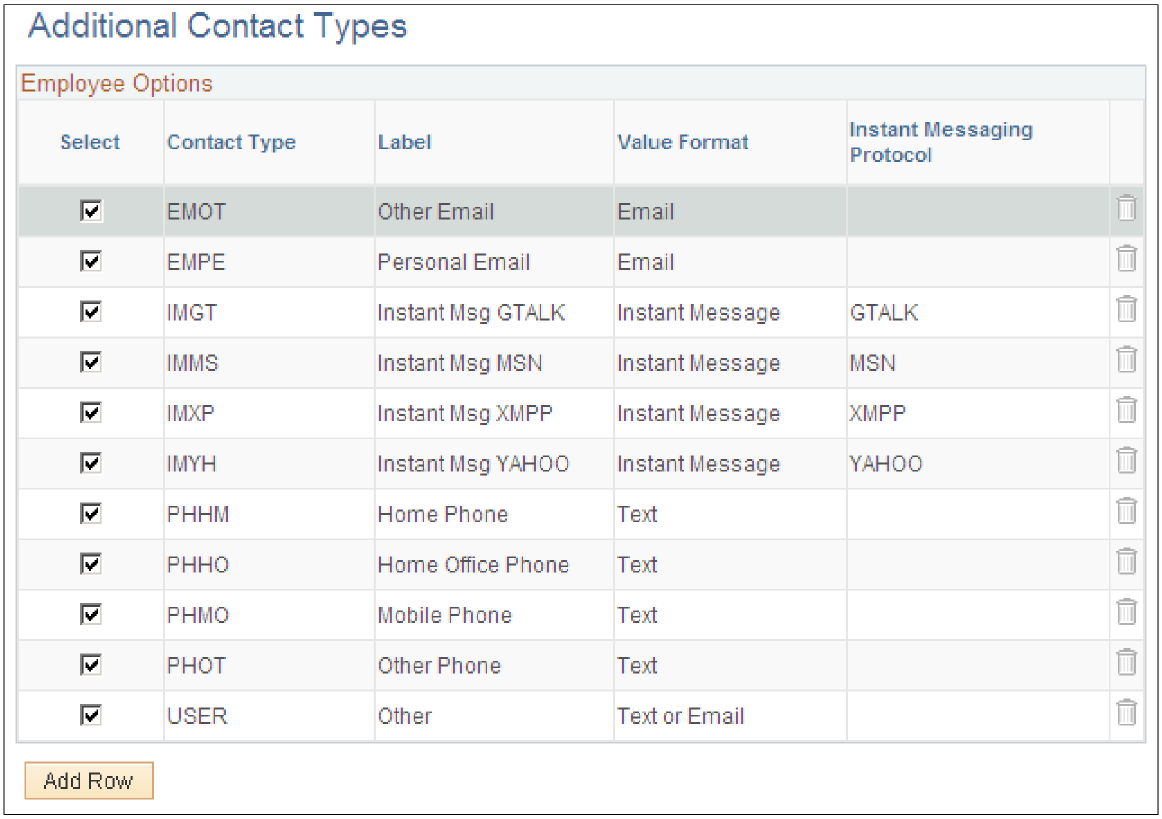
 

**Navigation**

Set Up HCM, Common Definitions, Org Chart Viewer, Additional Contact Types, Additional Contact Types

**Image: Additional Contact Types page**

This example illustrates the fields and controls on the Additional Contact Types page. You can find definitions for the fields and controls later on this page.




**Select**

Select the contact types that should be available to the user on the Edit Additional Contacts page when the user updates his or her additional contact information on the Profile page of the Org Chart Viewer. If you deselect an option, this contact type will not be available to the user.

The following contact types are delivered selected:

- *EMOT* - Other Email
- *EMPE* - Personal Email
- *PHHM* - Home Phone
- *PHHO* - Home Office Phone
- *PHMO* - Mobile Phone
- *PHOT* - Other Phone

- *USER* - Other

**Contact Type**

Enter a unique four letter code to identify the contact type. This page sorts the contact types by the code. However the Edit Additional Contacts page accessible from the Profile pages of the Org Chart Viewer sorts them by label name.

**Label**

Enter the name of this type of contact. This value will appear in the Contact Type drop-down list and as the Label name on the Edit Additional Contacts page. This label will appear on the Profile pages of the Org Chart Viewer when a user selects and enters a value for this contact type.

The following text or email contact types are delivered with the system:

- *BPHO* – Business Phone
- *EMOT* – Other Email
- *EMPE* – Personal Email
- *PHHM* – Home Phone
- *PHHO* – Home Office Phone
- *PHMO* – Mobile Phone
- *PHOT* – Other Phone
- *USER* - Other

The following instant messaging contact types are delivered with the system:

- *IMGT* – Instant Msg GTALK
- *IMMS* – Instant Msg MSN
- *IMXP* – Instant Msg XMPP
- *IMYH* – Intant Msg YAHOO

These labels are display-only for the user with the exception of the Other field. The contact type *Other* enables users of the Company Directory to enter their own label or field description for a contact type.

**Value Format**

Select the format the system should use for this field. Options are *Email, Instant Message, Text,* and *Text or Email.*

**Instant Messaging Protocol**

Identify the IM protocol that should be associated with this IM contact type. Valid values include *GTALK, MSN, XMPP,* and *YAHOO.* This field is available when you select *Instant Message* from the Value Format field.

| | |
|---|---|
| | With the delivered IM contact types, the field displays the associated IM protocol type. |
| **Add Row** | Click this button to add additional contact types in the Employee Options group box. This will open up free-form text fields in which the administrator can enter the field labels and determine the value format that will be available to the user. |

## Chart and Profile Settings Page

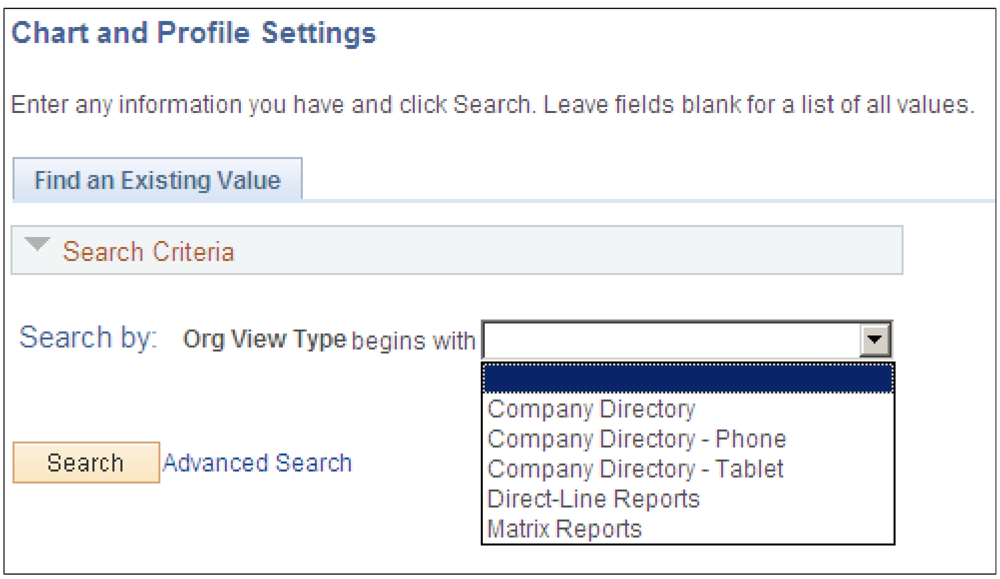
Use the Chart and Profile Settings search page to select an org view type for page configuration.

**Navigation**

Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings, Chart and Profile Settings

**Image: Chart and Profile Setting search page**

This example illustrates the fields and controls on the Chart and Profile Setting search page. You can find definitions for the fields and controls later on this page.




You use the Chart and Profile Settings component to configure the pages of the Org Chart Viewer for each org view type (including the mobile Company Directory).

The desktop Org Chart Viewer component consists of up to three types of organizational views (shown as folders and tabs to the user). The PeopleSoft application delivers these desktop org view types:

- *Company Directory* — a view of the Company Directory.
- *Direct-Line Reports* — a view of a user's direct-line reports.
- *Matrix Reports* — views of the matrix teams associated with a user.

The PeopleSoft application delivers these mobile Company Directory org view types:

- *Company Directory - Phone*

- *Company Directory - Tablet*

All org view types use a similar setup format. The Chart and Profile Settings component may contain up to three pages (the General Settings, Profile Content, and Org Chart Content pages), however, some fields and pages are hidden depending upon the org view type you select.

| | |
|---|---|
| **Org View Type** | Select from one of the list of valid values to define the setup for that specific org view type. Valid values for the desktop version of the org chart viewer are *Company Directory, Direct-Line Reports,* or *Matrix Reports.* Valid values for the mobile company directory are *Company Directory - Phone* and *Company Directory - Tablet.* |

## Chart and Profile Settings - General Settings Page

Use the General Settings page (HRCD_SETUP_GENERAL) to define default startup page content and layout settings for each org view type.

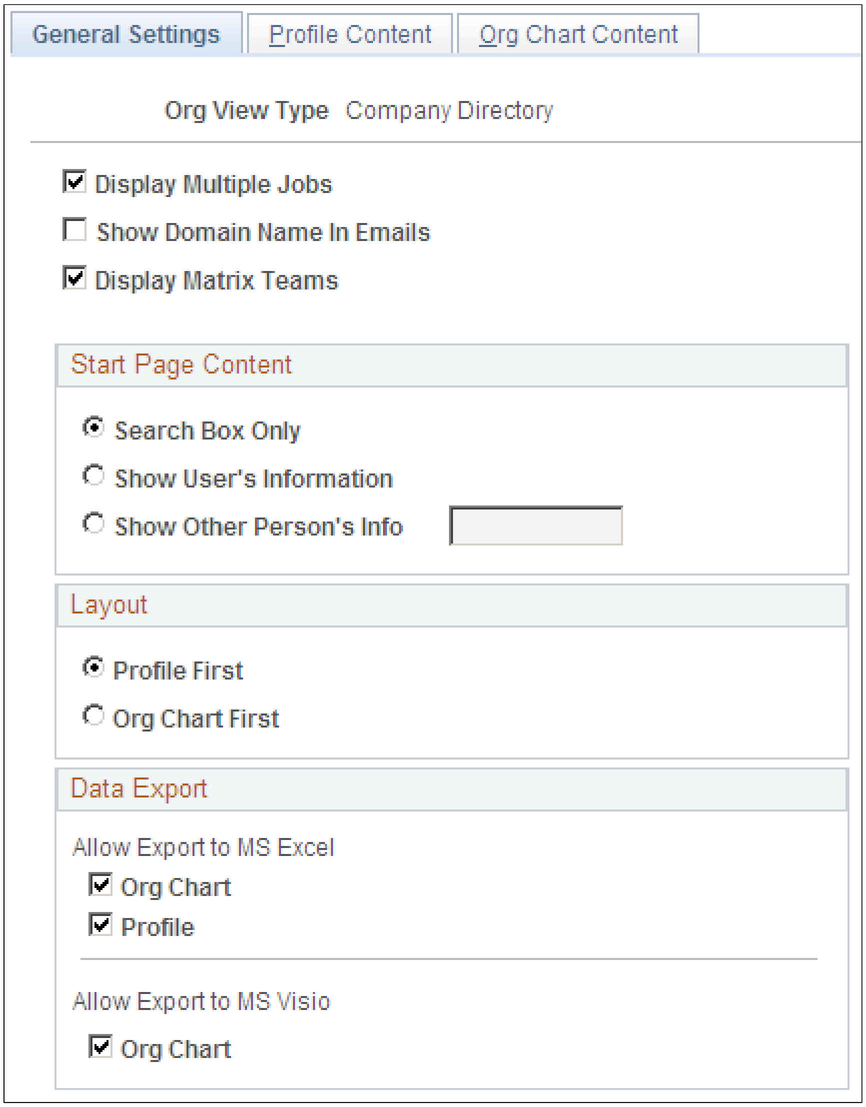
 

**Navigation**

Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings, General Settings

**Image: Chart and Profile Settings – General Settings page for the Company Directory org view type**

This example illustrates the fields and controls on the Chart and Profile Settings – General Settings page. You can find definitions for the fields and controls later on this page.




## Field Availability on the General Settings Page by Org View Type

These tables list the field elements available on the Chart and Profile Settings - General Settings page according to the Org View Type value you select:

The following field elements are available at the top of the page for the mentioned org view types:

| Page Element | Company Directory | Direct-Line Reports | Matrix Reports | Company Director - Tablet | Company Director - Phone |
|---|---|---|---|---|---|
| Display Multiple Jobs | Yes | N/A | N/A | Yes<br><br>(display only) | Yes<br><br>(display only) |
| Show Domain Name in Emails | Yes | Yes | Yes | N/A | N/A |
| Display Matrix Teams | Yes | Yes | Yes | N/A | N/A |

The following field elements are available in the Start Page Content group box for the mentioned org view types:

| Page Element | Company Directory |
|---|---|
| Search Box Only | Yes |
| Show User's Information | Yes |
| Show Other Person's Info | Yes |

The following field elements are available in the Layout group box for the mentioned org view types:

| Page Element | Company Directory | Direct-Line Reports | Matrix Reports |
|---|---|---|---|
| Profile First | Yes | Yes | Yes |
| Org Chart First | Yes | Yes | Yes |

The following field elements are available in the Data Export group box for the mentioned org view types:

| Page Element | Company Directory | Direct-Line Reports | Matrix Reports |
|---|---|---|---|
| Allow Export to MS Excel - Org Chart | Yes | Yes | Yes |
| Allow Export to MS Excel - Profile | Yes | Yes | Yes |
| Allow Export to MS Visio - Org Chart | Yes | Yes | Yes |

## General Settings

Use the first several check boxes on the General Settings page to specify the amount of detail the system should display about a person.

**Display Multiple Jobs**

This field is available for the *Company Directory* org view type.

Select to have the Company Directory search feature return all multiple job or additional job rows for a person. Deselect this option to have the system display the primary job only for the person.

**Note:** For the *Company Directory - Phone* and *Company Directory - Tablet* org view types, this field is display only and comes from the setting that was selected for the *Company Directory* org view type.

When you select this check box, the Job Title fields on the Profile Content and Org Chart Content pages will be automatically selected. Also, the Company Directory - Profile page will display the Additional Jobs field in the HR Details group box.

**Note:** Selecting the Display Multiple Jobs check box will allow additional jobs in the search only when these jobs are present in the tree. You may need to refresh the tree using the Job Tree Builder component or update the tree manually in Tree Manager.

See Tree Builder Run Control Page.

**Show Domain Name in Emails**

This field is available for all of the org view types.

Select this check box to have the domain name appear in the person's email. The domain name is the text that appears after the @ sign in an email address.

Deselect this check box to not have the system display the domain name. This will save space on the page and avoid redundancy, such as when all employees have the same domain name in their business email address. With this option deselected, the full email address still appears when the user places the mouse over an email address field.

**Note:** The selection you make here does not affect the email addresses entered by end-users in the Additional Contact Information group box of the Profile page.

**Display Matrix Teams**

This field element is available for a all org view types.

Select this check box to enable the user to view or export hierarchical reporting details for a matrix team. See the Data Export group box on this page.

## Start Page Content

These fields are available for the *Company Directory* Org View Type.

Use this group box to specify the default settings for the Company Directory start page. Choose from one of the three options to define what information the system should display to the user when first accessing the Company Directory. Users can override this default setting by defining their own preferences.

**Search Box Only**

Select this option to display the search field only, where you can search by name, job title, department, or email for any active person in the system. You will also have the option to use an advanced search, where you can enter additional search criteria.

**Show User's Information**

Select this option to have the system display the information of the user accessing the Org Chart Viewer pages. The user will appear as the focus of the node or Profile page, depending on the layout setting selected.

The search field is also available at the top of the page when you select this option.

**Show Other Person's Info**

Select this option and enter a person's employee ID in the accompanying field to have the system display the information of this employee on the startup page. The identified person will appear as the focus of the node or the Profile page, depending on the layout setting selected.

**Note:** In order to populate this field, a tree must already be created and the tree name must match the Tree Name provided on the portal folder definition HC_COMPANY_DIRECTORY. For more information, see *PeopleTools: PeopleTools Portal Technologies,* "Administering Portals," Managing Portal Objects.

See Org Chart Viewer - Preferences Page.

## Layout

These fields are available for all Org View Types.

Use this group box to define which page of the Org Chart Viewer pages the system should display first. The value you select here will determine the page order. The user can override these default settings by defining personal preferences.

**Profile First**

Select this option to have the system display the Profile page for the focus person. The Profile page displays detailed information about the person, such as contact information, HR details, and personalized links and information. This option will also display the Profile page as the first page in the component.

**Org Chart First organizational chart first**

Select this option to have the system display the Org Chart page. The Org Chart page displays a multi-leveled graphical representation of the focus person's reporting structure, as well as high-level details about this person. This option will also display the Org Chart page as the first page in the component.

See Org Chart Viewer - Preferences Page.

### Data Export

These field elements are available for all Org View Types.

Use this group box to enable exporting options for the user.

**Allow Export to MS Excel (allow export to Microsoft Excel) – Org Chart and Profile**

Select these check boxes to enable the user to export profile or org chart information to a Microsoft Excel spreadsheet.

Users will be able to export the following hierarchical reporting details:

- Focus node’s manager.
- Focus node.
- Focus node’s siblings if such is selected to display via the Org Chart tab setting.
- Focus node's hierarchy (from focus node down); all of the manager’s direct or dotted-line (matrix) reports, and their indirect reports.

**Allow Export to MS Visio – Org Chart**

Select this check box to enable the user to export org chart information to a Microsoft Visio drawing.

## Chart and Profile Settings - Profile Content Page

Use the Profile Content page (HRCD_SETUP_PROFILE) to select the contact information, HR details, and employee personalization field options that should appear on the Profile page for each org view type.

### Navigation

Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings, Profile Content

**Image: Chart and Profile Settings- Profile Content page for the Direct-Line Reports org view type (1 of 2)**

This example illustrates the fields and controls on the Chart and Profile Settings - Profile Content page (1 of 2). You can find definitions for the fields and controls later on this page.

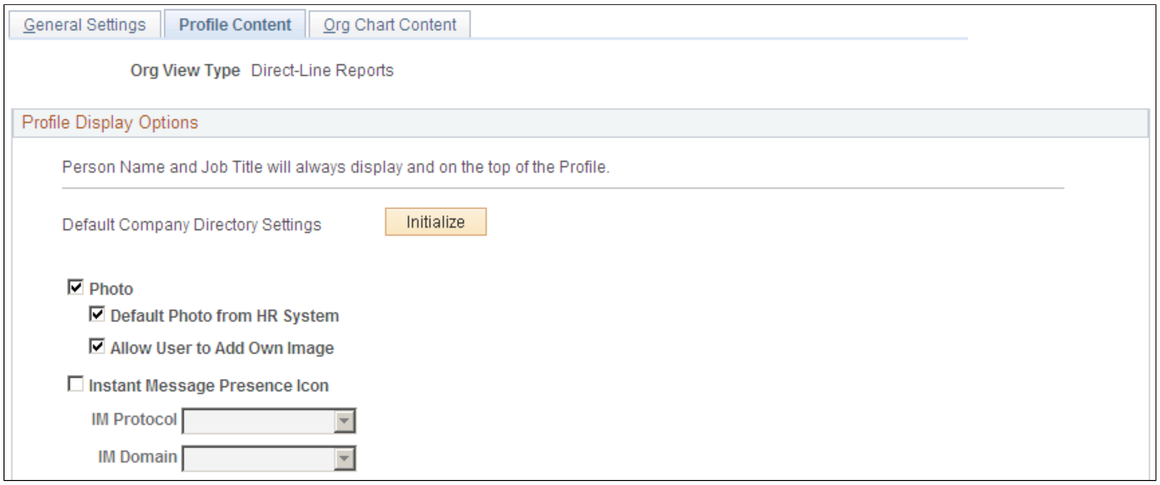
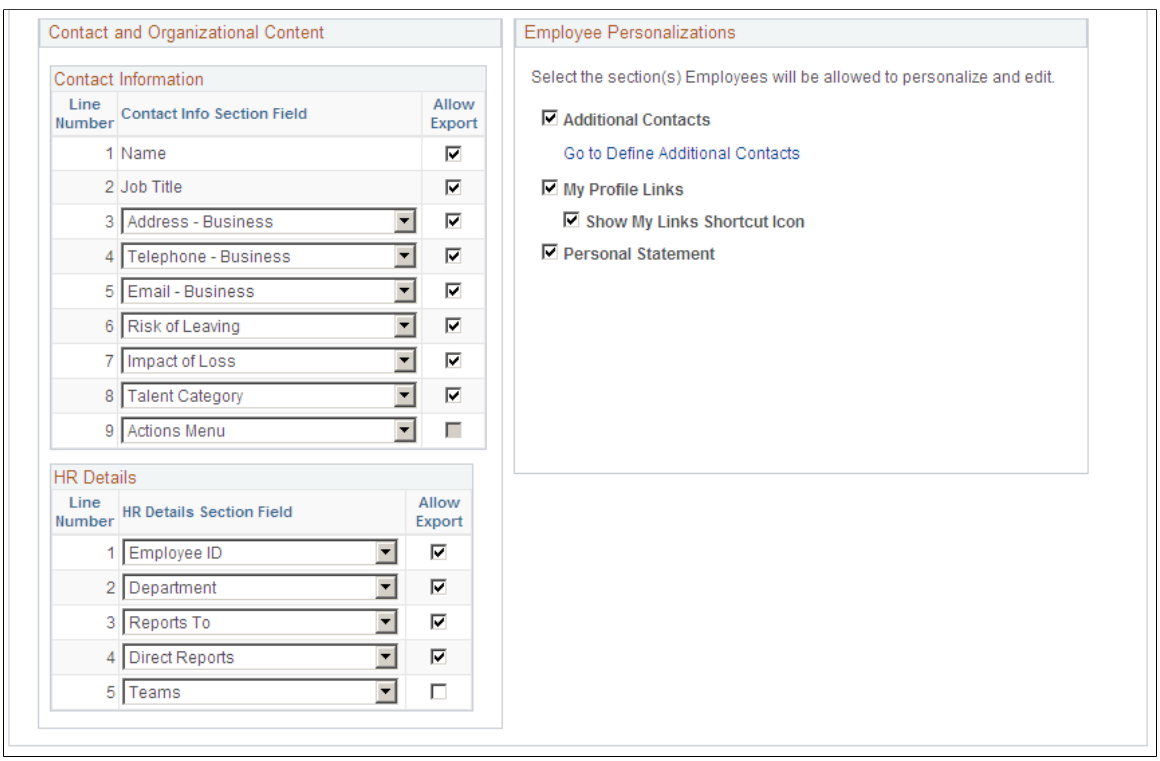



**Image: Chart and Profile Settings- Profile Content page for the Direct-Line Reports org view type (2 of 2)**

This example illustrates the fields and controls on the Chart and Profile Settings - Profile Content page (2 of 2). You can find definitions for the fields and controls later on this page.



The Profile page in the Org Chart Viewer component and profile pages in the mobile Company directory will display detailed information about a person using the fields you select on this page for the individual org view types. The field content is specific to the org view type.

The field elements on this page are available for all org view types unless otherwise specified.

## Profile Display Options

**Initialize**

Click to have the system provide by default the same settings you established for the *Company Directory* org view type.

This field element is available for the following org view types: *Direct-Line Reports* and *Matrix Reports.*

**Photo**

Select to have the photo of the person appear on the Profile page, if available. If a phote is not available, a dummy photo will appear for the person.

When you select this option, you must select the Default Photo from HR System check box, Allow User to Add Own Image check box, or both selected.

If you deselect this check box, the Default Photo from HR System and Allow User to Add Own Image check boxes will not be available.

**Default Photo from HR System**

Select this option to have the system use the HR photo stored on the Identification Data - Employee Photo page for a person. You can use this option in conjunction with the Allow User to Add Own Image check box.

**Note:** This check box is always selected for the *Company Directory - Phone* and *Company Directory - Tablet* org view types, thus the mobile applications will always display the HR photo if a person has not uploaded a personal photo using the desktop version of the Company Directory.

**Allow User to Add Own Image**

Select this option to enable the use to upload his or her own picture. This option can be used in conjunction with the Default Photo from HR System check box.

**Note:** As delivered, users can upload images of type JPEG with a maximum file size of 256KB. For more information on field images, see *PeopleTools: PeopleSoft Application Designer Developer's Guide,* "Creating Field Definitions," Specifying Image Field Attributes.

This field element is not available for the following org view types: *Company Directory - Phone* and *Company Directory - Tablet.*

The Instant Message field elements are not available for the following org view types: *Company Directory - Phone* and *Company Directory - Tablet.*

**Instant Message Presence Icon**

Select this check box to have the Profile page display the IM icon for a person, if an IM address exists for a person. Store instant message IDs for a person on the Contact Information page of personal data in HR.

**IM Protocol (instant messaging protocol)**

Identify the IM protocol that the system should use when displaying the IM icon. Valid values include *GTALK, MSN, XMPP,* and *YAHOO.* If a person does not have this IM protocol type defined in their personal data, the icon will not display for this person. This field is available when you select the Instant Message Presence Icon check box.

**IM Domain**

Displays the Instant Message domain associated with the IM Protocol you selected for all protocols except *XMPP.* For *XMPP,* you must select the value of the XMPP server that has been defined by your organization.

See *PeopleTools: PeopleSoft MultiChannel Framework,* "Configuring Instant Messaging in PeopleSoft MultiChannel Framework"

## Contact and Organizational Content

Select fields in this group box that should appear on the Profile page. This information comes from the HR tables. The field elements in this group box are available for all org view types unless otherwise specified.

**Contact Information**

Select contact-related fields that will appear as person profile data in the Contact Information group box of the Profile page, the Contact Information page of (tablet), or the Detail page ( phone). The page will display the fields in the order you select them on this page. Valid values are:

- *Name*

  This field display is always selected and listed as line number *1*.

- *Job Title*

  For the Company Directory org view type, *Job Title* is always selected for line number *2* when Display Multiple Job is selected on the General Setting page. If Display Multiple Job is deselected, then you have the option of selecting *Job Title* or leaving this field blank.

  For the other org view types, *Job Title* is always selected.

- *Action Menu*

  *Actions Menu* is the only field display option available for line number *9,* and is not available for the mobile Company Directory org view types.

Select this field display option if you want to enable the user to perform self service transactions from his or her profile, such as an address or name change, or for direct or indirect reports.

The *Actions Menu* values are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content. For more information, see *PeopleTools: PeopleTools Portal Technologies,* "Developing and Configuring Related Content".

- *Department*

  *Department* is always selected for the mobile Company Directory org types for line number *3.*

These options are available for the remaining line numbers:

- *Address - Business*

  When you select this field for a mobile Company Directory org view type, a map of the address will appear on the Contact Information page (tablet) and a View Map button will appear on the Detail page (phone).

  ---

  **Note:** It is best to include the *Address - Business* field value as the last field in the list for a mobile Company Directory org view type. The application will display a map or the View Map button for the location as the last entry in the contact information section of the page. By listing the address last, the map or button will display just below the address.

  ---

- *Building*
- *Email - Business*
- *Floor Nbr*
- *Location* (not available for the mobile Company Directory org view types)
- *Telephone - Business*
- *Telephone - Mobile*

Addition values specific to the *Direct-Line Reports* and *Matrix Reports* org view types:

- *Career Readiness* *
- *Comp Rate* *

- *Hire Date*
- *Impact of Loss* *
- *Organizational Relationship*
- *Risk of Leaving* *
- *Talent Category* *

---

**Note:** * These field elements are considered to be sensitive data. Sensitive data will only display if the employee reports to the signed-in user, hence the user will only see this information for his or her subordinates.

---

**HR Details**

Select HR details fields that will appear as person profile data in the HR Details group box of the Profile page, on the HR Details page (tablet), or in the Manager or Directs sections of the Detail page (phone).

The pages will display the fields in the order you select them on this page.

These are the only two fields available for the *Company Directory - Phone* org view type. They are display only and cannot be changed or deleted:

- *Reports To*
- *Direct Reports*

Select from these valid values for all remaining org view types:

- *Business Unit*
- *Company*
- *Cost Center*
- *Department* (select in as contact information for the *Company Directory - Tablet* org view type)
- *Direct Reports* (provided as a page for the tablet user)
- *Dotted-Line To (by Position)* (not available for the mobile *Company Directory - Tablet* org view type)
- *Job Family*
- *Job Function*
- *Manager Level*
- *Organizational Relationship*
- *Peers* (provided as a page for the tablet user)

- *Employee ID*
- *Regular/Temporary*
- *Reports To* (not available for the mobile *Company Directory - Tablet* org view type)
- *Standard Hours*
- *Standard Work Period*
- *Union*
- *Years of Service*

Value specific to the *Company Directory* org view type: *Additional Jobs*.

Value specific to the *Company Directory* and *Direct-Line Reports* org view types: *Teams*.

Value specific to the *Direct-Line Reports* org view type: *Salary Plan/Grade/Step*.

---

**Note:** *Salary Plan/Grade/Step* is considered to be sensitive data. Sensitive data will only display if the employee reports to the user, hence, the user will only see this information for his or her subordinates.

---

Value specific to the *Direct-Line Reports* and *Matrix Reports* org view types: *Reports Count - Total*.

Values specific to the *Matrix Reports* org view type:

- *Other Teams*
- *Team Directs*
- *Team Peers*
- *Team Reports To*
- *Team Total Reports*

When there is an empty position, only these values will display, if selected:

- *Direct Reports*
- *Dotted-Line To (by Position)*
- *Job Family*
- *Job Function*
- *Manager Level*

- *Peers*
- *Reports To*
- *Union*

**Allow Export**

Select this check box to enable the user to export this field content.

**Select, Add, and Delete**

Select the check box after a field and use the Delete button to remove a field from appearing on the HR Details page of the tablet. The system automatically re-sequences line numbers when you delete rows in the middle of the grid.

Select the Add button to identify additional fields that should appear on the HR Details page of the tablet.

---

**Note:** These page elements are available for the *Company Directory - Tablet* org view type only.

---

See Org Chart Viewer - Update Photo Page.

## Employee Personalizations

This group box is not available for the *Company Directory - Tablet* or *Company Directory - Phone* org view types.

Use information in this group box to determine which personalization group boxes should appear on the right side of the Profile page.

**Display Additional Contacts**

Select this option to have the Additional Contact Information group box available on the Profile page. When this option is selected, the system will enable the user to select from the different contact types you specify on the Additional Contact Types page.

If you deselect this option, the Additional Contact Information group box will not be available on the Profile page.

**Go to Define Additional Contact Types**

Click this link to access the Additional Contact Types page to add or review contact types.

See Additional Contact Types Page.

**My Profile Links**

Select this option to have the My Profile Links group box available on the Profile page. Profile links enable the user to define shortcut links to other web sites.

When you select this option, the Show My Links Shortcut Icon check box on this page will be available for selection.

If you deselect this option, the My Profile Links group box will not be available on the Profile page.

| | |
|---|---|
| **Show My Links Shortcut Icon** | Select this check box to have the shortcut icons associated with target web addresses appear next to the label entered by the user. Some sites may or may not have a default shortcut icon. For example, when this check box is selected, and the user enters the web address for Oracle (http://oracle.com), the following icon will appear next to the label name.<br><br>This option is available when the Display My Profile Links check box is selected. |
| **Personal Statement** | Select this option to have the Personal Statement group box available on the Profile page. This functionality enables the user to enter personalized text. Users will update their personal statement using the Rich Text Editor.<br><br>See *PeopleTools: Using PeopleSoft Applications,* "Using PeopleSoft Application Pages," Working With the Rich Text Editor<br><br>If you deselect this option, the Personal Statement group box will not be available on the Profile page. |

## Org Chart Content Page

Use the Org Chart Content page (HRCD_SETUP_OC_NODE) to select the organization chart field options that should appear on the Org Chart page for each org view type.

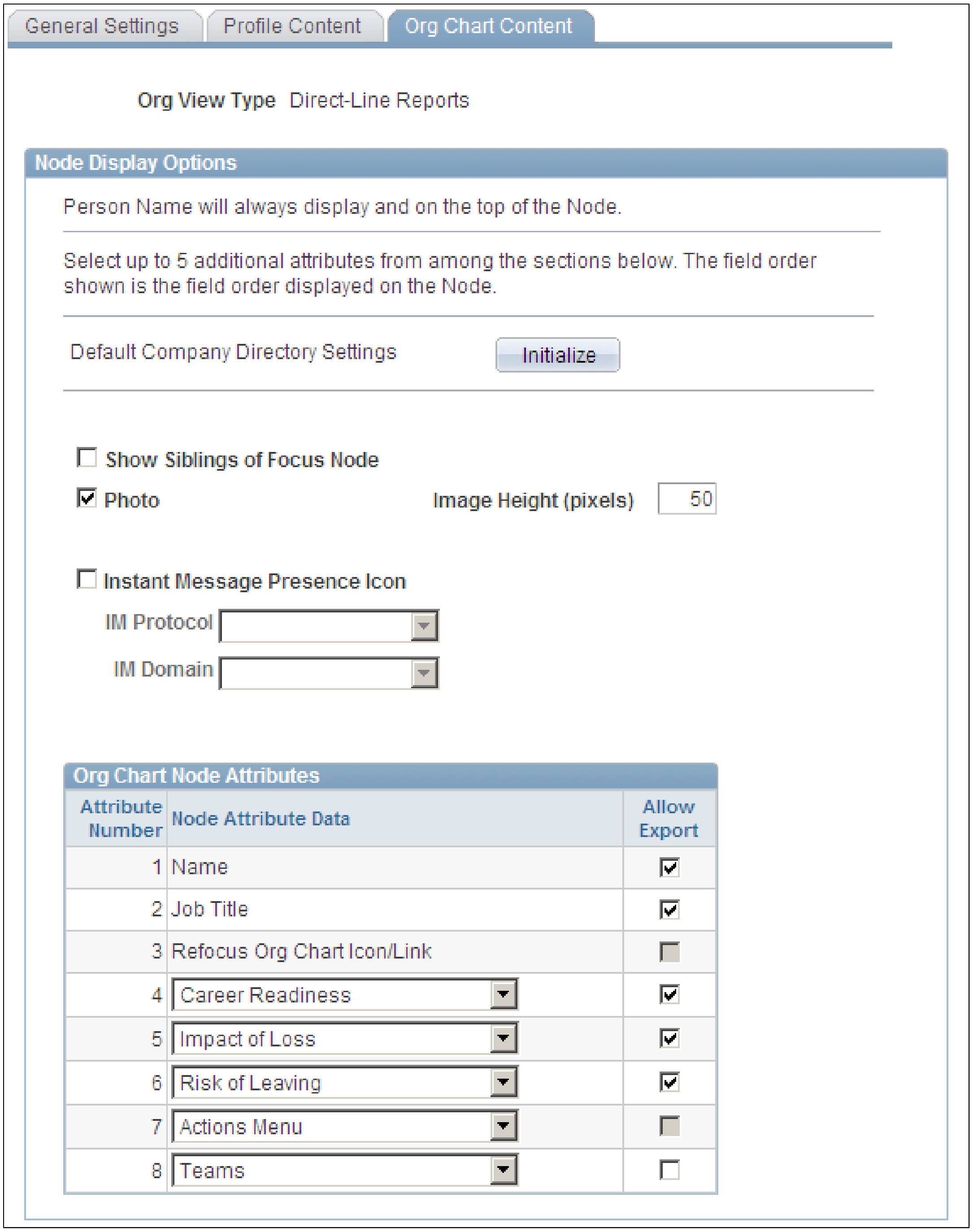
 

### Navigation

Set Up HCM, Common Definitions, Org Chart Viewer, Chart and Profile Settings, Org Chart Content

### Image: Org Chart Content page

This example illustrates the fields and controls on the Org Chart Content page. You can find definitions for the fields and controls later on this page.




**Note:** This page is not available for the *Company Directory - Phone* org view type.

## Node Display Options

| | |
|---|---|
| **Initialize** | Click this button to have the system provide by default the same settings you established for the *Company Directory* org view type.<br><br>This field element is available for the following org view types: *Direct-Line Reports* and *Matrix Reports.* |
| **Show Siblings of Focus Node** | Select this check box to have the system display peers within the same reporting structure level of the focus person. Deselect this check box to show only the focus person at the middle level of the organizational chart. The report to and subordinate nodes will still display for this person, if applicable. |
| **Photo** | Select to have a photo of the person appear within the node box of the person on the Org Chart page.<br><br>The photo that appears in a node depends upon the settings you have defined on the Profile Content page.<br><br>**Note:** This check box is always selected *Company Directory - Tablet* org view type. Thus, the mobile application will always display the photo image. |
| **Image Height (pixels)** | Enter size in which the height of the picture should appear within the node. This option is available when you select the Photo check box.<br><br>This field element is not available for the following org view type: *Company Directory - Tablet.* |

The Instant Message field elements are not available for the following org view type: *Company Directory - Tablet.*

| | |
|---|---|
| **Instant Message Presence Icon** | Select this check box to have the Org Chart node display the IM icon for a person, if IM information exists in the HR person model. Instant Message IDs for a person can be stored on the Contact Information page of personal data in HR. |
| **IM Protocol (instant messaging protocol)** | Identify the IM protocol that the system should use when displaying the IM icon. Valid values include *GTALK, MSN, XMPP,* and *YAHOO.* If a person does not have an IM protocol type defined in his or her personal data, the icon will not display for this person. This field is available when you select the Instant Message Presence Icon check box. |
| **IM Domain** | Displays the Instant Message domain associated with the IM Protocol you selected for all protocols except *XMPP.* For *XMPP,* you must select the value of the XMPP server that has been defined by your organization. |

See *PeopleTools: PeopleSoft MultiChannel Framework,* "Configuring Instant Messaging in PeopleSoft MultiChannel Framework"

## Org Chart Node Attributes

**Org Chart Node Attributes**

Select field attributes that will display in the individual nodes of the chart on the Org Chart page. The fields within the node will appear in the order of the attribute line number. Valid values for line numbers are:

- *Name*

  This field is always selected and listed as line number *1*.

- *Job Title*

  For the *Company Directory* org view type, *Job Title* is always selected for line number *2* when Display Multiple Job is selected on the General Setting page. If Display Multiple Job is deselected, then you have the option of selecting *Job Title* or leaving the field blank.

  For the other org view types, *Job Title* is always selected.

These values are available for selection for the *Company Directory - Tablet* org view type:

- *Email – Business*
- *Telephone - Business*
- *Telephone – Mobile*
- *Reports Count – Directs/Total* – This field attribute is always selected for line number *6.*

  This attribute will display the Directs field, which lists the number of direct reports for a person, and the Total field, which lists the total number of direct and indirect reports that report up to the person.

These remaining field selections discussed here apply to the following org view types: *Company Directory, Direct-Line Reports,* and *Matrix Reports,* unless otherwise noted.

- *Refocus Org Chart Icon/Link*

  This field is always selected and listed as line number *3.* This link appears in each node of the organization chart and enables you to change the focus node to another individual.

- *Action Menu*

*Action Menu* is the only field display option available for line number *7*.

Select this field display option if you want to enable the user to perform self service transactions from his or her profile, such as an address or name change, or to perform these transactions for a direct or indirect report.

The *Action Menu* values are configured through PeopleSoft Related Content Services. This framework enables developers and subject matter experts to link application pages with contextually relevant collaborative content.

For more information, see *PeopleTools: PeopleTools Portal Technologies,* "Developing and Configuring Related Content"

These values are available for the remaining line numbers.

- *Building*
- *Business Unit*
- *Company*
- *Cost Center*
- *Department*
- *Dotted-Line To*
- *Email - Business*
- *Floor Nbr*
- *Job Family*
- *Job Function*
- *Location*
- *Manager Level*
- *Regular/Temporary*
- *Reports Count - Directs*

  The *Reports Count – Directs* option will show the number of employees that directly report to this individual.
- *Standard Hours*
- *Standard Work Period*
- *Telephone - Business*
- *Telephone - Mobile*

- *Union*
- *Years of Service*

These options are specific to the *Company Directory* org view type.

- *Reports Count - Directs/Total*

  The *Reports Count – Directs/Total* options will show the number of employees that directly report to this individual as well as the total number of subordinate workers that report indirectly to this person.

- *Reports Count - Total*

  The *Reports Count - Total* option will show the total number of subordinate workers that report up through this person.

These values are specific to the *Direct-Line Reports* and *Matrix Reports* org view types:

- *Career Readiness* *
- *Comp Rate* *
- *Employee ID*
- *Impact of Loss* *
- *Organizational Relationship*
- *Risk of Leaving* *
- *Salary Plan/Grade/Step* *

  ---

  **Note:** * These field elements are considered to be sensitive data. Sensitive data will only display if the employee reports to the signed-in user, hence the user will only see this information for his or her subordinates.

  ---

When there is an empty position, only these values will display, if selected:

- *Dotted-Line To (by Position)*
- *Job Family*
- *Job Function*
- *Manager Level*
- *Reports Count - Directs*
- *Reports Count - Directs/Total*

- *Reports Count – Total*

Attribute number *8* enables you to display either the Teams or Other Teams link in a node for a person who is part of a matrix team. If the person is not part of a matrix team, the link will not appear in the node. Valid values are:

- *Teams*
- *Other Teams*

**Allow Export** Select this check box to enable the user to export this field content.

## Matrix Team Page

Use the Matrix Team page (HRMH_MATRIX_DEFN) to define matrix team details such as the matrix ID, effective date, status, and description.

Create your own or use an existing reporting relationship for the team.

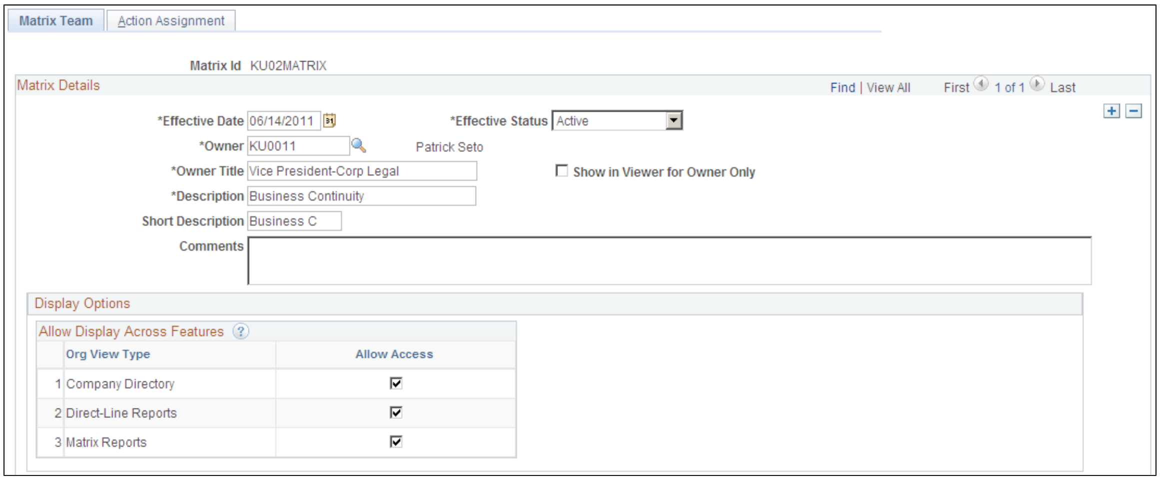
 

### Navigation

- Set Up HCM, Common Definitions, Org Chart Viewer, Matrix Teams, Matrix Team
- Workforce Administration, Define Matrix Team, Matrix Team

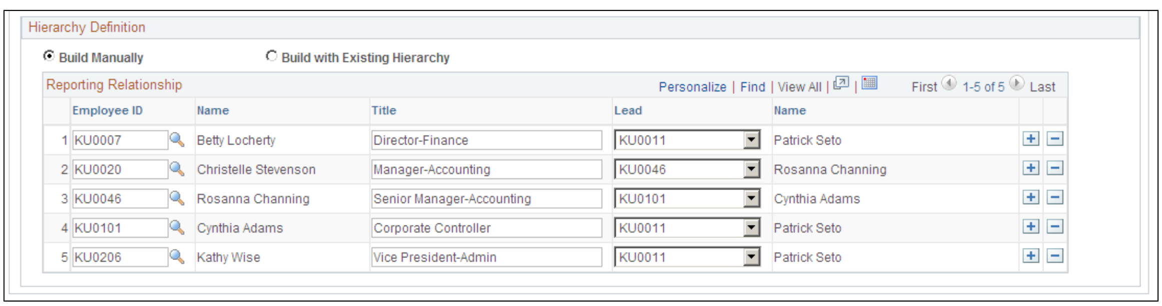
### Image: Matrix Team page (1 of 2)

This example illustrates the fields and controls on the Matrix Team page (1 of 2). You can find definitions for the fields and controls later on this page.




### Image: Matrix Team page (2 of 2)

This example illustrates the fields and controls on the Matrix Team page (2 of 2) page. You can find definitions for the fields and controls later on this page.




## Matrix Details

**Owner**

Select the employee ID for the person who is the owner of this matrix team. The owner is the top node or person of the matrix team or org chart when creating a manual matrix team. When the matrix team is built from an existing hierarchy, the Owner is Top of Hierarchy check box must be selected on this page to have the owner appear in the top node.

**Note:** An owner may or may not have access to administer manager self service transactions for all of their dotted-line reports through the Action link in the Org Chart Viewer pages. This depends on transaction assignment definitions.

See Assign Transaction Access Page.

**Owner Title**

Displays the job title for the person you entered in the Owner field. If this person holds multiple jobs, the system will display the job title of the primary job. If the person is associated with a position, the page will display the position title. You can change the title but this information will not be written back to Job Data or Position Management.

**Show in Viewer for Owner Only**

Select to have this matrix team viewable as an Org Chart Viewer – <matrix report name> tab folder to only the owner of this matrix. Other members of this matrix team will not see this folder tab when this option is selected.

See Understanding and Viewing Matrix Teams.

## Display Options – Allow Display Across Features

**Allow Access**

Select the org view types where a user can access and view this matrix team. By selecting a check box, you make the matrix public to other users through the use of the Teams or Other Teams fields. The fields will display the matrix team name on only those org view type folder pages where you have selected the Allow Access check box. Deselect an option to keep the matrix team private within that org view type folder.

---

**Note:** You must also select the Display Matrix Teams check box on the Chart and Profile Setting - General Settings page for each org view type that should display this matrix ID.

---

For example, if Company Directory is selected here and the *Company Directory* org view type is set up to view teams (on the Chart and Profile Settings - General Settings page), this matrix team will appear in the Teams menu drop-down list on the Company Directory pages for employees associated with this team. You would also be able to search for this matrix team within the Company Directory.

See Understanding and Viewing Matrix Teams.

See Chart and Profile Settings - Profile Content Page.

See Org Chart Content Page.

## Hierarchy Definition

**Build Manually**

Select this option to have the Reporting Relationship group box display and enter employee names manually into a team matrix.

**Build with Existing Hierarchy**

Select this option to have the Source (Existing Hierarchy) group box display. This will enable you to select an access type or a tree as the basis for your matrix hierarchy.

### Reporting Relationship

This group box is available when you select Build Manually as a hierarchy definition. Employees that have others reporting to them are considered leads and will be available to you when you assign transactions to managers and leads through the Action Assignment page.

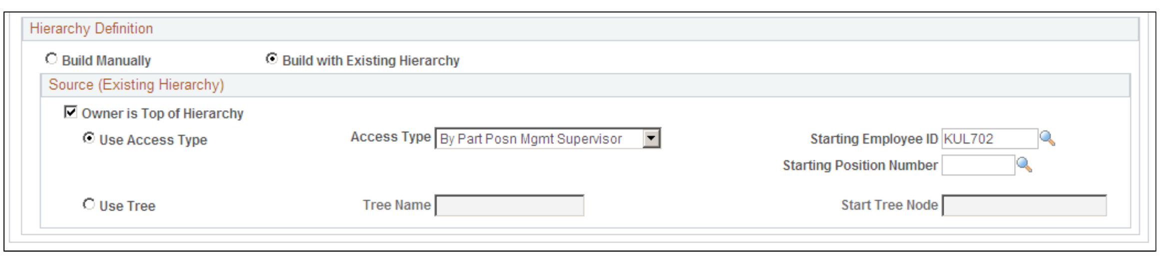
| | |
|---|---|
| **Employee ID, Name, and Title** | Enter the employee IDs of those whom you want to include in this matrix team. The name and title will display. The job title is provided by default from the employee's job code. You can override the job title, but doing this will not update the Job Data information in HR for the person. |
| **Leadand Name** | Enter the employee ID of the person who should have a dotted-line report to the matrix owner. The people you enter in this field are considered managers or leads because they have others reporting to them. Valid values for this field come from other employee IDs associated with this matrix team. To have an employee available to you in this field, add the employee ID in the Employee ID or the Owner field.<br><br>**Note:** A manager or lead may or may not have access to administer manager self service transactions for all of their dotted-line reports through the Action link in the Org Chart Viewer pages. This depends on transaction assignment definitions.<br><br>See Assign Transaction Access Page. |

### Source (Existing Hierarchy)

This group box is available when you select Build with Existing Hierarchy as a hierarchy definition.

**Image: Matrix Team page showing the Hierarchy Definition group box with Build with Existing Hierarchy selected**

This example illustrates the fields and controls on the Matrix Team page with Build with Existing Hierarchy selected. You can find definitions for the fields and controls later on this page.




The matrix definition is built dynamically at runtime. Employees that have others reporting to them are considered managers or leads and will be available to you when you assign transactions to managers and leads through the Action Assignment page.

| | |
|---|---|
| **Owner is Top of Hierarchy** | Select if the owner of this matrix team should be placed at the top of the hierarchy. |

This option is selected automatically when you select an access type of By Group ID or By Dept Security Tree.

**Use Access Type**

Select this option to choose an access type as the basis for the matrix hierarchy.

**Access Type**

This field is available when you select the Use Access Type option. Valid options are:

- *By Department Manager ID*
- *By Dept Security Tree*
- *By Group ID*
- *By Part Posn Mgmt Dept Mgr ID*
- *By Part Posn Mgmt Supervisor*
- *By Reports To Position*
- *By Supervisor ID*

See Common Terms and Elements Used When Working with the Org Chart Viewer.

---

**Note:** The system issues a warning message when you select and access a type that does not match your Installation table settings, such as Position Management.

---

**Group ID**

This field is available when you select *By Group ID* as the access type. Groups are defined using the Group Build feature. A group must be available for manager self service through the group definition and then assigned access to Matrix Teams (HRMH_MATRIX_SETUP) component though Group Build security.

See "Understanding Group Build *(PeopleSoft HCM 9.2: Application Fundamentals)*".

**Force Group Refresh**

This field is available when you select *By Group ID* as the Access Type value and enter a group ID. This enables the user to refresh a group at the matrix level.

**Starting Employee ID**

This field is available when you select the *Use Access Type* option and specify any Access Type value except *By Group ID.* The system will display all currently active employees.

**Starting Position Number**

This field is available when you select any of the Position Management related access types: *By Part Posn Mgmt Dept Mgr ID, By Part Posn Mgmt Supervisor,* or *By Reports To Position.*

**Use Tree**

Select this option to use an existing tree assigned to the *MATRIX BY JOB* tree structure.

| | |
|---|---|
| | See Tree Builder Run Control Page. |
| **Tree Name** | Enter the tree name that will serve as the basis for your matrix team. The tree you enter here must use the *MATRIX_BY_JOB* tree structure. |
| **Start Tree Node** | Select a node from the tree. The node can be from anywhere within the selected tree. |

---

**Note:** A matrix will become invalid under these circumstances:
- An employee of a manually built matrix has an inactive status in HR.
- When a starting employee ID is no longer a member of a prebuilt existing hierarchy.
- When a starting employee ID, position number, or tree node is no longer a lead due to an external hierarchy change and that lead is allocated access to transactions via the matrix.
- The transaction defined is no longer available through content services.
- The approval override transaction on the Action Assignment page is no longer associated with the component in Approval Workflows.
- The approval override process definition on the Action Assignment page is no longer associated with the transaction in Approval Workflows and therefore the component.

---

An owner, manager, or lead may or may not have access to administer manager self service transactions for all of their dotted-line reports through the Actions link in the Org Chart Viewer pages. This depends on transaction assignment definitions.

See Understanding and Viewing Matrix Teams, Assign Transaction Access Page.

## Action Assignment Page

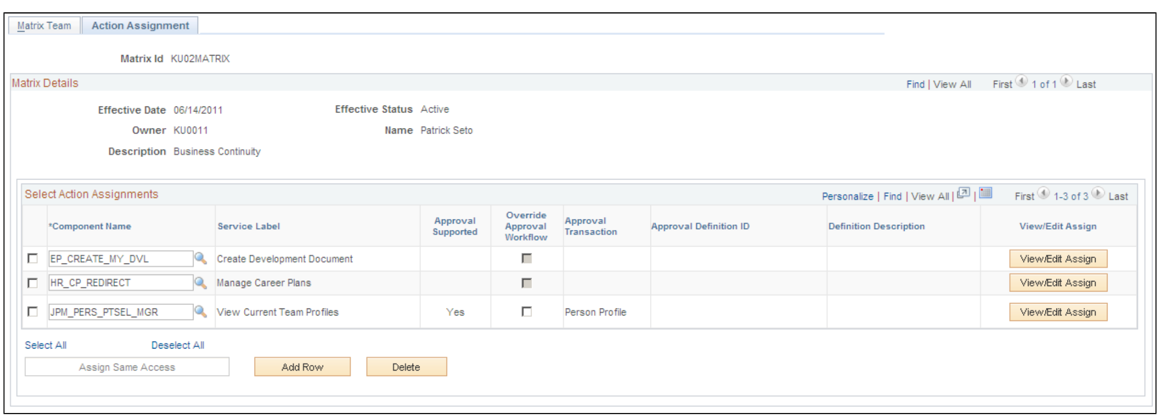
Use the Action Assignments page (HRMH_TRAN_ASSIGN) to associate Manager Self-Service transactions to a matrix owner or other managers or leads that are part of the matrix reporting relationship.

### Navigation

Set Up HCM, Common Definitions, Org Chart Viewer, Matrix Teams, Action Assignment

### Image: Action Assignment page

This example illustrates the fields and controls on the Action Assignment page. You can find definitions for the fields and controls later on this page.



Use this page when a matrix owner or lead within the matrix team should have the capability to administer manager self service transactions for any dotted-line report.

**Component Name and Service Label**

Enter the manager self service transaction that should be available to this matrix team. The page displays the name of the transaction.

**Approval Supported**

The field displays Yes when the transaction uses an approval process. These transactions are defined in Approval Workflow as having content service IDs. You can access this information by navigating to Set Up HCM, Common Definitions, Approvals, Workflow Transactions. The content service is defined on the Details2 tab to the approval transaction in the Org Viewer Service ID column. Components that are delivered with approvals are:

- *GP_ABS_MGRSS_REQ – Request Absence*
- *HR_MGR_REPORT_CHNG – Request Reporting Change*
- *HR_PROMOTE_MGR – Promote Employee*
- *HR_TRANSFER_MGR – Transfer Employee*
- *JPM_PERS_PTSEL_MGR – Current Team Profiles*

See "Defining the Setup Process Definitions Component *(PeopleSoft 9.2: Approval Framework)*".

**Override Approval Workflow**

This field is available when the transaction is associated with more than one process definition.

---

**Note:** For a complete list of delivered transaction registry definitions, access the Register Transactions component by navigating to Set Up HCM, Common Definitions, Approvals, Approvals Setup Center, Register Transactions.

---

For more information about approvals, see "Understanding the Approval Framework Feature *(PeopleSoft 9.2: Approval Framework)*".

**Approval Transaction, Approval Definition ID, and Definition Description**

Displays the approval transaction associated with this component, if applicable. The component associated with this transaction is where requests are approved or denied. Define approval processes by navigating to Set Up HCM, Common Definitions, Approvals, Approval Process Setup.

When you select the Override Approval Workflow check box, this field becomes available for you to select another approval transaction.

| | |
|---|---|
| **View/Edit Assign** | Click the button to access the Assign Transaction Access page and assign transaction access to the owner or leads within the matrix team. |
| **Assign Same Access** | Select multiple components and click this button to access the Assign Same Transaction Access page. |

### Related Links

Understanding and Viewing Matrix Teams

## Assign Transaction Access Page

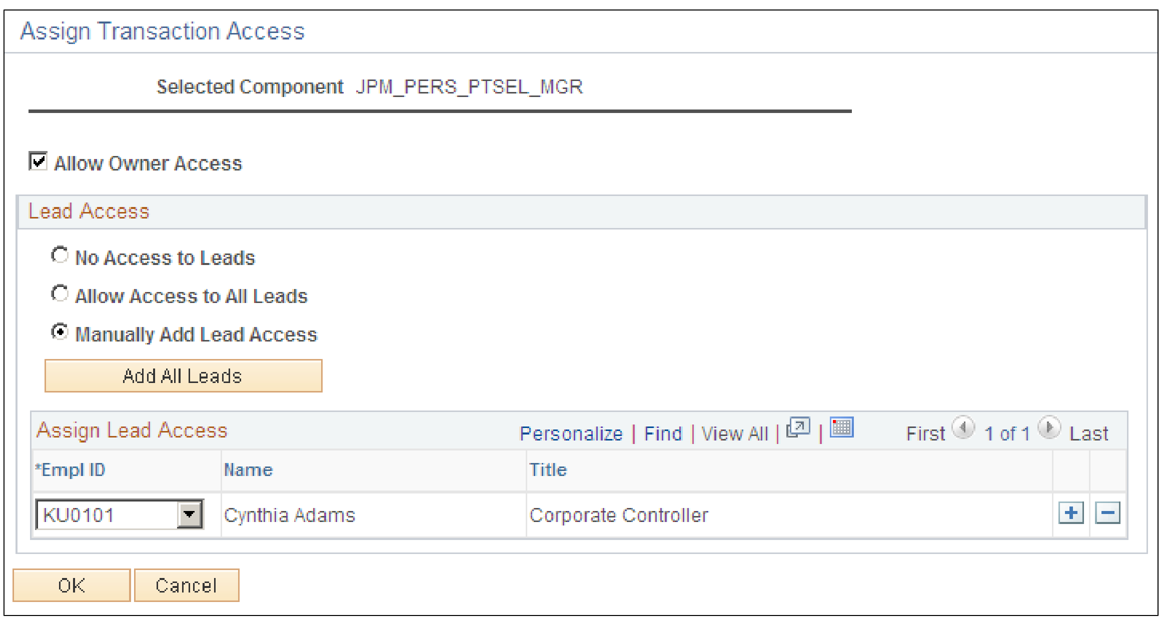
Use the Assign Transaction Access page (HRMH_TRAN_LEAD_ASN) to assign transaction access to matrix owners and leads.

**Navigation**

Click the View/Edit Assign button on the Action Assignments page.

**Image: Assign Transaction Access page**

This example illustrates the fields and controls on the Assign Transaction Access page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Allow Owner Access** | Select to allow the transaction to be assigned to the owner of this matrix team. |
| **Lead Access** | Identify matrix team leads to which you want to assign transaction access. Options are:<br>• No Access to Leads - Does not allow leads to have transaction assignments. |

- Allow Access to All Leads - Allows all leads in this matrix to have transaction assignments.
- Manually Add Lead Access - This option enables you to manually select leads from this matrix for which you want to assign transactions.

**Add All Leads**

Click to automatically list all leads as having access to this transaction. This button is available when you select Manually Add Lead Access. Use the Delete button to remove those who should not be on this list.

**Empl ID**

Enter the leads that should have access to this transaction. Valid values come from the Matrix Team page for this matrix and are employees that have others reporting to them.

---

**Note:** The Assign Same Transaction Access page setup is identical to this page but enables you to assign access to multiple component transactions simultaneously. You access the Assign Same Transaction Access page by selecting multiple components on the Action Assignment page and clicking Assign Same Access.

---

### Related Links

Understanding and Viewing Matrix Teams

## Chapter 3

# Setting Up Country-Specific Tables

## Understanding Country-Specific Table Setup

Once you've set up the tables that you'll use to administer your core workforce functionality in PeopleSoft Human Resources, you may also need to set up additional tables to manage the Administer Workforce business process for specific countries.

You need to set up only the tables that are relevant to your organization's business needs.

### Related Links

Defining Personnel Actions and Reasons

## (FRA) Setting Up French Workforce Tables

To set up the French workforce tables, use the APE Table (APE_TABLE_FRA), the INSEE Table (INSEE_TABLE_FRA), the External Variables (EXTERNAL_VARIABLES), URSSAF Table (URSSAF_TABLE_FRA), FRA CPAM Table (CPAM_TABLE_FRA), FRA CRAM table (CRAM_TBL_FRA), Hour Type table (HOUR_TYPE_TABLE), and Occupational Illness Tbl - FRA (OCC_ILLNESS_FRA) components.

These topics provide an overview of maintaining French social security tracking codes and discuss how to:

- Maintain INSEE codes.
- Enter salary and social security ceiling information.
- Define hours type codes.
- Enter French occupational illness codes.

### Understanding French Social Security Tracking Code Maintenance

In France, CPAMs are the local social security offices that manage health coverage for French workers. The French government establishes and regulates CPAMs. If you're managing a French workforce, you'll need to identify and track the CPAM offices that impact your enterprise.

The CRAM is the regional social security body that oversees the running of CPAMs. CRAM offices work with companies to both prevent and compensate workers for vocational or personal injuries.

Use the French setup tables to maintain *Caisse Primaire d'Assurance Maladie* (CPAM) and *Caisse Regionale d'Assurance Maladie* (CRAM) codes for compliance with French social insurance regulations.

Track and report on occupational injuries for French workers using the Monitor Health and Safety business process in PeopleSoft Human Resources.

### Related Links

"Understanding Health and Safety Incidents *(PeopleSoft HCM 9.2: Human Resources Monitor Health and Safety)*"

## Pages Used to Set Up French Workforce Tables

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| APE Table | APE_INDSTRY_CD_FRA | Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, APE Table | Maintain APE codes for your French organization. APE codes are used to classify the type of industry (such as software, banking, and insurance) that a company represents. APE codes are a normalized set of codes that are required by law and are used on Training Report 2483 (TRN029). |
| INSEE Table | INSEE_TABLE_FRA | Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, INSEE Table | Maintain INSEE codes for your French organization. |
| External Variables | EXT_PARM_CD_FRA | • Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, External Variables<br>• Set Up HCM, Product Related, Workforce Monitoring, Regulatory Requirements FRA, External Variables | Enter information that is related to the salaries and Social Security ceilings that are established by the French government each year. |
| URSSAF Table | URSSAF_TABLE_FRA | Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, URSSAF Table | Set up URSSAF codes. The URSSAF is a French administration that collects the worker and employer contributions for Social Security. This table stores the codes for the local URSSAF offices. |
| CPAM Table | CPAM_TABLE | Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, CPAM Table, CPAM Table | Modify or add a CPAM ID to your human resources system. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| CRAM Table | CRAM_TBL | Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, CRAM Table, CRAM Table | Modify or add a CRAM code to your human resources system. |
| Hours Type | HOURS_TYPE_FRA | Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, Hours Type, Hours Type | Define hours type codes that you'll use to track job hours information for French workers. |
| Occupational Illness Tbl - FRA | OCC_ILLNESS_FRA | Set Up HCM, Product Related, Workforce Monitoring, Health and Safety, Occupational Illness Tbl - FRA, Occupational Illness Tbl - FRA | Enter French occupational illness codes. |

# INSEE Table Page

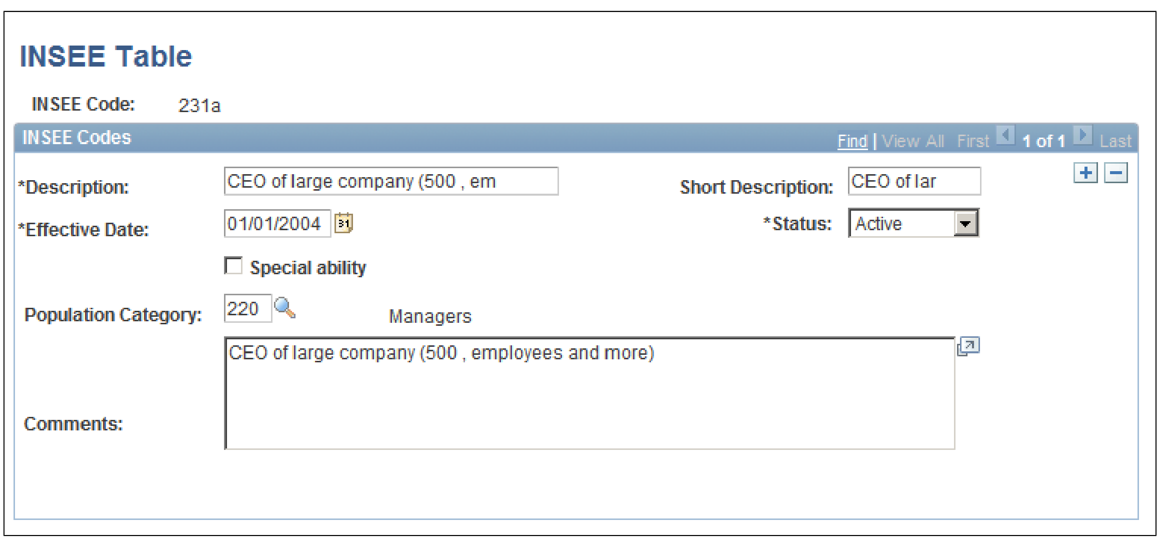
Use the INSEE Table page (INSEE_TABLE_FRA) to maintain INSEE codes for your French organization.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, INSEE Table

**Image: INSEE Table page**

This example illustrates the fields and controls on the INSEE Table page. You can find definitions for the fields and controls later on this page.




The system displays the description that you enter for this code on pages or reports in PeopleSoft Human Resources that reference the INSEE code.

These values are set by the INSEE and classify job codes. Link INSEE codes to job codes that are used in French organizations on the Job Data - Evaluation Criteria page.

**Special ability**

Select if this INSEE code represents a job that requires a special ability.

An worker who is assigned (through the job code) an INSEE code with this check box selected can't be listed as disabled on the French Disability report.

**Population Category**

Select the population category associated with this INSEE code. Population codes are used in the definition of contingency contracts to identify the population covered by a contract. Population codes are also used by the DUCS reporting in PeopleSoft Global Payroll for France.

### Related Links

"Classifying Jobs *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Setting Up French Regulatory Requirements *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"

## Workforce Data FRA - External Variables Page

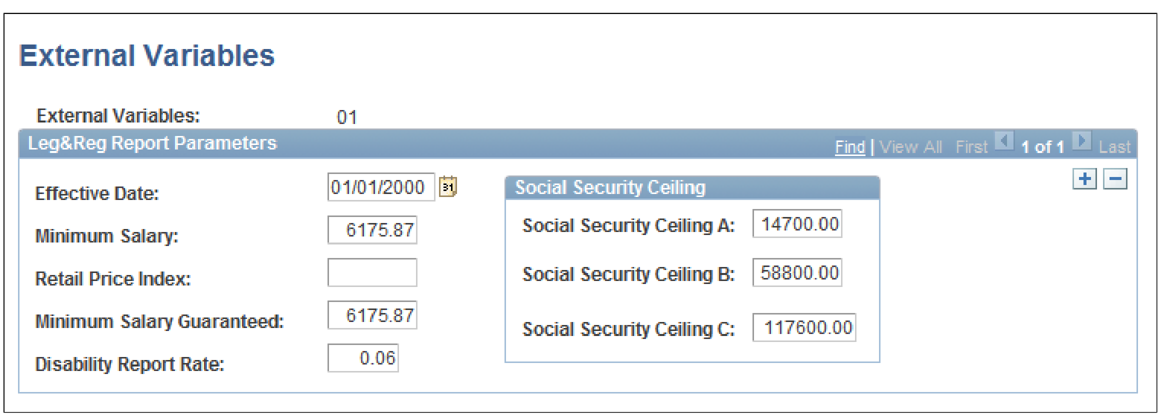
Use the External Variables page (EXT_PARM_CD_FRA) to enter information that is related to the salaries and Social Security ceilings that are established by the French government each year.

**Navigation**

- Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, External Variables
- Set Up HCM, Product Related, Workforce Monitoring, Regulatory Requirements FRA, External Variables

**Image: External Variables page**

This example illustrates the fields and controls on the External Variables page. You can find definitions for the fields and controls later on this page.



The values that you enter act as a reference for salary and payroll processing in PeopleSoft Human Resources.

### Leg&Reg Report Parameters (legislative and regulatory report parameters)

**Minimum Salary, Retail Price Index, and Minimum Salary Guaranteed** — Enter a minimum salary, retail price index, and guaranteed minimum salary for this external variable. The French government sets the amounts.

**Disability Report Rate** — Prior to launching the Disability report (DIS001), enter a disability report rate. The rate is set by the French government, and the current rate is 6 percent (a field value of *0,06*). The disability report rate is set up in the External Variables Table.

### Social Security Ceiling

These ceiling values are determined every year by the French Social Security Administration; the values that you enter are the ceiling values that define different income brackets for French workers. They are also used as a reference for payroll calculations for French workers because many types of Social Security contributions are calculated based on the Social Security income bracket into which an worker's salary falls.

For example, if you enter the following Social Security ceilings for Social Security Ceiling A, B, and C, and the tax rates for each bracket of income are as shown:

| | ***Bracket A*** | ***Bracket B*** | ***Bracket C*** | ***Above*** |
|---|---|---|---|---|
| Ceiling | 2279 EUR | 9116 EUR | 18233 EUR | |
| Tax Rate | 10% | 15% | 18% | 20% |

Then an worker whose salary is 31000 EUR per month, based on this Social Security and tax rate scenario, is required to pay the following Social Security premium:

(2,279 × 10%) + (9,116 × 15%) + (18,233 × 18%) + (1,372 × 20%)

## Hours Type Page

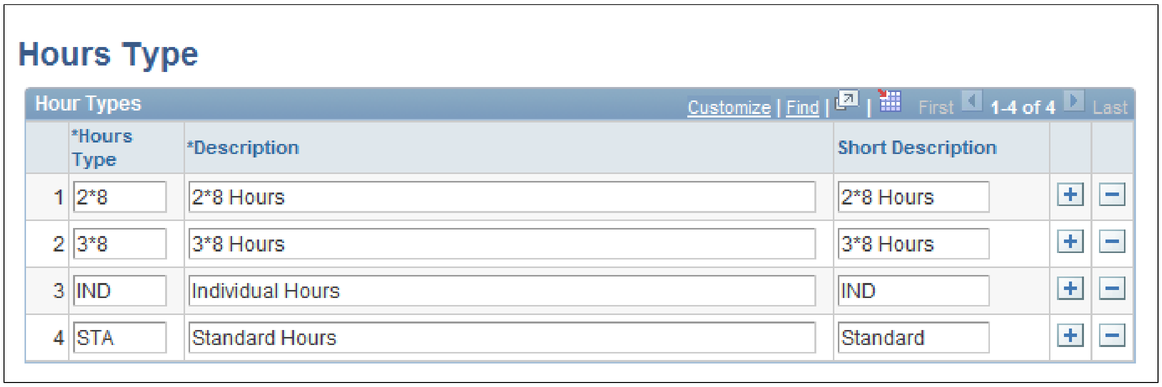
Use the Hours Type page (HOURS_TYPE_FRA) to define hours type codes that you'll use to track job hours information for French workers.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data FRA, Hours Type, Hours Type

### Image: Hours Type page

This example illustrates the fields and controls on the Hours Type page. You can find definitions for the fields and controls later on this page.




**Hours Type** Enter the hours type code you are defining. Add rows to define as many hours type codes as needed.

| ***Hours Type*** | ***Description*** |
|---|---|
| 3*8 | Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can go on round the clock. The production workers are split into three groups—each group is working one after the other, eight hours a day. Every month, for example, the workers shift to another group. Shift workers who were working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints in their personal life, those workers are often paid a shift bonus. |
| 2*8 | Works the same way as the 3*8 option, but indicates that there are two work shifts as opposed to three. |
| STA | Indicates that the work hours follow a regular pattern using the job's standard hours as indicated on the Job Information page. |
| IND | Indicate that the worker's hours follow an individualized pattern that is different from the company's default standard hours. Indicate this amount in the Standard Hours field on the Job Information page. This field is used by the French Employee report (indicator 413 of the Employee Survey for the Trade/Services industry). |

## Occupational Illness Tbl - FRA Page

Use the Occupational Illness Tbl - FRA page (OCC_ILLNESS_FRA) to enter French occupational illness codes.

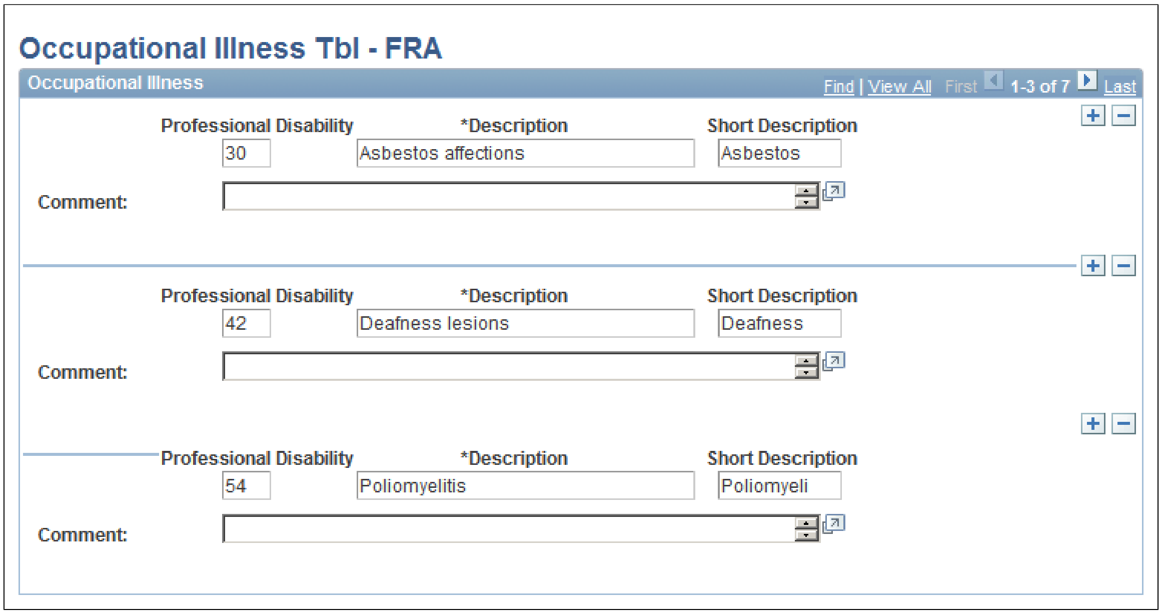
 

**Navigation**

Set Up HCM, Product Related, Workforce Monitoring, Health and Safety, Occupational Illness Tbl - FRA, Occupational Illness Tbl - FRA

**Image: Occupational Illness Tbl - FRA page**

This example illustrates the fields and controls on the Occupational Illness Tbl - FRA page. You can find definitions for the fields and controls later on this page.




Use this page to define occupational illness categories for French workers. Use the categories when you enter information on the Disability page.

---

**Note:** The Occupational Illness Tbl - FRA table (OCC_ILLNESS_FRA) is used as a prompt table on the Prof. Dis (Professional Disease) field for the Disability page. While there is another Occupation Illness table (OCC_ILLNESS_TBL) used in the Monitor Health and Safety business process, they aren't the same page. If you're entering information about disabilities for French employees on the French Disability page, you must complete this table.

---

| | |
|---|---|
| **Professional Disability** | Enter codes for the occupational illnesses that you want to track in your system. |

# (DEU) Setting Up German Workforce Tables

To set up the German workforce tables, use the Accident Insurance table (ACCDT_INS_TABLE), BA Cd table (BA_CD_TABLE), Function Code Table (FUNCTION_CD_TBL), Nation Duvo (NATION_DUVO_TABLE), Industrial Inspection (INDUST_INSP_GER), and SI Unit (SI_UNIT_GER) components.

These topics provide an overview of social insurance in Germany and discuss how to:

- Define accident insurance codes.

- Enter German national DEUEV codes.

## Understanding Accident Insurance

Accident insurance in Germany is maintained and administered by private organizations *(Berufsgenossenschaften)* that act as employer's liability insurance associations. Employers pay out a certain amount in the form of premiums to these associations, who administer and pay out funds to workers injured on the job. To manage the amount your company contributes to the fund, set up information regarding accident insurance codes and accident insurance hazard codes. The insurance associations usually determine these codes.

To determine your premium, track the number of employees who belong to a hazard class. This number is multiplied by a hazard factor, and the results are supplied to the social insurance provider, which determines the required premium for your organization. These contribution amounts are based on the number of organizations that the provider serves; for example, if one of the companies in the group goes bankrupt, the other member companies may have to pay higher premiums.

## Pages Used to Set Up German Workforce Tables

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Accident Insurance Table | ACCDT_INS_TABLE | Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Table | Define accident insurance codes for German employees. |
| Accident Insurance Address | ACCDT_INS2_TABLE | Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Address | Enter address information for this accident insurance provider. |
| Accident Insurance Upload | HRDE_AI_UPLOAD | Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Upload | Upload UVGT and UVSD files to use. |
| BA Codes (*Bundesanstalt fur Arbeit* Codes) | BA_CD_TABLE | Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, BA Codes, BA Codes | Add or update *Bundesanstalt fur Arbeit* job codes.<br><br>PeopleSoft maintains the BA Code table so that you can add or update it. All job codes are published by the German Federal Labor Office *(Bundesanstalt fur Arbeit* ) in *Verzeichnis der Berufsbezeichnungen* and are required on reports to the German Federal Labor Office. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Function Code | FUNCTION_CD_TABLE | Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Function Code, Function Code | Add or maintain job codes for conducting statistical analyses of your workforce in Germany. For example, you can use the codes that you establish here to examine how many consultants, administrators, support staff, or sales representatives make up your workforce. |
| Nation Duvo | NATION_DUVO_TABLE | Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Nation Duvo, Nation Duvo | Add or update nation DEUEV information. |
| Industrial Inspection | INDUST_INSP_GER | Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection, Industrial Inspection | Set up German industrial inspection codes that you associate with locations in your organization.<br><br>Industrial inspection codes are not effective-dated and have no status. |
| Social Insurance Unit | SI_UNIT_GER | Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Social Insurance Unit, Social Insurance Unit | Set up German social insurance unit codes that you associate with locations in your organization. |

## Accident Insurance - Accident Insurance Table Page

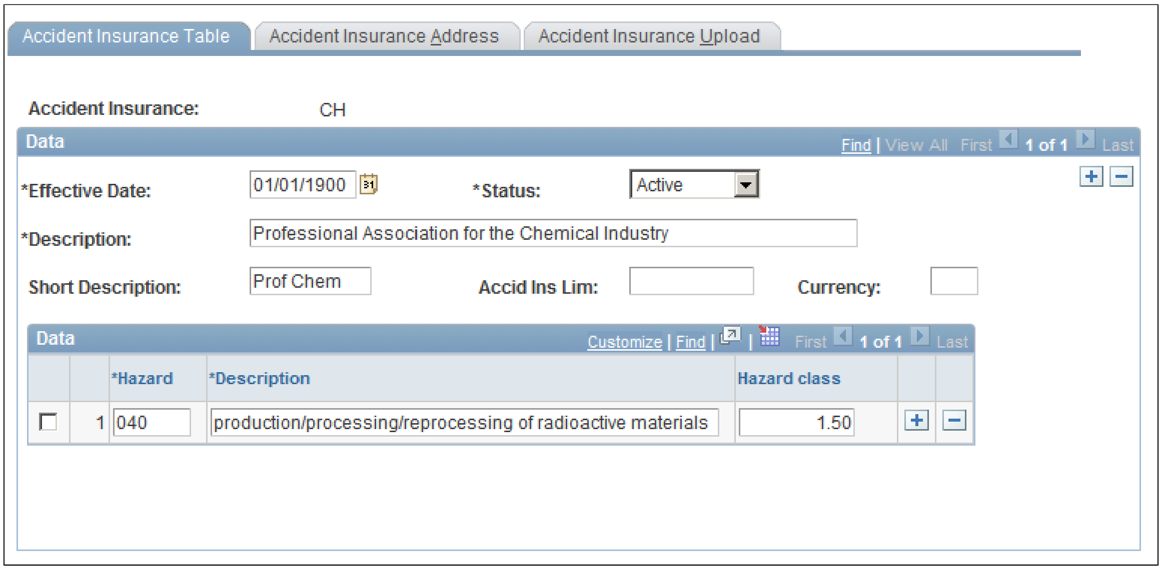
Use the Accident Insurance Table page (ACCDT_INS_TABLE) to define accident insurance codes for German employees.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Table

### Image: Accident Insurance - Accident Insurance Table page

This example illustrates the fields and controls on the Accident Insurance - Accident Insurance Table page. You can find definitions for the fields and controls later on this page.




**Hazard**

Enter the code for the hazard type.

**Note:** German hazard codes are regulated and standardized by the German government.

**Hazard Class**

Enter the class, or degree, of the covered hazard.

## Nation Duvo Page

Use the Nation Duvo page (NATION_DUVO_TABLE) to add or update nation DEUEV information.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data DEU, Nation Duvo, Nation Duvo

### Image: Nation Duvo page

This example illustrates the fields and controls on the Nation Duvo page. You can find definitions for the fields and controls later on this page.


The Nation DEUEV table is maintained by PeopleSoft and stores nationality codes specified by the German DEUEV Directive that regulates how data is to be provided to the German social insurance administration by companies doing business in Germany. Using these codes is required for compliance with the German DEUEV (data transmission/transfer) Directive.

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**Note:** The nation codes on the Nation DEUEV table are different from the country codes on the Country table. Nation DEUEV codes are specific to the German DEUEV Directive and are not based on ISO.

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**Note:** The DEUEV Directive specifies the nationality key for each DEUEV country. Don't change it here unless the DEUEV Directive changes the nationality key.

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**Nationality**

Enter the nationality associated with this country. For example, the nationality associated with The Netherlands is *Dutch.*

**Nationality Code**

The DEUEV Directive specifies a unique two-character nationality code for each nationality key. These nationality codes are different from the three-character ISO country codes stored on the Country table.

**Country**

Indicate an ISO country code to be associated with the DEUEV Directive nationality key.

**OECD Country (Organization of Economic Cooperation and Development country)**

Select to indicate the nationality key is for an OECD country. Germany carefully regulates the types of industries in which citizens of non-OECD countries, like Iraq, can work. For example, non-OECD nationals are restricted from working in defense-related industries or for companies that produce products involving protected trade technologies.

**Note:** There isn't always a one-to-one correspondence between ISO countries on the Country table and the nationality keys on the Nation DEUEV table. The German DEUEV Directive makes nationality distinctions that have no direct relationship to ISO country standards.

**EU-Land (European Union country)** Select to indicate this is European Union country. Workers from European Union nations are tracked for purposes of reporting to the German Social Insurance administration.

**Note:** Nationality keys are attached to an employee's job data on the Job Data Identity/Diversity page. If you're entering information for German workers, the system prompts for the worker's nationality code using the DEUEV nations on the Nation DEUEV table.

# (ITA) Setting Up Italian Workforce Tables

To set up the Italian Workforce tables, use the ITA C.I.A. table (CIA_TBL_ITA), Cities table (CITY_TABLE_ITA), ITA INAIL table (INAIL_TBL_ITA), ITA INPDAI table (INPDAI_TBL_ITA), INPS Site (INPS_SITE_ITA), INPS Codes (INPS_TBL_ITA), ITA PREV table (PREV_TBL_ITA), Company Codes (COMP_CD_ITA), Company/Estab Codes (COMP_ESTAB_CD_ITA), IT Country FCode (COUNTRY_TABLE_ITA), Seniority Notification Periods (SENIORIT_NOTIF_ITA), Turnover Action (TRV_ACTREAS_ITA), and Productive Unit (UNITA_PROD_TBL) components.

These topics discuss setting up Italian workforce tables and how to:

- Define *Istituto Nazionale per la Previdenza Sociale* (INPS) codes.
- Define seniority notification periods.

## Pages Used to Set Up Italian Workforce Tables

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| C.I.A.) | CIA_TBL_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, C.I.A., C.I.A. | Enter company integrative contract information. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Cities | CITY_TABLE_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Cities, Cities | Use the Italian City Table page to maintain the city data. Update the table by downloading the file supplied annually from the *Ministero delle Finanze* website and the running the Italian City Update process. You can enter the postal codes for cities to expedite data entry during the hiring process. |
| INAIL Codes | INAIL_TBL_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, INAIL Codes, INAIL Codes | Define the INAIL *(Istituto Nazionale per l'Assicurazione degli Incidenti sul Lavoro)* position code and rate for INAIL contribution. |
| INPDAI Codes | INPDAI_TBL_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, INPDAI Codes, INPDAI Codes | Define the INPDAI *(Istituto Nazionale di Previdenza per I Dirigenti di Aziende Industriali)* position codes for pension funds.<br><br>The INPDAI codes are used for historical data only. The INPDAI is no longer a legal body in Italy and these codes are no longer required. |
| INPS Sites | INPS_SITE_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, INPS Sites, INPS Sites | Set up INPS *(Istituto Nazionale per la Previdenza Sociale)* site codes. Link INPS sites to INPS codes on the INPS Codes page. |
| INPS Codes | INPS_TBL_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, INPS Codes, INPS Codes | Define INPS data for social security contributions and information needed for social security reporting (DM10). |
| PREV Codes | PREV_TBL_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, PREV Codes, PREV Codes | Define PREVINDAI codes, descriptions, and PREVINDAI position codes. |
| Company Codes - INPS Codes | COMP_INPS_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPS Codes | Link the company with INPS codes. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Company Codes - INAIL Codes | COMP_INAIL_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INAIL Codes | Link the company with INAIL codes. |
| Company Codes - INPDAI Codes | COMP_INPDAI_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPDAI Codes | Link the company with INPDAI codes. |
| Company Codes - PREV Codes | COMP_PREV_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, PREV Codes | Link the company with PREV codes. |
| Company Codes - C.I.A. Codes | COMP_CIA_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, C.I.A. Codes | Link the company with C.I.A. codes. |
| Company/Estab Codes - INPS Codes | EST_INPS_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INPS Codes | Link the company and establishment with INPS codes. |
| Company/Estab Codes - INAIL Codes | EST_INAIL_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INAIL Codes | Link the company and establishment with INAIL codes. |
| Company/Estab Codes - INPDAI Codes | EST_INPDAI_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INPDAI Codes | Link the company and establishment with INPDAI codes. |
| Company/Estab Codes - PREV Codes | EST_PREV_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, PREV Codes | Link the company and establishment with PREV codes. |
| Company/Estab Codes - CIA Codes | EST_CIA_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, CIA Codes | Link the company and establishment with C.I.A. *(Contratto Intergrativo Aziendale)* codes. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Country Fiscal Codes | COUNTRY_DEFN_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Country Fiscal Codes, Country Fiscal Codes | Define the city fiscal code. |
| Seniority Notification Periods | SENIORIT_NOTIF_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Seniority Notification Periods, Seniority Notification Periods | Define seniority termination notification periods for employment categories. |
| Turnover Action | TRV_ACT_REAS_ITA | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Turnover Reasons, Turnover Action | Set up action reasons for job turnover actions. |
| Productive Unit | UNITA_PROD_TBL | Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Production Unit, Productive Unit | Define production units based on your company's agreements with the unions. |

## INPS Codes Page

Use the INPS Sites page (INPS_SITE_ITA) to set up INPS (*Istituto Nazionale per la Previdenza Sociale*) site codes.

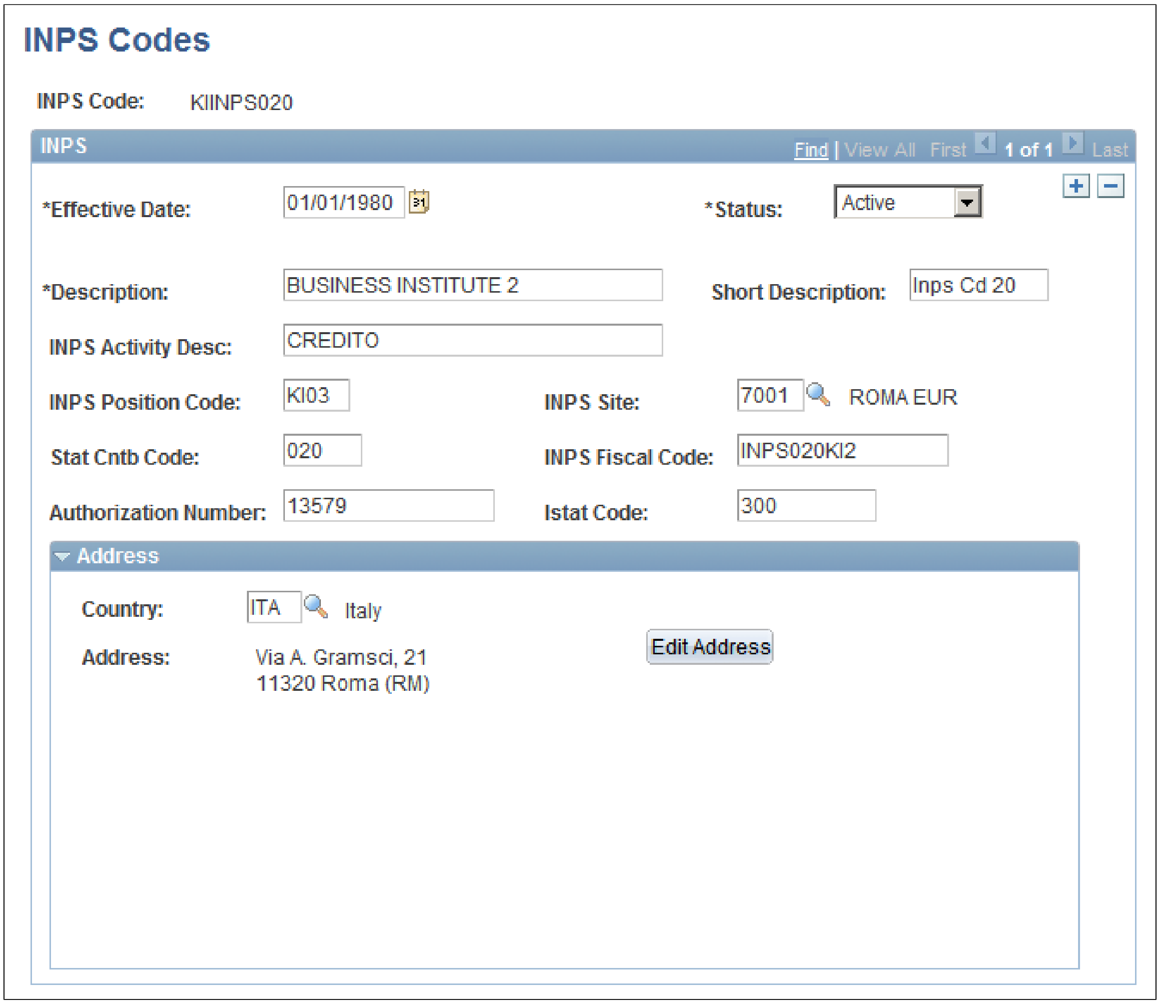
Link INPS sites to INPS codes on the INPS Codes page.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, INPS Sites, INPS Sites

### Image: INPS Codes page

This example illustrates the fields and controls on the INPS Codes page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **INPS Activity Desc (INPS activity description)** | Enter the company activity description to be reported on the INPS declarations. |
| **INPS Position Code** | Enter the company INPS position codes. |
| **INPS Site** | Select the INPS site to which the company must send declarations. Set up INPS site codes on the INPS Site page. |
| **Stat Contr Code (statistical contribution code)** | Enter the statistical contribution code to be reported on the INPS declarations. |
| **INPS Fiscal Code** | Enter the company fiscal code. |

**Authorization Number**

Enter the authorization codes to be reported on the INPS declarations.

**Istat Code**

Enter the Istat code to be reported on the INPS declarations.

## Seniority Notification Periods Page

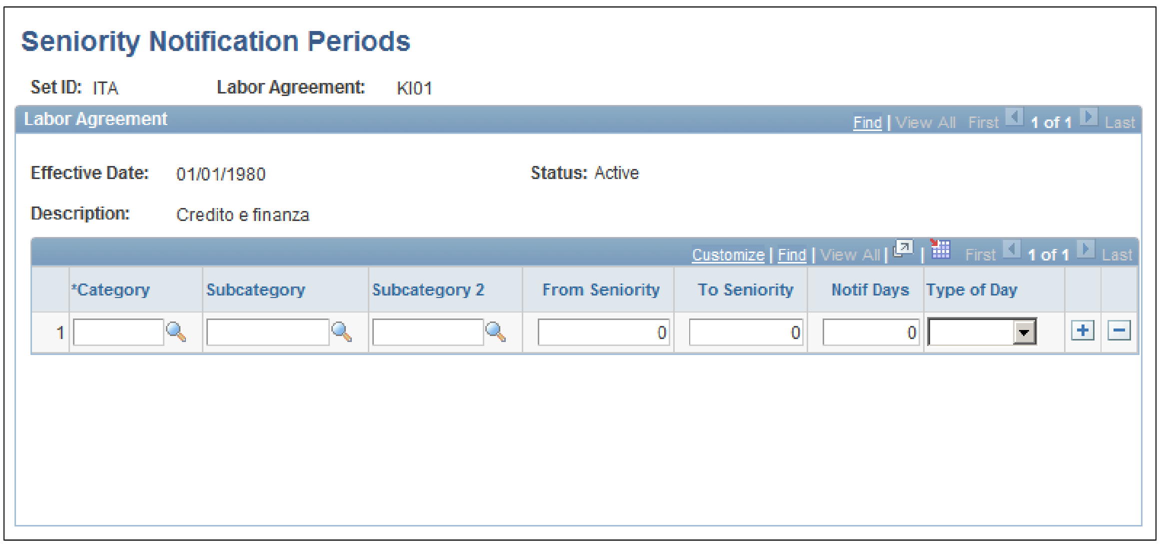
Use the Seniority Notification Periods page (SENIORIT_NOTIF_ITA) to define seniority termination notification periods for employment categories.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ITA, Seniority Notification Periods, Seniority Notification Periods

**Image: Seniority Notification Periods page**

This example illustrates the fields and controls on the Seniority Notification Periods page. You can find definitions for the fields and controls later on this page.




**Category**

Select the job category to which this labor agreement notification applies.

**Subcategory**

Select the job subcategory to which this labor agreement notification applies.

**Subcategory 2**

Select the job subcategory 2 to which this labor agreement notification applies.

**From Seniority**

Enter the beginning of the seniority period to which this labor agreement notification applies. The seniority must be entered in month units.

**To Seniority**

Enter the end of the seniority period to which this labor agreement notification applies. The seniority must be entered in month units.

**Notif Days (notification days)** Enter, in days, the seniority applicable to this period. For example, a labor agreement might require that employees employed for more than 6 months but less than 12 months have a notification period of 30 calendar days.

**Type of Day** Indicate whether the notification uses working days or calendar days.

# (JPN) Setting Up Intercompany Transfer Company Data

To set up intercompany transfer company data, use the IC Trans External Company/Dept (INTCPX_CPY_JPN) and IC Trans External Superv Lvl (INTCPX_SPV_JPN) components.

These topics provide an overview of the setup of company data for intercompany transfers and describe how to set up company data for intercompany transfers.

## Understanding Setup of Company Data for Intercompany Transfers

In any intercompany transfer, one of the companies is outside of the PeopleSoft database in which your organization's company data has been set up. Therefore it is necessary to create data in the database for those companies. These setup steps are for that purpose.

To set up company data for intercompany transfers for Japan:

- Set up a "dummy" pay group to use as the compensation indicator if you create intercompany transfers in which the host company is responsible for paying the employee.
- Set up company and department codes to use for companies outside of the database.
- Set up supervisor level codes to use for companies outside of the database.

### Related Links

Understanding Supervisor Levels
"Understanding Payee Data *(PeopleSoft HCM 9.2: Global Payroll)*"
Indicating the Home or Host Compensation Owner

## Pages Used to Set Up Intercompany Transfer Company Data

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| IC Trans External Company/ Dept (internal company transfer external company/ department) | INTCPX_CPY_JPN | Set Up HCM, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept, IC Trans External Company/Dept | Set up company and department codes for companies outside the database to use for intercompany transfers. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| IC Trans External Superv Lvl (intercompany transfer external supervisor level) | INTCPX_SPV_JPN | Set Up HCM, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl | Set up supervisor level codes for companies outside the database to use for intercompany transfers. |

## IC Trans External Company/Dept Page

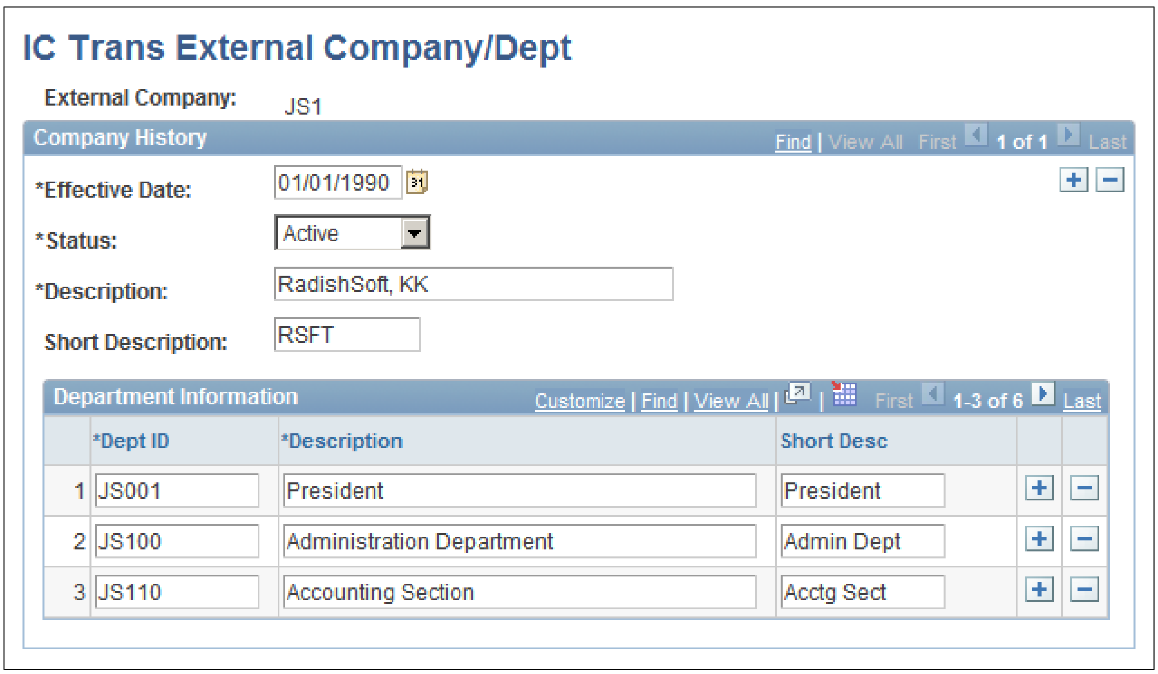
Use the IC Trans External Company/Dept (internal company transfer external company/department) page (INTCPX_CPY_JPN) to set up company and department codes for companies outside the database to use for intercompany transfers.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept, IC Trans External Company/Dept

**Image: IC Trans External Company/Dept page**

This example illustrates the fields and controls on the IC Trans External Company/Dept page. You can find definitions for the fields and controls later on this page.




The Effective Date must be prior to any intercompany transfer effective dates to transfer to the external company, and the Status option must be *Active.*

Enter required rows in the Department Information group box.

# (MYS and SGP) Setting Up Festive Advance Religions Tables for Singapore and Malaysia

To set up festive advance religions, use the Religions MYS/SGP (RELIGION_TBL_FA) component.

Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.

## Page Used to Set Up Festive Advance Religions for Singapore and Malaysia

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Religions MYS/SGP | RELIGION_TBL_FA | Set Up HCM, Product Related, Workforce Administration, Religions MYS/SGP, Religions MYS/SGP | Define religions and festive advance types for Malaysia and Singapore. Select the appropriate festive advance type from the FA Holiday Type field associated with this religion |

# (NZL) Setting Up New Zealand Disability Codes

To set up New Zealand disability codes, use the Disability Codes (DISABILITY_TBL_NZL) component.

## Page Used to Set Up New Zealand Disability Codes

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Disability NZL | DISABILITY_TBL_NZL | Set Up HCM, Product Related, Workforce Administration, Disabilities NZL, Disability NZL | Create new disability type codes or modify existing codes. |

# (ESP) Setting Up Spanish Workforce Tables

To set up Spanish workforce tables, use the Social Security Country Code (SOCS_CNTRY_ESP), Industry Activity (INDUSTRY_ACT_ESP), Insurance Company (INSUR_COMPANY_ESP), Social Security Risk Code (SOCS_RISKCD_ESP), Social Security Scheme (SOCS_SCHEME_ESP), Social Security Occupation Cd (SOCS_OCCUPATN_ESP), Social Security Company Setup (SOCS_SETUP_ESP), Social Security Data (SSEC_DATA_ESP), and Hiring Center Table (HIRING_CENTER_ESP) components.

If your organization does business in Spain, you must set up several tables to track information required by the Spanish government for Spanish workers.

These topics discuss how to:

- Enter Country codes for social security reporting.
- Enter Industry Activity codes.
- Enter insurance company descriptions and address information.
- View risk codes.
- Define maximum and minimum social security ceilings.
- Define maximum and minimum social security bases by work group.
- Define contribution rates and percentages.
- Define social security occupation codes.
- Enter company information needed for Social Security reporting.
- Define a social security time limit for FDI data.
- Define Spanish hiring centers.

## Pages Used for Spanish Workforce Tables

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Country Codes Table | SOCS_CNTRY_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Country Codes Table, Country Codes Table | Enter country codes valid for social security reporting purposes. |
| Industry Activity Table | INDUSTRY_ACT_CD_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity Table | Enter industry activity codes and descriptions. The industry activity code helps determine the employer social security number. |
| Insurance Company Table | INSUR_COMP_CD_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company Table | Enter insurance company descriptions and address information |
| Social Security Risk Code | SOCS_RISKCD_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Risk Code, Social Security Risk Code | View the risk codes that can apply to employees in your organization. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Scheme | SOCS_SCHEME_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Scheme | Review or define maximum and minimum social security ceilings, as well as review or define the minimum hourly rate for each social security scheme. |
| Work Group | SOCS_WRKGRP_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Work Group | Define maximum and minimum social security bases by work group, as well as the minimum hourly rate used to calculate the base for part-time employees. |
| Contribution | SOCS_CONTRIB_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Contribution | Define the contribution rates and percentages for both employees and employers used in the social security calculation. |
| Social Security Occupation Cd (social security occupation code) | SOCS_OCCUPATN_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Occupation Cd, Social Security Occupation Cd | Define social security occupation codes. |
| Company Setup | SOCS_SETUP_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Company Setup | Enter specific company information, including data needed for social security purposes. |
| Banking Setup | SOCS_SETUP_2_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Banking Setup | Enter pay type and specific bank information. |
| Social Security Data | SOCS_DATA_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Data, Social Security Data | Define a time limit for transferring FDI medical report data to the social security agency. |
| Hiring Center Table | HIRING_CENTER_ESP | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Hiring Center Table, Hiring Center Table | Define the hiring centers you will attach to employee personnel records on the Contract Data page.<br><br>You connect every Spanish employee with a hiring center. |

## Country Codes Table Page

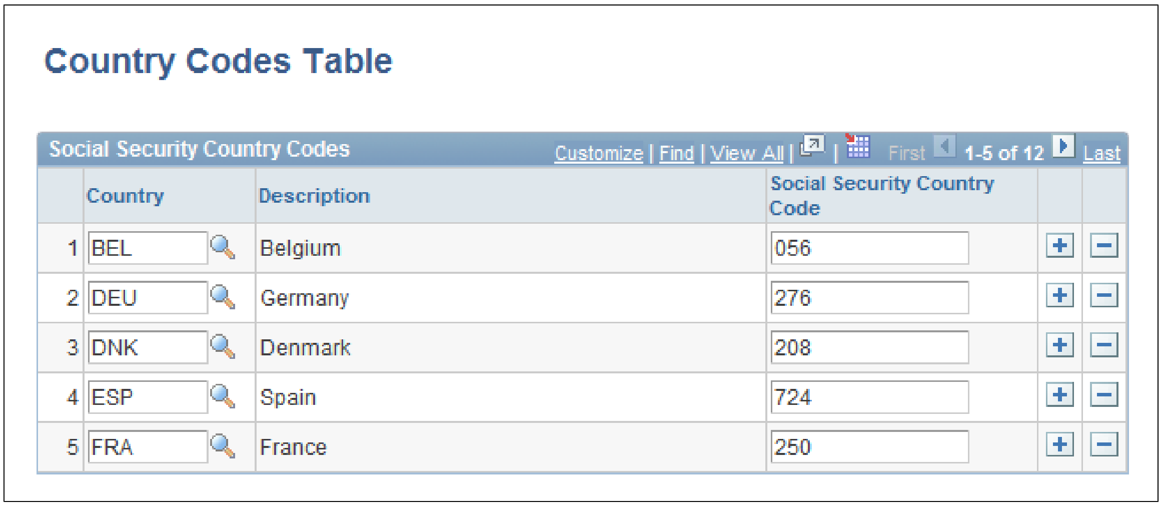
Use the Country Codes Table page (SOCS_CNTRY_ESP) to enter country codes valid for social security reporting purposes.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Country Codes Table, Country Codes Table

**Image: Country Codes Table page**

This example illustrates the fields and controls on the Country Codes Table page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Country** | Enter the standard ISO country code. |
| **Social Security Country Code** | Enter the country code used for social security processing. |

## Industry Activity Table Page

Use the Industry Activity Table page (INDUSTRY_ACT_CD_ESP) to enter industry activity codes and descriptions.

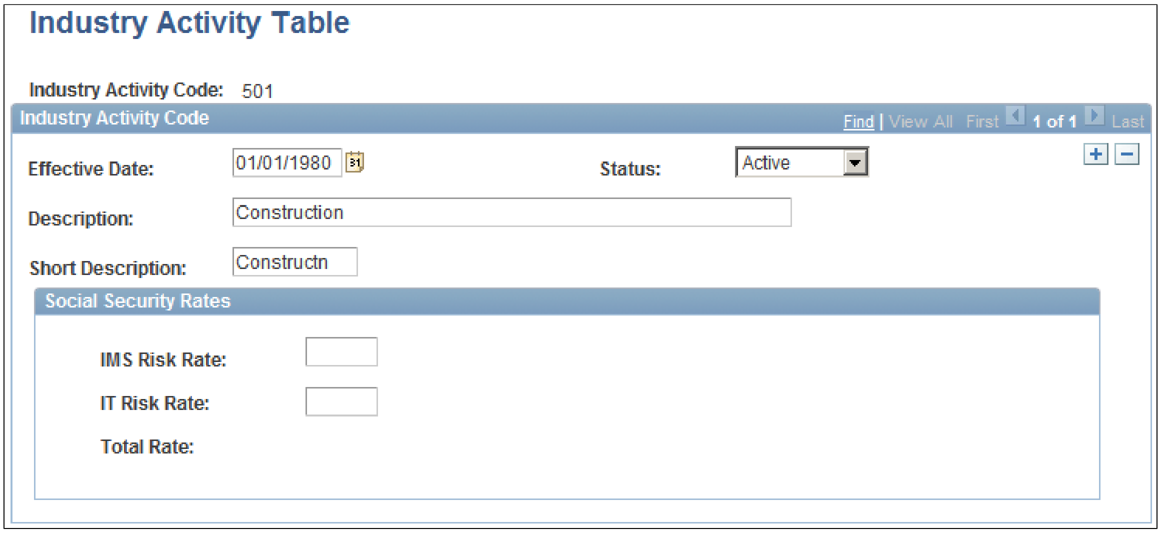
The industry activity code helps determine the employer social security number.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity Table

**Image: Industry Activity Table page**

This example illustrates the fields and controls on the Industry Activity Table page. You can find definitions for the fields and controls later on this page.




Enter the effective date, status, description, and short description of the industry activity.

### Social Security Rates

Enter percentages for *Invalidez, Muerte y Supervivencia* (IMS) and *Incapacidad Temporal* (IT) risks. For payees with no assigned occupational code, PeopleSoft Global Payroll for Spain uses these percentages to calculate IMS and IT contributions.

### Related Links

"Retrieving Calculation Percentages and Rates *(PeopleSoft HCM 9.2: Global Payroll for Spain)*"

## Insurance Company Table Page

Use the Insurance Company Table page (INSUR_COMP_CD_ESP) to enter insurance company descriptions and address information.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company Table

**Image: Insurance Company Table page**

This example illustrates the fields and controls on the Insurance Company Table page. You can find definitions for the fields and controls later on this page.


| | |
|---|---|
| **Edit Address** | Click to enter or modify address information. |

## Social Security Risk Code Page

Use the Social Security Risk Code page (SOCS_RISKCD_ESP) to view the risk codes that can apply to employees in your organization.

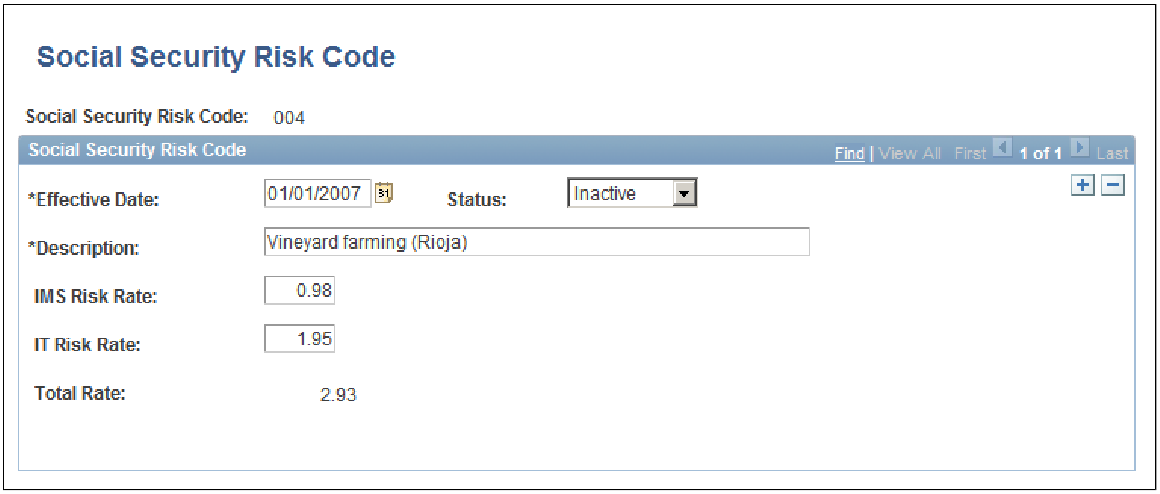
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Risk Code, Social Security Risk Code

**Image: Social Security Risk Code page**

This example illustrates the fields and controls on the Social Security Risk Code page. You can find definitions for the fields and controls later on this page.

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**Note:** The Spanish government requires employers to assign jobs a social security risk code that rates the risk of illness, accident, or death connected with that type of job.

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The PeopleSoft system delivers all social security risk codes as system data.

**Social Security Risk Code** The code that you entered to access this page. This is the code defined on this page.

**IMS Risk Rate (Riesgo de Invalidez/ Muerte/ Supervivencia)** Displays the IMS risk rate that applies to this social security risk code. The Spanish government assigns IMS risk rate codes that assess the risk of work-related disability, death, or survival.

**IT Risk Rate (Riesgo de Incapacidad Temporal)** Displays the IT risk rate that applies to this social security risk code. The Spanish government assigns IT risk rate codes to assess the risk of work-related temporary disability, such as respiratory problems for miners or injuries for construction workers.

**Total Rate** The system automatically calculates the total rate, the sum of the IMS risk rate, and the IT risk rate.

## Social Security Scheme Table - Scheme page

Use the Scheme page (SOCS_SCHEME_ESP) to review or define maximum and minimum social security ceilings, as well as review or define the minimum hourly rate for each social security scheme.

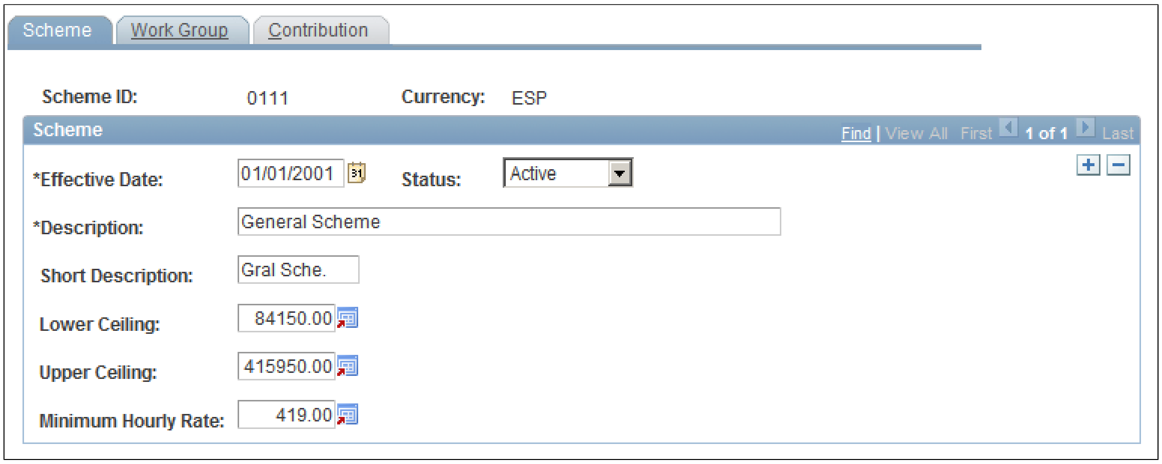
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Scheme

**Image: Scheme page**

This example illustrates the fields and controls on the Scheme page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Lower Ceiling** | Enter the lower ceiling amount used to calculate the professional contingencies funding base. |
| **Upper Ceiling** | Enter the upper ceiling amount used to calculate the professional contingencies funding base. |
| **Minimum Hourly Rate** | Enter the amount used to calculate the professional contingencies funding base in the case of employees working part-time. |

**Important!** To trigger the correct part-time calculation of the base, you must specify whether the employee is working on a full or part-time basis in the Full/Part field on the Job Information page.

## Social Security Scheme Table - Work Group Page

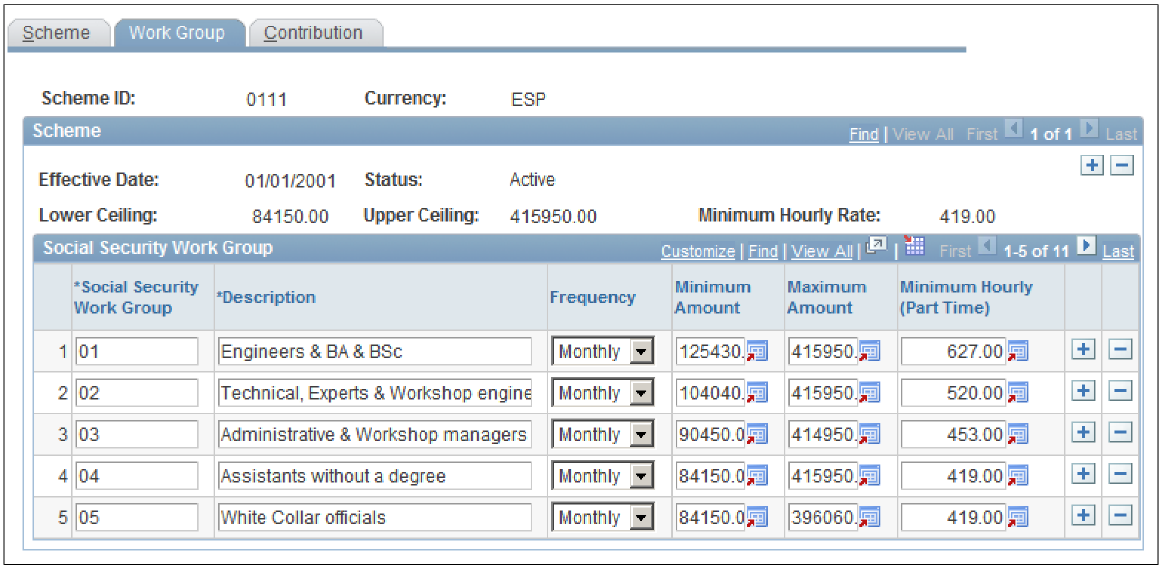
Use the Work Group page (SOCS_WRKGRP_ESP) to define maximum and minimum social security bases by work group, as well as the minimum hourly rate used to calculate the base for part-time employees.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Work Group

### Image: Work Group page

This example illustrates the fields and controls on the Work Group page. You can find definitions for the fields and controls later on this page.




Once you've reviewed the ceilings and hourly rate on the Scheme page, use the Work Group page to view and update the maximum and minimum bases for regular employees, and the minimum hourly rate used to calculate the funding base for part-time employees. If you need to define rates and percentages for schemes other than the general scheme, you can do so on this page as well.

**Social Security Work Group**

All employees who contribute to social security must be assigned to social security work groups (also known as contribution groups) based on their level of education, professional skills, and job title. The SS Work Group field displays the numerical code for each group.

**Frequency**

This field displays an *M* (Monthly) or a *D* (Daily), depending on whether members of the social security work group have their contributions calculated on a daily basis or a monthly basis.

**Minimum Amount**

Enter the minimum amount used to calculate the common contingencies funding base.

**Maximum Amount**

Enter the maximum amount used to calculate the common contingencies funding base.

**Minimum Hourly (Part Time)**

Enter the minimum hourly rate used to calculate the common contingencies funding base for part-time employees.

**Important!** To trigger the correct part-time calculation of the base, you must specify whether the employee is working on a full or part-time basis in the Full/Part field on the Job Information page.

## Related Links

Job Information Page

# Social Security Scheme Table - Contribution page

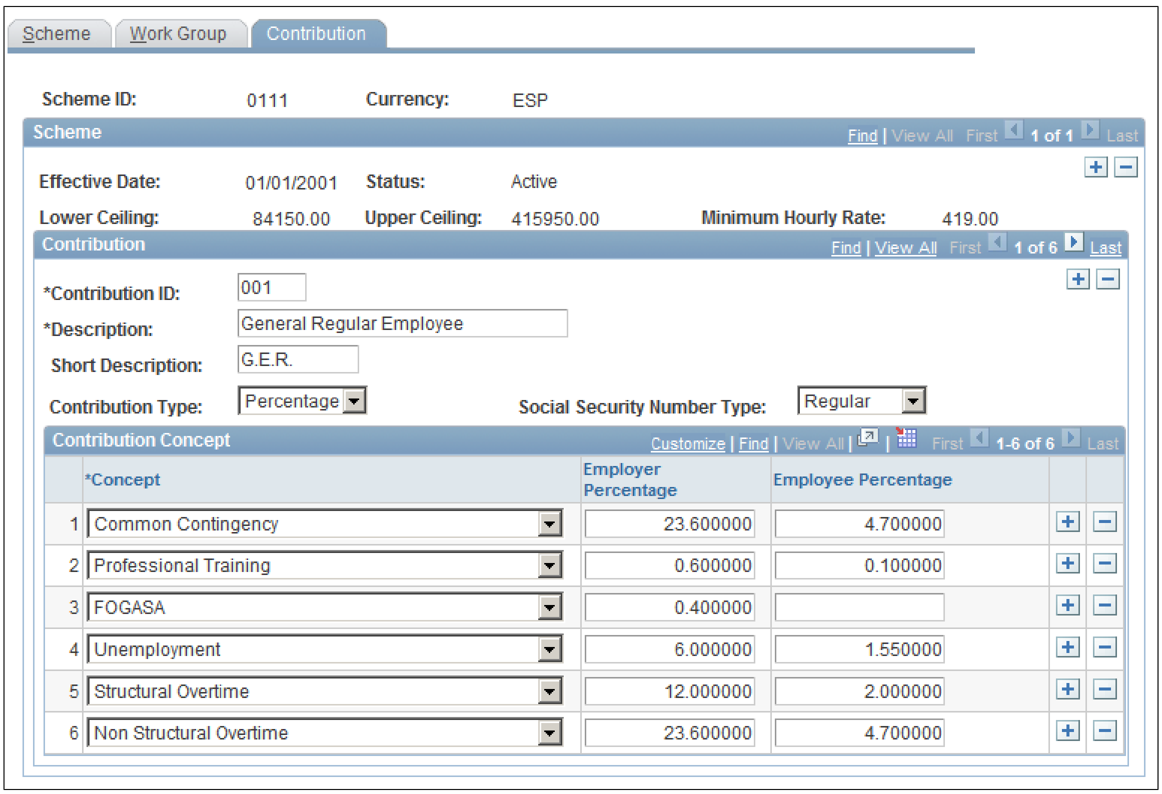
Use the Contribution page (SOCS_CONTRIB_ESP) to define the contribution rates and percentages for both employees and employers used in the social security calculation.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Contribution

**Image: Contribution page**

This example illustrates the fields and controls on the Contribution page. You can find definitions for the fields and controls later on this page.




If you need to define rates and percentages for schemes other than the general scheme, you can do so on this page.

**Contribution ID**

In PeopleSoft Global Payroll for Spain, there are multiple contribution IDs for each scheme ID, and each contribution ID is associated with its own rates and percentages. To view the different contribution ID classes and their corresponding rates or percentages, use the scroll arrows in the Contribution and Contribution Concepts scroll areas.

Possible values for the contribution ID are:

- *General Empleado Regular* (general regular employee)
- *Empleado Regular Tiemp Completo* (full-time regular employee)
- *Empleado Reg Tiempo Parcial* (part-time regular employee)
- *Empleado Regular E.T.T.* (E.T.T. regular employee)
- *Training Contracts*
- *Apprenticeship Contract*

---

**Note:** You must associate individual employees with a Scheme and SS Contribution ID on the Contract Data page.

---

**Social Security Number Type**

Select one of the following values:

- *Regular:* Select to define the percentages used to calculate the contributions of employees with regular contracts.
- *Apprentice:* Select to define rates used to calculate the contributions of apprentices.
- *Training:* Select to define rates used to calculate the contributions of employees with training contracts.

**Contribution Type**

Select *Percentage* if you will be entering percentages in the Employer Percentage or Employee Percentage fields. If you select *Percentage,* the Employer and Employee Rate fields become unavailable for data entry.

Select *Rate* if you will be entering rates in the Employer or Employee Rate fields. If you select *Rate,* the Employer and Employee Percentage fields become unavailable for data entry.

---

**Important!** You should always select *Percentage* for regular employees, and *Rate* for apprentices and trainees.

---

**Concept**

Indicates the type of contributions for which the system displays corresponding employee or employer contribution rates or percentages in the Contribution-Concepts grid. Possible values are:

- *Common Contingency*
- *FOGASA*

- *Non Structural Overtime*
- *Permanent Disability D & S*
- *Professional Training*
- *Structural Overtime*
- *Temporary Disability*
- *Unemployment*

**Employer Rate**

Displays the employer contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.

**Note:** Only contributions of apprentices and trainees are based on fixed rates.

**Employer Percentage**

Displays the employer contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

**Employee Rate**

Displays the employee contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.

**Employee Percentage**

Displays the employee contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

## Social Security Occupation Cd Page

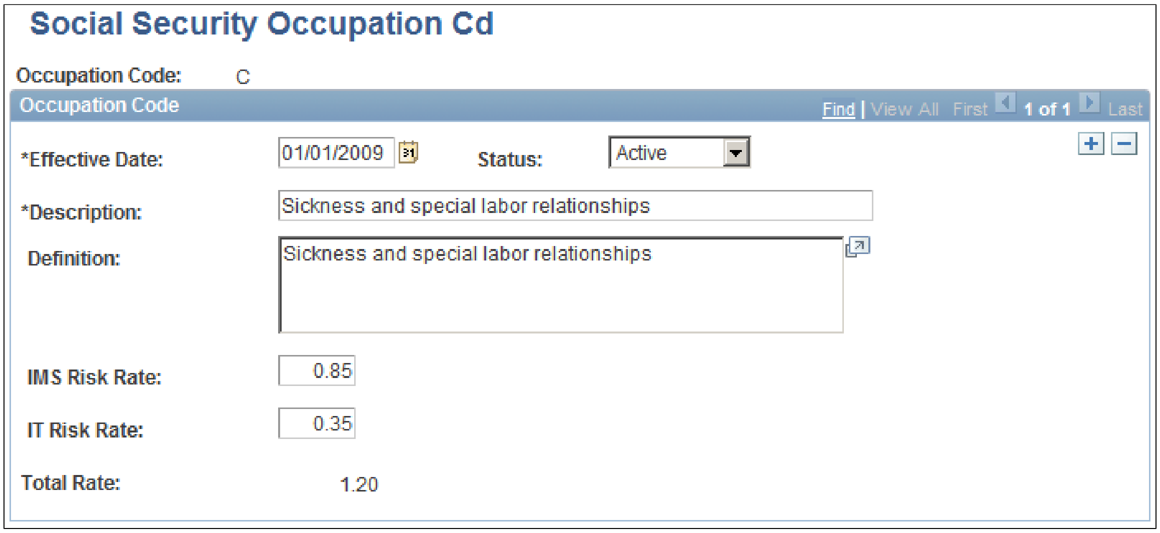
Use the Social Security Occupation Cd (social security occupation code) page (SOCS_OCCUPATN_ESP) to define social security occupation codes.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Occupation Cd, Social Security Occupation Cd

**Image: Social Security Occupation Cd (social security occupation code) page**

This example illustrates the fields and controls on the Social Security Occupation Cd (social security occupation code) page. You can find definitions for the fields and controls later on this page.




Enter the effective date, status, description, and short description of the occupation code.

Enter percentages for *Invalidez, Muerte y Supervivencia* (IMS) and *Incapacidad Temporal* (IT) risks. PeopleSoft Global Payroll for Spain uses these percentages to calculate IMS and IT contributions.

### Related Links

"Retrieving Calculation Percentages and Rates *(PeopleSoft HCM 9.2: Global Payroll for Spain)*"

## Social Security Company Setup - Company Setup Page

Use the Company Setup page (SOCS_SETUP_ESP) to enter specific company information, including data needed for social security purposes.

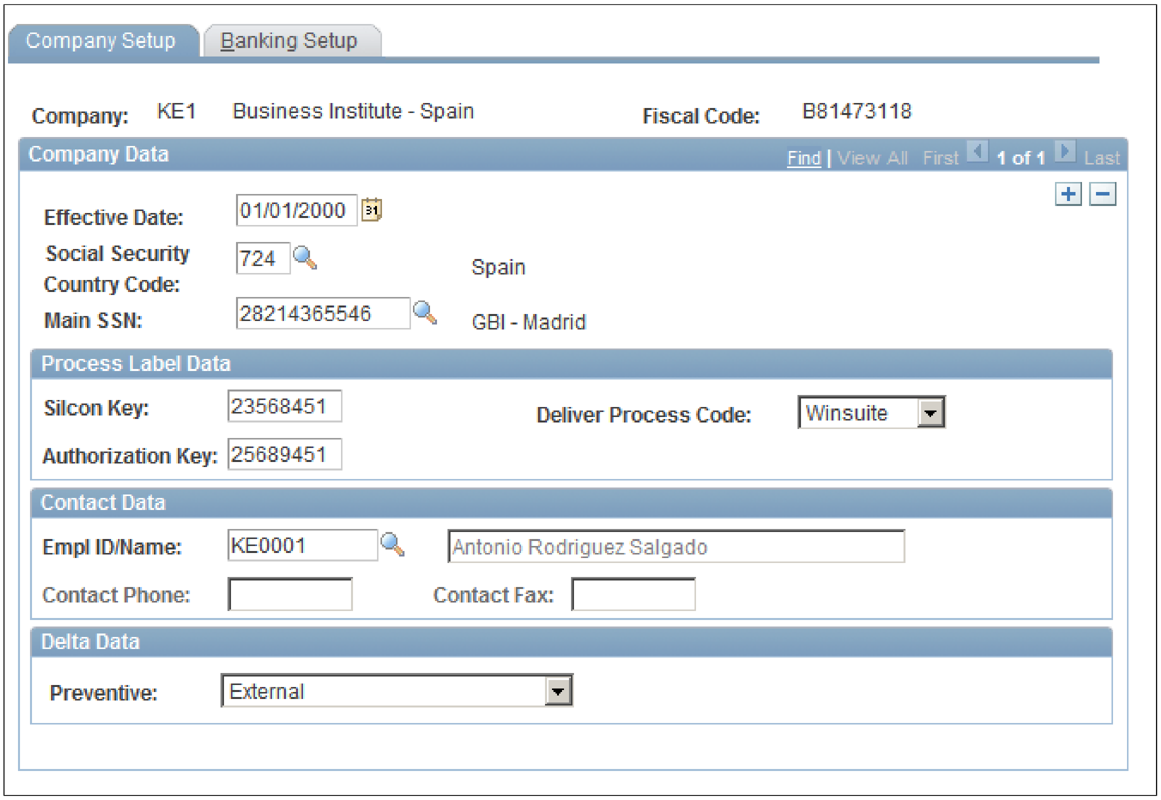
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Company Setup

**Image: Company Setup page**

This example illustrates the fields and controls on the Company Setup page. You can find definitions for the fields and controls later on this page.




**Social Security Country Code** Enter the social security country code for the company.

**Silcon Key** Enter the key provided by the Social Security General Treasury to identify your company during electronic file transfers and to access the shared network.

**Deliver Process Code** Select how the company submits social security reports to the Social Security General Treasury. Values include *MS DOS,* *Magnetic D,* or *Winsuite.* Winsuite is the official system for sending flat files containing monthly reports and human resource changes using software provided by the Social Security General Treasury and payroll flat files (like those generated by PeopleSoft Global Payroll).

**Authorization Key** Enter the authorization code to access Winsuite provided by the Social Security General Treasury.

### Delta Data

**Preventive**

Identify the kind of labor risk prevention management that the company uses. Valid values are:

- *Business owner:* The company assumes responsibilities. Fills the <asunpersona> tag.
- *Designated Workers:* Managed by designated employees. Fills the <trabdesigna> tag.
- *External:* Managed by an external service outside of the company. Fills the <serprevpro> tag.
- *Internal:* Managed by a service organization within the company. Fills the <serprevaje> tag.
- *None:* The company does not manage labor risk prevention. Fills the <ninguna> tag.
- *Shared:* Managed jointly by several services. Fills the <serprevman> tag.

See Managing Delta Communications.

## Banking Setup Page

Use the Banking Setup page (SOCS_SETUP_2_ESP) to enter pay type and specific bank information.

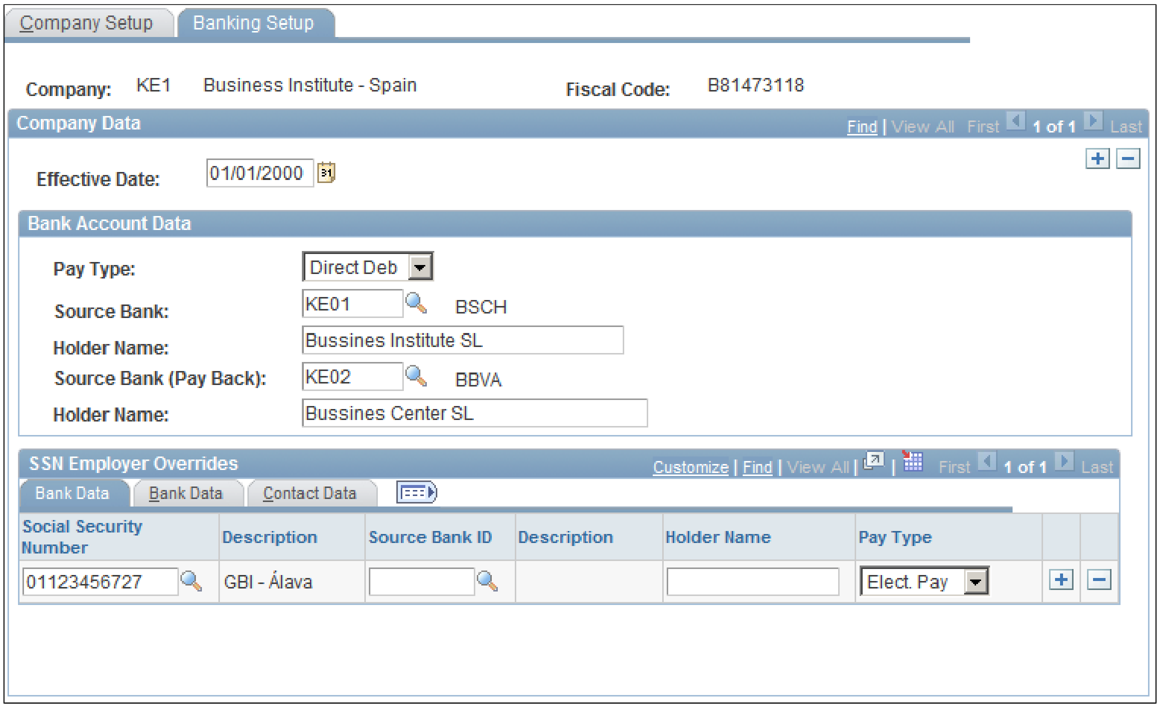
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Banking Setup

**Image: Banking Setup page**

This example illustrates the fields and controls on the Banking Setup page. You can find definitions for the fields and controls later on this page.




## Bank Account Data

**Source Bank ID** Enter the name of the bank the company uses to pay social security contributions.

**Holder Name** Enter the name the company uses at the bank.

# Social Security Data Page

Use the Social Security Data page (SOCS_DATA_ESP) to define a time limit for transferring FDI medical report data to the social security agency.

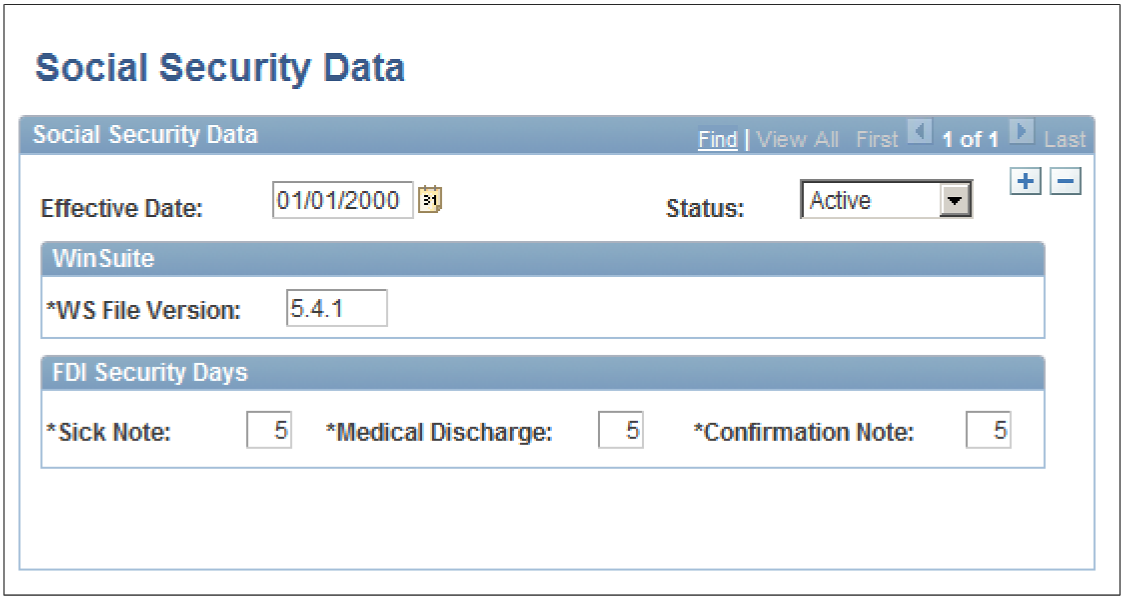
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Data, Social Security Data

**Image: Social Security Data page**

This example illustrates the fields and controls on the Social Security Data page. You can find definitions for the fields and controls later on this page.

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**Note:** If your organization uses Global Payroll for Spain, do not use this page to define FDI parameters. Intead, use the Social Security Data page in the GPES_SOCS_DATA_ESP component.

---

See "Generating the FDI Medical Report Text File *(PeopleSoft HCM 9.2: Global Payroll for Spain)*".

**WS File Version**

This field identifies the version of the Winsuite software used by the social security agency for reporting. As this software is updated, you must update the file version.

**Sick Note**

Specify the time limit (in days) for transferring sick note data to the social security agency following receipt of the note from an employee.

**Medical Discharge**

Specify the time limit (in days) for transferring medical discharge data to the social security agency following receipt of a discharge note from an employee.

**Confirmation Note**

Specify the time limit (in days) for transferring confirmation note data to the social security agency following receipt of the note from an employee.

## Hiring Center Table Page

Use the Hiring Center Table page (HIRING_CENTER_ESP) to define the hiring centers you will attach to employee personnel records on the Contract Data page.

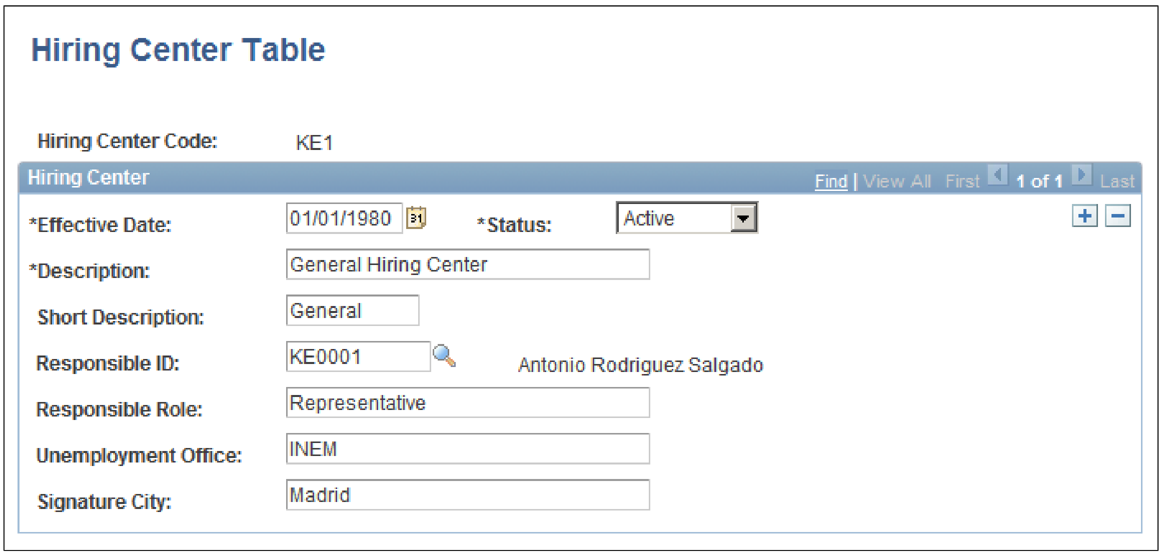
You connect every Spanish employee with a hiring center.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, Hiring Center Table, Hiring Center Table

**Image: Hiring Center Table page**

This example illustrates the fields and controls on the Hiring Center Table page. You can find definitions for the fields and controls later on this page.




**Hiring Center Code** The hiring center code that you entered to access this page.

**Responsible ID** Select the employee ID of the person in your organization who is responsible for signing employment contracts at this hiring center.

**Responsible Role** Enter a description of the job responsibilities of the person who you designated in the Responsible ID field.

**Unemployment Office** Enter a description of the unemployment office for this hiring center.

**Signature City** Spanish contracts must be stamped with the date and the name of the city where the contract was signed. Enter the city's name here.

### Related Links

"Understanding PeopleSoft HCM System Data Regulation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

# (BRA) Setting Up Brazilian Establishments

To set up Brazilian establishments, use the Establishment ID Type BRA (ESTAB_TYPE_BRA), Establishment BRA (ESTAB_TBL_BRA), and Centralization Data BRA (CENTRALIZATION_BRA) components.

A company may have several establishments. You must enter data required for reporting purposes for each establishment, such as different ID types.

**Note:** All Brazilian establishments must belong to a company.

These topics discuss how to:

- Enter types of establishment ID codes.
- Set up establishments.
- Group establishments for centralized data.

## Pages Used to Set Up Establishments

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Establishment ID Type BRA | ESTAB_TYPE_BRA | Set Up HCM, Product Related, Workforce Administration, Establishment ID Type BRA, Establishment ID Type BRA | Enter types of establishment ID codes and the format for each ID. |
| Additional Info - Brazil ( additional information - Brazil) | ESTAB_TBL_BRA | Set Up HCM, Product Related, Workforce Administration, Establishment BRA, Additional Info - Brazil | Set up establishments. |
| Centralization Data BRA | CENTRALIZATION_BRA | Set Up HCM, Product Related, Workforce Administration, Centralization Data BRA, Centralization Data BRA | Group establishments to obtain centralized data for multiple reports such as SEFIP and CAGED. |

## Establishment ID Type BRA Page

Use the Establishment ID Type BRA page (ESTAB_TYPE_BRA) to enter types of establishment ID codes and the format for each ID.

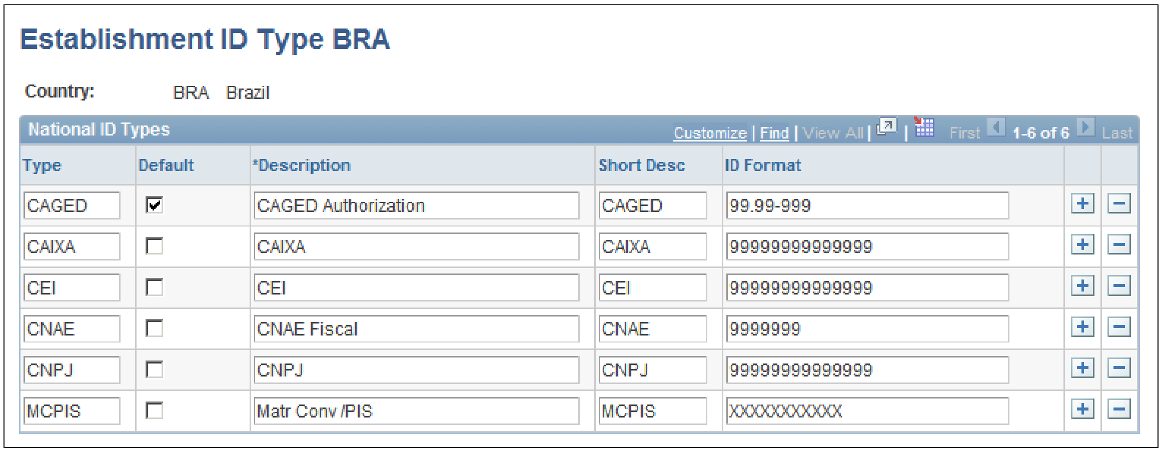
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Establishment ID Type BRA, Establishment ID Type BRA

**Image: Establishment ID Type BRA page**

This example illustrates the fields and controls on the Establishment ID Type BRA page. You can find definitions for the fields and controls later on this page.


Establishment ID Type BRA

Country: BRA Brazil

National ID Types — Customize | Find | View All | First 1-6 of 6 Last

| Type | Default | *Description | Short Desc | ID Format |
|---|---|---|---|---|
| CAGED | ☑ | CAGED Authorization | CAGED | 99.99-999 |
| CAIXA | ☐ | CAIXA | CAIXA | 99999999999999 |
| CEI | ☐ | CEI | CEI | 99999999999999 |
| CNAE | ☐ | CNAE Fiscal | CNAE | 9999999 |
| CNPJ | ☐ | CNPJ | CNPJ | 99999999999999 |
| MCPIS | ☐ | Matr Conv /PIS | MCPIS | XXXXXXXXXXX |

**Type**

Enter the type of establishment ID code. You can enter ID types that are not legal IDs (national IDs) but are required for certain reports.

**Default**

Select to establish this type of ID code as the default for the selected country.

**ID Format**

Specify the format of the ID code. Enter a 9 for each digit of the ID number.

The system has edit masks that apply special formatting to some of the ID types you enter on this page. The system applies the following formatting to these ID types:

- CNPJ: 99.999.999/9999-99
- CNAE: 99.99-9

## Additional Info - Brazil Page

Use the Additional Info - Brazil (additional information - Brazil) page (ESTAB_TBL_BRA) to set up establishments.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Establishment BRA, Additional Info - Brazil

### Image: Additional Info - Brazil page (1 of 3)

This example illustrates the fields and controls on the Additional Info - Brazil page (1 of 3). You can find definitions for the fields and controls later on this page.

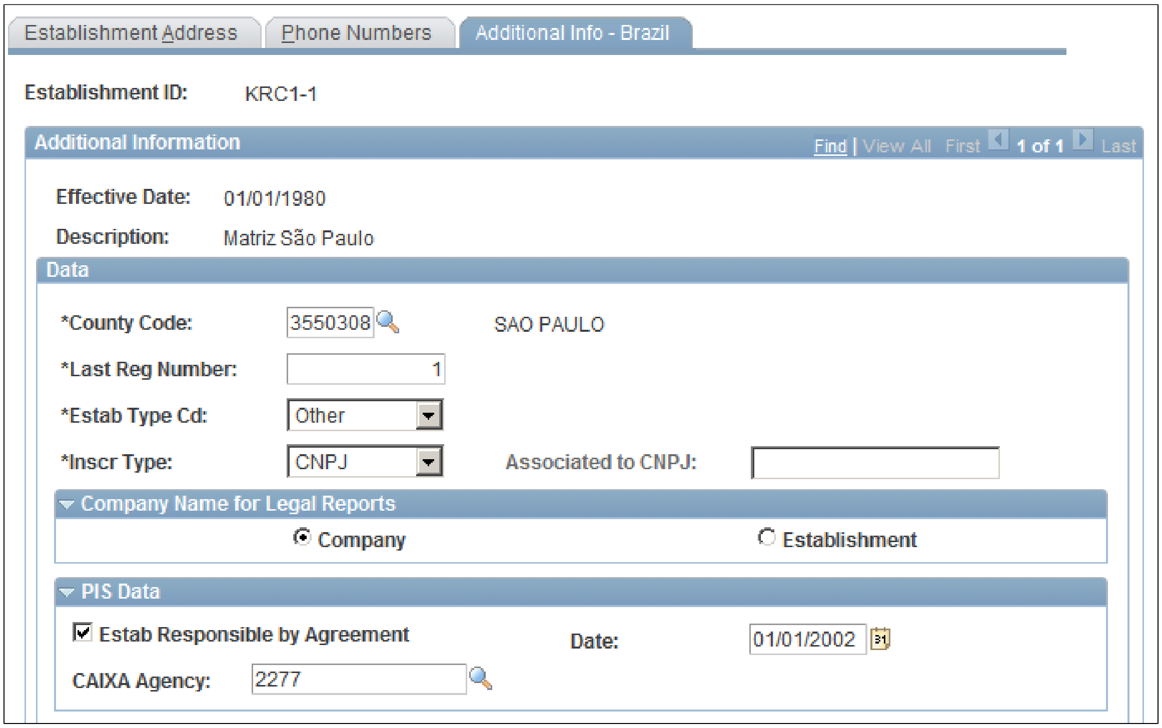


**Image: Additional Info - Brazil page (2 of 3)**

This example illustrates the fields and controls on the Additional Info - Brazil page (2 of 3). You can find definitions for the fields and controls later on this page.

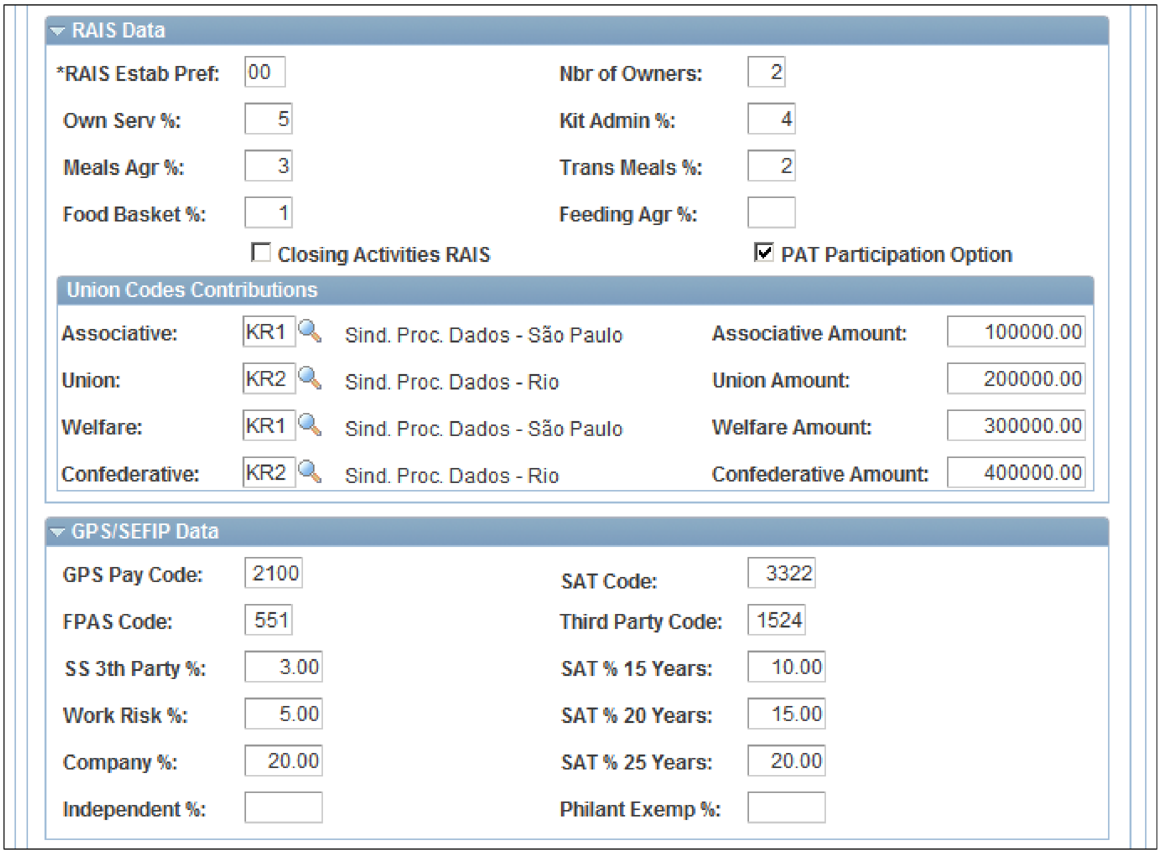
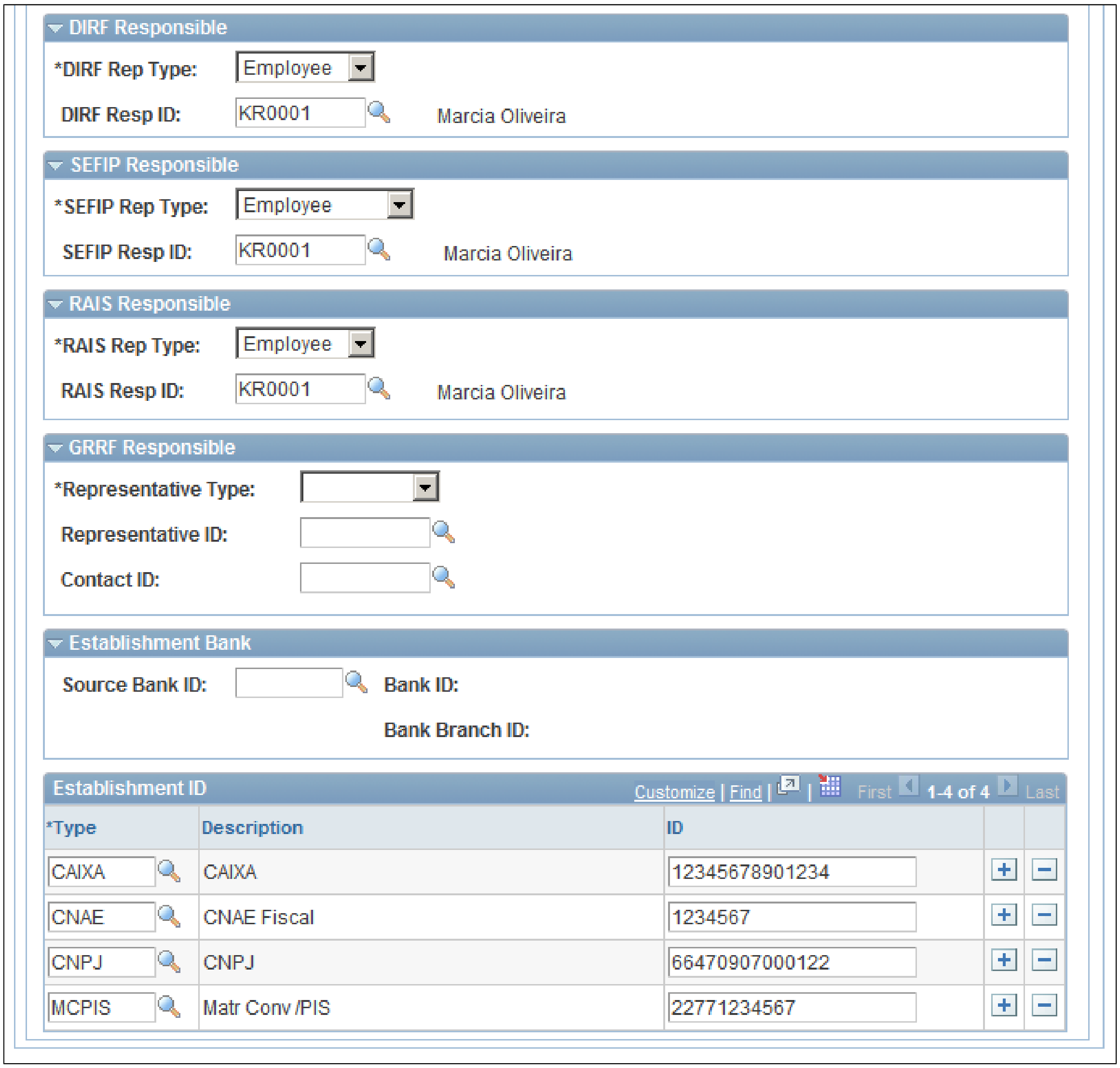


**Image: Additional Info - Brazil page (3 of 3)**

This example illustrates the fields and controls on the Additional Info - Brazil page (3 of 3). You can find definitions for the fields and controls later on this page.




**County Code**

Enter the county code.

**Last Reg Number (last registration number)**

Displays the registration number to be assigned to the next employee who is hired, rehired, or transferred to this establishment.

The system automatically increments the last registration number value after the current value has been assigned.

This field is not available for edit if the associated company is configured to assign and track registration numbers by company instead of establishment on the Default Settings page *(PeopleSoft HCM 9.2: Application Fundamentals)*.

| | |
|---|---|
| **Estab Type Cd (establishment type code)** | Select the establishment type code, which is based on the size of the establishment. Values are: *Micro, Other,* and *Small.* |
| **Inscr Type (inscription type)** | Select the company inscription type. Values are: *CNPJ* or *CEI.* |

---

**Note:** The following topics contain setup data for various reports. PeopleSoft delivers only the GPS, SEFIP, and CAGED reports. The other reports will be delivered later.

---

## PIS Data

Enter information used to generate the *Programa de Integração Social* (PIS) report.

| | |
|---|---|
| **Estab Responsible by Agreement (establishment responsible by agreement)** | When you select this check box, the CAIXA Agency field appears. |
| **CAIXA Agency** | Enter the number of the *Caixa Economica Federal* (Federal Saving Bank) branch that generates the file with the issued resources for the PIS payment of employees (TSO file). |
| **Date** | The date the Federal Saving Bank generated the TSO file. |

## RAIS Data

Enter information used to generate the *Relação Anual de Informações Sociais* (RAIS) report.

| | |
|---|---|
| **RAIS Estab Pref (RAIS establishment prefix)** | Enter the prefix only if the establishment register appears for RAIS as a key differentiation. RAIS assigns the establishment prefix. |
| **Nbr of Owners (number of owners)** | Enter the number of owners working in the establishment. |
| **Own Serv % (owner service percentage)** | Enter the owner service percentage. |
| **Kit Admin % (kitchen administration percentage)** | Enter the kitchen administration percentage. |
| **Meals Agr % (meals agreement percentage)** | Enter the meals agreement percentage. |
| **Trans Meals % (transported meals percentage)** | Enter the transported meals percentage. |
| **Food Basket % (food basket percentage)** | Enter the food basket percentage. |
| **Feeding Agr % (feeding tickets agreement percentage)** | Enter the feeding tickets agreement percentage. |
| **Closing Activities RAIS** | Select to indicate that the establishment closed its activities during the base year (the year for which you are currently reporting). A RAIS report uses this information. |

| | |
|---|---|
| **PAT Participation Option (*Programa de Alimentação do Trabalhador* participation option)** | Select to indicate the establishment participates in PAT. |

## GPS/SEFIP Data

Enter information used to generate the *Guia de Recolhimento da Previdência Social/ Sistema Empresa de Recolhimento do FGTS e Informações à Previdência Social*(GPS/SEFIP) report.

| | |
|---|---|
| **GPS Pay Code** | Enter the company's social security contribution code. |
| **SAT Code** | Enter the work accident insurance code. |
| **FPAS Code** | Enter the FPAS *(Fundo de Previdência e Assistência Social)* social assistance and pension fund code. The activity type of the company determines this code.<br><br>The system identifies all third parties and their respective percentages assigned to this code and generates a total percentage of collection for the establishment. |
| **Third Party Code** | Enter the code of the third-party that collected service from the establishment. The system uses these codes to identify the third parties involved in a specific collection.<br><br>The SEFIP report uses this code to get the GFIP value. |
| **SS 3th Party % (social security third-party percentage)** | Enter the total percentage of social security contributed by a third-party for a specific collection. The system uses this value to obtain the Other Entities Amount on the social security payment form (GPS). |
| **SAT % 15 Years (SAT percentage up to 15 years), SAT % 20 Years (SAT percentage up to 20 years), andSAT % 25 Years (SAT percentage up to 25 years)** | Enter the percentages that apply to only the eligible employees for each case of special retirement (with 15, 20, and 25 years of service). The system uses this percentage to obtain the special retirement component of the INSS total amount for collection. |
| **Work Risk %** | Enter the establishment's identified predominant worth risk percentage. The system uses this percentage to obtain worth risk component of the INSS total amount for collection. |
| **Company %** | Enter the percentage to use to obtain the company component of the INSS total amount for collection. |
| **Independent %** | Enter the percentage to use to obtain the independent component of the INSS total amount for collection. |
| **Philant Exemp % (philanthropy exemption percentage)** | Enter the percentage to use to obtain the philanthropy exemption component of the INSS total amount for collection. |

### DIRF Responsible

Complete this group box only for *Declaração de Informações à Receita Federal* (DIRF) centralizing establishments.

**DIRF Rep Type (DIRF representative type)** Select whether the party responsible for generating the DIRF file is a *Company, Employee,* or *Non Empl* (non-employee).

**DIRF Resp ID (DIRF responsible ID)** Enter the company code or employee ID of the party responsible for generating the DIRF file.

### SEFIP Responsible

**SEFIP Rep Type (SEFIP representative type)** Select whether the party responsible for generating the SEFIP file is a *Company, Employee,* or *Non Empl* (non-employee).

**SEFIP Resp ID (SEFIP responsible ID)** Enter the company code or employee ID of the party responsible for generating the SEFIP file.

### RAIS Responsible

Complete this group box only for RAIS centralizing establishments.

**RAIS Rep Type (RAIS representative type)** Select whether the party responsible for generating the RAIS file is a *Company, Employee,* or *Non Empl* (non-employee).

**RAIS Resp ID (RAIS responsible ID)** Enter the company code or employee ID of the party responsible for generating the RAIS file.

### Establishment Bank

**Type** Enter an establishment ID type.

**Source Bank ID** Enter the establishment's ID.

### Establishment ID

**Type** Enter an establishment ID type.

**ID** Enter the establishment's ID.

## Centralization Data BRA Page

Use the Centralization Data BRA page (CENTRALIZATION_BRA) to group establishments to obtain centralized data for multiple reports such as SEFIP and CAGED.

### Navigation

Set Up HCM, Product Related, Workforce Administration, Centralization Data BRA, Centralization Data BRA

### Image: Centralization Data BRA page

This example illustrates the fields and controls on the Centralization Data BRA page. You can find definitions for the fields and controls later on this page.


| | |
|---|---|
| **Process Type** | When you add a record, select the type of data that you want to centralize, such as SEFIP or CAGED. |
| **Centralizer** | Enter the name of the establishment that creates centralized data for reporting purposes. |
| **Establishment ID** | Enter the IDs of all establishments whose data the centralizer collects. |

# (CHN) Setting Up Hukou Data

To set up Hukou data, use the Hukou Setup CHN (HUKOU_SETUP_CHN) component.

These topics discuss how to:

- Set up Hukou types.
- Set up Hukou locations.

## Pages Used to Set Up Hukou Data

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Hukou Type | HUKOU_DTL_TYPE_CHN | Set Up HCM, Product Related, Workforce Administration, Hukou Setup CHN, Hukou Type | Set up Hukou types. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Hukou Location | HUKOU_DTL_LOC_CHN | Set Up HCM, Product Related, Workforce Administration, Hukou Setup CHN, Hukou Location | Set up Hukou locations. |

## Hukou Type Page

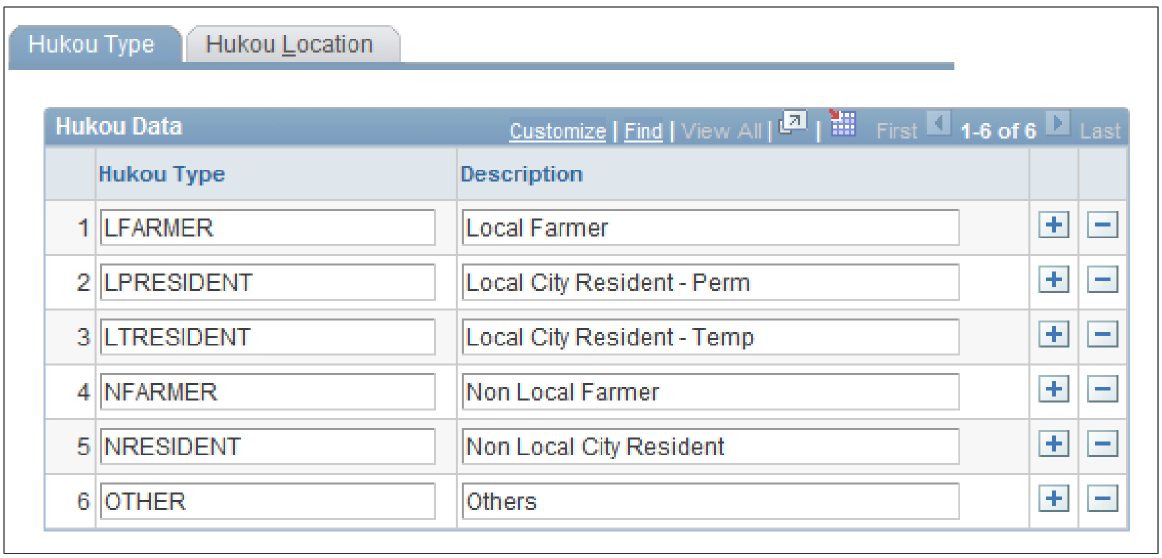
Use the Hukou Type page (HUKOU_DTL_TYPE_CHN) to set up Hukou types.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Hukou Setup CHN, Hukou Type

**Image: Hukou Type page**

This example illustrates the fields and controls on the Hukou Type page. You can find definitions for the fields and controls later on this page.




Use this page to review and update Hukou types and their descriptions.

## Hukou Location Page

Use the Hukou Location page (HUKOU_DTL_LOC_CHN) to set up Hukou locations.

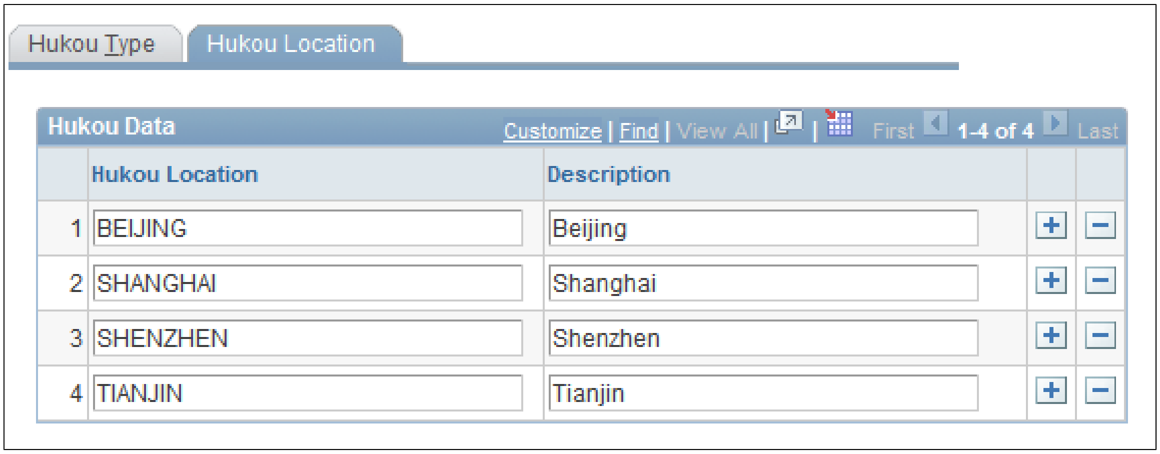
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Hukou Setup CHN, Hukou Location

**Image: Hukou Location page**

This example illustrates the fields and controls on the Hukou Location page. You can find definitions for the fields and controls later on this page.




Use this page to review and update Hukou locations and their descriptions.

Chapter 4

# Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs

## Organizational Relationships

Organizations have relationships with a variety of people for a variety of reasons. PeopleSoft enables you to manage the data of those people with whom you have an organizational relationship. A person can have more than one organizational relationship at any one time or can change relationships over time.

Organizational relationships fall into one of the following categories:

- Employee.

  A person who is hired to provide services to the organization and has a legal employee relationship with the organization.

- Contingent worker.

  A person who provides services to the organization and who does not have a legal employee relationship with the organization.

  **Note:** PeopleSoft Payroll for North America does not process payroll for contingent workers.

- Person of interest (POI).

  A person who is not an employee or contingent worker but is of interest to the organization. POIs can be:

  - COBRA participants.
  - Pension payees.
  - Stock - board members.
  - Stock - non-HR administered employees.
  - Global Payroll payees.
  - Campus Solutions persons.
  - External trainees.
  - External instructors.
  - Any person who fits within a POI type you've created.

- Applicants who require payment through Payroll for North America prior to being hired.

---

**Note:** Dependents, beneficiaries, emergency contacts, and health and safety physicians are not captured as POIs.
These topics refer only to those people with organizational relationships.

---

### Personal Information Data for People with Organizational Relationships

The system requires the same personal information regardless of a person's organizational relationship, so all people with an organizational relationship are added to the system using the Personal Data component (PERSONAL_DATA). This enables you to simplify data entry and maintenance and to use a single, unique identification code for people as you add new organizational instances for them or as their relationships to the organization change.

The generic Add a Person component is on the Administer Workforce menu, but there are additional components on the menus of other applications enabling you to create records for people of interest specifically for that application. For example, you can add PeopleSoft Global Payroll payees on the Add a POI Payee component (PERSONAL_DATA) on the Global Payroll & Absence Mgmt, Payee Data menu.

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**Note:** Enter people whose relationship to the organization does not constitute an organizational relationship, such as emergency contacts or beneficiaries, on specialized components throughout HCM. The identification number can be labeled as EmplID, Person ID, or ID. These fields all refer to the same identification number. Do not assume that a field labeled EmplID refers to employees only.

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See Understanding Identification Assignment.

## Organizational Instances

An organizational instance is a single occurrence of an organizational relationship. After you create a personal information record for a person, create an organizational instance to enter and maintain job records. An organizational instance has its own hire date and contains the accumulation of the person's job data records that are associated with that instance.

Use one of the following components to create an organizational instance:

- New Employment Instance (JOB_DATA_EMP).
- New Contingent Worker Instance (JOB_DATA_CWR).
- Template-Based Hire (HR_TBH_EULIST).

  ---

  **Note:** Templates must be created first before the template-based hire component can be used.

  ---

- Add Person of Interest Job Relationship (JOB_DATA_POI).

**Note:** Access this component from the Administer Workforce menu when you select a POI type that requires a job record. Otherwise, this component is available, under varying names, on the menus of applications that process POIs with jobs.

**Note:** Hire applicants with data that is in the system by using the Hire component (ER_APP_HIRE_LAUNCH) in PeopleSoft Talent Acquisition Manager.

See "Hiring Applicants *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*".

**Note:** Update and maintain job data for the instances on the Job Data component (JOB_DATA) or Current Job component (JOB_DATA_CURRENT).

## Organizational Instances for People of Interest

PeopleSoft delivers a number of different POI types that you can activate and use as needed. The following types require job records:

- COBRA qualified beneficiaries.
- Pension Payees.
- Stock - board members.
- Stock - non-HR employees.
- Global Payroll payees.
- Student refunds.

Some of the POIs you may want to track will not require a job record. If you are tracking POIs without jobs, you will need to use the Add a Person of Interest component (PERS_POI_ADD) to indicate what kind of POI relationship the person has, as well as to enter any necessary security parameters to control access to the person's data.

## Example: A Person with Three Organizational Instances

Mario Estevez needs to successfully complete training with a third-party vendor before starting his new position. To reimburse Mario for the cost of the training, he needs a job record. The human resources administrator adds him in the system by using the Add a Person component and assigns him the ID 1234. The administrator then creates a POI job record for him by using the Add Person of Interest Job component.

After Mario completes his training, he joins the company as an employee. The human resources administrator terminates his POI instance (by using the Job Data component) and creates an employment instance by using the Add Employment Instance component.

A little more than a year after joining the company, Mario is given the opportunity to participate in a short-term project. The human resources administrator creates a contingent worker instance for him on the Add Contingent Worker Instance component.

Mario is later transferred and promoted in his employee job, and a new job data row is inserted for each of these changes. The historical job records accumulate under the organizational instance in which they are created. The human resources administrator updates the job records for the employment and contingent worker instances by using the Job Data component.

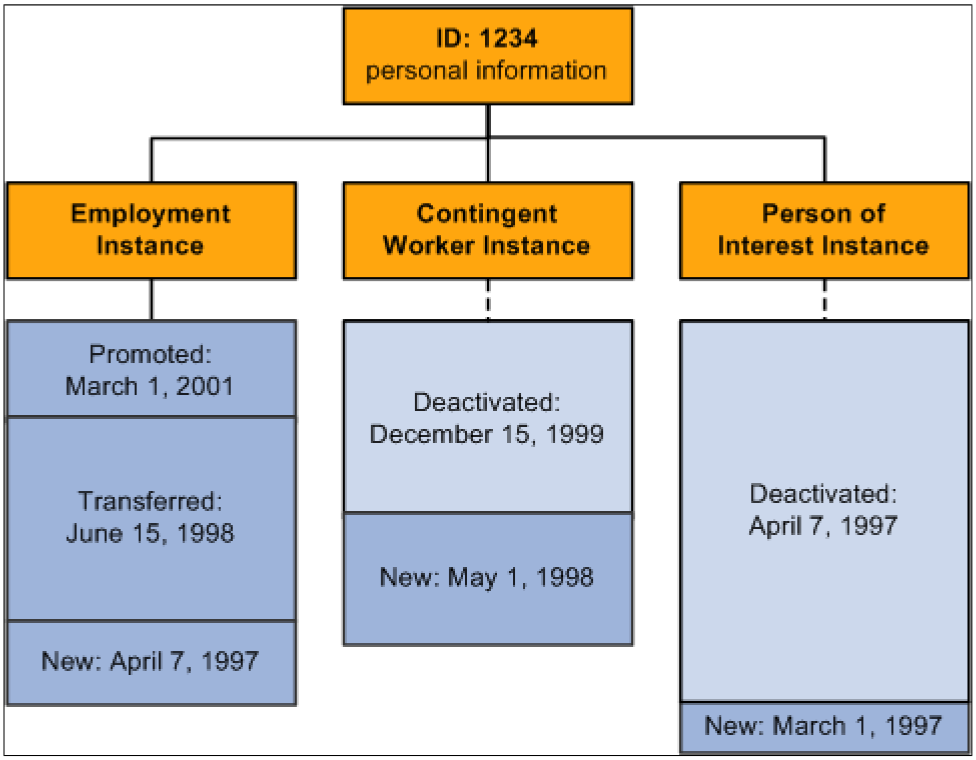
This table lists the changes to Mario's job records over a four-year period:

| ***Action Date*** | ***Employment Instance*** | ***Contingent Worker Instance*** | ***POI Instance*** |
|---|---|---|---|
| March 1, 1997 | | | POI instance created. |
| April 7, 1997 | Employment instance created with this date as the hire date. | | POI instance job record deactivated. |
| May 1, 1998 | No change to employment job record. | Contingent worker instance created with this as the hire date. | |
| June 15, 1998 | Transferred departments | No change to the contingent worker job record. | |
| December 15, 1999 | No change to employment job record. | Contingent worker job ends and the job data record is deactivated. This date is the termination date for this instance. | |

| Action Date | Employment Instance | Contingent Worker Instance | POI Instance |
|---|---|---|---|
| March 1, 2001 | Promoted. | | |

**Image: Mario's employee, contingent worker, and POI instances and the job records that are associated with those instances**

This diagram illustrates how the system stores Mario's data: under the person record, there are separate employee, contingent worker, and POI organizational instances, each with its own event history:




## Employment Record Numbers

Employment record numbers (ERNs), in combination with a person's ID, uniquely identify a person's job data records. The system distinguishes between a person's organizational instances by using a new ERN when you create a new instance.

The system also creates a new ERN when you create a job data record in the following circumstances:

<table>
<tr><th>Action</th><th>Comments</th></tr>
<tr><td>Create concurrent jobs, including:<br>• Additional assignments.<br>• Additional organizational instances.<br>• (JPN) Additional appointment (kenmu).<br>• (CHE) Multicontract.</td><td>• Use the Add Additional Assignment component ( ADD_PER_ORG_ASGN) to add an additional job ( using the action of Add Additional Job) to the one an employee or contingent worker already holds. This job is added to an existing organizational instance, retains the employment dates of the original job, and is terminated if you terminate the original job.<br><br>Note: Access the Concurrent Job Data component (JOB_ DATA_CONCUR) from the Add Additional Assignment component.<br><br>• Use the Add Employment Instance component or Add Contingent Worker Instance component to create an additional organizational instance for a worker using the action Hire. This job record is not tied to any other jobs that the worker holds, has its own job data, and has its own hire dates. HIR is used in the Add Employment Instance only. The Add Contingent Worker Instance component uses the ADD action.<br><br>Note: Additional organizational instances are identified as hires on human resources reports and additional assignments are not. Use this distinction to guide how you enter additional jobs in the system.<br>If you do not need to distinguish between concurrent jobs, choose one method of entering concurrent jobs and use it consistently.<br><br>See Adding Organizational Instances for Employees, Contingent Workers, and POIs.<br><br>See Adding Additional Assignments.<br><br>See Understanding Additional Appointments.</td></tr>
<tr><td>Create a global assignment (employees only).</td><td>Use the Home/Host Information component (HOME_ HOST_DATA) to create a global assignment job record. The system gives the global assignment (host) job record a new employment record number to distinguish it from the employee's original (home) job record.<br><br>See "Understanding Global Assignment Tracking (PeopleSoft HCM 9.2: Human Resources Track Global Assignments)".</td></tr>
<tr><td>Create a temporary assignment, including Japanese intercompany transfer (shukkou).</td><td>When you assign a worker to a temporary assignment on the Job Data component, the system suspends the substantive job and identifies the temporary job record with a new employment record number.<br><br>See Entering Temporary Assignments.<br><br>See Understanding Intercompany Transfer Tracking.</td></tr>
</table>

## Example: A Person with Multiple ERNs

Jan Smith is hired to work in the sales division of Sutter Enterprises. After two years of outstanding performance, she starts a six-month temporary assignment in a subsidiary company to assist with the launch of a new application. At the end of the assignment she returns to her original job, but three months later she takes on a consulting role at the subsidiary in addition to her sales job. This table lists the changes to Jan's job records over the three-year period:

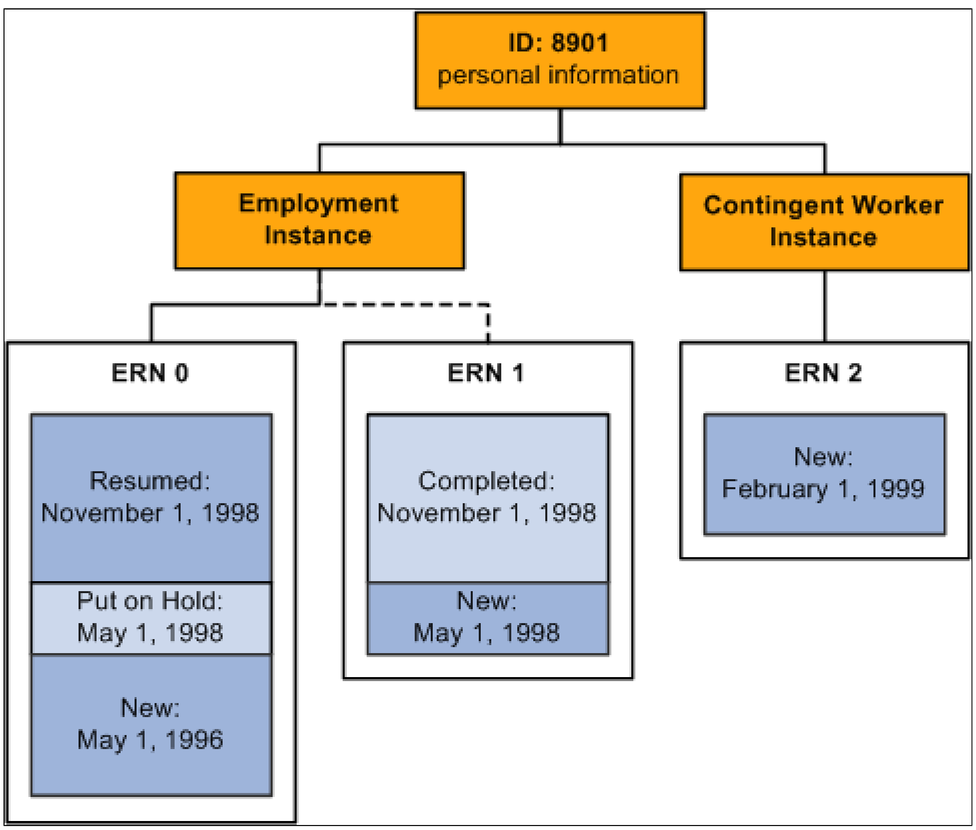
| ***Action Date*** | ***Employment Instance*** | ***Contingent Worker Instance*** |
|---|---|---|
| May 1, 1996 | Employment instance created. Job record identified by:<br>• ID: 8901<br>• ERN: 0<br>• Organizational relationship: employee | |
| May 1, 1998 | Substantive job suspended. | |
| May 1, 1998 | New job record for temporary assignment created. Job record identified by:<br>• ID: 8901<br>• ERN: 1<br>• Organizational relationship: employee | |
| November 1, 1998 | Temporary assignment completed. | |
| November 1, 1998 | Substantive job resumed. | |

| *Action Date* | *Employment Instance* | *Contingent Worker Instance* |
|---|---|---|
| February 1, 1999 | No change to employment job record. | Contingent worker instance created. Job record identified by:<br>• ID: 8901<br>• ERN: 2<br>• Organizational relationship: contingent worker |

**Image: Jan Smith's employee and contingent worker instances and the ERNs that are associated with those instances**

This diagram illustrates Jan Smith's job records under the organizational relationships. Under the person record, there are separate employee and contingent worker organizational instances. There are two ERNs under the employment instance and one ERN under the contingent worker instance. Each ERN has its own event history:




# Multiple Jobs

Workers who hold more than one active job at the same time under one organizational instance create unique requirements in People Soft Human Resources, Benefits Administration, Payroll for North

America, and Pension Administration. If your organization allows a worker to hold multiple jobs, you must be able to:

- Combine the worker's job data to comply with regulatory requirements.
- Determine benefit and pension eligibility.
- Calculate deductions and credits for payroll processing.

These topics discuss:

- Multiple employment records compared to multiple jobs.
- Multiple jobs and PeopleSoft Human Resources.
- Multiple jobs and Base Benefits.
- Multiple jobs and PeopleSoft Benefits Administration.
- Multiple jobs and Payroll for North America.
- Multiple jobs and PeopleSoft Pension Administration.

## Multiple Employment Records Compared to Multiple Jobs

A person can have multiple ERNs without holding multiple jobs.

A person does not have multiple jobs when they have:

- A contingent worker and an employment instance.

  The two organizational instances have their own job records, each identified by a unique ERN.
- A substantive job and a temporary job where the substantive job is suspended.

People have multiple jobs when they have:

- More than one active contingent worker or employment organizational instance.
- A substantive job and an additional assignment where the substantive job is not suspended.

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**Note:** Multiple jobs processing does not apply to person of interest job records.

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Examples of multiple jobs include these methods:

| ***Multiple Job Method*** | ***Description*** |
|---|---|
| Concurrent Jobs (separate job instances) | • Tracks multiple permanent employment relationships.<br>• Each instance is entirely separate – terminating one has no affect on the other. There is no linkage between the two employment records.<br>• Each instance is created with the *HIR* action (or *ADD* if a contingent worker).<br>• Each instance can be of a permanent or a temporary nature.<br>• Each instance has its own payroll and compensation data. Either, both, or none can be paid.<br>• Benefits data can be combined using the Benefits Rcd Nbr.<br>• Both employment record numbers are available for matching processes in PeopleSoft.<br>• Both employment records are active. |
| Additional Assignment | • The additional assignment is linked to the permanent job (instance). The new employment record is linked to an existing employment records.<br>• The additional assignment is created with the *ADL* action.<br>• An additional assignment can only be active if the first instance is active (Active, Leave of absence, Leave with Pay, Suspended, Short Work Break).<br>• An additional assignment is automatically terminated when the main instance is terminated. The new employment record can only be active during the time period that the existing employment records is active.<br>• An additional assignment can be completed and reactivated at any time during its controlling instance's active status period.<br>• An additional assignment must be of the same organizational relationship type as its controlling instance.<br>• An additional assignment can be promoted to its own instance if needed (but the history of its linkage to the original instance is lost).<br>• Both employment records are available for matching processes in PeopleSoft.<br>• Either, both, or none can be paid.<br>• Both employment records can be active at the same time. |

| ***Multiple Job Method*** | ***Description*** |
| --- | --- |
| Global Assignment | • Tracks temporary assignments while maintaining the employee's relationship with their home (or permanent) job.<br>• Provides additional information tracking for vehicles, dependents, schools, homes, travel details, and additional earnings and deductions.<br>• The additional (host) assignment is linked to the home job. The new employment record is linked to an existing employment record.<br>• The host assignment is created with the *ASG* action.<br>• A host assignment can only be active if the home instance is active.<br>• A host assignment is automatically terminated when the home instance is terminated. If the existing employment record is terminated, this new one is terminated as of the same day.<br>• A host assignment can be completed and reactivated at any time during its controlling instance's active status period.<br>• A host assignment is only available for the Employee relationship.<br>• A host assignment can be promoted to its own instance, but the history of its relationship to the original home instance is lost – except within the actual Track Global Assignments Assignment record.<br>• Host assignments do not have their own compensation data.<br>• Both jobs are available for matching.<br>• Both employment records are active. |

| ***Multiple Job Method*** | ***Description*** |
|---|---|
| Temporary Assignment | • Enables the tracking of temporary assignments while maintaining the employee's relationship with their permanent job.<br>• The original instance is copied to a temporary employment record and is put in a suspended status. Changes can still be applied to this suspended assignment including position incumbent updates – but payroll is never run on this assignment. Only the temporary employment record can be paid.<br>• The temporary assignment data is loaded into the original instance employment record.<br>• When the temporary assignment ends, the suspended instance data is copied back into the original employment record from its latest effective date (only the latest effective date row is copied – the history of changes made to it are still kept in the suspended employment record, like a mass pay change).<br>• The data on the existing employment record is suspended for the duration of the temporary one. |

This chart provides information about multiple jobs methods and the relationship between the initial job instance and the concurrent job:

| ***New Assignment Type*** | ***Both Jobs Can Be Active*** | ***Primary Instance ( Home) Must Be Active*** | ***Both Jobs Can Be Paid*** | ***Job History*** | ***Job Status Automation Process*** | ***Both Can Be Matched in the Career Matching Processes*** |
|---|---|---|---|---|---|---|
| New Instance | Yes | N/A | Yes | Separate | No | Yes |
| Additional Assignment | Yes | Yes | Yes | Separate | Additional job is terminated if the primary instance is terminated | Yes |
| Global Assignment | Yes | Yes | Home only | Separate | Host is terminated if Home is terminated. | Yes |
| Temporary Assignment | Yes | No – Temporary assignment only | Temporary only | Temp data is captured in Instance History | Suspended job can be automatically reactivated when the temporary is done. | No |

See Multiple Jobs.

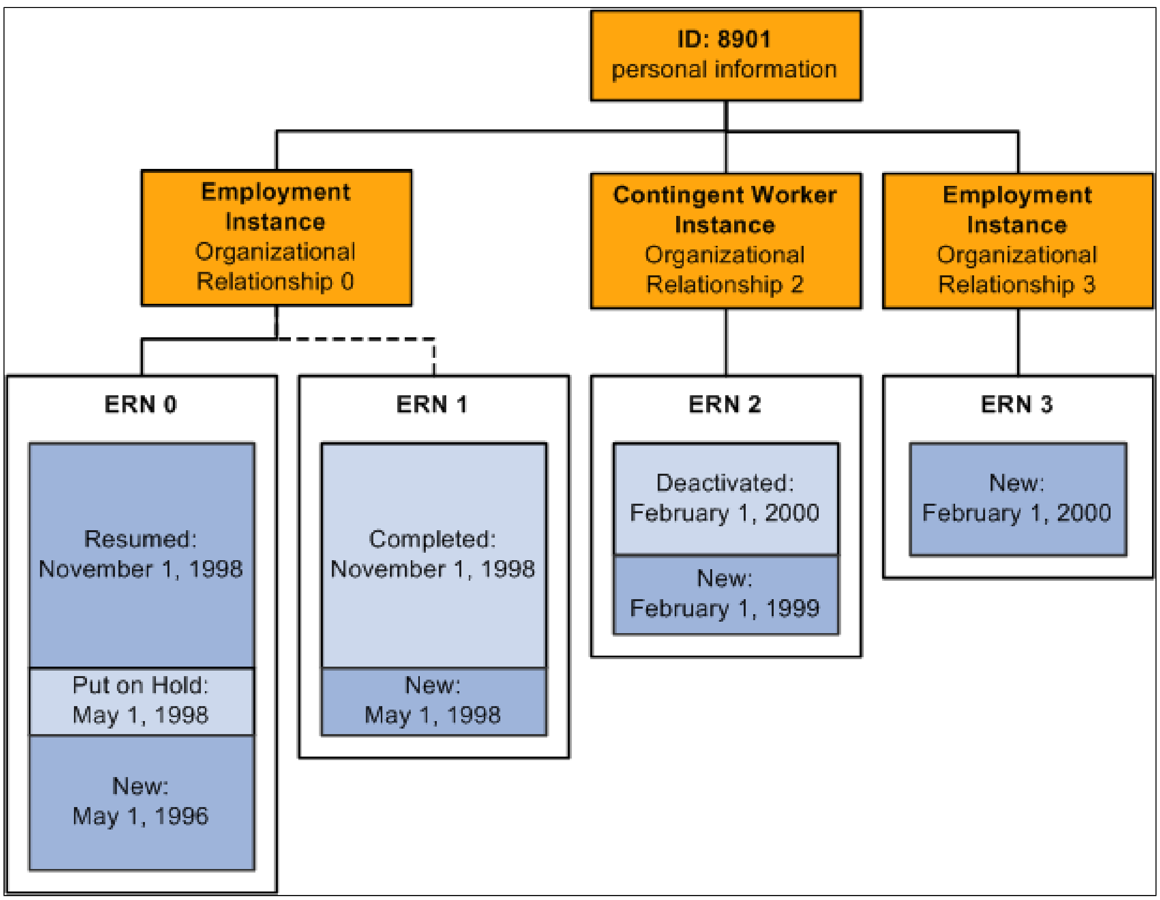
### Example: A Person with Multiple Jobs

**Image: Jan Smith's job records from May 1, 1996 to February 1, 2000**

As of February 1, 1999, when Jan Smith begins her contingent worker relationship with the organization, Jan Smith does not have multiple jobs. She has an active employment job record and an active contingent worker job record, distinguished in the system by their ERNs.

On February 1, 2000, when Jan has held the consulting job at the subsidiary company as a contingent worker for a year, management decides to make the job permanent. This requires creating a new employment job record in addition to the original job record. Jan Smith now has multiple jobs.

This diagram illustrates Jan Smith's organizational relationships and job records after the changes of February 1, 2000. A second employment instance has been added alongside the existing employment instance and contingent worker instances. The new employment instance has its own ERN and event history:




## Multiple Jobs and PeopleSoft Human Resources

When a worker holds multiple jobs, each job must have its Job Data record. When you enter an additional job, you need to make two decisions:

- For reporting purposes, which of the worker's jobs is the primary job.

  You don't have to designate a primary job, but you may want to, to ensure accurate affirmative action statistics and other data that is required for government reporting.

- Whether the worker's jobs will share a benefits program or have separate benefits.

  The system provides flexibility in mixing and matching jobs and benefits programs.

In other ways, PeopleSoft Human Resources treats an additional job the same way that it treats the worker's first job.

### Maintain Multiple Concurrent Military Ranks

PeopleSoft enables customers to track multiple and concurrent job employment through Administer Workforce job data. For military organizations this means the system maintains and manages multiple concurrent ranks for a single service member with concurrent jobs. This functionality enable organizations to track multiple jobs and ranks through one of or a combination of the following examples:

- Concurrent jobs or new instance – two or more separate permanent employment instances not related to each other.

  For example, a service member has responsibilities in two separate departments: two positions in two departments. This is common in staff positions.

- Additional assignments – the new employment record is linked to an existing employment record where the additional job is only active if the primary employment instance is active.

  For example, a Maritime Patrol Aircraft service member is also Safety Officer within the same unit. Here the member has two jobs in the same department; this is referred to as "collateral duty."

- Temporary assignments – track temporary assignments while maintaining the employee's relationship with their permanent job which is copied to a temporary employment record and put on a suspended status. When the temporary assignment ends, the suspended instance resumes as it did before the temporary assignment began.

  For example, a service member goes out for an assignment or training and then comes back to the original, permanent duty station job.

## Multiple Jobs and Base Benefits

Some of the issues regarding the PeopleSoft Human Resources Base Benefits business process and multiple jobs are:

- Which job is the worker's main, or primary, job?
- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- Which jobs are used for calculating deductions and contributions?
- How are the deductions or contributions calculated?
- When do you take deductions and when do you apply credits?

### Designate the Primary Job for Benefits

You may want to base a worker's eligibility for benefits on a single job. This is called the *primary job* (not to be confused with the primary job for PeopleSoft Human Resources reporting purposes). The system also uses the primary job to associate payroll deductions for benefits with a specific job. Each benefit record number (group of jobs) that you designate for a worker has one job designated as the primary job.

When you create a job record for a person, the system flags that job as *primary* based on rules that you have set up. This flag is stored in the Primary Jobs Flag page (BN_PRIJOBS_MAINT). As you create other Job Data records for a person, the system turns this flag on or off based on the rules that you have established.

For example, here is what the Primary Job Flag page would look like for an employee who is a professor and dean at a university and a doctor at the university hospital:

| ***Job Title*** | ***Employee Record Number*** | ***Benefit Record*** | ***Primary Job?*** |
|---|---|---|---|
| Professor | 0 | 0 | Yes |
| Dean | 1 | 0 | No |
| Physician | 2 | 1 | No |

The primary job flag is used throughout the system to:

- Determine when a deduction should be taken.
- Identify the job that will provide the service date and the termination date.

The designation of a worker's primary job is effective-dated and can be changed anytime from a data maintenance page. Also, because the action of starting a new, concurrent job or terminating an existing job usually affects the determination of the worker's primary job, you can define rules that redesignate the primary job when one of these job actions is entered into the system.

For other actions (such as a job moving from full-time to part-time status), you can also indicate whether the system sends a work list entry to the Benefits Administrator through PeopleSoft Workflow for review.

### Group Jobs to Determine Benefit Eligibility

When workers hold multiple jobs, they may be eligible for different offerings of benefits, based on the combination or mix of the jobs that they hold. Conversely, they may be eligible for certain offerings based solely on the fact that they hold a particular job.

Multiple jobs introduce the concept of a *benefit record number.* If an worker is eligible for multiple sets of benefits (or possibly multiple benefit programs), then you enroll the worker in those benefits according to the set of benefits that corresponds to a grouping of one or more jobs. The benefit record number is the mechanism that is used to group concurrent jobs for benefits eligibility and enrollment purposes.

All enrollments for benefits are specific to a benefit record number.

### Maximum Number of Concurrent Jobs

A worker can hold a maximum of 50 concurrent jobs across all benefit record numbers. PeopleSoft Payroll for North America can process only 50 benefit record numbers on one paycheck.

### Calculate Benefit Deductions

The same grouping method that is used to determine eligibility can be used to calculate deductions. You can group jobs to calculate a deduction that is based on the worker's salary. Typically this involves calculating coverage and related premiums for Life and Disability plans that are based on the worker's salary or compensation rate. You calculate the coverage and deduction based on:

- The salary of the primary job.
- The summed salaries from a group of jobs.

When you designate the primary job for a benefit record, the system ties all deductions for the benefits that are associated with this benefit record to this job. Benefits deductions are taken only from checks by which the associated primary job is paid. This assures that deductions are taken at the proper frequency when the individual jobs in a group are paid on different frequencies or on separate checks.

When jobs are combined into a single check for all benefits record numbers, the benefits deduction for the different benefit record numbers is printed as separate detail lines.

### Apply Regulatory Contribution Limits

When applying regulatory limits to contributions for savings plans, the system takes into account all earnings and deductions that the worker has across multiple jobs, not just the job or jobs that are associated with the plan that is being limited.

The Retro Deduction and Imputed Income Adjustment processes reevaluate deductions over a specified period of time. Using the current state of the database (benefit and general deduction enrollments, job history and primary job assignment), the system recalculates deductions and compares them to the deductions that were originally calculated and taken.

The primary job indicators play an important role in the calculation of deductions. If changes are made to the primary job history that affect confirmed pay periods, and these changes involve a shift of pay frequencies, then the system might calculate a different deduction amount for this period than it originally calculated. During Retro Deduction and Imputed Income Adjustment processing, the system drives the calculation off the primary job history for the adjustment period.

### Percent of Gross Deduction Limits

Calculation rules can be set up with a percent of gross limit applied to a benefit deduction. Also, rate tables can specify the portion of a deduction that is subject to this percent of gross limit. Now that earnings from multiple jobs with different benefit record numbers can be combined into a single check, this can result in a different gross earnings amount being calculated than when these jobs were not combined into a single check.

When applying the Percent of Gross limit to a deduction, the system uses the entire gross earnings from the check, as opposed to just the gross earnings that are attributable to the jobs with the same benefit record number as the enrollment for the deduction that is being limited. This can result in different deduction amounts being calculated than were previously calculated.

### Related Links

"Understanding Multiple Jobs *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

## Multiple Jobs and PeopleSoft Benefits Administration

The major impact that multiple jobs have on PeopleSoft Benefits Administration is on benefit eligibility and event triggering. Considerations are:

- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- If a change affects one job, how do you determine the effect that it has on the other jobs?

## Determine Eligibility with Multiple Jobs

The system uses Eligibility Rules to determine if a worker meets the organization's rules for enrollment in a benefit program or option. Eligibility Rules comprise three major components:

- Eligibility Criteria.
- Grouping Method.
- Evaluation Method.

Each component is tied to an Eligibility field within an eligibility rule. The Eligibility Criteria field defines the data values that determine eligibility or ineligibility. The status of the worker's Primary Job indicator and Include for Eligibility check boxes on the Primary Jobs table, together with the Grouping Method and Consider Active Jobs Only fields, define which jobs should be evaluated. Finally, the Evaluation Method component defines how the group of jobs should be evaluated.

With multiple jobs, you specify a grouping method. Grouping methods enable you to define which jobs to include when the system is evaluating the benefits for which an employee is eligible:

| | |
|---|---|
| **All Flagged Jobs** | Groups all jobs with the Include for Eligibility selected on Primary Jobs that are selected for all benefit record numbers. |
| **Flagged Jobs in Benefit Record** | Groups all jobs with the Include for Eligibility selected on Primary Jobs that are selected within the benefit record number of the event. |
| **Primary Job in Benefit Record** | Looks at only the primary job within the benefit record number of the event. |

When determining which jobs should be grouped, the Consider Active Jobs Only check box from the eligibility rule is also used. If this check box is selected, then only those jobs with an active Empl_Status (employee status) of A, L, P, W, or S are included when the grouping method is *All Flagged Jobs* or *Flagged Jobs in Benefit Record.*

Another component of the eligibility rule is Evaluation Method. Evaluation methods enable you control how the jobs that are selected from the grouping method are evaluated against the eligibility criteria, when determining whether the employee satisfies the eligibility rule:

| | |
|---|---|
| **One or More in Group** | At least one job in the group must satisfy the rule. |
| **All in Group** | All jobs in the group must satisfy the rule. |
| **Sum** | The sum of the eligibility field's data value from all jobs in the group must satisfy the rule. |

For example, the table below lists the eligibility of the employee with three jobs when processing an event for Benefit Record 0 and the Eligibility Rule for the FTE file is:

- Minimum FTE must equal *1*.
- Grouping Method is *All Flagged Jobs.*

- Consider Active Jobs Only check box is selected.

| ***Job*** | ***Employee Record #*** | ***Benefit Record #*** | ***Primary Job*** | ***Include for Eligibility*** | ***Include for Deductions*** | ***FTE*** |
|---|---|---|---|---|---|---|
| Professor | 0 | 0 | Yes | Yes | Yes | .50 |
| Dean | 1 | 0 | No | Yes | Yes | .25 |
| Physician | 2 | 1 | Yes | Yes | Yes | .25 |

All jobs are active, so the group consists of all the jobs. The FTE adds up to 1.0 across these jobs, so this employee meets the eligibility rule.

Suppose that the Grouping Method is All Flagged BR. Then the group of jobs you evaluate is Empl_Rcd (employee record) 0 and Empl_Rcd 1. The sum of these FTE fields is .75, which does not meet the eligibility criteria.

## Benefits Credits and the Primary Job

PeopleSoft Benefits Administration posts credits for benefits to the Additional Pay tables under the employee record number that is equal to the benefit record number. During a pay calculation, the system loads deductions for benefits only if the primary job for the benefit record is being paid on the check that is being calculated. Likewise, when loading additional pay for benefits credits, the credits posted under any employee records number for a particular benefit record are loaded to the paysheet of the primary job only for that benefit record.

This means that during a pay calculation, the system (while processing a particular job) determines whether this is the primary job for the associated benefit record number. If it is, the system searches for the additional pay data, looking for benefits credit entries, for example Add'l Pay Reason = 'BAS' for *any* Empl_Rcd that is assigned to this benefit record.

All entries found are loaded to the paycheck. If this is not the primary job, no benefit credits are added to the check. This ensures that there is no "double dipping" of deductions and that the credits for benefits always appear on the same check as the corresponding deductions.

## Trigger Events with Multiple Jobs

The primary job drives the processing of an event for a specific benefit record number. This job must have a benefit system flag set to BA - Benefits Administration. The primary job provides the company ID and the BAS Group ID data for the processing schedule.

There are three main categories of events:

- Events that are triggered though a direct change to employee data.
- Events that are inserted into the system manually on the BAS Activity page.
- Passive events.

If changes are made to a worker's job data that impacts the worker's primary job designation, Include for Eligibility flag, or Include for Deduction flag, the system generates an entry into the BAS Activity Table for a new type of trigger, the (MJ) MultiJob trigger. These triggers are generated with a Bas_Action code of MJC (MultiJob Change), which resolves to the system Miscellaneous Event, if a specific Event Class is not set up for this Bas_Action code. Events that are created as a result of a change to the Primary Jobs table process through the system as (MSC) Miscellaneous Events.

Some of these trigger types may affect a worker's eligibility for benefits across all Benefit Records. For example, the (TP) trigger (Pers_Data_Effdt) is generated when you change a worker's address. Because the Employee Address is not related to any particular job (or benefit record), this change could affect the eligibility for benefits across all of that worker's benefit records. Changes to the worker's age are not specific to a particular job. Because these types of changes can affect all benefit records for a worker the system creates an event for each benefit record that is held by the worker when it processes one of these triggers. This is also true for Passive Birthdate (PB) triggers that are generated as a result of processing Passive Events.

The system explodes the original trigger into a set of new triggers, one for each benefit record. You won't see these exploded triggers in the BAS Activity Table, because they're normally processed in the same Event Maintenance run in which they're created. Each exploded trigger generates a new event that has the same event class as the original trigger.

Other expanded triggers are generated as a result of the options that you configure. Because you can define eligibility rules with grouping methods that cross benefit record boundaries, you can't assume that the data changes that generate other types of triggers won't affect other benefit records.

For example, suppose that you change the example employee (professor/dean/physician) from Full Time to Part Time in one job. The three concurrent jobs provide multiple benefit records. As a result of changing the Full/Part Time indicator, the system generates a (TJ) Job trigger in the BAS Activity Table. This trigger contains the employee record and the corresponding benefit record of the job that is changed. If any eligibility rule uses a Grouping Method of *All Flagged,* meaning that jobs from any benefit record can contribute eligibility information for this benefit record, you need to expand these triggers. Carefully consider whether you want to activate this trigger explosion. It creates some overhead for the system to maintain and process. If you have eligibility rules that cross benefit record boundaries, then you should select Job Triggers, Passive Service Triggers, and Multi-Jobs Triggers in the Explode activity triggers to all Benefit Records group box on the Multiple Jobs Options page. If you have no such eligibility rules in your system, you can safely turn off the explosion for each trigger type.

## Passive Events and Multiple Jobs

Service-based eligibility is based on the service date for the primary job. Because jobs outside of specific benefit records can be grouped, eligibility that is based on the service date can come from the primary job or from any other job in or outside a benefit record number. Therefore, the system creates a BAS Activity trigger for each job that it finds during Passive Event processing that meets the passive service evaluation. These are called PS triggers.

## Mark Events for Reprocessing

The system can now better identify events that should be considered for reprocessing. In prior versions, events were flagged for reprocessing consideration when a Bas_Activity trigger was processed, and events existed that used a later Job or Pers_Data_Effdt row for eligibility purposes. In the prior versions, only one Job row could contribute to eligibility, so in the event that Standard Hours was changed on the "non-primary" Job row, and standard hours accumulation was used for eligibility, the system would not detect that existing events may need to be re-processed. This flagging mechanism searches for, and flags all events for the employee that may have used the Job row indicated in the trigger. Although the system can't be sure that the Job row was used for eligibility purposes, it eliminates the risk of not flagging an event that should be considered for reprocessing.

### Related Links

"Understanding Multiple Jobs *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"
"Setting Up Eligibility Rules *(PeopleSoft HCM 9.2 Benefits Administration)*"

## Multiple Jobs and PeopleSoft Payroll for North America

The multiple job functionality has the following effect on PeopleSoft Payroll for North America:

- Primary Pay Group

  When an worker has jobs in more than one pay group, you can designate a primary pay group that controls when deductions are taken from the worker's earnings and when instructions for deduction overrides apply. The worker's primary pay group is also the pay group for which a consolidated paysheet is built, if you activate the single check feature described below.

- Single Check

  If you activate the Single Check for Multiple Jobs feature in PeopleSoft Payroll for North America, you can produce a single check for workers with multiple jobs across pay groups within the same company. During the Paysheet Calculation process, the system creates a consolidated paysheet for the worker's primary pay group. The paysheet includes all of the worker's FLSA (Fair Labor Standards Act) calculations, taxes, benefits, and general deductions for all jobs with the same period end date; check date; FLSA period, if applicable; and payroll cycle (on- or off-cycle). Pay run IDs and pay frequencies that are associated with the jobs can differ.

- Deduction Limits

  Limits for general deductions and benefit deductions can vary by job. PeopleSoft Payroll for North America adjusts the Current Goal Balance for the appropriate jobs when deductions are taken.

- Union Dues

  Union dues are deducted from earnings only when the job that's assigned the corresponding union code is paid.

- FLSA Overtime Rules

  PeopleSoft Payroll for North America fully complies with FLSA overtime rules for non-exempt workers. If a non-exempt worker has other exempt or non-exempt jobs in the same organization, the system calculates the correct overtime for any extra hours worked.

### Related Links

*PeopleSoft HCM 9.2: Payroll for North America*

## Multiple Jobs and PeopleSoft Pension Administration

PeopleSoft Pension Administration supports the use of multiple concurrent jobs, instead of relying on Employment Record number 0 for much of the information that is used in the pension benefit calculations.

## Multiple Jobs and the Eligibility Process

The eligibility process always produces two primary results:

- Confirmation of whether a worker has ever been eligible for pension benefits.
- Time line showing the periods of eligibility and ineligibility.

For a single-job environment, producing these results is a matter of examining a worker's only job record history. If a worker has multiple, concurrent jobs, the system determines plan eligibility based on all jobs. The system considers the worker to be eligible for a particular period if any of the jobs are eligible.

## Multiple Jobs and the Primary Job Record

The system examines all of a worker's records and selects a primary record by choosing the first record that it finds in the following prioritized order of categories:

1. Overrides
2. Covered Active
3. Covered Inactive
4. Any Active
5. Any Inactive

If it finds more than one of any of these categories, it selects the lowest-numbered record in that category.

You can accept the system-calculated primary record or override it with your own definition of which job record should be the primary record. Do this by configuring your definition of which actions make a job active or inactive or by using the Primary Job Overrides page to designate a record of your own choosing as the primary record.

## Related Links

"Pension Administration Business Processes *(PeopleSoft HCM 9.2: Pension Administration)*"
"Pension Administration Overview *(PeopleSoft HCM 9.2: Pension Administration)*"

## Chapter 5

# Adding a Person in PeopleSoft Human Resources

## Adding a Person

To create a person record, use the Add a Person component (PERSONAL_DATA_ADD). Use the (CI_PERSONAL_DATA) component interface to load the data into the table for this component.

These topics provide an overview of identification assignment, list common elements, and discuss how to:

- Enter name and biographical data.
- Enter contact information.
- Enter country-specific person data.
- Create organizational relationships and maintain checklists.

---

**Note:** You should create and save either a Job Data or a Person of Interest (POI) Relationship record for a new person at the time you create the new person.

---

### Understanding Identification Assignment

When you open the Add a Person component, the system requests a person ID. There are two ways to assign IDs:

- Automatically

  If you use automatic ID assignment, the system adds IDs sequentially as you add new people.

  The system maintains the last assigned ID on the Installation Table - Last ID Assigned page.

  See "Last ID Assigned Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- Manually

  You enter the IDs, using any system that you choose for the organization. With manual entry, you don't need to assign IDs sequentially.

  Assigning IDs manually is the only way that you can include alphabetical characters in the IDs.

---

**Note:** To avoid maintaining two different sets of IDs, it is recommended that you use only one method to assign them: either always assign them manually or always let the system assign them.

---

## Common Elements Used When Maintaining Personal Data

**Smoker andAs of**

Indicate if the person is a smoker and enter the date on which the person started smoking. A person's smoker status affects benefits eligibility and rate determination in PeopleSoft Human Resources (HR) Manage Base Benefits and is required for regulatory reporting.

**Ethnic Group**

Select an ethnic group. You set up ethnic groups on the Ethnic Groups page.

(AUS) Affirmative action reports and the ATSI (Aboriginal and Torres Strait Islander) code come from this page.

(USA) Values are based on U.S. Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's affirmative action plan and to generate several equal employment opportunity (EEO) reports.

(GBR) Values are based on U.K. equal opportunity ethnic categories.

**Military Status**

Enter the person's military status.

**Preferred**

Select the person's preferred email address or phone number.

## Pages Used to Add a Person

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Biographical Details | PERSONAL_DATA1 | Workforce Administration, Personal Information, Biographical, Add a Person, Biographical Details | Enter name and other biographical information. |
| Edit Name | NAME_DFT_SEC | Workforce Administration, Personal Information, Biographical, Add a Person, Biographical Details<br><br>Click the Add Name link on the Biographical Details page. | Edit and refresh name information. |
| Contact Information | PERSONAL_DATA2 | Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information | Enter or edit a person's contact information. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Address History | ADDR_HISTORY_SEC | Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information<br><br>Click the Add Address Detail link on the Contact Information page. | Enter the effective date, country, and status for the address and refresh the address data when you make changes. |
| Edit Address | EO_ADDR_SEC | Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information<br><br>Click the Add Address Detail link on the Contact Information page and then click Update/View Addresses on the Address History page. | Edit address information. |
| Regional | PERSONAL_DATA3 | Workforce Administration, Personal Information, Biographical, Add a Person, Regional | Enter country-specific personal information. |
| Self Identification Data Canada | CAN_SELF_ID_DATA | Click the Self Identification Data link on the Regional page.<br><br>This link is visible only to users with access to the Self Identification Data Canada page, which can be granted using the delivered role *HR Admin CAN Confdl Data.* | Enter Canadian ethnicity data for a person, including whether the person is a visible minority and whether the person is an aboriginal person.<br><br>Be sure this page is appropriately secured to protect the confidentiality of this data. |
| Organizational Relationships | PERSONAL_DATA4 | Workforce Administration, Personal Information, Biographical, Add a Person, Organizational Relationships | Select an organizational relationship and checklist to create for this person. |
| Update Personal Data-Future | PRCSRUNCNTL | Set Up HCM, System Administration, Database Processes, Update Personal Data-Future | Run this process shortly after midnight to update the Personal Data component. The process will update data with new, effective information that is not currently in the component.<br><br>The Update Personal Data-Future process runs the HR _PERSDATA application engine program. |

## Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Biographical Details Page

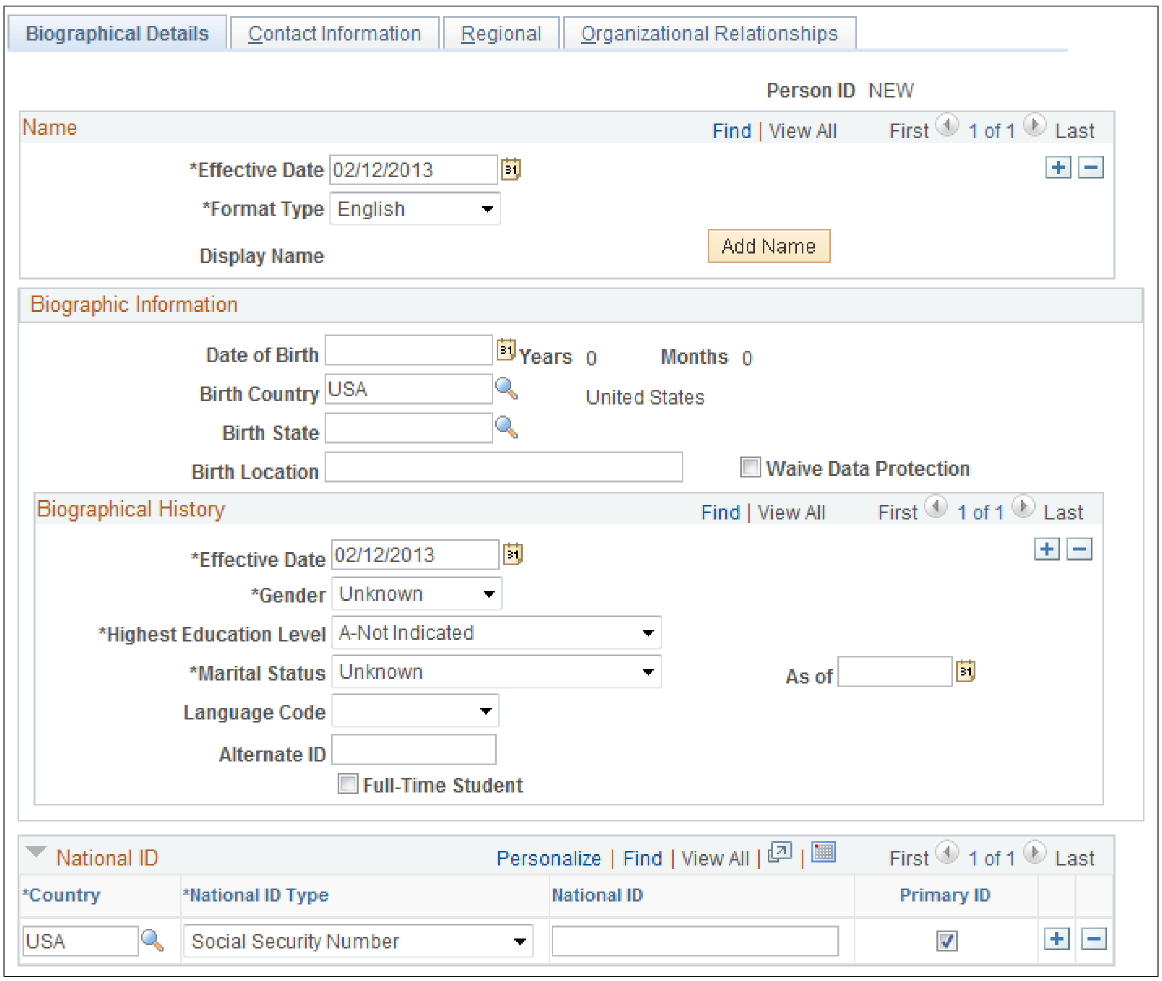
Use the Biographical Details page (PERSONAL_DATA1) to enter name and other biographical information.

**Navigation**

Workforce Administration, Personal Information, Biographical, Add a Person, Biographical Details

**Image: Biographical Details page**

This example illustrates the fields and controls on the Biographical Details page. You can find definitions for the fields and controls later on this page.




**Person ID** If you are adding a new person and are using system-assigned IDs, the field displays the value *NEW* until you save this record. Otherwise, the system displays the value that you enter to access the page.

### Name

**Display Name** Click to add or edit a name.

## Biographic Information

**Date of Birth**

Enter the person's date of birth. If you leave this field blank, a warning message appears when you save the record. You can continue entering information after you acknowledge the message. Though the birth date isn't required for the Administer Workforce business process, the system uses it to calculate a person's age in some benefit and payroll tasks. It also calculates dates, such as the U.K. expected retirement date, based on the person's age.

**Birth Country**

Select a country. Based on the selected country, the system might display additional fields.

**Birth Location**

Usually a city, town, or village.

**Date of Death**

This field does not appear during the hiring process. Use this field when updating a person's records.

**Waive Data Protection**

European community employment and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee. Select this check box if you obtain the employee's consent to share personal data with users in other European Union member nations.

## Biographical History

**Highest Education Level**

Select a value.

---

**Note:** (JPN) For Japanese education-level age-related pay calculations, a form of seniority pay, these values are linked to an education-level age basis as of hire.

---

**Marital Status and As of**

Select the person's marital status. Values are: *Common Law, Divorced, Head of Household, Married, PACS* [(FRA) this field is used in France. *Pacte civil de solidarite*], *Separated, Single, Unknown,* and *Widowed.* When a marital status is changed, the default as of date is the same as the biographical history effective date.

PeopleSoft Payroll doesn't use the marital status that is entered on this page for tax calculations. For U.S. employees, you enter that information in Maintain Payroll Data on the Federal, State, and Local Tax pages. Taxes for Canadian employees are based on net claim amount, which varies depending on the employee status.

---

**Note:** Laws in the Netherlands require tracking effective-dated marital status information for employees.

---

**Language Code**

Select the person's native or preferred language. Although tracking official or preferred languages is required in some countries in PeopleSoft Human Resources, the system also uses the preferred language when you communicate with people with a relationship to the organization. For example, PeopleSoft Global Payroll for Germany and Switzerland use the language code to print paychecks in the payee's preferred language. Other types of communication also use this as the default language for written communication.

---

**Note:** Don't use this field to record the organization's official language or to rate a worker's proficiency in speaking, reading, or writing various languages. Use the Location Table to track the organization's official language. Use the Languages table to record a worker's language proficiency.
The Language Code field prompts from the LANG_CD table, which concerns the person's native or preferred language, and not from the LANGUAGE_CD table, which contains the languages into which the application can be translated.

---

**Alternate ID**

To use a second type of ID for a person, enter the ID.

**Full-Time Student**

Select if the person is a full-time student.

## National ID

**Country**

Select the country that issued the worker's national ID.

**National ID Type**

The system enters the value that you establish for this country on the National ID Type Table page. You can override this default.

---

**Note:** (BRA) Add rows to enter one or more of the following IDs for the person: *RG number, voter registration card, PIS/PASEP number,* and *reserve certificate.*

---

**Note:** (BRA) Changes made to a Brazilian person's *Work Card* and *PIS* national ID types will be recorded on the National ID History page.

---

**National ID**

Enter the worker's national ID number. The system checks the format of the entry against the default format that you enter on the National ID Type Table page.

(GBR) For the U.K. the normal format of two letters followed by six digits and then one letter for National Insurance identification appears by default. Other options that are dependent on employee status are available.

(GBR) When you enter a national insurance number, the system uses the NID Prefix GBR page to check that you have entered a valid national insurance prefix. You can't save this page if you have entered an invalid national insurance prefix.

**Primary ID** Select if the national ID is the person's primary ID. If this is the only data row for this person, the system selects the check box by default. You can deselect it.

**Tax Ref** (SGP) Select if the worker's national registration ID is used as the person's employer tax reference number. This field is for information only.

**National ID Expiry Date** (CAN) Enter the expiration date for this National ID.

### (CAN) Verifying Social Insurance Numbers for Canadian Employees

Invoke a modulus 10-check digit formula to verify an employee's social insurance number (SIN), if needed. The formula follows federal standards for using the ninth digit in an employee SIN to verify the number.

If you enter an employee SIN that doesn't match the check digit that is calculated by the formula, an error message appears.

### (NLD) Verifying Social Security IDs for Dutch Employees

The Dutch national ID is commonly called the SoFi (Social/Fiscal) number. You can invoke the 11-check digit formula to verify a Dutch employee's SoFi number. The 11-check formula is a mathematical formula that evaluates the entry for the employee's social security ID and verifies that the result of the calculation is 11, to determine whether the national insurance/social security ID has a valid format.

### (USA) Reporting to Government Agencies When the Social Security Number Is Unknown

When the social security number (SSN) is missing, the system enters the default number that is defined on the National ID Type table, usually all 9s. However, reports and files that are created by PeopleSoft Payroll for North America for submission to government agencies, such as the IRS or Social Security Administration, convert missing or unknown SSNs to the specific format that is required by the government agency. For example, a missing or unknown SSN is reported to the IRS using all zeros on the W-2 file.

### Related Links

"Tracking Employee Medical Exam Results *(PeopleSoft HCM 9.2: Human Resources Monitor Health and Safety)*"
Understanding Additional Worker Data

## Add a Person - Contact Information Page

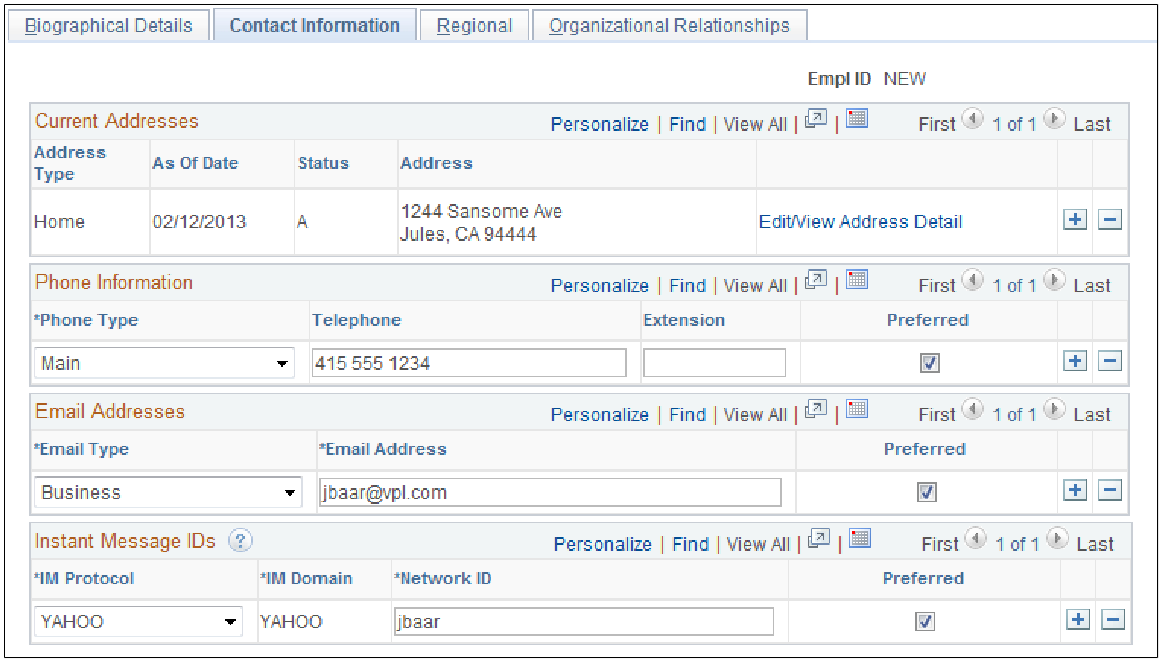
Use the Contact Information page (PERSONAL_DATA2) to enter or edit a person's contact information.

### Navigation

Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information

### Image: Contact Information page

This example illustrates the fields and controls on the Contact Information page. You can find definitions for the fields and controls later on this page.




## Current Address

**Address Type**

Select the type of address that appears in this row. The system automatically displays *Home* for the first address that you enter.

**Note:** Payroll for North America requires the person to have one address with type *Home* to successfully calculate taxes. You must set up each Puerto Rico employee's home address with country code *USA* and state code *PR* for proper tax reporting.

**Add Address**

Click to add an address and access the Edit Address page to edit addresses.

**Note:** (ITA) When entering Italian addresses, use the Address Search link on the Edit Address page to locate valid cities based on province.

**Note:** Laws in Belgium, the Netherlands, and Japan require maintaining effective-dated address information for employees.

### Phone Information

**Phone Type andTelephone**

Select the phone type and enter the phone number. The system formats the number based on the standard phone number format for the person's country as indicated in the address. If no special formatting is specified for the selected address country, the format is *000/000-0000.*

Select *Main* to designate a phone number as the individual's primary contact number.

---

**Note:** (JPN) Phone numbers are custom format fields. If you enter a phone number without any hyphenation (such as 9256944023), the system reformats the number into the standard format for the selected country (for example, the U.S. format: 925/694-4023). Because a 10-digit phone number in Japan can be formatted in several ways (03-1234-5670, 045-123-4567, or 0567-21-1234), this automatic formatting doesn't work for Japanese phone numbers. Japanese customers who want to store telephone numbers exactly as they are entered, without automatic formatting, should modify the Telephone field manually by using PeopleSoft Application Designer.

---

### Email Addresses

**Email Type andEmail Address**

Select an email type and enter the employee's email address.

**Note:** If an employee has more than one address, click the Add (+) button after selecting the address type.

### Instant Message IDs

Use this group box to enter instant message IDs that appear on application pages when chat is enabled.

**Network ID**

Enter the employee’s ID for the supported instant chat network.

**Note:** Google and MSN require special network IDs. The Google chatback badge and MSN user ID will need to be provided by the employee to provide permission for public presence to appear in the system. Please see MSN and Google for more information on network IDs.

**IM Protocol and IM Domain**

Enter the supported IM protocol for the network ID. Valid values are *GTALK, MSN, XMPP,* and *YAHOO.*

The system displays the instant message domain associated with the IM protocol you select except for *XMPP.* For *XMPP,* you must select the value of the XMPP server that has been defined by your organization.

See *PeopleTools: PeopleSoft MultiChannel Framework,* "Configuring Instant Messaging in PeopleSoft MultiChannel Framework"

**Preferred**

Select if this is the user’s preferred chat network ID.

**Note:** Some public networks such as *GTALK* and *MSN* require special network IDs which can only be obtained through their respective websites.

## Add a Person - Regional Page

Use the Regional page (PERSONAL_DATA3) to enter country-specific personal information.

### Navigation

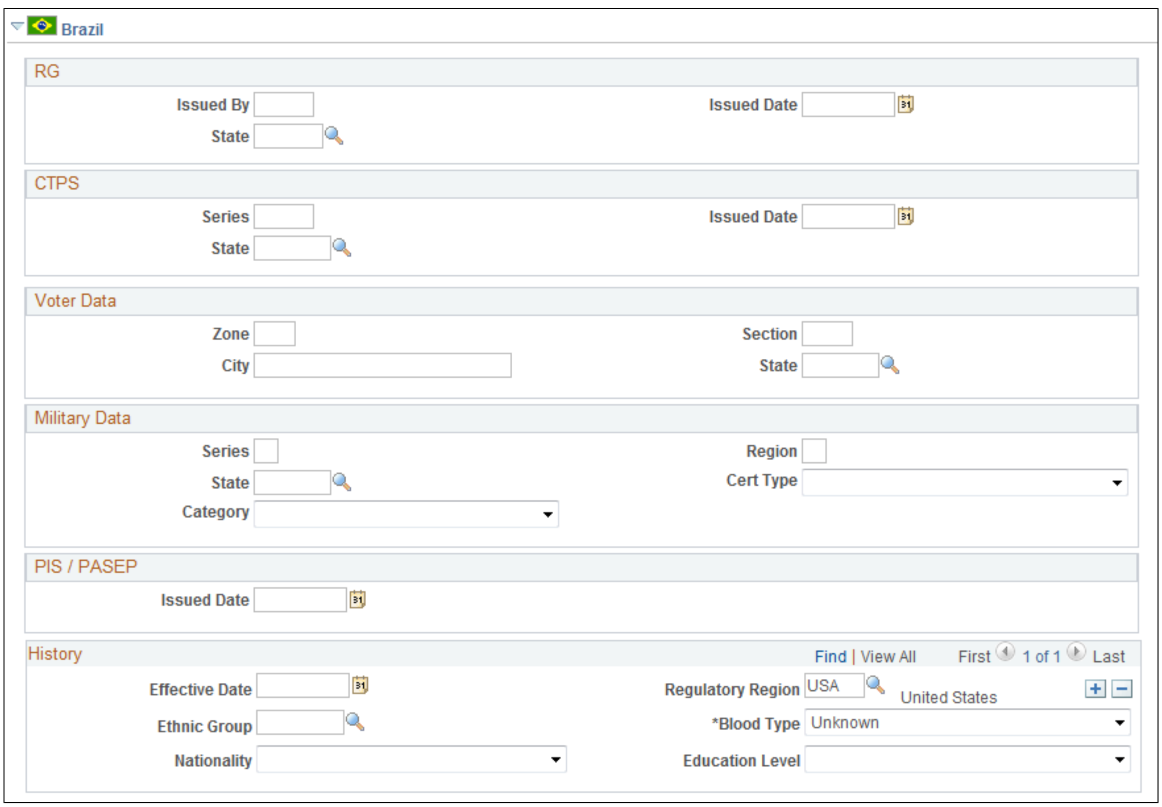
Workforce Administration, Personal Information, Biographical, Add a Person, Regional

### Image: Regional page (1 of 12)

This example illustrates the fields and controls on the Regional page (1 of 12). You can find definitions for the fields and controls later on this page.

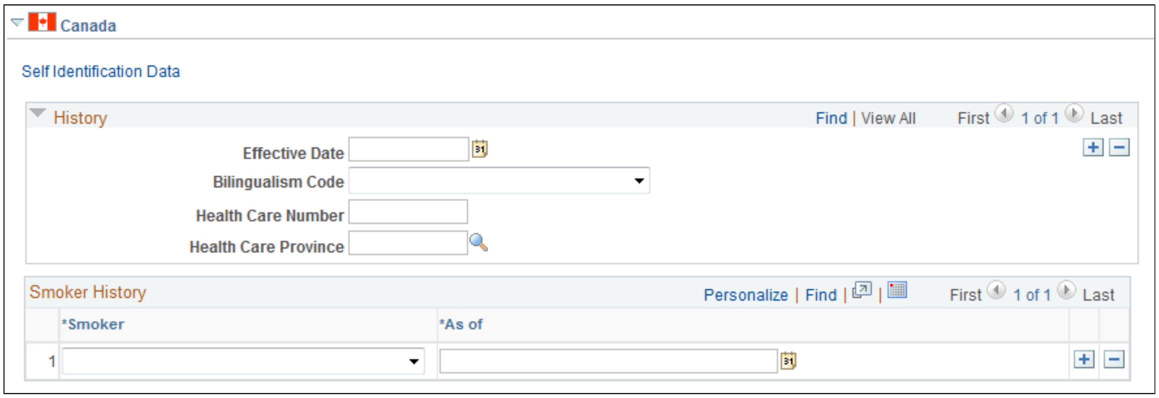

### Image: Regional page (2 of 12)

This example illustrates the fields and controls on the Regional page (2 of 12). You can find definitions for the fields and controls later on this page.



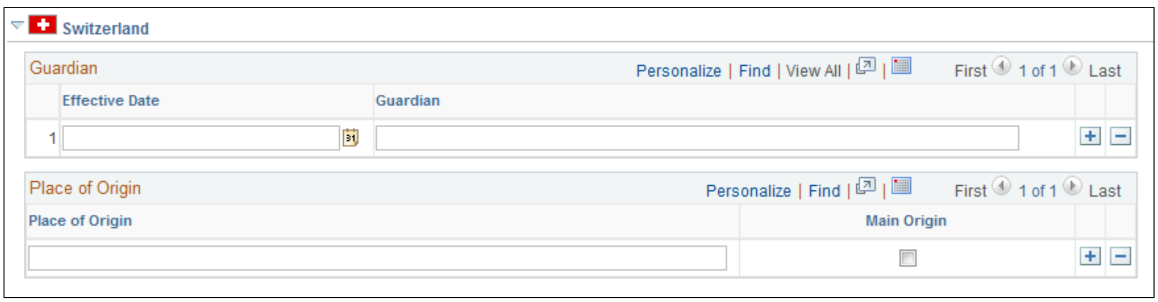
### Image: Regional page (3 of 12)

This example illustrates the fields and controls on the Regional page (3 of 12). You can find definitions for the fields and controls later on this page.




### Image: Regional page (4 of 12)

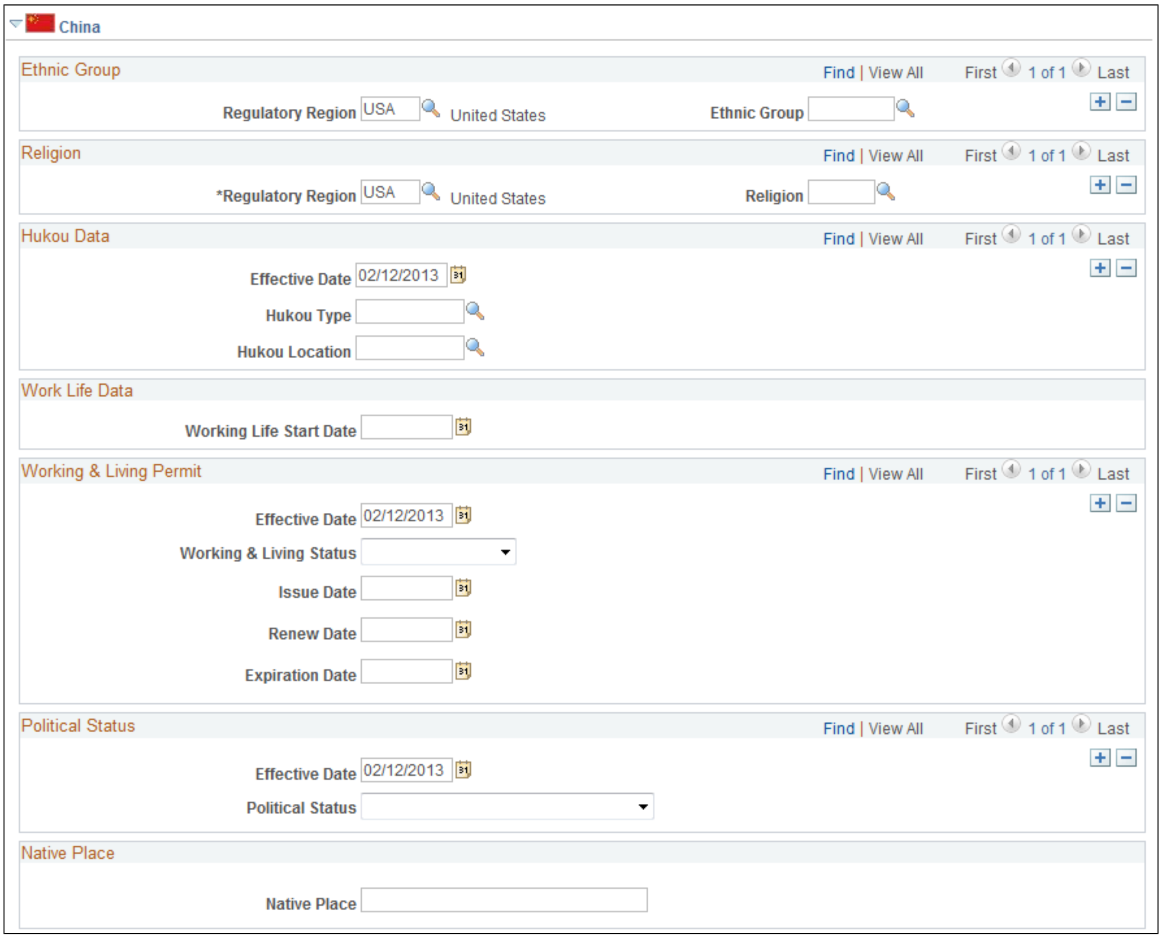
This example illustrates the fields and controls on the Regional page (4 of 12). You can find definitions for the fields and controls later on this page.



### Image: Regional page (5 of 12)

This example illustrates the fields and controls on the Regional page (5 of 12). You can find definitions for the fields and controls later on this page.




### Image: Regional page (6 of 12)

This example illustrates the fields and controls on the Regional page (6 of 12). You can find definitions for the fields and controls later on this page.

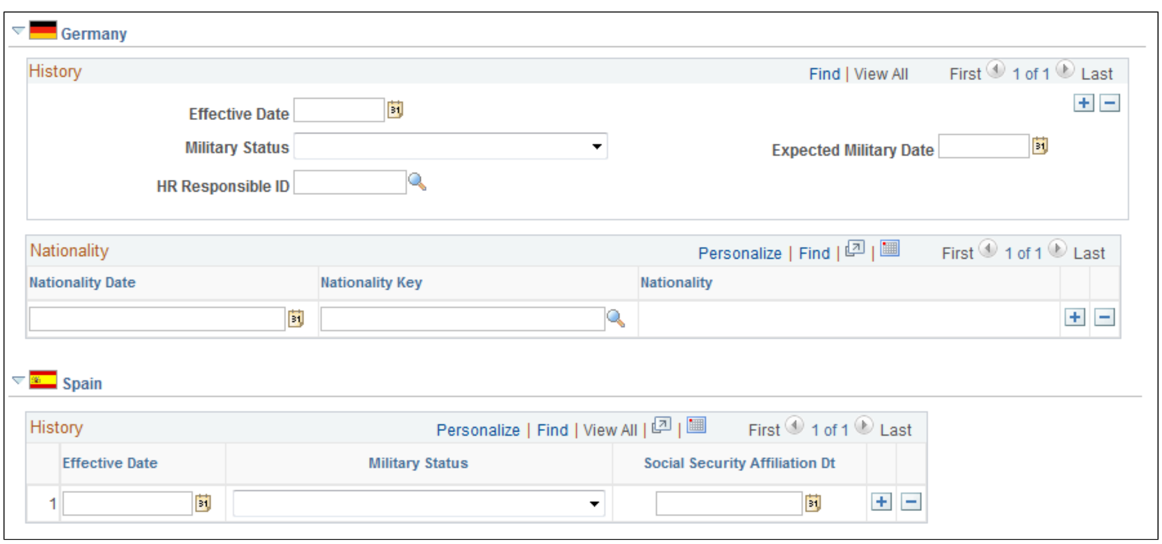


**Image: Regional page (7 of 12)**

This example illustrates the fields and controls on the Regional page (7 of 12). You can find definitions for the fields and controls later on this page.

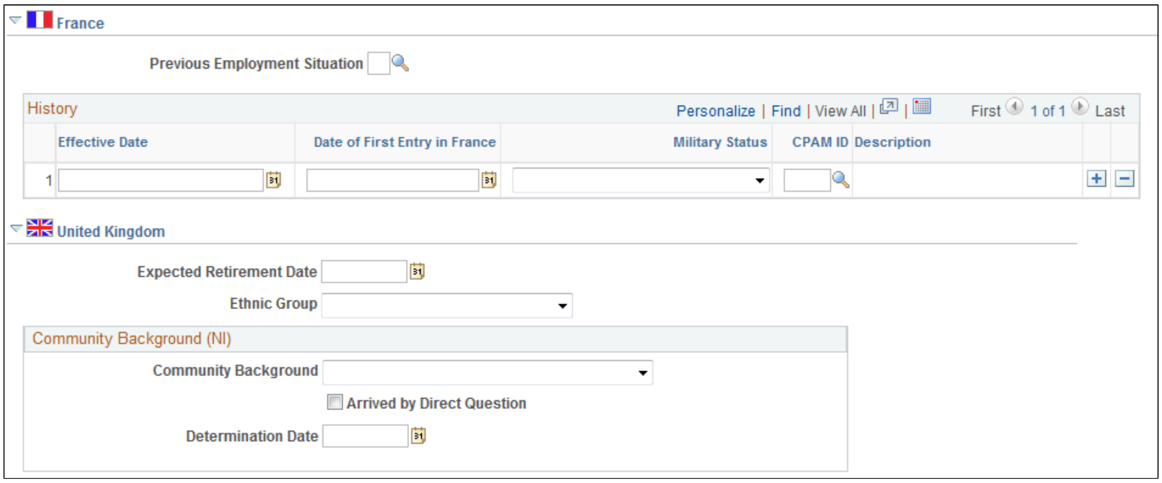



**Image: Regional page (8 of 12)**

This example illustrates the fields and controls on the Regional page (8 of 12). You can find definitions for the fields and controls later on this page.

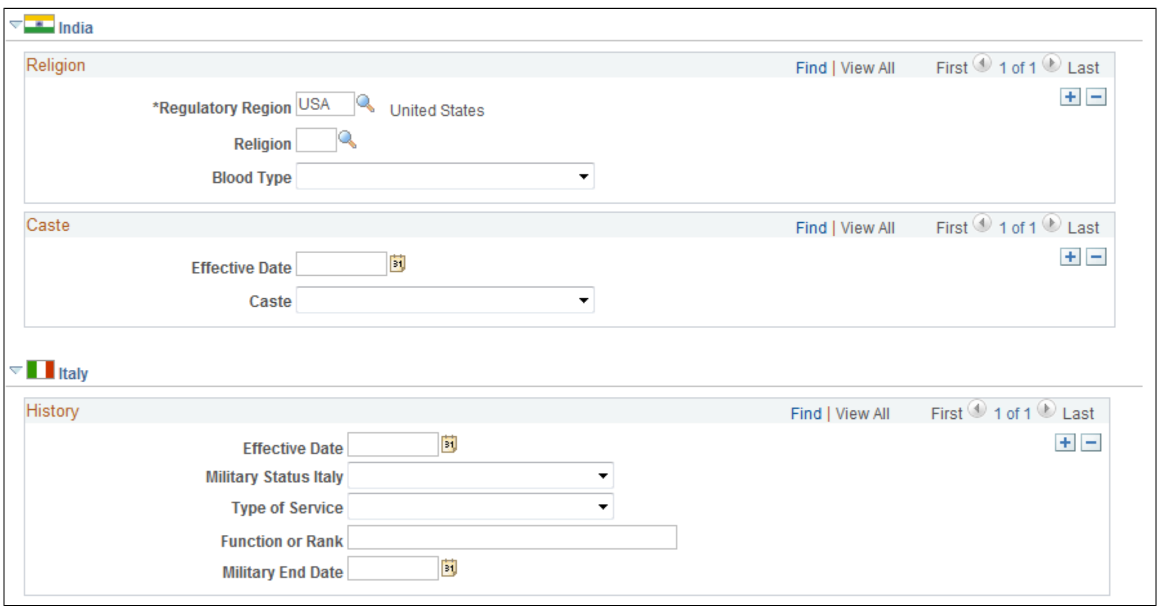


**Image: Regional page (9 of 12)**

This example illustrates the fields and controls on the Regional page (9 of 12). You can find definitions for the fields and controls later on this page.

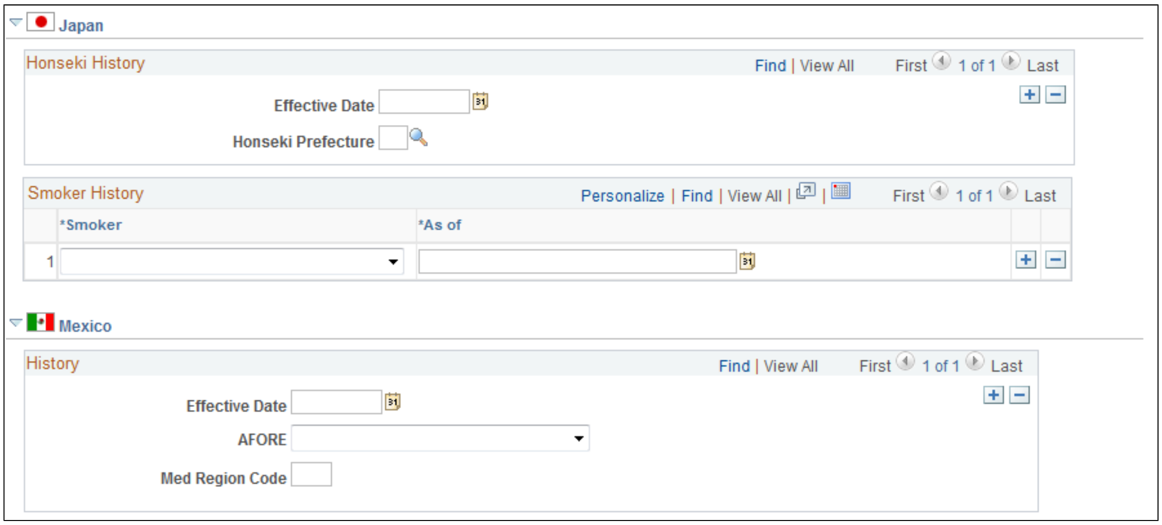



**Image: Regional page (10 of 12)**

This example illustrates the fields and controls on the Regional page (10 of 12). You can find definitions for the fields and controls later on this page.

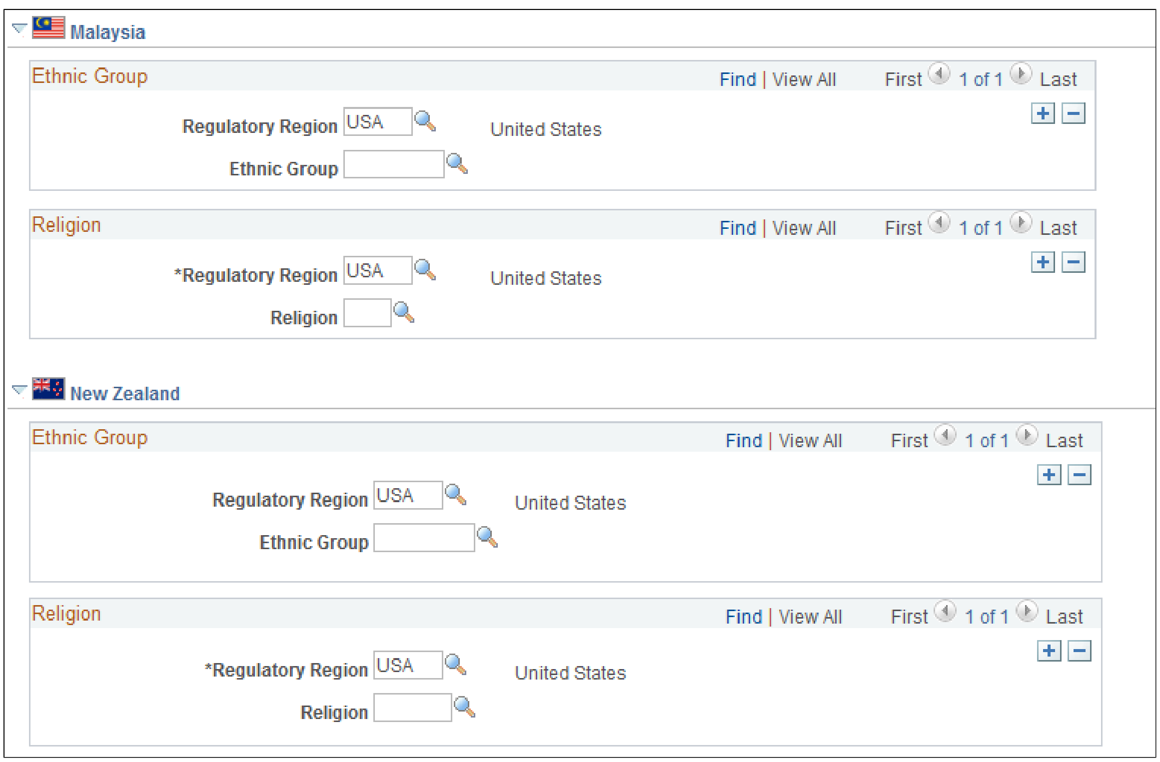


**Image: Regional page (11 of 12)**

This example illustrates the fields and controls on the Regional page (11 of 12). You can find definitions for the fields and controls later on this page.

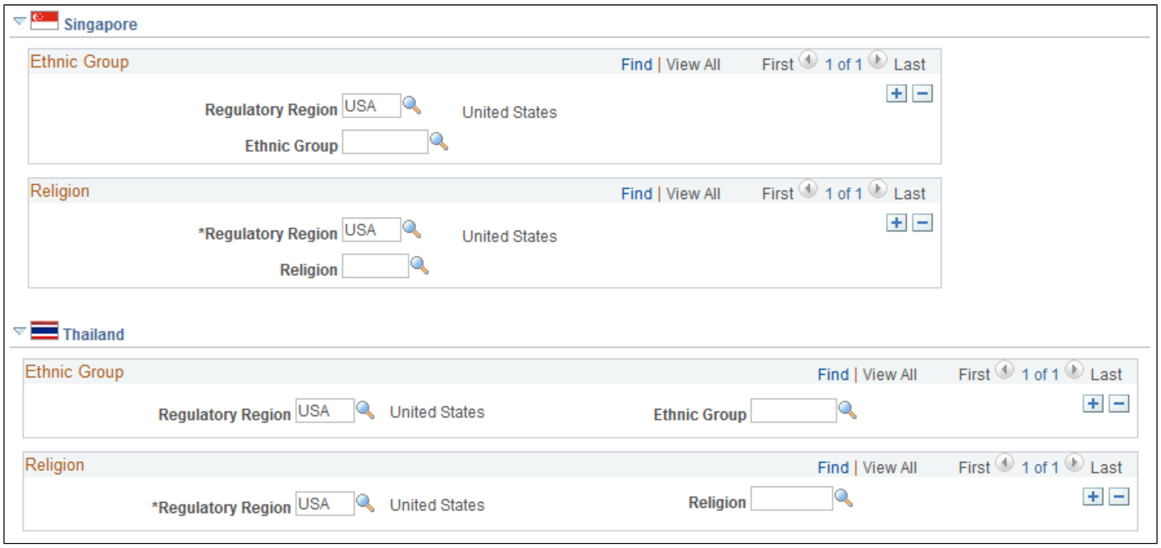
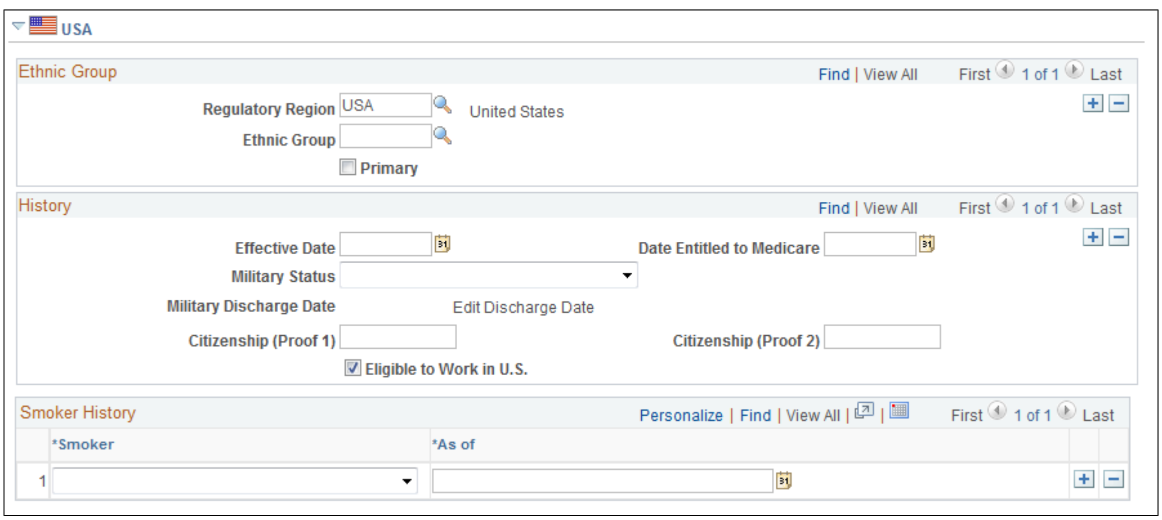



**Image: Regional page (12 of 12)**

This example illustrates the fields and controls on the Regional page (12 of 12). You can find definitions for the fields and controls later on this page.




Local country laws that require employers to verify a person's nationality and eligibility to work in that country might require information that you enter here. Much of the data that you enter is required for regulatory reporting in PeopleSoft Human Resources.

## (BRA) Brazil

**Issued By** Enter the *Registro Geral* (RG) issuing entity. This information is required if you enter the individual's RG number in the National ID group box.

**Issued Date andState** Enter this information, which is required if you enter the individual's RG number.

**Series** Enter the work card number.

**Issued Date** Enter the work card's issued date. This information is required if a *Carteira de Trabalho e Previdência Social* (CTPS) number is provided.

**State** Enter the political subdivision of the CTPS issuing agency. This information is required if a CTPS number is provided.

**Zone, Section, City, and State** Enter this information, which is required if a voter registration card is provided.

**Series, Region, and Category** Enter this information, which is required if a reserve certificate is provided.

**State** Enter the political subdivision of the issued reserve certificate. This information is required if a reserve certificate is provided.

**Cert Type (certificate type)** Enter the type of military service. Values are: *Aeronautic,* *Army,* *Marine,* or *Other.* This information is required if a reserve certificate is provided.

**Inscription Date** Enter the date of registration at PIS / PASEP. This information is required if the PIS/PASEP number is provided in the National ID group box.

**Regulatory Region and Ethnic Group** Enter the regulatory region for the person.

As you enter *BRA* as the regulatory region for a Brazilian employee, the system performs a number of validations, one of which checks for the presence of the ethnic group value. Specify the ethnic group when the regulatory region is set to *BRA*; this information is used in several Global Payroll for Brazil reports, including the RAIS report.

**Nationality and Educational Level** Enter the nationality and education level for the person. This information is used in the RAIS report of the Global Payroll for Brazil product.

## (CAN) Canada

**Self Identification Data** Click this link to access the Self Identification Data Canada page, where you enter ethnic background information for the person. The Self Identification Data Canada page has two fields:

- Use the Visible Minority field to indicate if the person's ethnic background is apparent based on physical appearance.
- Use the Aboriginal Person check box to indicate if the person is a Canadian aboriginal person.

| | |
|---|---|
| | The Self Identification Data link is visible only to users with access to the Self Identification Data Canada page. To secure this page and protect the confidentiality of the ethnicity data, you can use the delivered permission list *HCCPHR40CA* and the delivered role *HR Admin CAN Confdl Data.* |
| **Bilingualism Code** | Record the appropriate code for the person. If the Official Languages Act applies to the organization, use the bilingualism code as part of the Official Languages reports (PER102CN and PER108CAN) that you submit to the government. |
| **Health Care Number and Health Care Province** | Enter a number and select the health care province. |

### (CHE) Switzerland

| | |
|---|---|
| **Guardian** | Minors who are age 18 or younger or people with mental illness must have a parent or guardian sign employment contracts on their behalf. Enter the name of the parent or guardian who is authorized to act for this employee. |
| **Place of Origin** | Enter a place of origin. Every Swiss person has at least one place of origin, usually determined by the father or husband's birthplace. |
| **Main Origin** | Select if the place of origin in the Place of Origin field is the person's main place of origin. (A person can have more than one place of origin.) |

### (CHN) China

| | |
|---|---|
| **Regulatory Region** | Enter a regulatory region for the person. |
| **Ethnic Group** | Enter the person's ethnic group. |
| **Religion** | Enter the person's religion. |
| **Hukou Type** | Enter the person's Hukou type. |
| **Hukou Location** | Enter the person's Hukou location. |
| **Working Life Start Date** | Enter the date on which the person first began to work. |
| **Working & Living Status** | Enter the status of the worker's working and living permit. Values are: *Expired, Granted,* and *Renewed.* |
| **Issue Date** | Enter the date on which the working and living permit was issued. |
| **Renew Date** | Enter the date on which the working and living permit was renewed. |
| **Expiration Date** | Enter the date on which the working and living permit expires. |

## (DEU) Germany

| | |
|---|---|
| **Expected Military Date** | If the person hasn't already completed military service, enter the date when service is expected to begin. |
| **HR Responsible ID** | Select the ID of the human resources representative responsible for this person. |
| **Nationality Date** | Enter the effective date of the person's nationality status. If the employee is a native citizen of the country, enter the person's birth date. If the person is a naturalized citizen, enter the date on which the person became a citizen. |
| **Nationality** | Enter the person's nationality by selecting a nationality code.<br><br>German labor laws require recording an employee's nationality to determine if the employee is eligible to work in certain industries, particularly those that are related to technology or defense. Use the nationality code to determine the employee's eligibility to work in a regulated industry based on the employee's country's participation in OECD or the European Union. You can maintain information about whether each nationality code participates in the OECD and European Union.<br><br>**Note:** Duevo-compliant nationality codes are established by the Duevo Directive and are provided by the PeopleSoft system. |

## (DEU) German Public Sector

This section is available when German Public Sector is selected on the Installation Table.

The system uses this information when performing validations using the disability processing rules defined for the job group/service class information. The maximum age for hiring a person identified as disabled is different than for a person who is not identified as disabled for certain employee categories and service class group combinations.

The disability selection here displays on the Job Data - German Public Sector page *(PeopleSoft HCM 9.2: Human Resources Manage German Public Sector)* and is also maintained in the Disabilities component.

| | |
|---|---|
| **Disabled** | Select if the person is disabled. |

## (ESP) Spain

| | |
|---|---|
| **Social Security Affiliation Dt (social security affiliation date)** | Enter the date when the person is assigned a Spanish social security number. |

## (FRA) France

| | |
|---|---|
| **Date of First Entry in France** | Leave blank if the person is a native-born French citizen. If the person is foreign-born, enter the date on which the person |

first arrived in France. This data is used to maintain work visa information for foreign workers who are employed in France.

**CPAM ID** ***(Caisse Primaire d'Assurance Maladie ID)***

Enter the code of the CPAM ID that is assigned to the person. CPAM depends on the person's home address. The CPAM is the social security body that compensates persons for illness and work accidents.

## (GBR) United Kingdom

**Expected Retirement Date**

The system calculates and displays this value, based on the system date and the birth date that you enter on this page. This field is for information only; you can't change it.

A person's expected retirement date is based on the birth date that you enter on the Name/Location page. For men in the U.K., the expected retirement date is always the 65th birthday. For women, it is the 60th birthday. The British government is introducing measures to raise the state pension age for women. The retirement age for women will gradually increase to 65 years between 2010 and 2020. This table shows the expected retirement dates for women in the U.K.:

| ***Birth Date*** | ***Expected Retirement Age*** |
|---|---|
| Before April 6, 1950. | 60 years. |
| After April 6, 1950 and before April 6, 1955. | Retirement date is delayed one month for each month that the woman is born after April 6, 1950. |
| After April 6, 1955. | 65 years. |

The calculation that the system uses to determine the retirement age of U.K. employees is stored in FUNCLIB_HR_UK.EXP_RETIRE_DT.FieldFormula.

## (GBR) Community Background

The system displays the following fields only if you're logged in as an authorized user. Northern Ireland law requires that only a designated monitoring officer see community background data for employees. The system includes a special user class (UKNIPNLS) and user ID (UKNI) for you to use to enforce these rules.

**Community Background**

Select the person's community background: *Protestant, Catholic,* or *Undetermined/Other.*

**Arrived by Direct Question**

Select if you determine the person's community background by asking the employee directly.

**Determination Date**

Enter the date on which you determine the person's community background category.

The data that you enter about a Northern Ireland worker's community background is required under the Fair Employment Act. Employers must include this information in the Northern Ireland report (UKNI001) that they submit to the administrative body that monitors employment in Northern Ireland. This report provides an annual summary of the state of the workforce for a particular employer and breaks down employees and applicants for employment into their respective community background categories.

## (IND) India

**Blood Type** — Select the person's blood type or select *Unknown.* When the blood type is entered on this page at the time that an employee is hired, a component interface updates the employee's blood type on the physical exam record. Thereafter, this field is disabled and displays by default the blood type data from the physical exam record.

**Caste** — Select the person's caste.

## (ITA) Italy

**Type of Service** — Select the type of service that the person performed in the military.

**Function or Rank** — Enter the function or rank that was held by the person in the military.

**Military End Date** — Indicate the date on which the person's military service ended, if applicable.

## (JPN) Japan

**Honseki Prefecture** — Select the family prefecture, or place of registration. Tracking a person's Honseki Prefecture is a matter of custom.

## (MEX) Mexico

**AFORE (Retirement Funds Institution Code Mexico)** — Enter the AFORE for the employee. Values include: *Banamex, Bancomer, Dresdner, GNP, Garante, ING, Inbursa, Principal, Santander, Tepeyac, XXI,* and *Zurich.*

**Med Region Code (medical region code)** — Enter the three-character code for the medical region where the person resides.

## (MYS) Malaysia, (THA) Thailand, and (SGP) Singapore

In Malaysia, Thailand, and Singapore, you use the Ethnic Group and Religion fields for eligibility and calculation of festive advances.

## (USA) United States

**Ethnic Group**

Enter one of more ethnic groups for a person.

Values are based on U.S. Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's affirmative action plan and to generate several equal employment opportunity (EEO) reports. Ethnicity is also used when populating the Employee table during the Refresh Employees Table process.

**Primary**

Select the primary ethnicity for a person, if applicable. The Refresh Employees Table process (PER099) uses the Primary check box to determine which ethnicity to include in the Employees table.

See Understanding the Process of Refreshing the Employees Table.

**Date Entitled to Medicare**

(Optional) Enter the date on which this person is entitled to receive Medicare coverage.

**Military Discharge Date**

Displays the military discharge date from the Maintain Military Dischrg Date page. This date is used by the VETS-100 report to determine which veterans qualify for the Newly Separated Veteran designation.

To enter or modify the date, click the Edit Discharge Date link to access the Maintain Military Dischrg Date page.

**Citizenship (Proof 1) and Citizenship (Proof 2)**

Enter two forms of ID (for example, *passport* and *Social Security card)* to prove U.S. citizenship (required by U.S. law).

**Eligible to Work in U.S.**

Select if the person is eligible to work in the U.S.

## (FPS) French Public Sector

The information that you enter here is mandatory for including an employee in the French Public Sector security system.

**Supporting Document Required**

Select to track supporting documents. The system inserts a row in the Supporting Documents group box. The row is identified by the person ID, the action code, and the effective date and enables you to verify that the person provided the required documents.

For more information, see product documentation for *PeopleTools: PeopleSoft Process Scheduler* and *PeopleTools: Global Technology*

## Related Links

Understanding French Social Security Tracking Code Maintenance

"Understanding Regulatory Requirements for Canada *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"

"Understanding Payroll Data *(PeopleSoft HCM 9.2: Payroll for North America)*"
"Understanding the Core Tables for PeopleSoft Manage Base Benefits *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"
"(JPN) Setting Up Japanese Control Tables *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Effective Dates *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding Language Support in PeopleSoft *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding PeopleSoft HCM System Data Regulation *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Common Elements Used in PeopleSoft HCM *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Maintaining the ASCO Table *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"
"Creating Reports for the PSMPC *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"
"Understanding French Regulatory Requirements *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"
"Tracking Supporting Documents *(PeopleSoft HCM 9.2: Human Resources Manage French Public Sector)*"
"Understanding U.K. Regulatory Requirements *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"
"Understanding U.S. Regulatory Requirements *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"

## Add a Person - Organizational Relationships Page

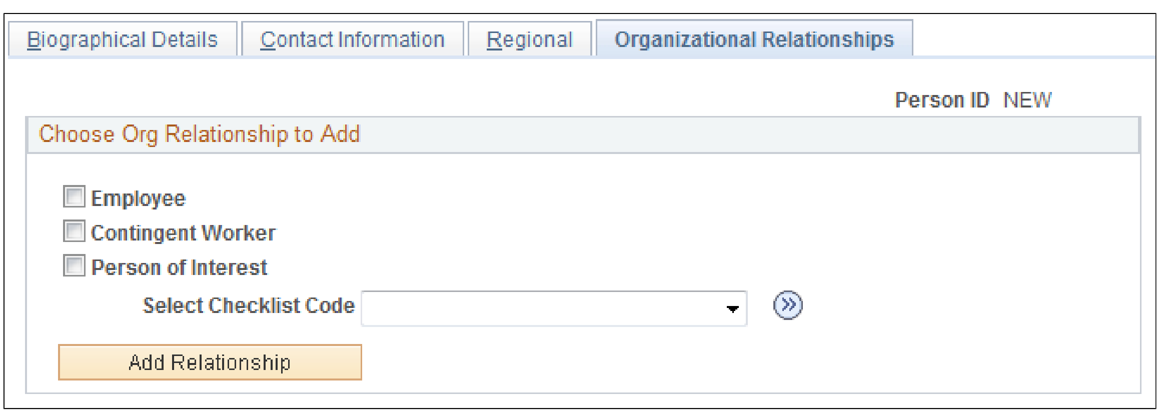
Use the Organizational Relationships page (PERSONAL_DATA4) to select an organizational relationship and checklist to create for this person.

**Navigation**

Workforce Administration, Personal Information, Biographical, Add a Person, Organizational Relationships

**Image: Organizational Relationships page**

This example illustrates the fields and controls on the Organizational Relationships page. You can find definitions for the fields and controls later on this page.



## Choose Org Relationship to Add

Select Employee, Contingent Worker, or Person of Interest to indicate the organizational relationship of this person.

If you select Person of Interest, select one of the available person of interest types:

- *External Instructor*
- *External Trainee*
- *Global Payroll Employee*
- *Other*
- *Other Payee*
- *Stock - Board Member*
- *Stock - Non-HR Employee*

You can assign any of the POI types that are defined on the POI_TYPE_TBL. After a person is created, the POI relationships can be added in various places. POIs without Jobs can be added from Administer Training and from within Campus Solutions. POIs with Jobs relationships are created from within the relevant applications, such as Stock, Global Payroll, Absence Management, Benefits, and Pension.

When you select Employee, Contingent Worker, or a POI type with a job, the Empl Rcd Nbr field appears. The system determines the next employee record number available for this person, or you can enter your own number and the system will verify that the number you entered does not already exist for this person.

To create a checklist for the person on the Employee Checklist page at the same time, select the appropriate checklist.

**Note:** Contingent workers are not paid in Payroll for North America. Customers using the E&G contract pay functionality, need to add contract workers using the Add Employment Instance component or select Employee on the Organizational Relationships page.

| | |
|---|---|
| **Add the Relationship** | Click this button to save the data on this component. If you select Employee or Contingent Worker, the system opens either the New Employment Instance component (JOB_DATA_EMP) or the New Contingent Worker Instance component (JOB_ DATA_CWR).<br><br>If you select Person of Interest, the system opens either the Person of Interest Job Data component (JOB_DATA_POI) or the Add a POI Reltn to a Person component (PERS_POI_ADD), depending on the POI type you selected.<br><br>**Note:** You can only select one relationship when you create the Personal Data record, but you can create additional relationships directly from the New Employment Instance, New Contingent Worker Instance, Add Person of Interest Job, and Add a POI Type to a Person components. |

**Note:** If you create a person but do not create and save a job data record or POI type record for them, the system will save the person as a POI without job with a POI Type of Unknown. When you do create and save a record for the person on the Add an Employment Instance component, Add a Contingent Worker component, Add a POI Instance component, or Add a POI Reltn. component, the system will delete the Unknown POI without job instance for that person.

### (FPS) French Public Sector

If you have French Public Sector installed and you select Employee, you select one of these types of employee:

- *Commercial Employee*
- *French Public Sector Employee*

If you select *French Public Sector Employee,* the system displays these fields: Business Unit, Department, and Job Code. Complete these fields for the new employee.

Use the *French P Sector Employee* checklist for French public sector employees.

See "Understanding the Hiring Process *(PeopleSoft HCM 9.2: Human Resources Manage French Public Sector)*".

### Related Links

Controlling Data Access for POIs Without Jobs
Adding Organizational Instances for Employees, Contingent Workers, and POIs
"Understanding Contract Pay Processing *(PeopleSoft HCM 9.2: Payroll for North America)*"

# Controlling Data Access for POIs Without Jobs

These topics provides an overview of security for POIs without jobs and discuss how to add and maintain POI types.

## Understanding Security for POIs Without Jobs

When a POI does not have a job record you need to enter additional information about them in order to control user access to their data.

Data access for POIs without jobs is primarily controlled by POI type. Assign the person a POI type in the Add a POI Relationship component (PERS_POI_ADD) or Maintain POI Relationship component (PERS_POI_MAINTAIN).

You can add additional security criteria by assigning the person to one or more business units, locations, or institutions.

For example, a person has the POI type of External Instructor and the following security types:

| ***Security Type*** | ***Security Key*** |
|---|---|
| Location | CCBC1 |

| ***Security Type*** | ***Security Key*** |
|---|---|
| Business Unit | CFBBU |
| Institution | PSSTA |

The following users have access to this person:

- User A, who has access to all External Instructor POIs.
- User B, who has access to all External Instructor POIs in the location CCBC1.
- User C, who has access to all External Instructor POIs in the business unit CFBBU.
- User D, who has access to all External Instructor POIs in the institution PSSTA.

---

**Note:** Data permission security for employees, contingent workers, and POIs with jobs is controlled by data you enter on the person's job record.

---

## Pages Used to Control Access to the Data of POIs Without Jobs

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Add a POI Relationship<br><br>Maintain POI Relationship | PER_POI_TRANS | • Workforce Administration, Personal Information, Organizational Relationships, Add a POI Relationship, Add a POI Relationship<br><br>• Workforce Administration, Personal Information, Organizational Relationships, Maintain POI Relationship, Maintain POI Relationship | Use these pages to set up and maintain a person of interest's POI type and security access keys. |

### Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Add a POI Relationship Page

Use the Add a POI Relationship page (PER_POI_TRANS) to use these pages to set up and maintain a person of interest's POI type and security access keys.

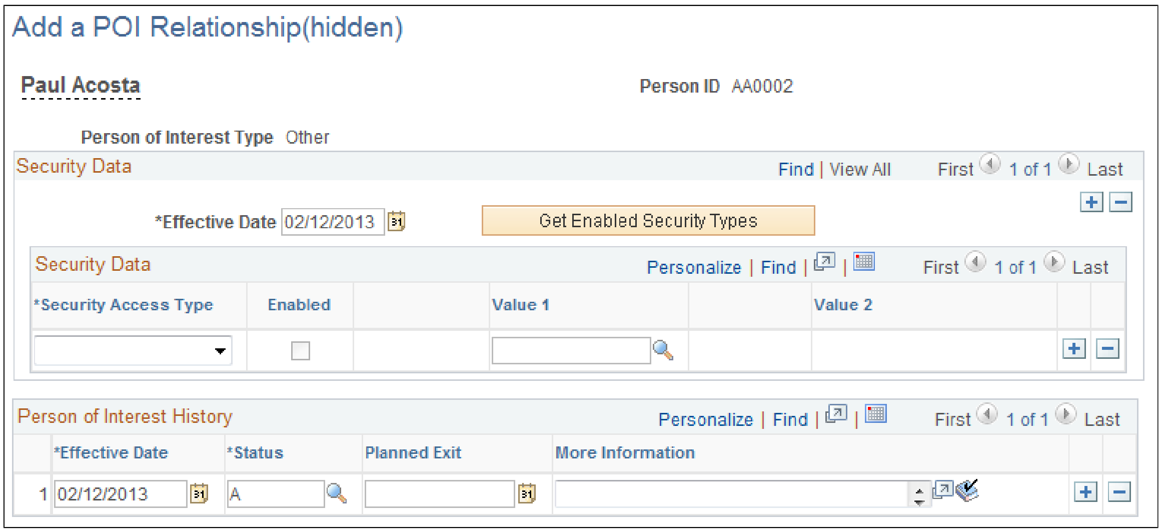
 

**Navigation**

- Workforce Administration, Personal Information, Organizational Relationships, Add a POI Relationship, Add a POI Relationship
- Workforce Administration, Personal Information, Organizational Relationships, Maintain POI Relationship, Maintain POI Relationship

**Image: Add a POI Relationship page**

This example illustrates the fields and controls on the Add a POI Relationship page. You can find definitions for the fields and controls later on this page.




**Person of Interest Type** Select a person of interest type when you create a record for the person. You can create multiple records for a person with different POI types on the Add New POI Type component.

## Security Data

**Get Enabled Security Types** Click to add a row to the Security Data grid for each security type that has been enabled for the people without jobs.

**Security Access Type** To restrict user access to this person's data using values in addition to the POI type, select a security access type.

**Value 1 andValue 2** If you select a security access type of *Business Unit* or *Institution,* select the business unit or institution associated with this person for security purposes.

If you select a security access type of *Location,* first select the appropriate business unit for the location's SetID in Security Key 1 and the location associated with this person for security purposes in Security Key 2.

You can enter multiple rows in this group box to set up multiple security access types and keys. PeopleSoft includes the Business Unit, location, and institution security types as part of the system data. You can choose to disable any of these security types.

Click the Get Enabled Security Types button to find out which security types are enabled. You can enter data for a type that has not been enabled, allowing you to capture additional data on a POI without a job without having to modify the system. To do this, you must create a new security type on the Security Access Type page for the People without Jobs Security Set and enter a new field name. Then use the new field name in this component and capture the required data for this POI.

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

## Person of Interest History

Maintain a history of this person of interest type using the effective date field and by adding new rows as necessary. Make the person inactive if they are not being used in system.

---

**Note:** Some of the POI Types without Jobs use application-specific transaction tables to capture the history of this relationship. The system makes this table available for External Trainee or Other POIs. You can track information about Students and External Instructor POIs on other system components intended for this purpose For example, the External Instructor POI Type is tracked in the learning instructor table components. This is defined on the POI Type setup table.

---

See "Setting Up Instructors *(PeopleSoft HCM 9.2: Human Resources Administer Training)*".

See *PeopleSoft Enterprise Learning Management* documentation.

| | |
|---|---|
| **Planned Exit** | Select the date the person will exit this person of interest type, if known. This field is for information only. |

## Chapter 6

# Increasing the Workforce

## Understanding Job Data

You can add a new job record to the system in several ways. Each way uses its own component. Although the components are made up of the same pages, each one is configured to help you enter the correct data for a particular situation.

Before you create a job record for a person, you must add them to the system in the Add a Person component (PERSONAL_DATA_ADD).

See Adding a Person.

| ***Component*** | ***Menu*** | ***Use To*** |
|---|---|---|
| Add Employment Instance (JOB_DATA_EMP) | • Workforce Administration, Job Information<br>• Workforce Administration, Personal Information, Organizational Relationships | Add a new employment organizational instance for a person who doesn't have applicant information in the system. |
| • (FPS) Hire Employee (EE_HIRE)<br>• (USF) Hire Employee USF (EE_HIRE) | (FPS) Workforce Administration, FPS Business Rules<br><br>(USF) Workforce Administration | Add a new employee who doesn't have applicant information in the system. |
| Template-Based Hire (HR_TBH_JOB) | • Workforce Administration, Template-Based Hire<br>• Manager Self-Service, Job and Personal Information, Add Template-Based Hire | Add a new hire by picking a pre-configured template and completing a simple data entry page.<br><br>Once the data is entered it can be saved directly to the database, submitted for processing or saved for later. |

<table>
<tr><th>Component</th><th>Menu</th><th>Use To</th></tr>
<tr><td>• Hire (HR_MANAGE_HIRES)<br>• (FPS) Hire<br>• (USF) Hire USF (ER_GVT_HIRE_LAUNCH)</td><td>Workforce Administration, Personal Information, Organizational Relationships, Manage Hires</td><td>Add a job applicant with information in the system, added through the Recruit Workforce business process.<br><br>When you use these components to hire an applicant, the information that you've already entered in the system becomes part of the worker's record, including the referral source information. All other fields on these pages are documented in these topics.<br><br>Note: (USF) Federal users can find information on hiring job applicants in the Recruit Workforce business process. (FPS) French Public Sector users can find information on hiring job applicants in the Recruit Workforce business process.</td></tr>
<tr><td>Add Contingent Worker Instance (JOB_DATA_CWR)</td><td>• Workforce Administration, Job Information<br>• Workforce Administration, Personal Information, Organizational Relationships</td><td>Add a contingent worker organizational instance.</td></tr>
<tr><td>Add POI Instance (JOB_DATA_POI)</td><td>• Workforce Administration, Job Information<br>• Workforce Administration, Personal Information, Organizational Relationships</td><td>Add a POI organizational instance for a person who does not comprise the workforce but for whom you require a job record.</td></tr>
<tr><td>• Add Additional Assignment (ADD_PER_ORG_ASGN)<br>• (FPS) Add Concurrent Empl Record FPS (HIRE_DATA_BIS)<br>• (USF) Concurrent Hire USF (EE_CONC_HIRE)</td><td>Workforce Administration, Job Information<br><br>Note: Access the Concurrent Job component from the Add Additional Assignment component (ADD_PER_ORG_ASGN).</td><td>Add an additional employment instance for an employee or contingent worker.</td></tr>
<tr><td>Job Data (JOB_DATA).</td><td>Workforce Administration, Job Information</td><td>Update (including adding temporary assignments) the job record of an employee, contingent worker, or POI.</td></tr>
</table>

Most of these components consist of the same job data pages. The data that you enter on these pages is used throughout PeopleSoft Human Resources and PeopleSoft HCM to manage the people in the system. The process of entering additional data for employees or contingent workers that is not covered in the job data pages discussed in these topics can be found elsewhere in this documentation.

**Note:** Template-based hires does not use the actual job data pages in the template, however, it does use all the fields broken up into logical sections.

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**Note:** The components that you use to add and update job records are made up of a number of different pages. To navigate through the entire component, click the Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation links at the bottom of the pages.

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See "Hiring Applicants *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*".

See Understanding U.S. Federal Hiring.

See (ARG) Providing Additional Information for Argentinean Employees.

See Understanding the Process of Updating Person and Job Information.

See "Understanding the Hiring Process *(PeopleSoft HCM 9.2: Human Resources Manage French Public Sector)*".

### Adding New Job Records through the PeopleSoft Services Procurement Integration

A new job record may also be created in the system if your organization uses the PeopleSoft Services Procurement product within the PeopleSoft Supply Chain Management (SCM) database. The PeopleSoft applications deliver integration points that enable you to use PeopleSoft Human Resources as your system of record for contingent workers who are brought in to fill PeopleSoft Services Procurement requisitions.

When a work order is submitted in Services Procurement, the Services Procurement application does the following:

1. If the Services Procurement service provider is a new candidate, Services Procurement sends a message to Human Resources requesting Human Resources to add this person with an organizational relationship of contingent worker, add a job assignment, and create a user profile.
2. If the Services Procurement candidate already exists in the Human Resources system, Services Procurement sends a message with this person's ID requesting Human Resources to create a new job assignment for this person.
3. When a Services Procurement work order is closed or cancelled, Services Procurement sends a termination message to Human Resources. Human Resources then terminates the associated job assignment.

Human Resources uses the Component Interface (CI) and internal services to add the person, job, and user profile. This integration is automated and requires manual intervention only if there is a problem. For example, let's say Human Resources has successfully added a person profile from a Services Procurement request but encountered errors when creating the job assignment, such as an incorrect job code or location code. Human Resources sends a message back to Services Procurement stating that the person was created but the job assignment and user profile were not created and lists the error details. A Services Procurement administrator will then access the error correction page, correct the data, and resubmit the request. Human Resources will process the updated information, create the job assignment and user profile, and send an acknowledgement back to Services Procurement.

---

**Note:** The *PeopleSoft Services Procurement* help provides the technical details of the integration between PeopleSoft Human Resources and PeopleSoft Services Procurement.

---

Additional integration enables you to use Services Procurement to search for contingent workers as an alternate source of filling job postings in PeopleSoft Talent Acquisition Manager. When you use this integration, and a new Services Procurement candidate is sent to Talent Acquisition Manager for hiring.

Talent Acquisition Manager initiates the hire process and sends all necessary Human Resources data to Services Procurement to add the contingent worker information. When the hire is successful, Talent Acquisition Manager sends a message to Services Procurement stating that the candidate was added. At this point, Services Procurement will send a message to Human Resources to add a user profile for this candidate in the Human Resources system. Human Resources will add the user profile and send an acknowledge message. Services Procurement continues to send messages directly to the Human Resources system when it is time to terminate the Services Procurement service provider.

See *PeopleSoft Services Procurement*

See "Posting Jobs to PeopleSoft Services Procurement *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*".

## Understanding the Job Data Pages

The information that you enter when you add a new employment, contingent worker, or POI instance is the foundation for most of the business processes that you carry out later. That information includes the following:

- General employment information.

  Includes business title and work phone. This information is optional, but useful for reporting purposes.

- Specific job data.

  Includes the person's department, job code, company, supervisor, and compensation information.

- Earnings data.

  This information is included if the person's compensation comes from more than one department or category. You specify how to distribute the person's earnings among the sponsoring groups.

- Benefits program.

After you enter job information into the system, you can work with it in a variety of ways. For example, you can generate printed reports, view summary data pages, and perform ad hoc queries online. You can also use job data as the basis for performing tasks in all other aspects of human resources management, such as salary administration, regulatory requirements, payroll, and benefits.

## Understanding Employment Information Data

Unlike the data on the Job Data pages, the information on the Employment Information page isn't effective-dated, so the data that you enter and review on this page tells you about the worker's current information for this employment record number.

This means that if you rehire a worker and enter a future effective date, the system deselects the Termination Date and Assignment End Date fields. To review information that is in other data rows, use the Job Data component.

This page tracks data at two different levels: organizational and assignment. The organizational instance is the occurrence of an employment, contingent worker, or POI relationship with an organization, initiated when you create the person's first job data record. The system uses an organizational instance record number to distinguish between organizational instances. The organizational instance number is the same as the Employment Record (ERN) of the original (controlling) job data record under that instance.

The assignment level is the actual job data record, or records, associated with the instance. Since people can have more than one job data record under an instance (for example, an additional job or a temporary assignment), tracking the dates of the assignments separately from the dates of the instance enables you to distinguish between when a person was hired (tracked at the instance level) and terminated and when they started and completed an assignment or job.

The system uses the dates of the original job data record under an instance (when there are more than one job data records under an instance, this job data record is the *controlling instance*) to determine the dates of the instance. All other assignments under the instance inherit the instance dates from the original assignment.

The system also uses the actions you use on a job data record to determine which dates to update. For example, when you use the action of *HIR* (hire), the system assumes that the new job data record represents a new instance for a new hire, with its own hire dates. However, if you use the action of *ADL* (additional job), the system assumes that the new job data record is in addition to an existing instance and will use the hire dates from the controlling instance.

This example illustrates how the system establishes and tracks the organizational record numbers, ERNs, instance dates, and assignment dates for someone with multiple organizational relationships and job data records:

---

**Note:** This example is intended to illustrate the record number fields and the system date fields, not every field on this page.

---

Bobby Singh joined company XYZ on February 2, 2002. At the end of 2006, company ABC bought company XYZ; it completed the takeover on January 1, 2007. When the HR administrator at company ABC first enters Bobby in the system, he creates a job data record with the action of *HIR* and an effective date of January 1, 2007, reflecting Bobby's hire date with the new company.

The fields on the Employment Data page have the following values:

| ***Bobby Singh*** | ***EmplID: XYZ001*** | ***ERN: 0*** |
|---|---|---|
| ***Level*** | ***Field*** | ***Date*** |
| Organizational Instance | Organizational Instance Record | 0 |
| | Original Start Date | February 2, 2002<br><br>The system entered the effective date of the job data record as a default value, but the HR administrator overrides it to enter Bobby's start date at company XYZ. |
| | Last Start Date | January 01, 2007 |
| | First Start Date<br><br>**Note:** This is the hire date used in all reports tracking hires. | January 01, 2007 |
| | Termination Date | blank |

| ***Bobby Singh*** | ***EmplID: XYZ001*** | ***ERN: 0*** |
|---|---|---|
| ***Level*** | ***Field*** | ***Date*** |
| | Org Instance Service Date | January 02, 2007<br><br>The system entered the effective date of the job data record as a default value, but the HR administrator overrides it to the date from which the company calculates service for acquired employees. |
| Organizational Assignment | Last Assignment Start Date | January 01, 2007 |
| | First Assignment Start | January 01, 2007 |
| | Assignment End Date | blank |

From June 3, 2007 to September 10, 2007, Bobby has an additional assignment with the company. The HR administrator uses the action of *ADL* when creating the additional assignment so the system does not treat the new job data record as a separate instance with it's own hire date. The fields on the Employment Data page for the new assignment's job data record have the following values:

| ***Bobby Singh*** | ***EmplID: XYZ001*** | ***ERN: 1*** |
|---|---|---|
| ***Level*** | ***Field*** | ***Date*** |
| Organizational Instance | Organizational Instance Record | 0 |
| | Original Start Date | February 2, 2002 |
| | Last Start Date | January 01, 2007 |
| | First Start Date | January 01, 2007 |
| | Termination Date | blank |
| | Org Instance Service Date | January 02, 2007 |
| Organizational Assignment | Last Assignment Start Date | June 3, 2007 |
| | First Assignment Start | June 3, 2007 |
| | Assignment End Date | September 10, 2007 |

The organizational instance dates come from the original, controlling instance and cannot be changed on the Employment Data page for the non-controlling instance.

On September 15, 2007, Bobby takes on a new job with company ABC. The HR administrator creates a new employment instance and uses the action of *HIR* when creating the instance. The fields on the Employment Data page for the new job have the following values:

| ***Bobby Singh*** | ***EmplID: XYZ001*** | ***ERN: 2*** |
|---|---|---|
| ***Level*** | ***Field*** | ***Date*** |
| Organizational Instance | Organizational Instance Record | 2<br>**Note:** Notice that the organizational instance record number does not follow in sequence with Bobby's other instance, but that it matches the ERN of the job data record created under the new instance. |
| | Original Start Date | September 15, 2007 |
| | Last Start Date | September 15, 2007 |
| | First Start Date | September 15, 2007 |
| | Termination Date | blank |
| | Org Instance Service Date | September 15, 2007 |
| Organizational Assignment | Last Assignment Start Date | September 15, 2007 |
| | First Assignment Start | September 15, 2007 |
| | Assignment End Date | blank |

This organizational instance is completely separate from the first organizational instance and Bobby is treated as a new hire, as reflected in his original start date and service date. A company with different business rules may choose to acknowledge his past service for this instance, but company ABC does not and, because the two instances are separate, it doesn't have to.

Bobby is offered an additional assignment with the second job starting on January 14, 2008 and so he tenders his resignation for his original job, effective January 15, 2008. The fields on the Employment Data page for the first organizational instance have the following values:

| ***Bobby Singh*** | ***EmplID: XYZ001*** | ***ERN: 0*** |
|---|---|---|
| ***Level*** | ***Field*** | ***Date*** |
| Organizational Instance | Organizational Instance Record | 0 |
| | Original Start Date | February 2, 2002 |
| | Last Start Date | January 1, 2007 |
| | First Start Date | January 1, 2007 |

| ***Bobby Singh*** | ***EmplID: XYZ001*** | ***ERN: 0*** |
|---|---|---|
| ***Level*** | ***Field*** | ***Date*** |
| | Termination Date | January 15, 2008 |
| | Org Instance Service Date | January 2, 2007 |
| Organizational Assignment | Last Assignment Start Date | January 1, 2007 |
| | First Assignment Start | January 1, 2007 |
| | Assignment End Date | January 15, 2008 |

The fields on the Employment Data page for the new assignment under the second organizational instance have the following values:

| ***Bobby Singh*** | ***EmplID: XYZ001*** | ***ERN: 3*** |
|---|---|---|
| ***Level*** | ***Field*** | ***Date*** |
| Organizational Instance | Organizational Instance Record | 2 |
| | Original Start Date | September 15, 2007 |
| | Last Start Date | September 15, 2007 |
| | First Start Date | September 15, 2007 |
| | Termination Date | blank |
| | Org Instance Service Date | September 15, 2007 |
| Organizational Assignment | Last Assignment Start Date | January 14, 2008 |
| | First Assignment Start | January 14, 2008 |

| *Bobby Singh* | *EmplID: XYZ001* | *ERN: 3* |
|---|---|---|
| ***Level*** | ***Field*** | ***Date*** |
| | Assignment End Date | blank |

**Image: Bobby's organizational relationships and assignments for organizational record 0 (1 of 2)**

Finally, the division in which Bobby has worked the two jobs in his second organizational instance closes, terminating both the controlling instance and, by association, the assignment effective September 30, 2008 and Bobby is rehired into his original job with a new, additional job on the side, effective September 15, 2008.

The following graphic illustrates Bobby's organizational instance record 0 and assignments:

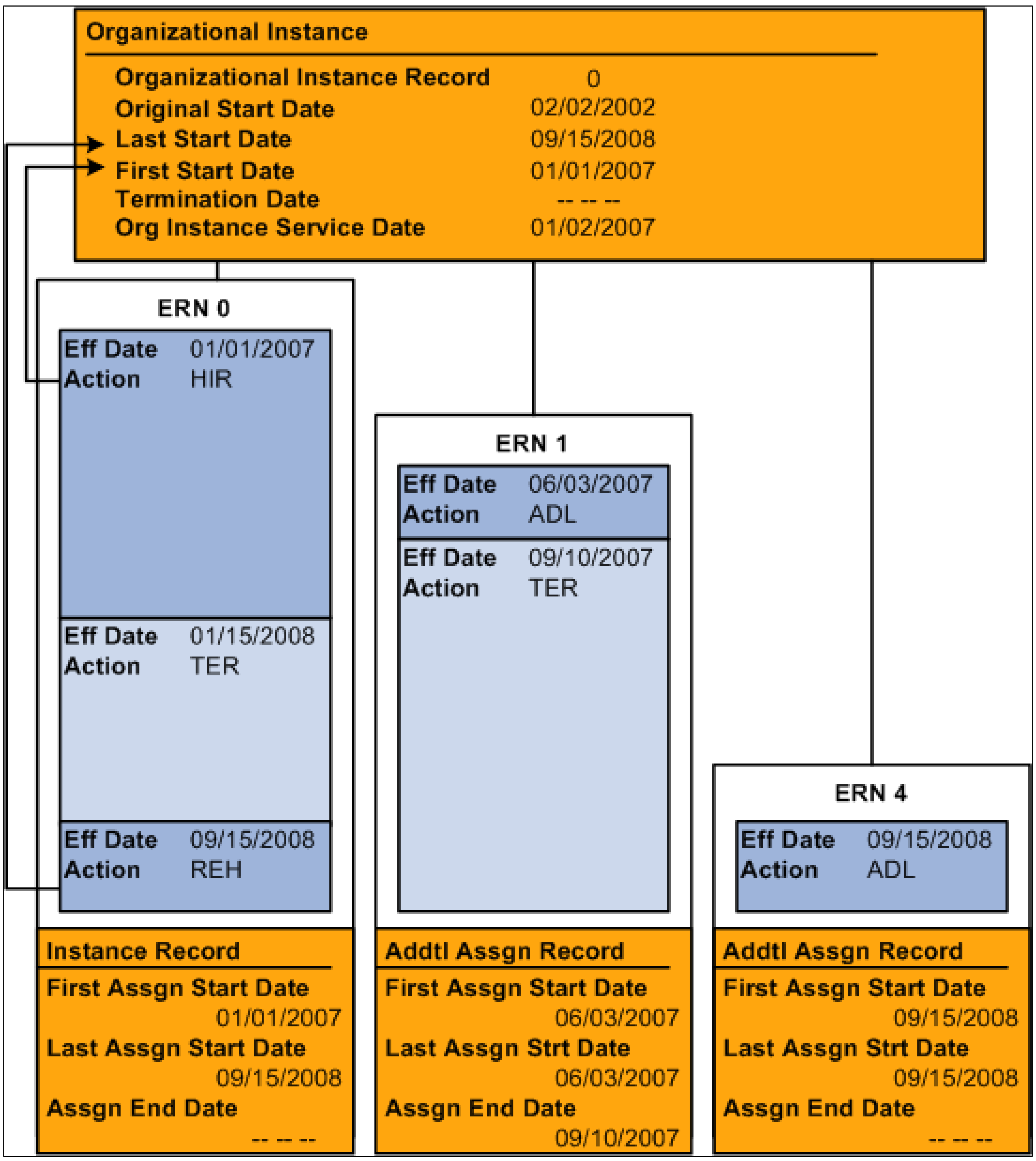
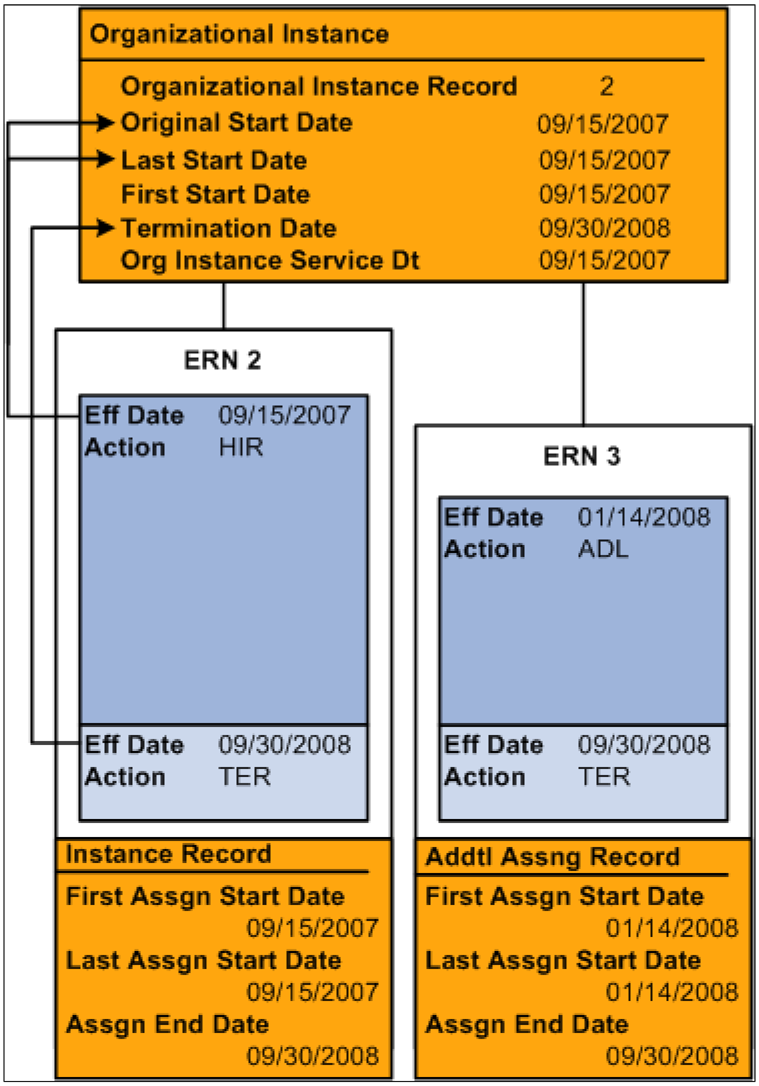


**Image: Bobby's organizational relationships and assignments for organizational record 2 (2 of 2)**

The following graphic illustrates Bobby's organizational instance record 1 and assignments:




Notice that all of the instance dates come from the controlling assignment and that the termination date is refreshed when Bobby is rehired.

## Differences Between the Add Employment Instance, Add Contingent Worker Instance, and Add POI Instance Components

The Add Contingent Worker Instance and Add POI Instance components are almost identical to the Add Employment Instance component with the following exceptions:

| ***Page*** | ***Add Employment Instance Fields*** | ***Add Contingent Worker Instance Fields*** | ***Add POI Instance Fields*** |
|---|---|---|---|
| Work Location | The default value for the Action field is *Hire* | The default value for the Action field is *Add Contingent Worker* | The default value for the Action field is *Add Person of Interest* |

| ***Page*** | ***Add Employment Instance Fields*** | ***Add Contingent Worker Instance Fields*** | ***Add POI Instance Fields*** |
|---|---|---|---|
| Work Location | Payroll Status | Job Status | Job Status |
| Payroll | Employee Type | Pay Type | Pay Type |
| Employment Information | | Provider ID | Provider ID |

## Security Considerations for Users Managing Employees and Contingent Workers

PeopleSoft Human Resources enables human resources administrators to create job records for people in departments that they can't access for updates. This enables them to transfer workers from one department to another.

If you want to prevent administrators from creating job records for people in departments to which they don't have access, the system contains an optional view (DEPT_TBL_ACCESS) that shows only the department IDs. The administrator can access the view based on user security. To use this view, update the JOB record in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_TBL_ACCESS.

## Managing Job Data When You Use the Manage Positions Business Process

If you drive part or all of PeopleSoft Human Resources by position, the process of adding a new job data record is somewhat different from the one that is described in these topics. You still enter some data on the pages that are described in these topics, but because you've already set up most job-related data on the Position Data component (POSITION_DATA), the system inserts default data automatically in many fields.

| ***Full Position Management*** | ***Partial Position Management*** |
|---|---|
| Position-related fields are unavailable for entry in several Administer Workforce pages. When you select a position number for the person in the Position Number field, the system updates the position-related fields with the values associated with the position in the Position Data component. | The position-related fields are available for entry until you enter a position number in the Position Number field and move out of the field. The system updates the position-related fields with the values associated with the position in the Position Data component and makes them unavailable for entry. |

## Adding Versus Updating Job Records

After you set up job records for a member of the workforce, you can enter more data, build a comprehensive history of the person's career with the organization, and support workforce-related planning and decision-making for all areas of the organization.

The pages that you use when you add an organizational instance are the same ones that you use later to update existing job data records but are contained on different components. Use the Job Data component to update job data information.

---

***Warning!*** PeopleSoft can't guarantee the results if you use the Add Employment Instance, Add Contingent Worker Instance, Add POI Instance, or Add Additional Assignment components to modify existing data. Use these components only when creating a new organizational instance.

---

See Understanding the Process of Updating Person and Job Information.

See Understanding the Administering PAR System.

## (JPN) Assigning Internal Identification Numbers

This feature enables you to assign to a person's job record identification numbers that have some meaning to the organization. For example, the third digit of an internal ID may indicate employment type; the fifth might indicate work location; and the sixth, job type. You can store a standard ID, which doesn't have meaning and is used for keying the database, and an alternative, meaningful ID that can be changed as the person's circumstances change.

The system assigns IDs to people as you add them to the system in the Personal Information component. The system uses this ID to identify the person in all job records. Enter a meaningful internal ID number for a person in the Internal EmplID field on the Work Location page to capture information about the person's job situation.

You can update the internal ID each time that you insert a new row into the Job Data component. You can see those changes at a glance on the employee's Job Summary page, and you can search employees by their internal IDs.

The following examples illustrate how a person's internal emplID changes as their relationship to the organization changes, while their standard ID remains constant.

Example 1

In the Internal EmplID column of the following table, the first two numbers indicate the year (2004) that the person is hired as a full-time employee and the 2 in 20091 indicates part-time employment:

| ***Effective Date*** | ***Action*** | ***Reason*** | ***ID*** | ***Internal EmplID*** | ***Notes*** |
|---|---|---|---|---|---|
| April 1, 2008 | Pay rate change | Merit | 45883 | 94010333 | |
| April 1, 2004 | Rehire | New position | 45883 | 94010333 | Rehired as full-time employee. |
| March 31, 2004 | Termination | | 45883 | 20091 | |
| April 1, 2000 | Hire | Temporary assignment | 45883 | 20091 | Hired as contingent worker. |

Example 2

In the Internal EmplID column of the following table, the first two numbers indicate the year (2000 and 2005) that the person is hired as an employee with the company and the next three numbers indicate the company (014 and 034) that the person is working for:

| ***Effective Date*** | ***Action*** | ***Reason*** | ***ID*** | ***Internal EmplID*** | ***Notes*** |
|---|---|---|---|---|---|
| May 31, 2006 | Transfer | Completion of intercompany transfer | 64096 | 90014278 | Transferred back to home company. |

| ***Effective Date*** | ***Action*** | ***Reason*** | ***ID*** | ***Internal EmplID*** | ***Notes*** |
|---|---|---|---|---|---|
| May 8, 2005 | Transfer | Intercompany transfer | 64096 | 95034278 | Transferred to host company. |
| April 1, 2000 | Hire | New graduates | 64096 | 90014278 | Hired as a full time employee. |

## Prerequisites

Before you add a new organizational instance:

- Set up the Administer Workforce control tables.

  See Defining Personnel Actions and Reasons.

- Set up the Administer Workforce country-specific control tables.

  See Understanding Country-Specific Table Setup.

- Create personal data records for employees, contingent workers, and POIs.

  See Adding a Person.

### Related Links

"Understanding Regulatory Regions *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Setting Up Implementation Defaults *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding Language Support in PeopleSoft *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Setting Up Person of Interest Types *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Defining Citizen Status Codes *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Defining Job Subfunction and Job Function Codes *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Setting Up Federal HCM Control Tables *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding Bank and Bank Branch Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding Local Country Functionality Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*"

# Adding Organizational Instances for Employees, Contingent Workers, and POIs

These topics list common elements and discuss how to:

- Enter employee job location and position information.
- Enter job information.
- Enter national labor agreement data.
- Enter payroll processing data.

- Enter salary plan information.
- Enter compensation information.
- Enter optional employment-related data.
- Distribute job earnings.
- Specify benefit program enrollment.
- Create a person checklist.
- Define applicant referral information.
- Create a person checklist.

See Adding Additional Assignments.

## Common Elements Used to Add Organizational Instances for Employees, Contingent Workers, and POIs

| | |
|---|---|
| **Go To Row** | Click icon to enter a date or row number in which you would like to view. |
| **Benefits Program Participation** | Click to Access the Benefit Program Participation page. |
| **Cross Border Worker** | Select if the person lives in one country and works in another. These people have special tax and social security needs. |
| **Employment Data** | Click to access the Employee Information page. |
| **Earnings Distribution** | Click to access the Job Earnings Distribution page. |
| **FA Holiday Type (festive advance holiday type)** | Select the festive advance holiday type. |
| **Festive Advance Eligible From** | Select the date on which the person becomes eligible for the selected festive advance pay program. |
| **Festive Advance Pay Program** | Select the festive advance pay program for the person. |
| **Job Data** | Click to access the Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Job Data - Compensation pages. |
| **Military Status** | Select the person's current military status. |
| **Owns 5% (Or More) of Company** | Select if the person owns five percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing – 401(k)/401(m) report (NDT004) in the Manage Base Benefits business process of PeopleSoft Human Resources. |
| **Regulatory Region** | Select the regulatory region. |
| **Religion** | Select the religion. You set up religion on the Religions page. |

**Note:** (AUS and NZL) Set this field to *Not Applicable.*

**Security Clearance**

If the person receives a security clearance, enter the level of clearance: *Classified, Secret,* or *Top Secret.*

### Related Links

Understanding U.S. Federal Hiring

Understanding Additional Worker Data

Understanding the Process of Updating Person and Job Information

## Pages Used to Add Organizational Instances for Employees, Contingent Workers, and POIs

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
| --- | --- | --- | --- |
| Work Location | JOB_DATA1 | • Workforce Administration, Job Information, Add Employment Instance, Work Location<br>• Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Work Location<br>• Workforce Administration, Job Information, Add Contingent Worker Instance, Work Location<br>• Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Work Location | Enter position and location information for a person's job, including the regulatory region, company, department, and location. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Job Information | JOB_DATA_JOBCODE | • Workforce Administration, Job Information, Add Employment Instance, Job Information<br>• Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Job Information<br>• Workforce Administration, Job Information, Add Contingent Worker Instance, Job Information<br>• Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Job Information | Enter information about a person's job, including status, employee class, shift, or standard hours. |
| Job Labor | JOB_LABOR | • Workforce Administration, Job Information, Add Employment Instance, Job Labor<br>• Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Job Labor<br>• Workforce Administration, Job Information, Add Contingent Worker Instance, Job Labor<br>• Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Job Labor | Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Payroll | JOB_DATA2 | • Workforce Administration, Job Information, Add Employment Instance, Payroll<br>• Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Payroll<br>• Workforce Administration, Job Information, Add Contingent Worker Instance, Payroll<br>• Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Payroll | Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Job Data - Compensation page. |
| Salary Plan | JOB_DATA_SALPLAN | • Workforce Administration, Job Information, Add Employment Instance, Salary Plan<br>• Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Salary Plan<br>• Workforce Administration, Job Information, Add Contingent Worker Instance, Salary Plan<br>• Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Salary Plan | Enter information about a person's salary plan. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Compensation | JOB_DATA3 | • Workforce Administration, Job Information, Add Employment Instance, Compensation<br>• Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Compensation<br>• Workforce Administration, Job Information, Add Contingent Worker Instance, Compensation<br>• Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Compensation | Enter compensation information. |
| Contract Change Prorate Options | JOB_CNT_CHG_SEC | Click the Contract Change Prorate Option link on the Compensation page. | Choose how to handle contract pay when there is a change to the contract amount. |
| Employment Information | EMPLOYMENT_DTA1 | • Click the Employment Data link at the bottom of the Add Employment Instance component.<br>• Click the Employment Data link at the bottom of the New Employment Instance component.<br>• Click the Employment Data link at the bottom of the Add Contingent Worker Instance component. | Enter optional data, such as a worker's business title. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Job Earnings Distribution | JOB_DATA_ERNDIST | • Click the Earnings Distribution link at the bottom of the Add Employment Instance component.<br>• Click the Earnings Distribution link at the bottom of the New Employment Instance component.<br>• Click the Earnings Distribution link at the bottom of the Add Contingent Worker Instance component.<br>• Click the Earnings Distribution link at the bottom of the New Contingent Worker Instance component. | Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center. |
| Benefit Program Participation | JOB_DATA_BENPRG | • Click the Benefits Program Participation link at the bottom of the Add Employment Instance component.<br>• Click the Benefits Program Participation link at the bottom of the New Employment Instance component.<br>• Click the Benefits Program Participation link at the bottom of the Add Contingent Worker Instance component.<br>• Click the Benefits Program Participation link at the bottom of the New Contingent Worker Instance component. | Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration. |
| Person Checklist | PERSON_CHECKLIST | Workforce Administration, Personal Information, Organizational Relationships, Person Checklist, Person Checklist | Ensure that the human resources administrators perform all the required administrative tasks for a person, create a checklist listing all the items that need to be completed and the person responsible for completing them. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Person Applicant Information | PERS_APPL_INFO | Workforce Administration, Personal Information, Organizational Relationships, Person Applicant Information, Person Applicant Information | Define applicant referral information. |
| Person Assignment Checklist | EMPLOYEE_CHECKLIST | Workforce Administration, Personal Information, Organizational Relationships, Person Assignment Checklist, Person Assignment Checklist | To ensure that the human resources administrators perform all the required administrative tasks for an employee, create a checklist listing all the items that need to be completed and the person responsible for completing them. |

## Work Location Page

Use the Work Location page (JOB_DATA1) to enter position and location information for a person's job, including the regulatory region, company, department, and location.

### Navigation

- Workforce Administration, Job Information, Add Employment Instance, Work Location
- Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Work Location
- Workforce Administration, Job Information, Add Contingent Worker Instance, Work Location
- Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Work Location

### Image: Work Location page (1 of 2)

This example illustrates the fields and controls on the Work Location page (1 of 2). You can find definitions for the fields and controls later on this page.

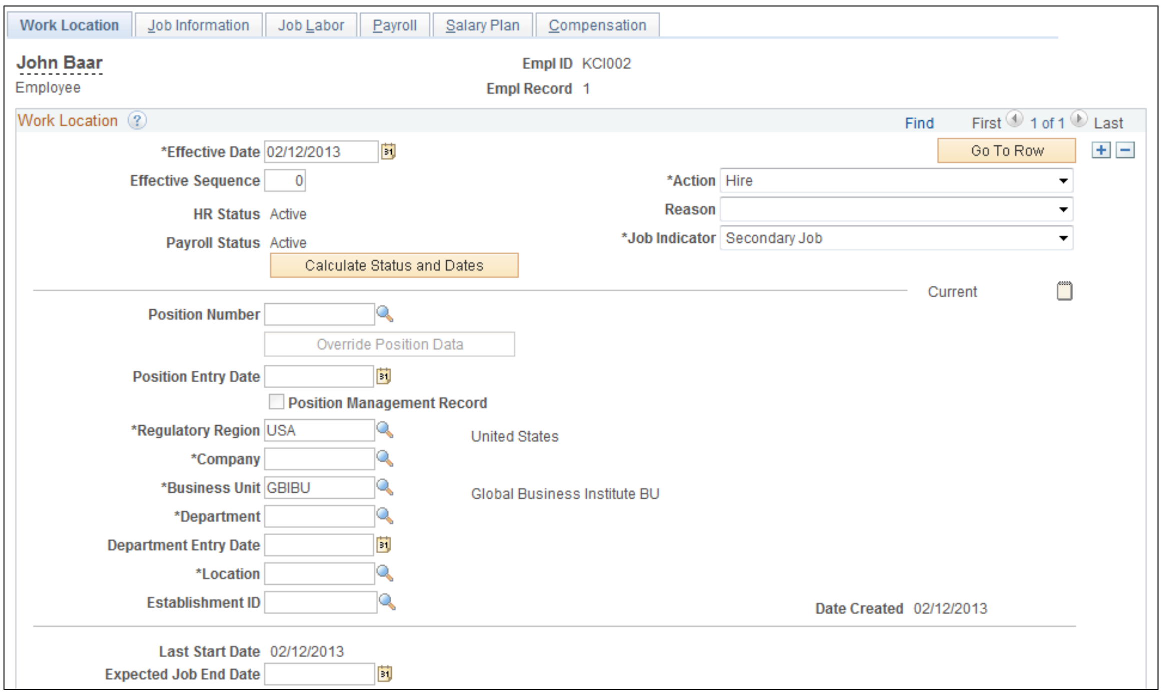
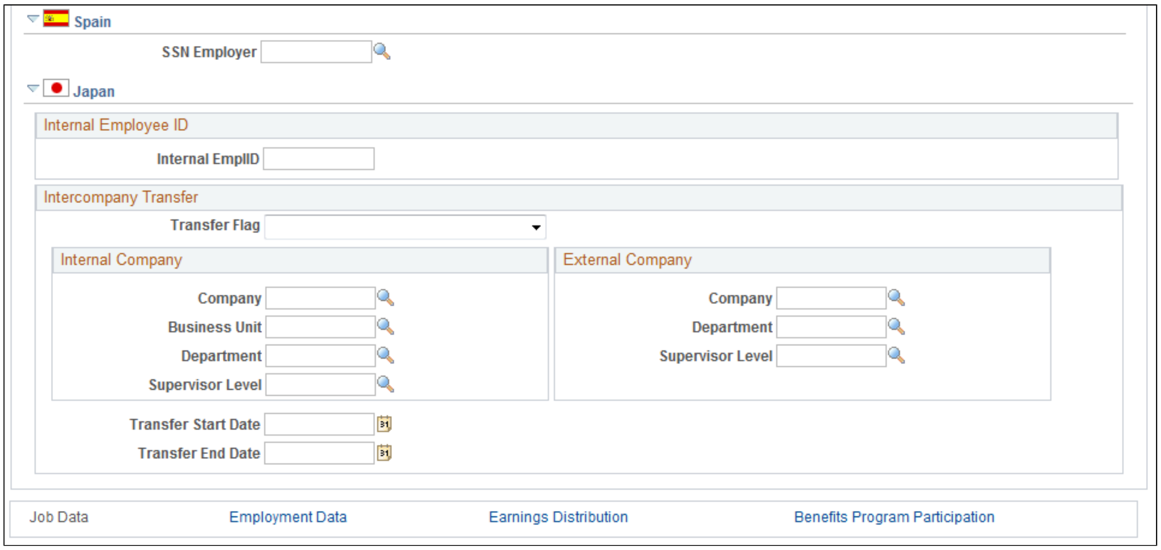


**Image: Work Location page (2 of 2)**

This example illustrates the fields and controls on the Work Location page (2 of 2). You can find definitions for the fields and controls later on this page.




**Military Service**

Select the military service in which the person is serving.

Displays when the Military check box is selected on the Installation Table. This field is available if you are adding a new Job Data record, when you are not adding a new Job Data record this field is display only.

**Effective Date**

Enter the effective date. When you add a new instance with the action of *Hire,* the effective date that you enter here becomes the hire and original hire date.

**Effective Sequence**

Enter a number to track multiple administrative actions that occur on the same day. The default value is *0,* the correct number for new instances.

**Action andReason**

Select the action requiring you to create or modify this record. The system displays a default value when you create a new employment, contingent worker, or POI instance. Reason codes are associated with the action you select.

---

**Note:** During data conversion into the PeopleSoft system for new customers, it may be appropriate to correct the default action value, such as *Hire,* to a value that reflects the person's current information, but changing the Action code for the first row of job data is not otherwise appropriate.

---

**HR Status**

Displays the status of the current job record. A person can have an active HR status but an inactive job or payroll status.

**Payroll Status or Job Status**

The page displays the Payroll Status text for employee employment instances.

Displays the payroll status of the current job record. Some changes that you make to this field trigger Retro Pay or Final Check processing.

A Retro Pay Request is triggered by any payroll status change with an effective date that's earlier than or equal to the latest pay end date of a check already paid to the employee.

A Final Check Request is triggered by any payroll status change that's based on one of the action or reason codes that are defined in the Final Check Action/Reason table.

The page displays the Job Status text for contingent worker or POI instances.

**Job Indicator**

Indicate whether this is the person's primary or secondary job for this organizational relationship. Select *Not Applicable* if those selections don't apply to this job. This field is used to process people with more than one organizational instance in a single organizational relationship.

**Calculate Status and Dates**

Click this button to calculate the person's HR, job, or payroll status and the employment dates so that you can review the changes before you save the component. The system displays this button when you make a change to the effective date or one of the status fields.

You do not need to click this button to refresh the status and date fields. The system will refresh these fields when you save the component.

**Maintain/View Notes**

Click this icon to access the Job Data Notepad page.

**Position Number**

If you drive part or all of the system by position, select a position number. Define positions in the Add/Update Position Info component. When you leave the Position Number field, the system completes position-related fields in the Job Data component with default data from the Add/Update Position Info component, including job code, department, location, supervisor level, reports to, and full- or part-time status. The corresponding fields become unavailable for entry.

PeopleSoft Human Resources issues a warning message if you assign a person to a position that is already filled and if the new appointment exceeds the maximum headcount for that position. The system calculates the headcount and displays the appropriate indicator in the Open/Filled field in the Add/Update Position Info component when you change assignments.

**Position Entry Date**

When you enter a position number for this person, the system populates this field with the effective date and this field becomes unavailable for entry. You can override the default by clicking the Override Position Data button.

**Override Position Data and Use Position Data**

Click Override Position Data to enter exceptions to the default position data for this person. This opens up the unavailable fields, including Job Code and Department, and you can override the entries that are in those fields. For example, the worker might have a higher salary grade than the standard grade that is associated with the position. When you click Override Position Data, the button becomes the Use Position Data button, and vice versa. This button is available only on new rows of data.

---

**Note:** If you override the defaults for position-related data, you must maintain the employee data manually; the system doesn't update the position data on the Job Data pages with data from the Add/Update Position Info component unless you click Use Position Data.

---

**Position Management Record**

The system selects this check box when you make changes to fields in the Add/Update Position Info component that initiate a system update of fields here. A selected check box indicates that the system inserts a data row on the Job Data pages.

**Regulatory Region**

If you have specified a regulatory region for the position you associated with this person, the system enters a default regulatory region and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, then the system populates the field by default with the regulatory region for the person, based on your user preferences entered in the Org Defaults by Permission Lst component. You can override the default.

**Company**

If you have specified a company for the position you associated with this person, the system enters a default company and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a company to a department in the Department table, a default company code appears, and this field becomes unavailable for entry. If you did not designate a company on the Department table, select a company here.

PeopleSoft Payroll for North America requires employees and supported types of persons of interest to be associated with companies that have the correct tax report type, as configured on the Company Table - Tax Details page:

- Employees must be associated with companies with tax report type W-2 or W-2PR (W-2 Puerto Rico).
- *Other Payee* and *Pension Payee* persons of interest must be associated with companies with tax report type 1099R.

- *Student Refund* persons of interest must be associated with companies with tax report type Non-Employees or None.

See "(USA) Tax Details Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

**Business Unit**

If you have specified a business unit for the position you associated with this person, the system enters a default business unit and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, then the system populates the field by default with the business unit for the person, based on your user preferences. You can override the default.

The business unit that you assign to the person on this page and the setID functionality in PeopleSoft Human Resources Management affect the way that default values work throughout the PeopleSoft Human Resources system. Your entry in this field controls the departments, locations, job codes, salary plans, and so on that you see on the remaining Job Data component pages.

**Department**

If you have specified a department for the position you associated with this person, the system enters a default department and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, select the department code for this person. When you leave the field, the system inserts a default supervisor or reports to ID on the Job Information page if you entered a default supervisor or reports to ID for this department in the Department table.

The system enters default values for the following fields on the Job Data - Payroll page: Employee Type and Pay Group (which you associate with a company in the Company table). Depending upon other data setup, the system might enter a default holiday schedule.

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

---

**Note:** Because this page can contain multiple data rows, the system doesn't always warn you that you must complete the Department field. However, if you change data in another field on the page, the system issues a warning and won't let you leave the field until you select a department code.

---

**Department Entry Date**

If you have specified a department for the position you associated with this person, the system enters a default department entry date and this field becomes unavailable for entry, unless you click the Override Position Data button.

When you leave the Department field, the system displays the date on which the person is first assigned to this department.

**Location**

If you have specified a location for the position you associated with this person, the system enters a default location and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a location to a department in the Department table, the system displays the department location, if the default location setID that you define in the Department table matches the control location setID that is defined for that business unit in the TableSet Control - Record Group table. You can change the location code.

If you did not designate a location on the Department table, select a location here.

**Note:** For workers paid through PeopleSoft Payroll for North America, the location that appears here does not determine the person's primary work state and location that appear on the paysheets. You specify that information by selecting a tax location code on the Job Data - Payroll page.

**Establishment ID**

Select the person's establishment.

Establishments are used for several countries for local regulatory reporting. These reports require that each person be assigned to a single establishment.

Establishments in regulatory regions other than USA have a one to one relationship with locations.

**Note:** (USA) In the USA regulatory region, there is a many to many relationship between locations and establishments. USA regulatory reports require that you associate an establishment ID with a person at the job level.

**Note:** (FRA) For payroll purposes, you must always assign persons to an establishment.
If a person is assigned to a position, the system enters the establishment ID that is associated with the position and makes the field unavailable. If you associate a non-French position with a French person, the field remains available for entry.

**Date Created**

Displays the date on which you enter this record.

**Last Start Date**

Enter the most recent start date for this organizational instance.

| | |
|---|---|
| **Expected Job End Date and Expected Return Date** | Enter the end date or return date for this job, if known. If you don't know the date initially, you can enter it later.<br><br>If this job is a temporary assignment and you do not enter a date in the Expected Job End Date field, you can run the Temporary Assignment w/out End Date report to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may be on hold.<br><br>The system displays the day before the termination effective date as the termination date. |
| **End Job Automatically** | Select to end the job on the specified date. This stops all related processing for payroll and benefits for this job. You must run the Reactivate/Termination Update process if the organization uses this feature. You can use this feature only if the Automatic Job Termination check box is selected on the Installation Table - Product Specific page. |
| **Termination Date, Last Date Worked, and Override Last Date Worked** | The system displays the day before the termination effective date as the termination date and the date last worked. These fields display when you have indicated an action that will inactivate or suspend a job. If you rehire the person, the system deselects these fields. When a person returns from leave, the system deselects only the Last Date Worked field. If the date is not accurate, select Override Last Date Worked to enter the date. |

## Military

The Military section is available when military is enabled on the Installation Table. Valid values for the service component and component category of the person depend upon the military service you enter at the top of the Work Location page.

| | |
|---|---|
| **Service Component** | Indicate the employee's service type for their military service, such as regular, activity reserve, and so forth. |
| **Component Category** | Enter a service component category to further define for the service component for this person. |

## (ESP) Spain

| | |
|---|---|
| **SSN Employer (social security number for employer)** | Enter the company SSN, as assigned by the Spanish government, that applies to this person. |

## (JPN) Japan

| | |
|---|---|
| **Internal EmplID (internal employee ID)** | Enter the person's internal ID.<br><br>You can store an internal emplID if the company uses meaningful employee IDs, and those IDs themselves need to change with certain employee data changes such as employment |

type changes. Internal EmplIDs also appear on the JPN Job Summary page, and you can search the system by internal EmplID.

See Understanding Identification Assignment.

## (JPN) Intercompany Transfer

This region enables you to specify intercompany transfer (shukkou) data for Japan. Enter information about the company and department that the person is transferring to or from in the appropriate group box, Internal Company or External Company. Values for the External Company group box are set up on the IC Trans External Company/Dept and IC Trans External Superv Lvl pages.

**Intercompany Transfer Flag**

Specify whether the data that you enter on the page is home or host company information. The system uses this value in conjunction with intercompany transfer-related action or action reason codes to check the validity of the entries. Values are:

- *Home Company Information:* Select if another company's worker joins the company in an intercompany transfer.
- *Host Company Information:* Select if one of the workers is on intercompany transfer to another company.

Select the blank value at the top of the list to remove all entries.

**Company**

Select the home or host company. The home or host company ID is a prompt value from the Company component (for internal company transfers) and the IC Trans External Company/Dept page (for external company transfers).

**Business Unit**

Select the home or host business unit for internal company transfers only. Your entry in this field controls the Department and Supervisor Level field values in the Internal Company group box due to setID functionality for business units.

**Department**

Select the home or host department. The home or host department ID is a prompt value from the Departments component (for internal company transfers) and the IC Trans External Company/Dept page (for external company transfers).

**Supervisor Level (external supervisor level)**

Select the home or host supervisor level. This value is a prompt value from the Supervisor Lvl Table component (for internal company transfers) and the IC Trans External Superv Lvl page ( for external company transfers).

**Transfer Start Date**

If you enter host data, enter the start date of this intercompany transfer.

Don't enter a date if the action is *RET* (retirement) and the reason is *PIT* (permanent intercompany transfer).

**Transfer End Date**

If you enter host data, enter the expected end date of this intercompany transfer.

Don't enter a date if the action is *RET* and the reason is *PIT.*

The end date must be equal to or later than the effective date of the worker's current job record.

### Related Links

"Defining the Final Check Process *(PeopleSoft HCM 9.2: Payroll for North America)*"

Understanding Additional Appointments

Understanding Intercompany Transfer Tracking

Running Job Data Reports

"Understanding PeopleSoft HCM System Data Regulation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Understanding Regulatory Regions *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Entering Company Information *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Understanding Retro Pay Processing *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Job Information Page

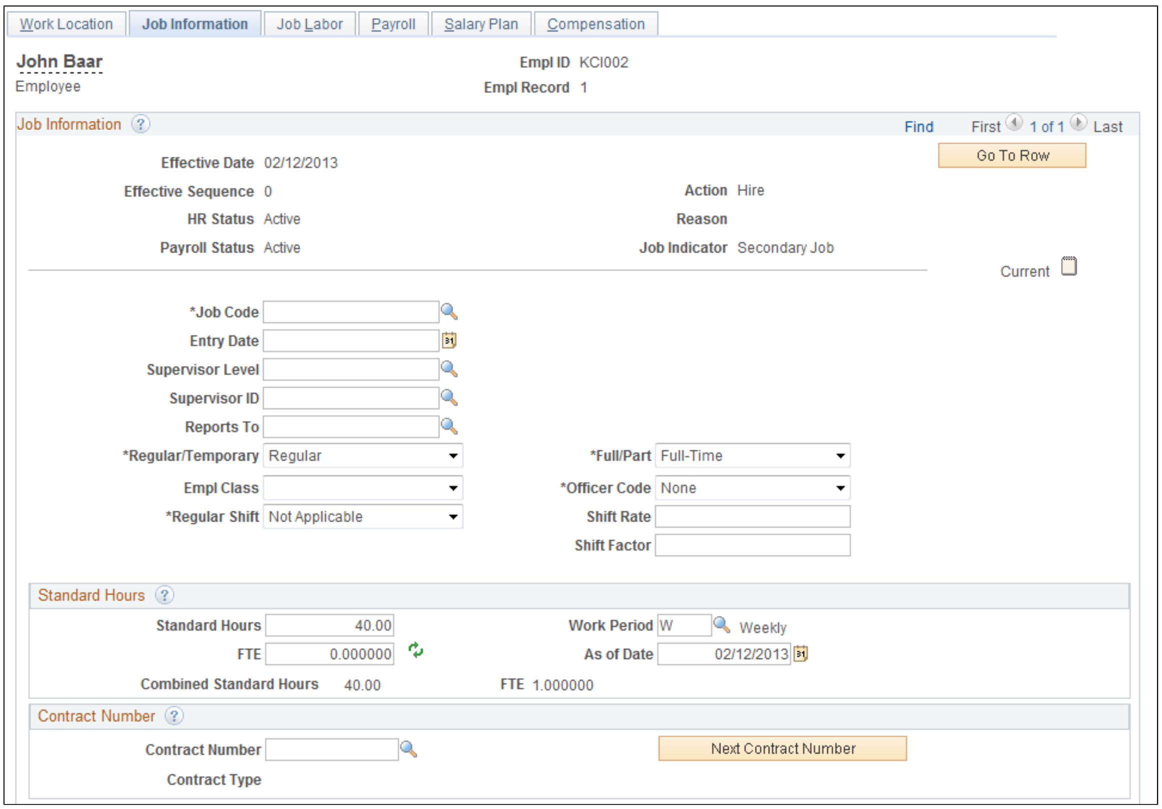
Use the Job Information page (JOB_DATA_JOBCODE) to enter information about a person's job, including status, employee class, shift, or standard hours.

## Navigation

- Workforce Administration, Job Information, Add Employment Instance, Job Information
- Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Job Information
- Workforce Administration, Job Information, Add Contingent Worker Instance, Job Information
- Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Job Information

## Image: Job Information page (1 of 4)

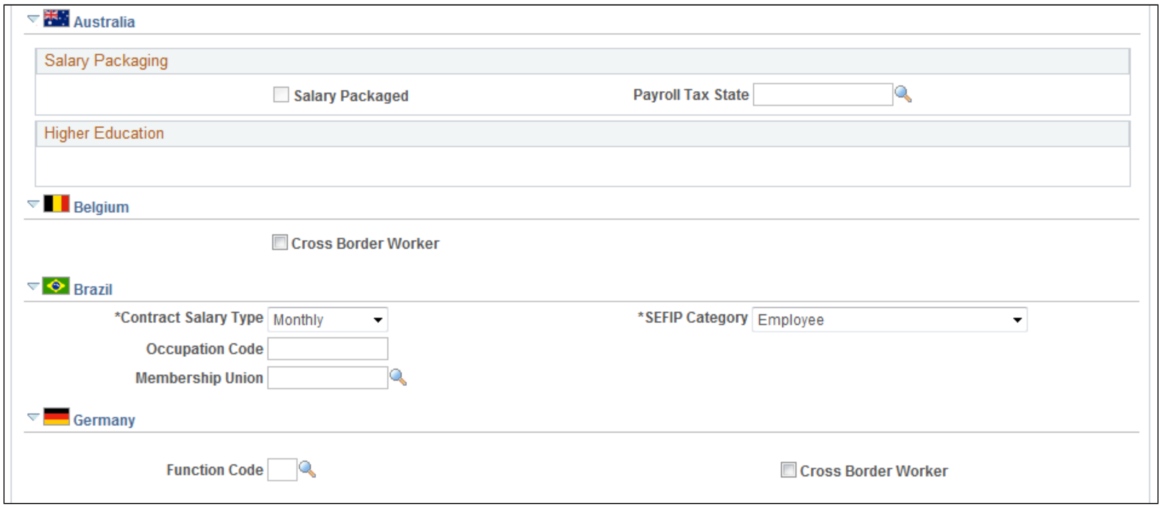
This example illustrates the fields and controls on the Job Information page (1 of 4). You can find definitions for the fields and controls later on this page.



### Image: Job Information page (2 of 4)

This example illustrates the fields and controls on the Job Information page (2 of 4). You can find definitions for the fields and controls later on this page.




### Image: Job Information page (3 of 4)

This example illustrates the fields and controls on the Job Information page (3 of 4). You can find definitions for the fields and controls later on this page.

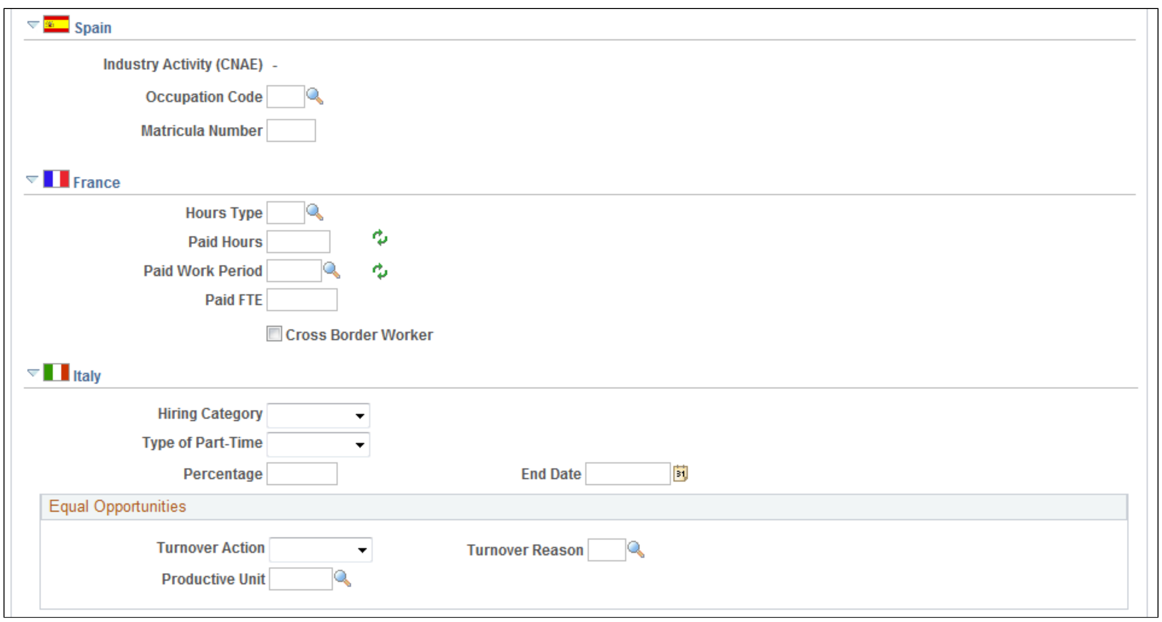
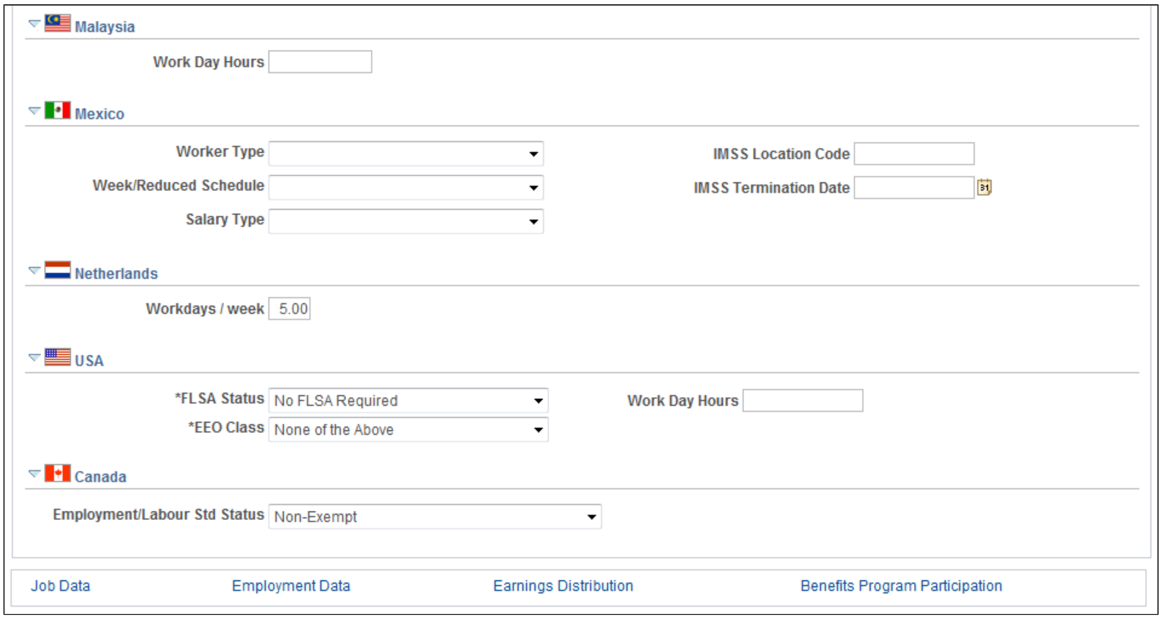


**Image: Job Information page (4 of 4)**

This example illustrates the fields and controls on the Job Information page (4 of 4). You can find definitions for the fields and controls later on this page.




---

**Note:** Many values on this page come from the value that you enter in the Department field on the Job Data - Work Location page. You can override most of these default values.

---

**Job Code**

If you have specified a job code for the position you associated with this person, the system enters a default job code and this field becomes unavailable for entry, unless you click the Override Position Data button on the Work Location page.

If you haven't assigned the person to a position, select the job code for this person.

---

**Note:** If you are attaching this person to a labor agreement on the Job Labor page and that labor agreement is associated with job codes, you must select a job code that is valid for the labor agreement.
PeopleSoft Payroll for North America uses this field to create a pay line on a person's paysheets. The system creates a pay earnings record for each active job code on the person's employment record.

---

See "Job Codes Page *(PeopleSoft HCM 9.2: Manage Labor Administration)*".

**Entry Date**

When you leave the Job Code field, the system displays the date on which the person is first assigned to this job code. If you are using position management, this field is unavailable for entry, unless you click the Override Position Data button on the Work Location page.

**Supervisor Level**

Supervisor levels are a class of position that represent levels of some managerial or supervisory significance and can be used as another type of employee identifier.

If you have specified a supervisor level for the position you associated with this person, the system enters a default supervisor level and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you did not assigned the person to a position, select the supervisor level code for this person, if applicable.

See Defining Additional Employment Setup Data.

**Supervisor ID**

If you use position management, don't use this field. Use the Reports To field to identify the position number to which this person reports. This field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a manager ID to a department in the Department table, a default supervisor ID appears.

If you did not designate a manager ID on the Department table, enter a supervisor ID here, if applicable.

---

**Note:** Specify the person's department code before you enter a new supervisor ID. If you enter a supervisor ID before you select a department code, the system overrides the ID each time that you enter or change the person's department.

---

**Reports To**

Displays the position number, title, and name of the manager associated with this position.

If you have specified a reports to number for the position you associated with this person, the system enters the default value and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a reports to ID to a department in the Department table, a default reports to ID appears.

If you did not designate a reports to ID on the Department table, enter a reports to ID here, if applicable.

**Regular/Temporary**

Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, the system displays the default value from the Job Code Table. You can override this value.

**Full/Part**

Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, indicate whether the worker is full-time or part-time.

---

**Note:** The Manage Base Benefits business process uses the values that you select in the Regular/Temporary and Full/Part fields to determine eligibility requirements.
PeopleSoft Payroll for North America uses the full-time or part-time information in conjunction with the holiday schedule. When a holiday falls within a pay period, Payroll for North America prorates the holiday hours for part-time workers. However, proration is based on the standard hours for the worker, not for the pay group.

---

**Empl Class (employee class)**

Select an employee class, which provides another method of grouping workers. Examples may include *Assignee, Expatriate,* or *Intern.* Employee classes are included in the Employee Class table. To override, access this page in correction mode.

The list of values depends on the regulatory region that is specified on the Work Location page and the setID values entered in the Employee Class component.

---

**Note:** (CHN) Select the Regular/Temporary field value first and then select the corresponding Empl Class value to enable the company to sort employees correctly. If you select the Regular/ Temporary value of *Regular,* then you should leave theEmpl Class field empty. Normal global payroll taxes will be calculated for the employee. (If you select *Regular* for Regular/Temporary and *Instructor* for Empl Class, you can still save the data, but the company will be unable to sort employees correctly or calculate the correct employee number.) If you select *Temporary* for the Regular/Temporary value, then you can select any of the Empl Class values *(Consultant, Contractor, Instructor, Intern,* or *Others).* Remuneration services tax will be calculated in this case.
(GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification of workers. If the organization submits this report, you must use the required employee classes for the report to work correctly.
(JPN) Select *Host ICT* (Hosting Intercompany Transfer) to flag those workers that are hired on an intercompany transfer basis when the company is the host company.

---

See "Understanding U.K. Regulatory Requirements *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*".

**Officer Code**

Identify highly compensated workers for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004). The default value is *None.*

**Regular Shift**

Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If the worker is working shifts, select the appropriate shift. If the worker doesn't work shifts, leave the Shift Rate and Factor fields blank. The default value is *N/A* (not applicable).

**Shift Rate andShift Factor**

If you selected the Specified at Employee level option on the Shift table, enter the shift differential for this worker and job.

Enter the shift differential as a rate (flat amount), a factor ( percentage), or both. Use the first field to enter a flat amount and the second field to enter a percentage.

---

**Note:** To apply the same shift differential to a group of workers who work the same shift, enter shift information in the Shift table in Payroll for North America. If you specify the differential on the Shift table, the system does not use shift rate information from Job data.

---

See "Understanding HCM Information Used in the Payroll Process *(PeopleSoft HCM 9.2: Payroll for North America)*" and "Understanding Tables That Support the Payroll Process *(PeopleSoft HCM 9.2: Payroll for North America)*".

**Classified Ind (classified indicator)**

Associate the position with an FTE Classification (full time equivalents classification) that you established on the Department Budget FTE page. This field is visible only for departments that have been set up to use commitment accounting. Departments are configured to use commitment accounting on the Comm. Acctg and EG page in the Department component.

**Duties Type**

For jobs where the action or reason is temporary assignment, select the type of duties for the temporary assignment from the Temporary Duties Type table. You can use this feature only if the Automatic Job Suspension check box is selected on the Installation Table - Product Specific page.

**Encumbrance Override**

Select to override encumbrance processing at the job level when you create a new organizational instance or add a concurrent job for a worker date if the department uses Commitment Accounting.

## Standard Hours

The standard hours fields defaults from the position number you associated with this person, and these fields are unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position or click the Override Position Data and change the job code, then the system populates the fields by default from the job code. You can override the defaults.

**Standard Hours**

Displays by default the standard hours for the worker. Change the default value, if required.

**Work Period**

Select a standard work period, the time period during which workers must complete the standard hours.

The system uses the annualization factor of the standard work period in combination with the standard hours to calculate full-time equivalency.

**FTE (full-time equivalency)**

Displays the percentage of full-time work that the worker should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter any value. The system issues a warning if you enter a value that is greater than 1.0.

**Combined Std Hours/FTE (combined standard hours/full-time equivalent)**

Displays the total standard hours that are assigned to the worker for all active jobs combined and the worker's total FTE status for all active jobs combined.

For example, if a worker holds two jobs, one as a professor with an FTE of .5 and one as a physician with an FTE of .35, the worker's combined FTE is .85 *(.5 + .35 ).* You can't change or delete this information.

---

**Note:** The combined FTE that appears here may be different from the total FTE that is calculated for benefits administration eligibility. Combined FTE on this page is the sum of a worker's individual FTEs from active jobs only.

---

## Contract Number

**Contract Number or Next Contract Number**

Select the worker's contract number or click the Next Contract Number to associate a contract with a person, if applicable.

---

**Note:** Existing contracts that have a value in the End Date field (the system displays this field on the prompt page) are not valid selections. The system populates the contract end date when the contract is terminated. If you know when the contract will end, enter the date in the Contract Expected End Date on the Contract Status/Content page.

---

---

**Note:** (ESP and FRA) This is a required field when the action is hire, rehire, or transfer for workers who belong to a Spanish or French regulatory region. View the prompt values in the Contract Number field to view all active contracts for that worker. If the worker has no active contracts in the system, click the Next Contract Number button; the system assigns a new contract number. When you save, the system warns you that you must update the contract information for the new contract number that is automatically created for this worker. Access the Contract Data component using the new contract number, and make the necessary updates.

---

**Contract Type** Displays the contract type that is associated with the contract number that you select.

See Tracking Workforce Contracts.

### Military

The Military check box must be selected on the Installation Table to view this section.

Information in this military section enables you to define an occupational group at the service member level to quickly identify which service members actually have specialty areas, such as a physician that is an orthopedic surgeon. Additionally, Australia Defense also uses job families, functions and subfunctions to derive pay for the service member. In Canada, a member with a particular specialty, for example, a light-wing pilot, may be paid an additional allowance. These values do not come from the job code.

**Job Family** Select a job family to categorize the job for this service member.

**Function** Select the code that best categorizes the job for this person by function, such as administrative, legal, or management. If you change the job family after entering the function, this field will be deselected.

**Subfunction** Enter a subfunction to further categorize the job function. If you change the job family for function after entering the subfunction, this field will be deselected.

### (AUS) Australia - Salary Packaging

**Salary Packaged** Select to transfer the worker's salary packaging information into the job data component.

**Payroll Tax State** Enter the code for the state in which the worker is paid and for which the organization pays the payroll tax.

### (AUS) Australia - Higher Education

These fields are required for DETYA reporting and appear only if the Australian Education & Government check box is selected on the Installation Table - Country Specific page.

**Annual Contact Hours** Enter the calculated annual contact hours for this worker.

| | |
|---|---|
| **Type of Appointment and Appointment Duration** | Select the type of appointment. If you select *Limited,* enter an appointment duration. |
| **Teaching Weeks** | Enter the number of teaching weeks for this worker. |
| **Job Classification** | Select the DETYA job classification. |

## (BEL) Belgium

| | |
|---|---|
| **Cross Border Worker** | Select if the person lives in one country and works in another. These people have special tax and social security needs. |

## (BRA) Brazil

| | |
|---|---|
| **Contract Salary Type** | Enter the contractual salary code for RAIS. |
| **SEFIP Category** | Select the worker category for SEFIP. |
| **Occupation Code** | Enter an occupation code based on the Brazilian Code of Occupation (CBO). Leave this field blank if the CBO that is associated with the position code is valid.<br><br>**Note:** Go to www.mte.gov.br to view a list of CBOs. |
| **Membership Union** | Enter the union code that details how to calculate and pay the worker's monthly union dues. |

## (DEU) Germany

| | |
|---|---|
| **Function Code** | Select the appropriate code for the worker. |
| **Cross Border Worker** | Select if the person lives in one country and works in another. These people have special tax and social security needs. |

## (ESP) Spain

| | |
|---|---|
| **Industrial Activity** | Displays the social security number (SSN) employer assigned to the employee. This industrial activity code defines the percent to calculate contributions for work-related accidents and occupational disease |
| **Occupation Code** | Assign a specific occupational code from the list provided by Social Security if the industry activity done by the employee doesn't match the general activity defined for the social security number he is assigned to. This occupational code determines the percent to calculate contributions for work-related accidents and occupational disease.<br><br>**Note:** This information replaces the social security risk code. |

**Matricula Number and Next Matricula Number**

Enter or click the button to enter a *matricula* number. The Spanish government requires every worker to have a *matricula* number. Employers use this number to compile a *matricula* book that reports workplace statistics to the government. You maintain *matricula* numbers in the Location table.

## (FRA) France

**Hours Type**

Select the appropriate hours type from the list. Different hours type options affect a worker's compensation and standard hours.

This field is for information only. No payroll calculation is based on information in this field.

| ***Hours Type*** | ***Description*** |
|---|---|
| 3 × 8 | Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can continue around the clock. The production workers are split into three groups with each group working one after the other, eight hours a day. Periodically the workers shift to another group. Shift workers who are working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints to a worker's personal life, these workers are often paid a shift bonus. |
| 2 × 8 | A shift work pattern that is similar to the 3 × 8 option, except that there are two work shifts instead of three. |
| STA | Work hours follow a regular pattern using the job's standard hours as indicated on the Job Date - Job Information page. |
| IND | Work hours follow a regular pattern that is different from the company's default standard hours. Indicate the number of hours in the Standard Hours field on the Job Date - Job Information page. |

**Paid Hours**

Displays the number of hours for which the worker is paid. The system enters the value that is defined for standard hours (defined for the job code for this worker) as the default in this field only for workers who are part of a French regulatory region.

**Paid Work Period**

Select the period in which the worker should work. If the regulatory region to which the worker is assigned is French, the system inserts the work period that is defined on the Job Code Table - Job Code Profile page as the default value. Values are:

*A:* Annual

*B:* Biweekly

*C:* Contract

*D:* Daily

*F:* Every four weeks

*M:* Monthly

*Q:* Quarterly

*S:* Semimonthly

*W:* Weekly

**Paid FTE** Displays the ratio of the paid hours to the standard hours reference for workers whose regulatory region is French. The system calculates and inserts a value for this field.

## (ITA) Italy

**Hiring Category** If the worker is hired from a special hiring category, indicate the category here. Values are: *CIG, Mobility, Protected, Unemployed,* and *Weak Wrap.*

**Type of Part-Time** If the worker is part-time, indicate the type. Values are: *Cyclic* (employed only for a certain period of the year, either full or reduced hours), *Horizontal* (employed five days per week with fewer than full-time hours), and *Vertical* (employed full-time on certain days but fewer than 40 hours per week).

**Percentage** Define the percentage of part-time.

**Turnover Action** Select the turnover action (for example, *Layoff* or *Termination)* causing the change in the worker's job. The value that you enter appears in the Equal Opportunities reports.

**Turnover Reason** Select the reason for the turnover action. The value that you enter appears in the Equal Opportunities reports.

**Productive Unit** Select the worker's productive unit. You use productive units to group workers based on agreements between unions and employers.

## (MYS) Malaysia

**Work Day Hours** Enter the standard workday hours that are used for payroll and leave calculations.

## (MEX) Mexico

It is common in Mexico to have two termination dates: the original termination date and the IMSS termination date.

The company must notify IMSS of a worker's termination date five days after the worker leaves. However, there are some exceptions to this rule, such as when a worker is on disability and does not return to the company.

| | |
|---|---|
| **Worker Type** | Define the person's worker type. Values are: *Construction Eventual, Eventual Worker,* and *Permanent Worker.* This field is used for reporting the type of worker to the SUA. |
| **IMSS Location Code** | Specify the location code. This field is used to indicate the location of the worker to the SUA. |
| **Week/Reduction Schedule (reduced weekly schedule)** | Specify the reduced work schedule for the worker. Values are: *1 Day per Week, 2 Days per Week, 3 Days per Week, 4 Days per Week, 5 Days per Week, Complete Week,* and *Workday Less than 8 Hours.* |
| **IMSS Termination Date** | Enter the IMSS termination date. |
| **Salary Type** | Select the salary type that the worker receives. Values are: *All Salaries, Fixed Salary, Mixed Salary,* and *Variable Salary.* This field is used for reporting to the IMSS. |

### (NLD) Netherlands

**Workdays / week**

Enter the average number of working days per week. The default value is *5,* reflecting a full-time job. Enter *0* for standby workers who are only working on demand.

You receive a warning if the number of working days is inconsistent with the full- or part-time parameter.

**Note:** From January 1, 2006, PeopleSoft Global Payroll for the Netherlands no longer uses this field to calculate social security premiums for part-time workers. For further information refer to the *PeopleSoft Global Payroll for the Netherlands* documentation.

See "Understanding Social Security Contributions *(PeopleSoft HCM 9.2: Global Payroll for the Netherlands)*".

### (GBR) UK

The following fields appear only if PeopleSoft Global Payroll for the U.K. is not installed.

| | |
|---|---|
| **Tax Code** | Enter the worker's tax code for the current tax year. |
| **Tax Basis** | Select the basis that is used to calculate the worker's tax. |

### (USA) United States of America

| | |
|---|---|
| **FLSA Status (Fair Labor Standards Act status)** | FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also |

| | |
|---|---|
| | helps determine benefits eligibility in PeopleSoft Benefits Administration.<br>The FLSA status defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.<br>If you have not assigned the person to a position or you click the Override Position Data button and change the job code, then the system populates the fields by default from the job code. You can override the defaults |
| **Work Day Hours** | Enter the workday hours. The workday hours information is used in the FLSA calculation for the basic rate formula. |
| **EEO Class (Equal Employment Opportunity class)** | Displays a regulatory status for this job based on the job code that you assign the worker. |

### Related Links

*PeopleSoft HCM 9.2: Global Payroll*

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

"Defining Job Subfunction and Job Function Codes *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Understanding the Core Tables for PeopleSoft Manage Base Benefits *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

## Job Labor Page

Use the Job Labor page (JOB_LABOR) to enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.

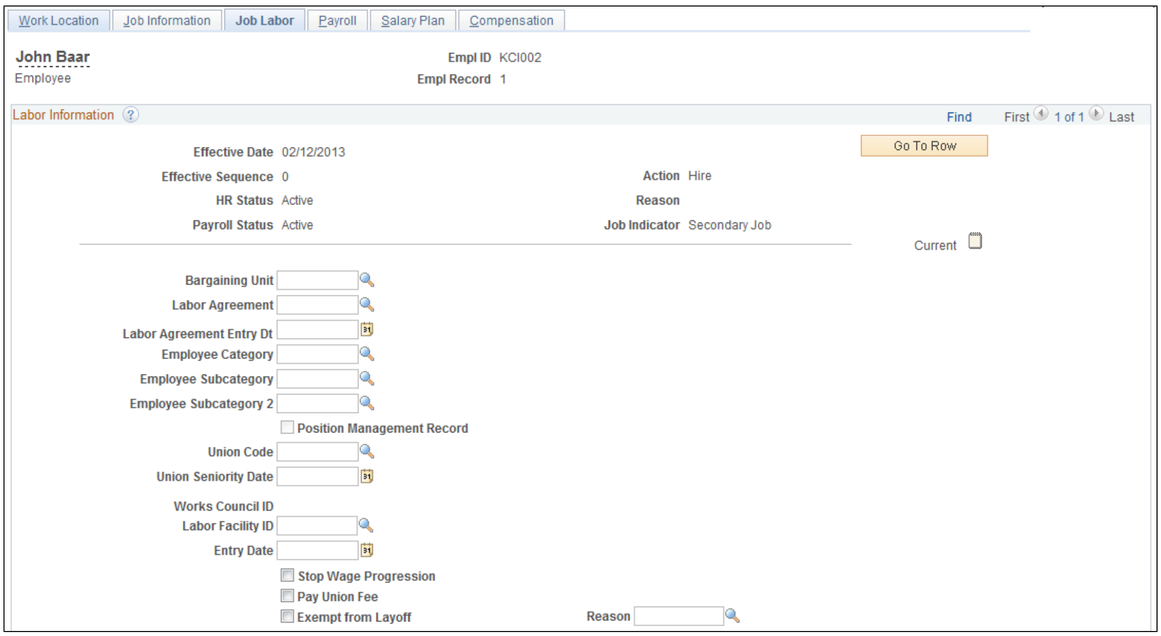
 

### Navigation

- Workforce Administration, Job Information, Add Employment Instance, Job Labor
- Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Job Labor
- Workforce Administration, Job Information, Add Contingent Worker Instance, Job Labor
- Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Job Labor

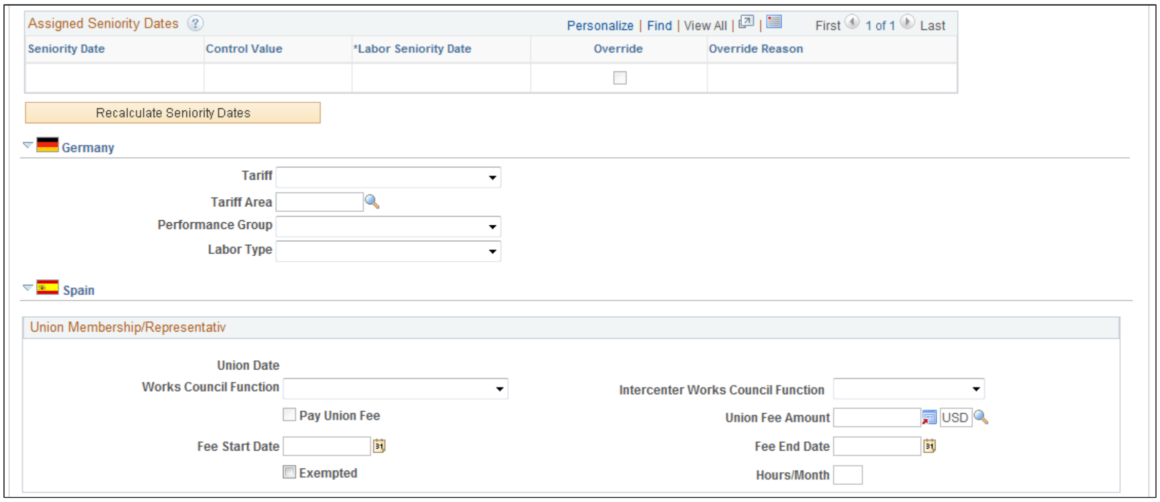
### Image: Job Labor page (1 of 3)

This example illustrates the fields and controls on the Job Labor page (1 of 3). You can find definitions for the fields and controls later on this page.



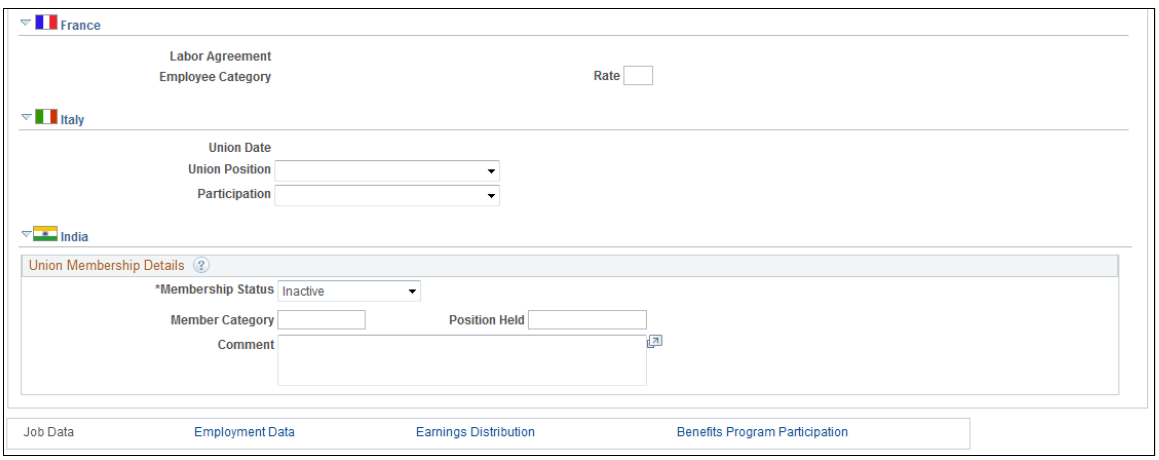
### Image: Job Labor page (2 of 3)

This example illustrates the fields and controls on the Job Labor page (2 of 3). You can find definitions for the fields and controls later on this page.




### Image: Job Labor page (3 of 3)

This example illustrates the fields and controls on the Job Labor page (3 of 3). You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Bargaining Unit** | Select a code representing the bargaining unit to which the employee belongs. |
| **Labor Agreement** | Specify which labor agreement applies to this worker. |
| **Labor Agreement Entry Dt (labor agreement entry date)** | If this worker is part of a national labor agreement, enter the date on which the worker enters the category or subcategory. Also, use this date to track the worker's seniority within the category. |
| **Employee Category** | Specify the worker category to which the worker belongs under the labor agreement. |
| **Employee Subcategory** | Select the subcategory that applies to the worker. If the employee category that you select for this person contains subcategories, this field appears. |

| | |
|---|---|
| | **Note:** (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page. |
| **Employee Subcategory 2** | Select the secondary subcategory that applies to this worker. If the subcategory that you select for this person contains secondary subcategories, this field appears.<br><br>**Note:** (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page. |
| **Position Management Record** | The system selects this check box whenever the system inserts this data by updating the incumbent to reflect user-made changes to the Position Management component. |
| **Union Code** | This field defaults from the position number you associated with a person, and is unavailable for entry, unless you click the Override Position Data button.<br><br>If the worker belongs to a union, enter the code. |
| **Union Seniority Date** | Enter the date on which the worker enters the union. |
| **Works Council ID** | Select the ID of the Works Council representing this employee. |
| **Labor Facility ID** | Select the facility this worker belongs to. |
| **Entry Date** | Enter the date the worker began in the labor facility. |
| **Stop Wage Progression** | If the selected job code is associated with a wage progression salary plan, select to stop wage progression for this worker. The system will not accumulate hours towards a wage progression step for this worker. To resume wage progression, insert a new Job Data row and deselect this check box. |
| **Pay Union Fee** | Select if a union fee should be paid. The organization can define whether the worker or the employer should pay the fee. This field doesn't affect system processing. |
| **Exempt From Layoff and Reason** | Select if the worker is exempt from layoff and select a reason for the layoff exemption. |

See *PeopleSoft HCM 9.2: Manage Labor Administration*.

## Assigned Seniority Dates

This grid lists the seniority dates associated with the selected labor agreement.

If the seniority date is set up to default from an existing value, the system will populate them. If the dates are set up to allow overrides, select the Override check box and enter the appropriate date.

If the seniority date is set up for manual entry, enter the appropriate date.

Click the Recalculate Seniority Dates button to recalculate seniority dates as needed.

See "Defining Seniority Dates *(PeopleSoft HCM 9.2: Manage Labor Administration)*".

## (DEU) Germany

Describing a German worker's labor category and role in a company is the third step in the German Works Council business process. Before you complete these fields, you must enter codes and values into the setup tables and create an association between the works council decision groups and the personnel action.

| | |
|---|---|
| **Tariff** | Displays the tariff, which is a labor contract between the union and the employers' association. The default comes from the worker's location listed in the Location table. You can override this default. |
| **Tariff Area** | Displays the tariff area, which is usually associated with geographical regions in Germany. The tariff area comes from the worker's location that is listed in the Location table. You can override this default. |
| **Performance Group** | Select a performance group, such as blue collar or white collar. |
| **Labor Type** | Specify if a worker is management or nonmanagement. Depending on where this worker belongs, different sets of human resources laws and rules apply. One rule concerns which internal labor committee monitors personnel actions. |
| **Spokesmen Committee ID** | If you identify a worker as management in the Labor Type field, then the Spokesmen Committee is responsible for the worker, and this field appears. The Spokesmen Committee ID for this worker comes from the worker's location in the Location table. |

## (ESP) Spain

| | |
|---|---|
| **Union Date** | Enter the date on which the worker joins the union. |
| **Works Council Function** | If the worker is a member of the works council for the organization, select which role. Values are: *Member, President,* and *Secretary.* |
| **Intercenter Works Council Function** | Select the role that the worker has in the union group *(comite intercentros).* Values are: *Member 1, Member 2,* and *Member 3.* |
| **Pay Union Fee andUnion Fee Amount** | Select if the worker pays a fee to the union and enter the amount of the fee. |
| **Fee Start Date and Fee End Date (fee end date)** | Enter the first and last dates on which the union fee should be paid. |
| **Exempted** | Select if this worker is exempt from a certain amount of work duty to handle works council duties. |

**Hours/Month** Enter the number of hours each month that the worker is exempted from regular work to handle works council business.

### (FRA) France

**Rate** Enter the minimum salary calculation rate for this category. The rate is a three-digit number that is used in certain collective agreements to calculate the minimum salary for the subcategories, as defined on the Labor Agreement Categories page for the category. A subcategory can be associated with several possible rates, but only one rate is associated with the worker.

### (ITA) Italy

Use this region to enter the union membership details of workers who belong to a union.

**Union Date** Enter the date on which the worker joins the union.

**Union Position** Select the position that the worker holds in the union, if applicable.

**Participation** Indicate the worker's level of participation in the union.

### (IND) India

**Membership Status** Select whether the worker's union membership status is active or inactive.

**Member Category** Enter the member category. For example, *Staff, Officer,* or *Workman Category.*

**Position Held** Enter the position that the worker holds. Some of the members of the union may hold office in the union as president, vice president, treasurer, or secretary; you enter this information here.

### (CAN and USA) Reviewing Union Membership in Canada and the U.S.

If you're managing a workforce in Canada or the U.S., you might want to review information about each union organization that the workers belong to and see a list of workers who are members. Use the Union Membership report (PER009) for this purpose. That report displays the worker ID, name, date hired, seniority date, department, location, job title, and shift.

### Related Links

"Understanding Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*"

## Job Data - Payroll Page

Use the Payroll page (JOB_DATA2) to enter payroll processing data.

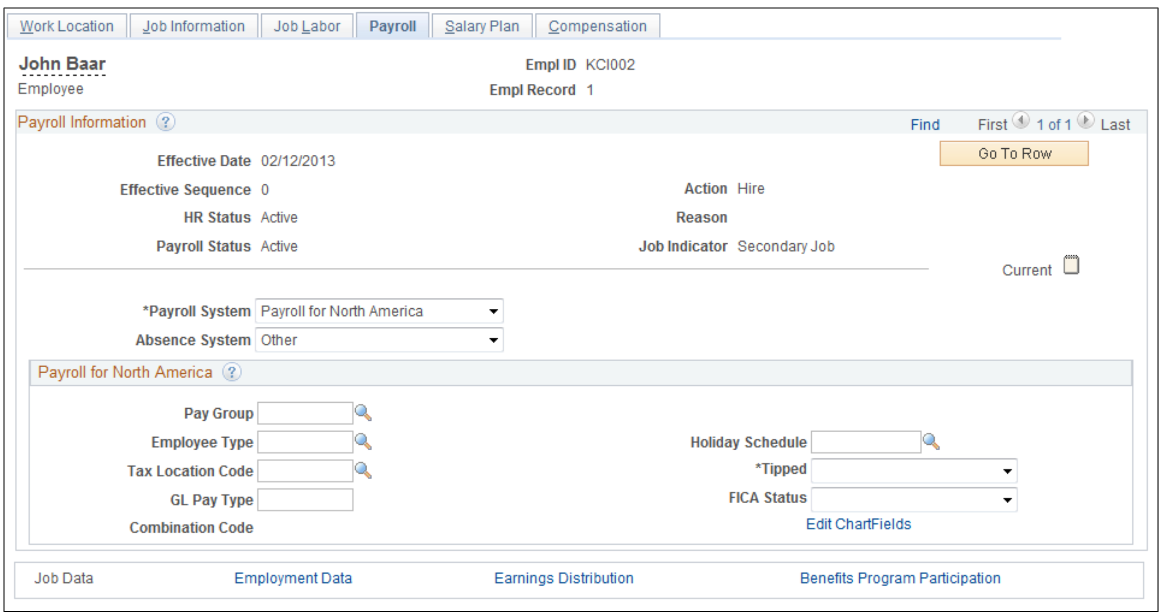
The payroll system and pay group information that you enter here affects component compensation processing on the Job Data - Compensation page.

**Navigation**

- Workforce Administration, Job Information, Add Employment Instance, Payroll
- Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Payroll
- Workforce Administration, Job Information, Add Contingent Worker Instance, Payroll
- Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Payroll

**Image: Payroll page**

This example illustrates the fields and controls on the Payroll page. You can find definitions for the fields and controls later on this page.




**Payroll System**

Select the payroll system that is used to process this person's paycheck. The Payroll System field is available for entry only if the Action that was entered on the Work Location page is *Change of Pay System* or a hire-related action such as *Hire, Rehire,* or *Additional Job.*

---

**Note:** PeopleSoft Payroll for North America does not process payroll for contingent workers. Customers using the E&G contract pay functionality need to add contract workers using the Add Employment Instance component or the Organizational Relationships page.

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**Absence System**

Select the absence system that is used to process this person's absences.

 

## Payroll for North America

If you use PeopleSoft Payroll for North America or PeopleSoft Payroll Interface to process this person's paycheck, complete these fields:

**Pay Group**

Select a pay group. Available values are the valid pay groups for the country selected on the Company table (not the regulatory region selected in the worker's job data).

**Employee Type**

Displays the employee type; the value depends on the pay group. The system completes the field with the default value from the Pay Group table. If an employee type doesn't exist for this pay group, establish one in the Pay Group table.

**Holiday Schedule**

If you defined a default holiday schedule for the employee's location, the system displays it here. If you left the holiday schedule blank on the Location Profile page and entered a default on the Pay Group table, the system displays it here.

**Tax Location Code**

Select a tax location code. Available values are the valid tax locations for the country selected on the Company table (not the regulatory region selected in the worker's job data).

***Warning!*** Do not change a person's tax location code more than once for the same effective date (using effective sequence). The system creates tax records according to the first tax location change only. Tax records for the second tax location change on the same date are not created; instead, the system issues an error message.

**Tipped**

Indicate whether this worker receives tips. This field is available only if you define tips processing in the Company table. Values are:

*Directly:* Select for workers who normally receive tips directly from customers (for example, food servers).

*Indirectly:* Select for workers who do not normally receive tips directly from customers, but who might receive tips occasionally (for example, cooks and kitchen helpers).

*Not Tipped:* Select for workers who are not tipped.

**GL Pay Type (general ledger pay type)**

Organizations can use this field for customized general ledger interfaces. Payroll for North America does not use this field.

**FICA Status**

Indicate whether the person status is *exempt, subject,* or *Medicare only.*

**Combination Code**

(Optional) Select the appropriate labor distribution to which to post the hours and earnings for this person. Enter the general ledger combination code in the employee's job data only on an exception basis. If you do not want the employee's earnings charged to the default combination code that is mapped to the earnings code and department, you can enter a different combination code here. For example, you might want to temporarily charge the employee's earnings to a different department. Use Correct History mode to enter or remove the temporary combination code.

**Combination Code**

Displays the combination code that defines a combination of ChartFields.

**Edit ChartFields**

Click this link to access the ChartField Details page for selecting ChartField values.

## Global Payroll

If you use PeopleSoft Global Payroll to process this person's paycheck, complete these fields:

**Pay Group**

Select a pay group.

The payroll system that you select on the Installation Table - Products page determines what value appears here. If *Global Payroll* is selected, the Global Payroll pay groups appear.

**Note:** The Global Payroll Pay Group field is different from the Payroll for North America Pay Group field. Pay group is very important in Global Payroll. Selecting *Global Payroll* as your payroll system on the Installation Table - Products page and selecting a pay group is what helps select a payee into the payroll process.

**Use Pay Group Eligibility, Use Pay Group Rate Type, and Use Pay Group As Of Date**

When you select a pay group, these check boxes are automatically selected.

Leave the check boxes selected to use the default values from the pay group definition. Deselect the check boxes to override the default values.

**Note:** PeopleSoft Global Payroll stores the values at the Job level *only* if you override them here. If you add a new effective-dated row to the job record or change the pay group assignment, the system reverts to the pay group defaults.

**Holiday Schedule**

Enter a holiday schedule. If you leave this field blank, Global Payroll processing uses the holiday schedule assigned to the payee's pay group, but does not enter that holiday schedule here.

**Eligibility Group**

This field is blank if the Use Pay Group Eligibility check box is selected. If you want to override the pay group default, deselect the check box and select an eligibility group which specifies earnings, deduction, and absence elements that a payee might be eligible to receive.

**Exchange Rate Type**

This field is blank if the Use Pay Group Rate Type check box is selected. If you want to override the pay group default, deselect the check box and select the currency exchange rate type to use when performing currency conversions for the payee.

**Use Rate As Of**

This field is blank if the Pay Group As Of Date check box is selected. If you want to override the pay group default, deselect the check box and select the pay calendar date to use when retrieving the effective-dated exchange rate information during currency conversions. The Use Rate As Of field works with the Exchange Rate Type field to determine which effective date is retrieved to get the appropriate exchange rate for the calendar period being processed. Exchange rate effective dates include: *Period Begin Date, Period End Date,* and *Payment Date.*

## (AUS) Australia

**Balance Group Nbr (balance group number)**

Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

## (HKG) Hong Kong

**Balance Group Nbr (balance group number)**

Enter a balance group number. When workers are terminated and subsequently rehired in the same or similar position in the same tax year (using the Job Data component in Workforce Administration), there is a legislative reporting requirement in Hong Kong to keep the periods of employment and earnings balances separately. PeopleSoft Global Payroll uses the balance group number to ensure that the relevant periods of employment and balances of a worker in a tax year are stored separately in terms of payroll data. This enables a worker to have multiple tax balances if the worker is terminated and rehired in the same financial year.

When a worker is rehired in the same tax year, the balance amount is stored in the system variable CM VR BAL GRP ID, which is attached to each year-to-date (YTD) accumulator.

Every time you run the payroll process, the balance that is stored in the system variable CM VR BAL GRP ID is retrieved by the accumulator to resolve the earnings that are generated for each new position.

Balance group numbers are used to maintain earnings balances and are used as User Key 2 for all Hong Kong YTD accumulators.

### (NZL) New Zealand

**Balance Group Nbr (balance group number)**

Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

### (SGP) Singapore

**Balance Group Nbr (balance group number)**

Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

---

**Note:** Before entering information for U.S. foreign nationals, use the Substantial Presence Test. Select Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA, Employee Presence Test USA.

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### Related Links

(USA) Determining U.S. Residency Status for Foreign Nationals

"Administer Compensation Overview *(PeopleSoft HCM 9.2: Human Resources Administer Compensation)*"

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

*PeopleSoft HCM 9.2: Payroll for North America*

## Job Data - Salary Plan Page

Use the Salary Plan page (JOB_DATA_SALPLAN) to enter information about a person's salary plan.

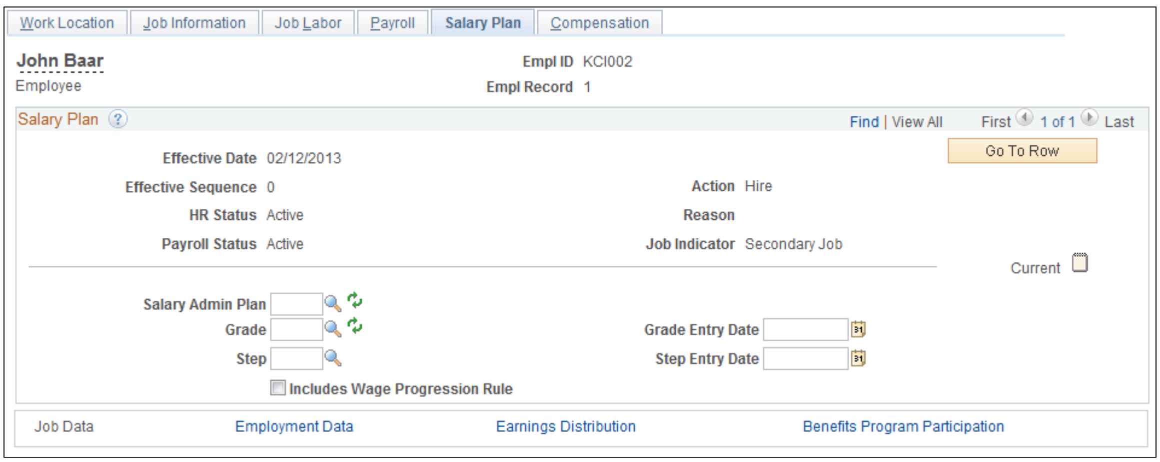
 

### Navigation

- Workforce Administration, Job Information, Add Employment Instance, Salary Plan
- Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Salary Plan
- Workforce Administration, Job Information, Add Contingent Worker Instance, Salary Plan
- Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Salary Plan

### Image: Salary Plan page

This example illustrates the fields and controls on the Salary Plan page. You can find definitions for the fields and controls later on this page.




## Military

The section appears when military functionality is enabled on the Installation Table. Select a military service for a person on the Work Location page prior to entering a rank or worn rank.

**Rank** Enter the service member's earned rank. Valid ranks are defined on the Military Service - Service Ranks page.

**Rank Entry Date** Enter the date the member received this rank.

**Worn Rank** Enter the service member's rank insignia while serving in a particular post.

The default value for this field comes from the Rank field but it can be overwritten. Changes to the Rank field value will also change the value in this field.

---

**Note:** To have the system display the worn rank in front of the employee's name at the top of the Personal Data, Job Data, and military pages, you must have Military, Event Manager, and Publish/Subscribe enabled in the system and the Domain status should be active. When a rank is changed on the current row, the event AssignmentMilitaryRankChanged is raised and the Event Manager triggers the handler to update the Names in Personal Data Component.

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See *PeopleSoft: Events and Notifications*

**Worn Rank Type**

Indicate why the individual is on worn rank.

**Skill Grade**

Select the overall grade level for which the individual has been evaluated

---

**Note:** When military rank information is defined for a service member, the system restricts the salary plan to those plans associated with military ranks on the Military Service table. In addition to this, only the salary grades associated with the specified ranks are available. Therefore, the salary defaulting logic does not apply to military users.

---

## Salary Plan

**Salary Administration Plan**

Displays the salary administration plan code. This field will default from the position number you associated with a person, and is available for entry regardless if you click the Override Position Data button.

If you are not using position management and you associate salary administration plans with locations or job codes, the value that is in this field comes from either the Location or Job Code table, based on setID matching. You can override the default.

---

**Note:** If you have salary administration plans associated with more that one of these tables, the system uses the default from the last table value entered. For example, first you enter a location that is associated with salary plan KU02 where this salary plan defaults to this page. Then, you enter a job code that is associated with salary plan KU03, and the system will update the salary plan to KU03.

---

If you change the location after hire (and a salary plan is defined in the Location table), then the system does not automatically display a default value for this salary plan. Instead, the system checks if the existing grade and step are still valid for this new salary plan. The existing grade and step must also be defined for the new salary plan. If the grade and step are defined for this new salary plan, then the system displays by default from the Location table the value for the new salary plan. If the grade and

| | |
|---|---|
| | step are not defined for this new salary plan, then the system does not change to the salary plan from the Location table.<br><br>To use auto-calculated premium processing for this person, select a plan that has Auto Calculated Premium selected and an absorbing or nonabsorbing (or both) premium rate code assigned in the Salary Plan table. The system displays auto-calculated-premium-related fields on the Compensation page only if you select an auto-calculated premium plan here.<br><br>**Note:** If this worker has a labor agreement and job code with a wage progression salary plan, the system populates this field by default and makes it unavailable for entry. |
| **Grade** | If you associate a grade with the person's position or job code, the system displays the default value from the appropriate table.<br><br>**Note:** If this worker has a labor agreement and job code with a wage progression salary plan, the system populates this field by default and makes it unavailable for entry. |
| **Grade Entry Date** | Displays the date on which the person first joined this grade. You can override this value. |
| **Step** | If you associate a step with the person's position or job code, the system displays the default value from the appropriate table. |
| **Step Entry Date** | Displays the date on which the person first joined this step. You can override this value.<br><br>**Note:** The system verifies the combinations of salary administration plans and grades that you select. |
| **Includes Wage Progression Rule** | The system selects this check box if the salary plan includes wage progression. |

### Related Links

"Understanding PeopleSoft HCM System Data Regulation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Compensation Page

Use the Compensation page (JOB_DATA3) to enter compensation information.

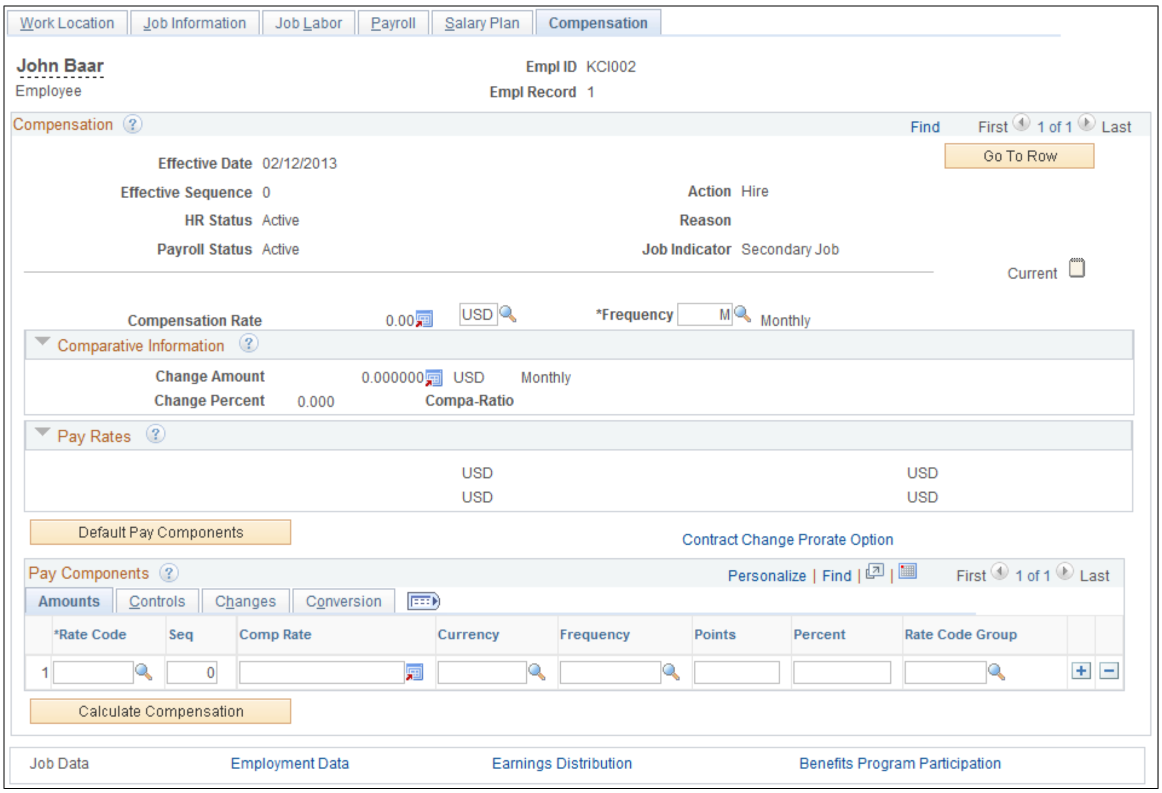
 

### Navigation

- Workforce Administration, Job Information, Add Employment Instance, Compensation
- Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Compensation
- Workforce Administration, Job Information, Add Contingent Worker Instance, Compensation
- Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Compensation

### Image: Compensation page

This example illustrates the fields and controls on the Compensation page. You can find definitions for the fields and controls later on this page.




**Compensation Rate**

Displays the compensation rate for the person, which is the sum of all base pay salary components.

**Frequency**

Select a compensation frequency.

Select *Contract* for contract persons. The system uses the information that you set up on the Contract Pay page to manage the person's compensation.

**Note:** The Retro Pay functionality in PeopleSoft Payroll for North America and PeopleSoft Global Payroll is triggered by any frequency or compensation rate change with an effective date that's earlier than or equal to the latest pay end date of a check that is already paid to the person.

## Auto Calculated Premium

**Target Comprate (target compensation rate)**

Enter the compensation rate for the person if the person is being compensated at a rate that exceeds the default salary. Auto calculating premium may be:

*Absorbing.* Premium decreases when the compensation rate increases over time in order to maintain the target compensation rate.

*Non-Absorbing.* Premium does not change even when the compensation rate increases over time.

The system calculates the difference between this amount and the original job compensation rate and enters the difference in the premium components (the absorbing or nonabsorbing or both premium rate codes of the salary plan) of the person's compensation package. The system then recalculates the compensation rate with the premium component compensation rate.

If both an absorbing rate code and a nonabsorbing rate code are associated with the salary plan, the absorbing rate code initially receives the full, calculated amount of the difference between the target compensation rate and the originally calculated job compensation rate.

You can then enter some portion of the total calculated premium in the nonabsorbing rate code (in which case the absorbing rate code amount automatically decreases by the same amount so that the target compensation rate remains the same) or delete the nonabsorbing rate code. The system recalculates the job compensation rate, including the premium component compensation rate.

You cannot enter a target compensation rate that is less than the original job compensation rate without the premium components.

This field is available only if the person's salary plan (on the Salary Plan page) has auto-calculated premium enabled.

**Don't Absorb Changes**

Select to instruct the system to leave absorbable rate codes unchanged if there is a change in the default salary amount.

This option only applies to persons who have a target compensation rate and are assigned to a salary plan with the auto calculated premium function enabled and an absorbing premium defined.

## Comparative Information

**Change Amount**

Displays the change in the amount of compensation for the rate code.

**Change Percent**

Displays the percent of change in the compensation for the rate code.

**Compa-Ratio (comparison ratio)**

Displays the percent-through-range calculation, based on the salary plan and grade and the currency that the organization uses.

**Job Ratio**

Displays the percent-through-range calculation, based on the midpoint salary of the person's job code.

The job ratio is available only if the person's job code has job ratio information (midpoint salary, currency, and frequency) defined.

## Pay Rates

This group box contains pay rates that are calculated by using the default frequencies from the country. You can specify the default frequencies by country on the Default Frequencies page.

See "Default Frequencies by Country Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

**Default Pay Components**

Click to:

- Carry out rate code defaults (excluding seniority pay) based on the current values of the designated job fields.
- Replace manual updates and old default values with the current default values.
- Recalculate the compensation package of affected persons, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, and so on.
- Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record.

If you don't click this button after updating relevant job data fields, the system issues a warning when you attempt to save the new record. If you click OK, the system displays this page, where you can click this button and make any required changes. If you do not click this button, the component package doesn't appear by default until the next time that the default component logic is triggered (either when you click the button or through a batch update process).

**(E&G) Contract Change Prorate Option**

Click to access the Contract Pay Prorate Options page, where you choose how to handle contract pay when there is a change to the contract amount. Use this link only when the payment frequency is *C* (contract).

The link is active only when the row is available for data entry. The system displays the selected proration option to the left of the link so that you can review the settings even when the link is inactive.

See "Contract Change Prorate Options Page *(PeopleSoft HCM 9.2: Payroll for North America)*".

**Calculate Compensation**

Click to have the system recalculate the person's compensation without carrying out any rate code defaults or replacing any default values. You cannot modify the person's pay components without recalculating the compensation.

## Pay Components: Amounts Tab

Select the Amounts tab.

**Rate Code**

Select a rate code. Rate codes are IDs for pay components. The system inserts any compensation information that is associated with this rate code in the pay components grid.

---

**Note:** If a seniority rate code, or group-based rate code, is inserted as a default, the values for these rate codes are display-only; you can't delete them.

---

**Comp Rate (compensation rate)**

Displays the compensation rate for the pay component.

**Frequency**

Displays the compensation frequency for the pay component.

**Points**

Displays the salary points that are associated with this rate code, if any. Set the points monetary value on the Company Table page. Associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages, Salary Step Components page, and Compensation page. To use points, select the Salary Points check box on the Installation Table page.

**Percent**

If the rate type for this rate code is percent, the system displays the percent that is to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

**Rate Code Group**

Select a rate code group. A rate code group enables you to be more specific when calculating percentage-based components as part of a person compensation package.

## Pay Components: Controls Tab

Select the Controls tab.

**Source**

Indicates how the pay component gets into the pay components grid. *Manual* indicates that the pay component is added manually. *Salary Step* indicates that the pay component is retrieved by default from the salary step. *Job Code* indicates that the pay component is retrieved by default from the job code, and so on.

**Manually Updated**

This flag indicates whether the pay component is manually updated or the pay component contains only values that appear by default.

**Default Without Override**

Indicates whether you can change the default values of the pay component or the values for this rate code are default values and display-only.

## Pay Components: Changes Tab

Select the Changes tab.

**Change Amount**

Displays the overall change amount in this pay component rate.

**Change Points**

Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.

**Change Percent**

Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

## Pay Components: Conversion Tab

Select the Conversion tab.

**Converted Comp Rate (converted compensation rate)**

Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.

**Apply FTE (apply full-time equivalent)**

Select if you want the value that is associated with the rate code to be multiplied by the FTE factor for annualization and deannualization. FTE is the percentage of full-time that the worker should normally work in the corresponding job. This field isn't available for rate codes of type percent.

## Related Links

"Understanding Contract Pay Processing *(PeopleSoft HCM 9.2: Payroll for North America)*"

"Understanding Contract Earnings *(PeopleSoft HCM 9.2: Payroll for North America)*"

*PeopleSoft HCM 9.2: Human Resources Administer Compensation*

"Job Data Pay Rate Frequencies *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Employment Information Page

Use the Employment Information page (EMPLOYMENT_DTA1) to enter optional data, such as a worker's business title.

### Navigation

- Click the Employment Data link at the bottom of the Add Employment Instance component.
- Click the Employment Data link at the bottom of the New Employment Instance component.
- Click the Employment Data link at the bottom of the Add Contingent Worker Instance component.

### Image: Employment Information page (1 of 4)

This example illustrates the fields and controls on the Employment Information page (1 of 4). You can find definitions for the fields and controls later on this page.

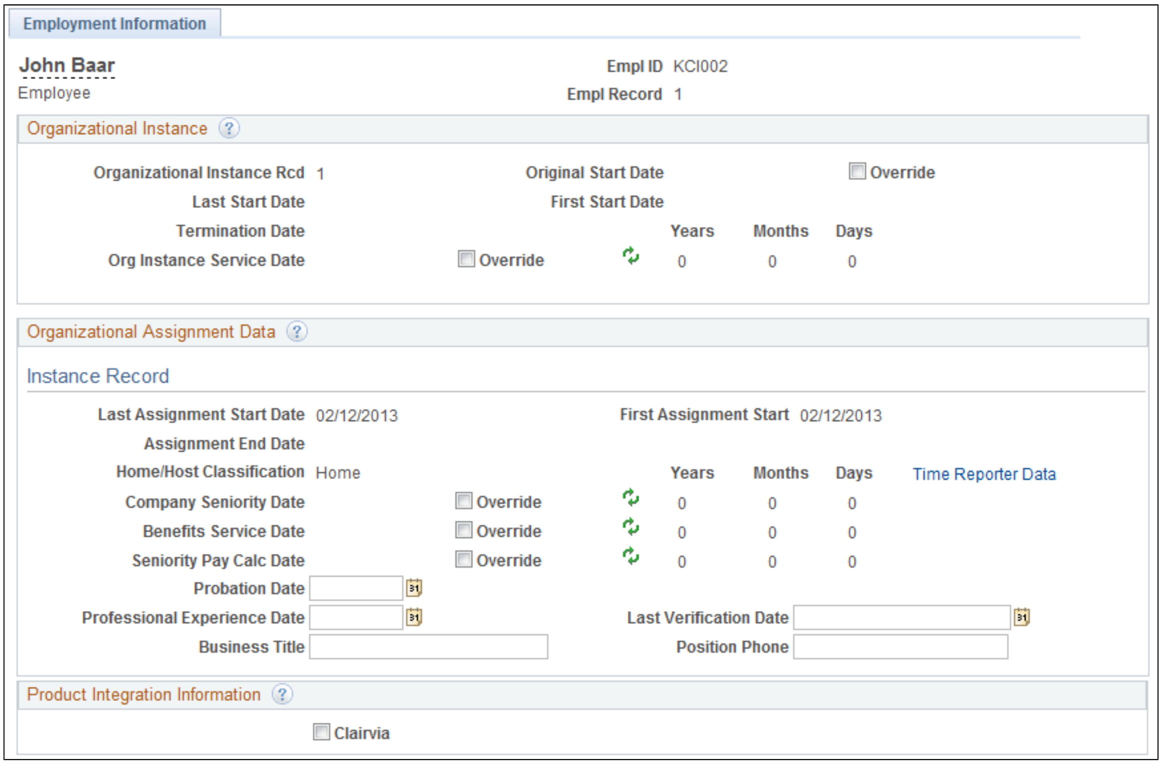


**Image: Employment Information page (2 of 4)**

This example illustrates the fields and controls on the Employment Information page (2 of 4). You can find definitions for the fields and controls later on this page.

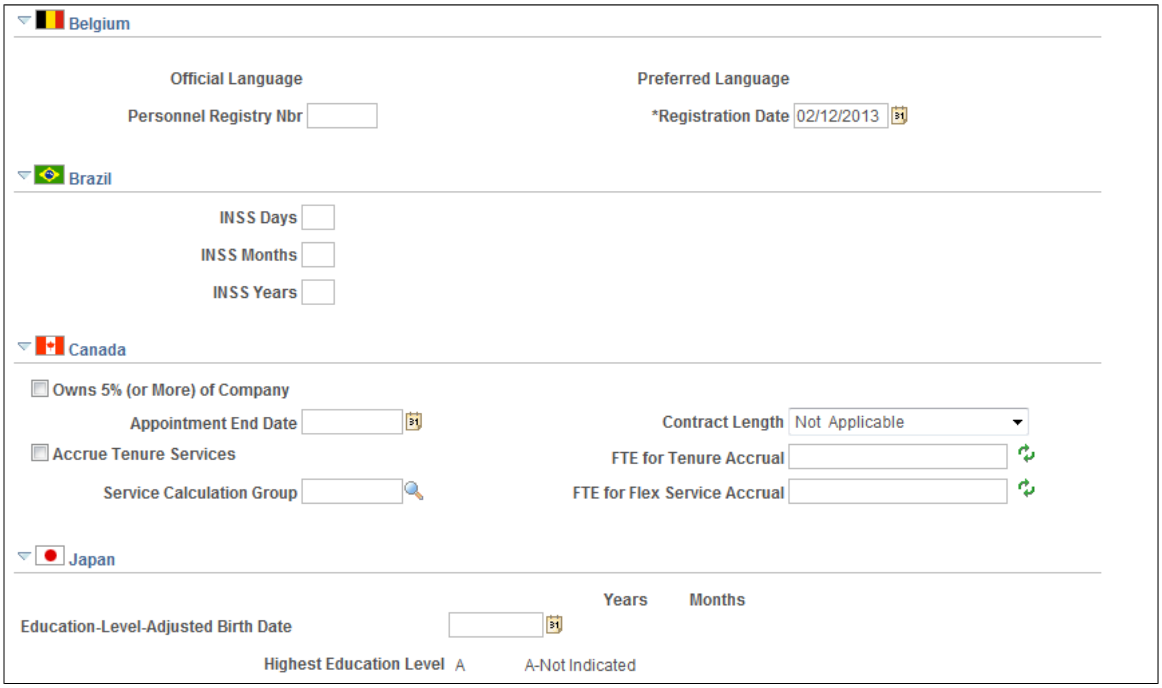


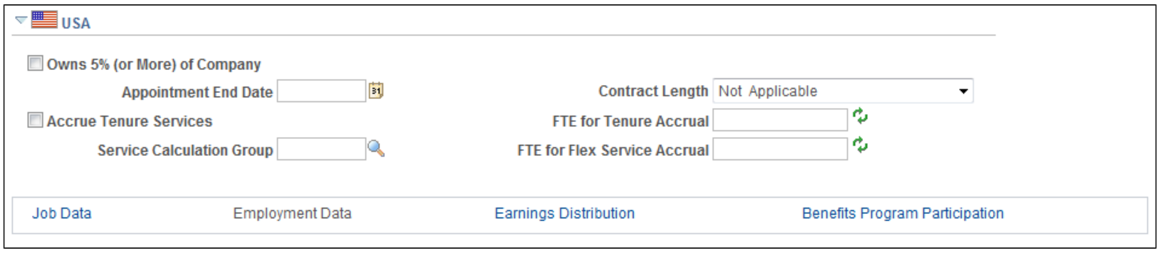

**Image: Employment Information page (3 of 4)**

This example illustrates the fields and controls on the Employment Information page (3 of 4). You can find definitions for the fields and controls later on this page.

**Image: Employment Information page (4 of 4)**

This example illustrates the fields and controls on the Employment Information page (4 of 4). You can find definitions for the fields and controls later on this page.




---

**Note:** The dates on this page are used in reports and to enable you to track a person's work history.

---

## Organizational Instance

**Organizational Instance Rcd (organizational instance record)**

The number of the instance associated with this job data record. The organizational instance record number is the same as the ERN of the controlling instance.

You can only modify the organizational instance dates when you review this page for the controlling instance.

---

**Note:** When you review this page for a non-controlling instance, the system makes the rest of the fields in this group box display only because non-controlling instances inherit the instance dates from the controlling instance.

---

**Original Start Date**

Displays the earliest date that this job data record (emplID/ ERN instance) was associated with the organization. The date is provided by default from the effective date of the job record with an action of *Hire, Add Contingent Worker,* or *Add POI Instance.* This is not the date the job was created in the system, like the Date Created field on the Work Location page. You can override this date to enter an earlier start date, for example if the person has previously worked for the company or an affiliate or, depending upon company policies, for special cases like jobs with probationary periods, mergers and acquisitions, and so on.

See Understanding Job Data.

**Last Start Date**

Displays the most recent start date for this organization instance. The system populates this field originally with the effective date of the controlling instance's job data row with the action of *HIR* and then refreshes it with the effective date of job data rows with the actions *REH* (for employees) or *RNW* (for contingent workers).

This date is different from the first start date if this organization instance has been inactive and then reactivated.

**First Start Date**

Displays the first start date for this organization instance. The system populates this field with the effective date of the first job data row with the action of *HIR* (for employees) or *ADD* (for contingent workers) from the controlling instance.

The system uses this date as the hire date in reports.

---

**Note:** The system does not refresh this date again unless you enter a new row in the controlling instance with one of these actions. You would normally not do this unless you needed to reset the hire date.

---

**Termination Date**

Displays the effective date of the controlling instance's job data row with the action of *TER* or *COM,* if applicable.

If you rehire or renew a person's controlling instance, the system deselects this field.

**Org Instance Service Date (organizational instance service date) and Override**

Displays the effective date on which the service of a person commenced with the organization. The date is provided by default from the effective date of the job record with an action of *Hire, Add Contingent Worker,* or *Add POI Instance.* Select the Override check box to override this date to enter an earlier service date, for example if the person has previously worked for the company or an affiliate.

See Understanding Job Data.

**Provider ID**

For contingent workers, displays the ID of the service provider.

## Organizational Assignment Data

Assignments are the job data records tracked under an organizational instance, each identified by a unique emplID/ERN combination. Track the start and completion dates of individual assignments at the assignment level.

**Last Assignment Start Date**

Displays the most recent start date for this assignment. The system populates this field with the effective date of the job data row with an action that reactivates the assignment. This date is different from the first assignment start date if this assignment has been inactive and then reactivated.

**First Assignment Start**

Displays the first start date for this assignment. The system populates this field with the effective date of the first job data row with an action that activates the assignment (such as *HIR* or *ADD).*

**Assignment End Date**

Displays the effective date of the job data row with the action of *TER* or *COM,* if applicable.

**Home/Host Classification**

For workers who are on assignments, this field specifies whether the current job is at the worker's home location or the assignment location. For a new hire, select *Home.*

**Time Reporter Data**

Click to review the PeopleSoft Time and Labor data for this worker. If you don't use PeopleSoft Time and Labor, this link is unavailable.

**Company Seniority Date or Engagement Date**

This field normally displays as the Company Seniority Date field. However, when military functionality is enabled on the Installation Table and this person is a person associated with a rank, this field displays as the Engagement Date field. Based on the date that you enter here, the system calculates the number of years, months, and days of seniority or engagement for a person.

**Benefits Service Date**

Based on the date that you enter here, the system calculates the total years, months, and days of service for a worker, including any credit for military leave or the total amount of time that the worker works for multiple companies in the organization. This date is used to calculate benefits eligibility.

**Seniority Pay Calc Date (seniority pay calculation date)**

Enter the date that the system should use to calculate seniority-based pay.

**Probation Date**

Enter the date on which the worker is placed on probation.

**Professional Experience Date**

Displays the earliest date on which the worker started working in a job that required skills that are directly related to the worker's current position.

**Last Verification Date**

Displays the latest date on which the worker verified his or her personal data in the system.

**Business Title**

Enter the worker's official title, which might be different from the job title. If you drive part or all of the system by position, the system enters the default title for the position number that you assign to the worker on the Work Location page.

**Position Phone**

Track the worker's primary work phone number. You can also update this field by using the Add/Update Position Info pages.

If you drive part or all of the system by position, the system enters the default phone number for the position number that you assign to the worker on the Work Location page.

---

**Note:** When you enter a new row with an action of *HIR, ADD, POI, ADL,* or *ASG* and save the component, the system sets the Company Seniority Date, Benefits Service Date, and Seniority Pay Calc Date (seniority pay calculation date) fields on this page to the effective date that you enter on the Work Location page as long as the Override date check box is not selected. You can override these fields after saving the component. The system calculates and displays the worker’s service months and days based on the information that you enter in the Company Seniority Date, Service Date, and Seniority Pay Calc Date fields.

---

## Military

The system displays the military section when military functionality is enabled on the Installation Table.

| | |
|---|---|
| **Early Promotion Date** | Enter the earliest date this service member may be considered for the next promotion. |

## (BEL) Belgium

The system displays the official language, based on the company official language, unless the company is located in Brussels-Capital Region, in which case the preferred language is the default.

| | |
|---|---|
| **Personnel Registry Nbr (personnel registry number)** | Enter the number under which the worker is registered in the personnel register. |

## (BRA) Brazil

| | |
|---|---|
| **INSS Days, INSS Months, and INSS Years (Instituto Nacional de Securidade Social days, months, and years)** | Enter the number of days, months, and years that the worker makes social security contributions before being hired by the company. |

## (CAN) Statistics Canada Academic Teaching Employment Table

The fields in this table are used in the Canada Academic Teaching Surveys business process, a regulatory requirement for Canadian higher-education, degree-granting institutions. Complete this table for all faculty staff if you are required to submit Academic Teaching Surveys to Statistics Canada. Review the information in this table to ensure that it is up-to-date every time that you change a worker's record.

| | |
|---|---|
| **Teaching Change Date** | The system adds a new teaching change date row only if you choose to add one.<br><br>Insert a new row for each teaching appointment if the institution uses the same employee record number to record successive appointments. For the Part-Time Academic Teaching Survey, the system reports the Academic Teaching Employment record that is effective on the end date of the appointment or at the end of the period that is being reported. |
| **Survey Report Flag** | Displays the report flag value, as specified on the Job Code Table - Job Code Profile page. If the value is *N/A,* this record isn't reported in academic teaching surveys. You can override this default value. |
| **Duties** | Displays the duties value, as specified on the Job Code Table - Job Code Profile page. You can override this default. |
| **Principal Subject** | Select the principal subject that is taught by the worker. |
| **Teaching Load** | Enter the worker's teaching load during the academic teaching employment. For example, if the worker is teaching three full courses, enter *3.0.* If the worker is teaching one full course and one-third of another, enter *1.33.* |

**FTTE (full-time teaching equivalency)**
Enter the ratio of the teaching load to the full-time teaching equivalency. For example, if teaching four courses constitutes full-time and the worker is teaching three courses, enter *.75.*

**Collapse as FT (collapse as full-time)**
Select if the employment can be collapsed into the reportable full-time job for the purpose of consolidating salary amounts from jobs that make up a full-time job.

Use this field only if the worker:

- Has two or more part-time jobs in different departments that function as a single full-time job.
- Receives an administrative stipend under another employee record number that doesn't accrue benefits but counts toward the worker's full-time salary.

Don't collapse reportable part-time jobs into a reportable full-time job. (The system doesn't report on the part-time job.) Instead, if you use this field, set up a separate employee record for part-time jobs.

## (CAN) Canada

**Accrue Tenure Services**
Select to activate the tenure accrual.

**FTE for Tenure Accrual**
Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.

**Service Calculation Group**
Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process.

**FTE for Flex Service Accrual**
Enter the FTE value to be used in prorating the worker's accrued service.

## (JPN) Japan

**Educ Lvl-Adjsted Birth Date (education-level-adjusted birth date)**
Select the worker's education-level-adjusted birth date. The day and the month are the organization's standard calculation birth date (SCB—usually April 1); the year comes from the worker's education-level-adjusted birth date (ELABi). Although the system calculates this date, you can overwrite it (for example, to give a worker credit for special work experience).

**Years Months**
Displays the worker's highest education level as specified in the Personal Data component. This education level is the starting point for education-level age-related calculations.

## (MYS and SGP) Malaysia and Singapore

After you set up festive advance calculation rules and the pay programs, and associated job codes with pay programs, the eligible workers that are in the workforce are granted festive advances. Assigning the festive advance type to the worker occurs during the hire process after you assign the ethnic group, religion, and job code. However, before you accept those defaults, you might still have some issues to resolve. If you decide that any of the worker's festive advance details should be different, change them on this page.

**Ethnic Group andReligion**

Displays the values that you enter on the Personal Data - Regional page.

**Festive Advance Pay Program**

Displays the value from the Job Code Table - Job Code Profile page. You can change this default.

**FA Holiday Type (festive advance holiday type)**

Select a festive advance type. Values are: *Chinese New Year, Christmas, Deepavali, Hari Raya,* and *N/A.*

The default value is the festive holiday that is appropriate to the ethnicity or religion that you enter for this person on the Personal Data - Regional page. You can change this selection. If a person chooses not to receive a festive advance, select *N/A.*

**Festive Advance Eligible From**

Displays the festive advance eligible from date. If the firm has a probation period that must be served before a worker is entitled to a festive advance, the probation period must be monitored.

When you set the probation period in the Festive Advance Pay Program, you set the number of days or months. The system adds this information to the worker's hire date to determine the festive advance eligible from date; this date appears as the default on the FA Employee Details page.

When you process the festive advances, the system checks the festive advance eligible from date against the date on which to pay the advance. If the festive advance eligible from date is not yet passed, the worker is not paid a festive advance.

**Note:** This date is used by the festive advance calculation process and the festive advance calculation rule to determine if the worker has served enough time to be eligible for a festive advance. The date is derived from the job commencement date and the probation period in the Festive Advance Pay Program.

## (NLD) Netherlands

**Relation to Owner**

Select the worker's relationship to the owner, as appropriate.

## (USA) United States of America

**Accrue Tenure Services**

Select to activate the tenure accrual.

| | |
|---|---|
| **FTE for Tenure Accrual** | Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0. |
| **Service Calculation Group** | Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process. |
| **FTE for Flex Service Accrual** | Enter the FTE value to be used in prorating the worker's accrued service. |

### Related Links

"Assignment Data Page *(PeopleSoft HCM 9.2: Human Resources Track Global Assignments)*"

"Education Level Page *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Understanding the Festive Advance Process *(PeopleSoft HCM 9.2: Human Resources Administer Festive Advance)*"

"Understanding the Core Tables for PeopleSoft Manage Base Benefits *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

"Understanding Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*"

"Understanding Time and Labor Implementation *(PeopleSoft HCM 9.2: Time and Labor)*"

## Job Earnings Distribution Page

Use the Job Earnings Distribution page (JOB_DATA_ERNDIST) to distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types.

If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

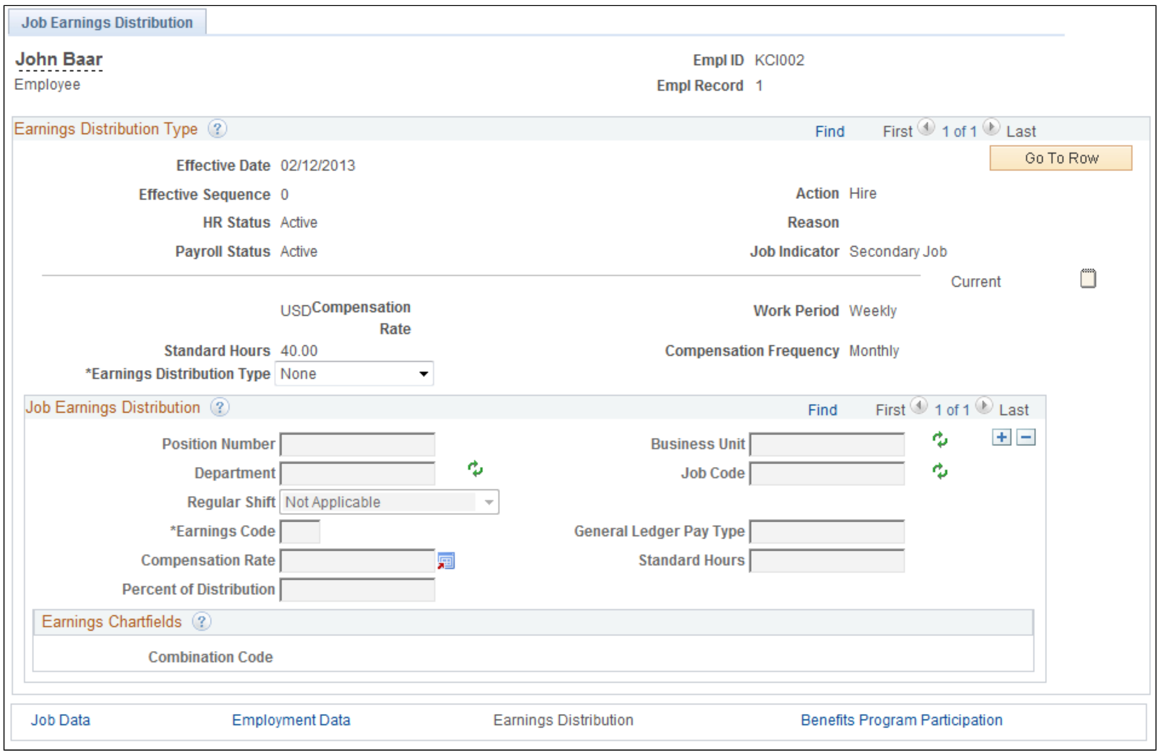
 

### Navigation

- Click the Earnings Distribution link at the bottom of the Add Employment Instance component.
- Click the Earnings Distribution link at the bottom of the New Employment Instance component.
- Click the Earnings Distribution link at the bottom of the Add Contingent Worker Instance component.
- Click the Earnings Distribution link at the bottom of the New Contingent Worker Instance component.

### Image: Job Earnings Distribution page

This example illustrates the fields and controls on the Job Earnings Distribution page. You can find definitions for the fields and controls later on this page.




Review these guidelines prior to entering data on the Job Earnings Distribution page:

- Skip this page if you don't need to distribute standard earnings for the person.

  Payroll for North America uses the department, job code, account, shift, position number, and general ledger type that you enter on the Work Information and Payroll pages to calculate pay earnings records.

- The system hides this page when all job rows in the component use PeopleSoft Global Payroll.

  However, if any job row has another payroll system (for example, PeopleSoft Payroll for North America or Payroll Interface), then the system displays the page.

- Don't use this page to distribute special earnings, such as holiday pay or bonuses; instead, use the processes in PeopleSoft Payroll for North America for handling special earnings.

- If you enter a parameter such as department on this page, the parameter overrides the same field on the job record.

If you leave a parameter blank, the system uses the field from the job record.

**Standard Hours and Work Period**

If you are using position management and click the Override Position Data button, these fields become available. If you change these values on this page, it will also update the same fields on the Job Information page.

**Earnings Distribution Type**

Select an earnings distribution type. Values are:

- *None:* Select to indicate that you don't allocate earnings for this person. The system calculates and charges person compensation according to the information that is listed in the Job Data component. If you select this option, leave the other fields on this page blank.

  ---

  **Note:** You must select *None* if you want the system to use the proration rule that you select on the Pay Group Table - Paysheets page when prorating partial pay.

  ---

  See "Setting Up Pay Groups *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- *By Amount:* Available only for salaried workers. This enables you to apportion the worker's total earnings for a period on the basis of an amount.

  Select to instruct the system to total the amounts that are in the distribution lines and check the total against the total in the Compensation Rate field on the Job Data - Compensation page. The total earnings distribution amount must equal the compensation rate amount. If the amounts are not the same, the system generates an error when you try to save the record. You will need to resolve the discrepancy to save the Job Data record.

  For example, to charge 3,000 of a worker's regular earnings to the worker's regular department (on the job record), 544 to department 105, and 1,000 to department 10503, you set up three distribution lines:

  - On the first line, leave Department blank (so that the system uses the worker's regular department from the job record) and enter *3000* in the Amount field.
  - On the second line, enter *105* in the Department field and *544* in the Amount field.
  - On the third line, enter *10503* in the Department field and *1000* in the Amount field.

  The amounts that are in the distribution lines total 4,544, so the system checks that amount in the Compensation Rate field on the worker's job record equals this total.

- *By Hours:* Available only for hourly or exception hourly workers. Select to instruct the system to total the hours that are in the distribution lines and update the total in the Standard Hours field on the Job Data - Job Information page. The Standard Hours field that appears at the top of this page also changes.

  Enables you to apportion the worker's total earnings for a week on an hourly basis. The system totals the hours in all distribution lines and inserts the total in the Standard Hours field on the worker's job record.

  For example, if a worker works a 40-hour week, and you want to charge 30 hours of regular pay to the worker's regular department (on the job record) and 10 hours to department 103, you set up two distribution lines:

  - On the first line, leave Department blank (so that the system uses the worker's regular department (from the job record) and enter *30* in the Standard Hours field.
  - On the second line, enter *103* in the Department field and *10* in the Standard Hours field. The hours that are in the distribution lines total 40, so the system inserts *40* in the Standard Hours field on the worker's job record.

- *By Percent:* Available to all workers. The sum of the percentages that are in the distribution lines must equal 100.

  Enables you to apportion the worker's total earnings for a period on a percentage basis.

  For example, to charge 80 percent of regular earnings to the worker's regular department (on the worker's job record) and 20 percent to department 100, set up two distribution lines:

  - On the first line, leave Department blank (so that the system uses the worker's department from the job record) and enter *80* in the Percent field.
  - On the second line, enter *100* in the Department field and *20* in the Percent field.

## Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

**Note:** This feature works only for hourly workers, not for salaried workers.

When you enter an action of short-term disability with pay or long-term disability with pay, the system changes the worker's status to leave with pay.

To send 100 percent of the worker's pay to the disability plan earnings code, access the Job Data - Job Earnings Distribution page, select the By Percent option, enter the appropriate disability earnings code, and enter a percent of *100.*

---

**Note:** When you put a worker on disability, don't forget to check additional pay records and make any necessary changes.

---

### Related Links

"Understanding Earnings Tables *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Benefit Program Participation Page

Use the Benefit Program Participation page (JOB_DATA_BENPRG) to specify the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration.

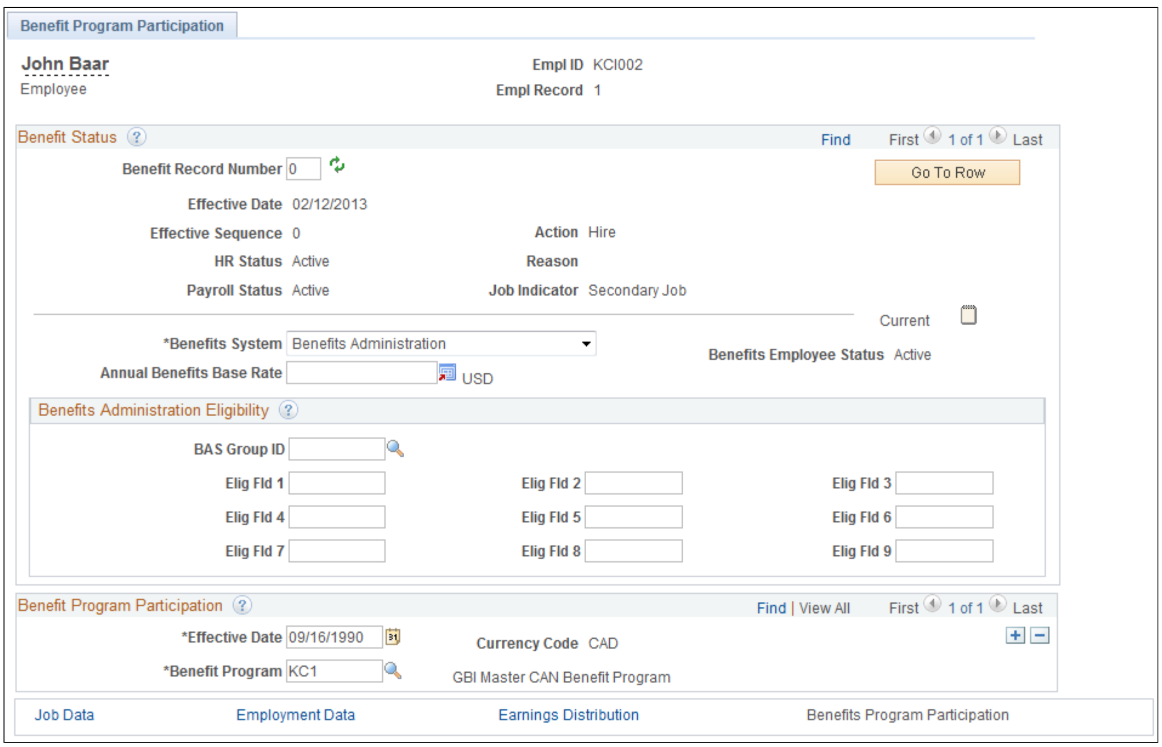
 

### Navigation

- Click the Benefits Program Participation link at the bottom of the Add Employment Instance component.
- Click the Benefits Program Participation link at the bottom of the New Employment Instance component.
- Click the Benefits Program Participation link at the bottom of the Add Contingent Worker Instance component.
- Click the Benefits Program Participation link at the bottom of the New Contingent Worker Instance component.

### Image: Benefit Program Participation page

This example illustrates the fields and controls on the Benefit Program Participation page. You can find definitions for the fields and controls later on this page.




**Benefit Record Number**

Displays the benefit record number, which is an identifier that links two or more jobs for benefits purposes. The system sets the value to *0.* You can override this value to attach this job to a different benefit record number. The system deselects the benefits program data and repopulates it with values that are attached to the benefit record number that you enter.

**Benefits System**

Select the appropriate benefits system. Select *Not Managed in PeopleSoft* (benefits managed by a system other than PeopleSoft) to filter out persons who have insufficient employment and job information to support benefit enrollment.

### Benefits Administration Eligibility

| | |
|---|---|
| **Elig Fld 1–9 (eligibility configuration fields 1−9)** | Enter values to further filter persons' eligibility for a specific benefit. These are client-definable fields. |

### Benefit Program Participation

| | |
|---|---|
| **Currency Code** | Displays the code of the currency that is specified for the benefit program in the Benefit Program table. |
| **Benefit Program** | Displays the code that corresponds with the benefits program for the person's pay group, which you specify in the Pay Group table. You can override this value. |

### Related Links

"Understanding the Core Tables for PeopleSoft Manage Base Benefits *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

## Person Checklist Page

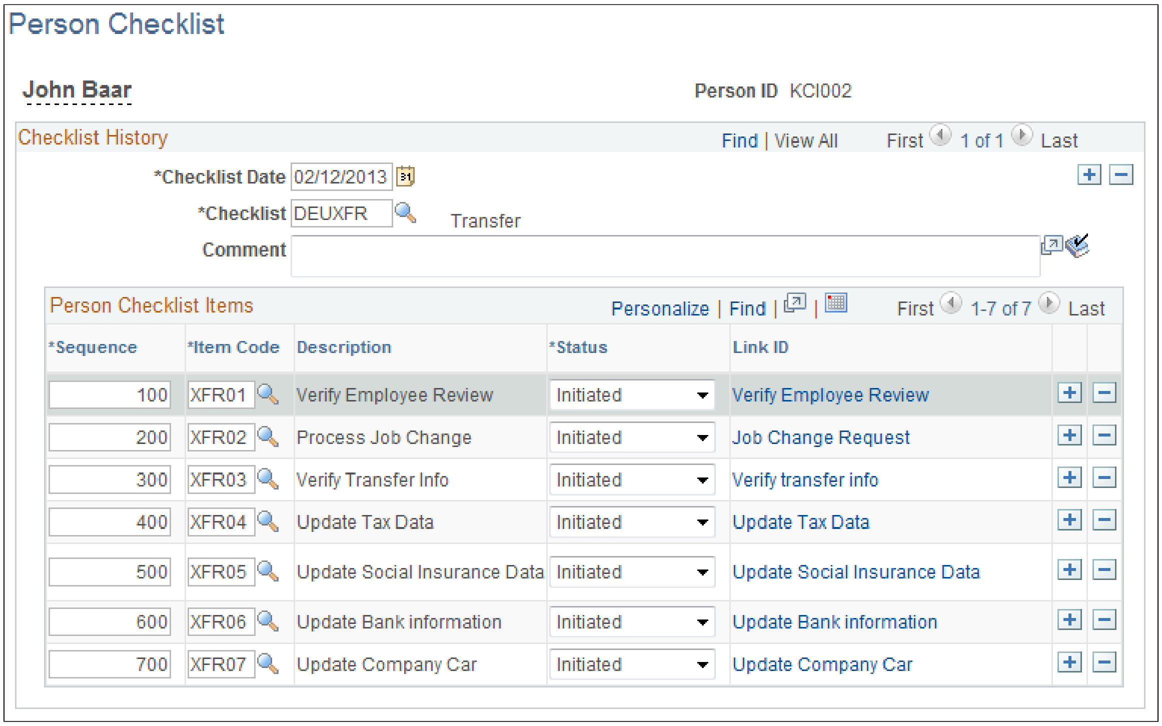
Use the Person Checklist page (PERSON_CHECKLIST) to ensure that the human resources administrators perform all the required administrative tasks for a person, create a checklist listing all the items that need to be completed and the person responsible for completing them.

### Navigation

Workforce Administration, Personal Information, Organizational Relationships, Person Checklist, Person Checklist

### Image: Person Checklist page

This example illustrates the fields and controls on the Person Checklist page. You can find definitions for the fields and controls later on this page.


Person Checklist

John Baar Person ID KCI002

Checklist History Find | View All First 1 of 1 Last

*Checklist Date 02/12/2013

*Checklist DEUXFR Transfer

Comment

Person Checklist Items Personalize | Find | First 1-7 of 7 Last

| *Sequence | *Item Code | Description | *Status | Link ID |
|---|---|---|---|---|
| 100 | XFR01 | Verify Employee Review | Initiated | Verify Employee Review |
| 200 | XFR02 | Process Job Change | Initiated | Job Change Request |
| 300 | XFR03 | Verify Transfer Info | Initiated | Verify transfer info |
| 400 | XFR04 | Update Tax Data | Initiated | Update Tax Data |
| 500 | XFR05 | Update Social Insurance Data | Initiated | Update Social Insurance Data |
| 600 | XFR06 | Update Bank information | Initiated | Update Bank information |
| 700 | XFR07 | Update Company Car | Initiated | Update Company Car |

You can have more than one checklist active for a person at any one time.

**Checklist** Select the appropriate checklist. The system populates the list with the associated items.

## Person Checklist Items

The system populates this table when you select a checklist. You can add additional items.

**Item Code** Displays the checklist item if you selected a checklist. To add items without a checklist, select the item.

**Status** The system displays a status of *Initiated* for all new checklist items. Update the status from the following options as necessary:

- *Completed*
- *Initiated*
- *Notified*

- *Received*

**Link ID**

Displays a link to the component used to complete the listed item.

For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT).

## Person Applicant Information Page

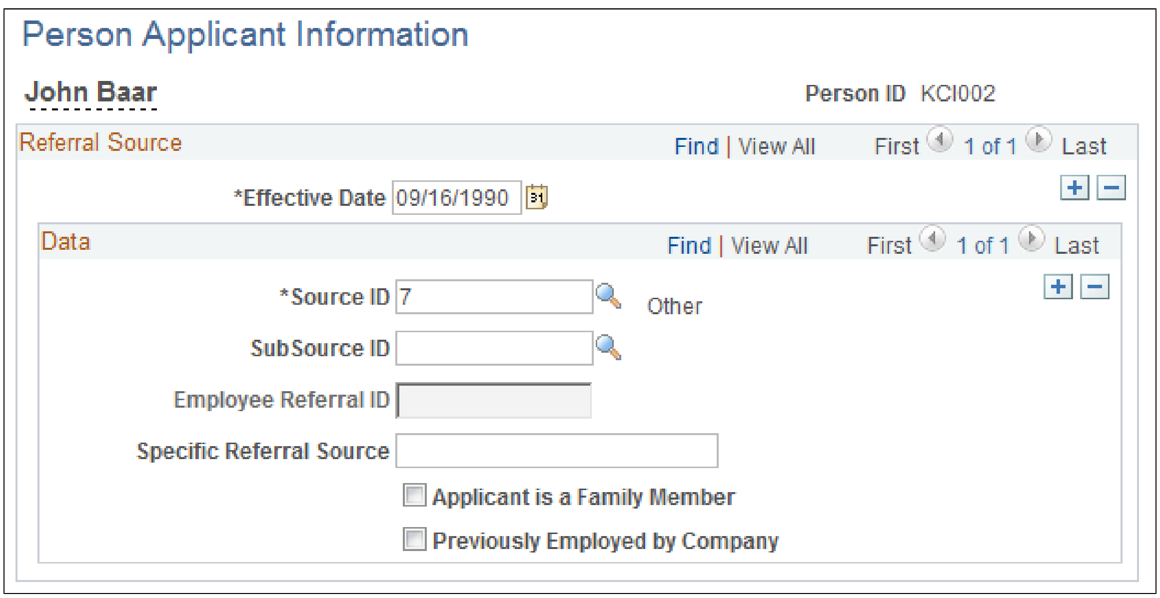
Use the Person Applicant Information page (PERS_APPL_INFO) to define applicant referral information.

**Navigation**

Workforce Administration, Personal Information, Organizational Relationships, Person Applicant Information, Person Applicant Information

**Image: Person Applicant Information page**

This example illustrates the fields and controls on the Person Applicant Information page. You can find definitions for the fields and controls later on this page.




**Source ID**

Select a referral source for this person. Referral sources are defined using the Source Setup page.

See "Setting Up Recruitment Sources *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*".

**SubSource ID**

Select a subsource for this person. Subsources are defined on the Marketing page.

See "Setting Up Recruitment Sources *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*".

**Employee Referral ID** — Select the employee who referred this person. This field is available if the Source ID field equals *Employee.*

**Specific Referral Source** — Enter any text that further defines the referral information.

**Applicant is a Family Member** — Select this check box if this person is a family member of the referral source.

**Previous Employed by Company** — Select this check box if this person was previously employed by the company.

## Person Assignment Checklist Page

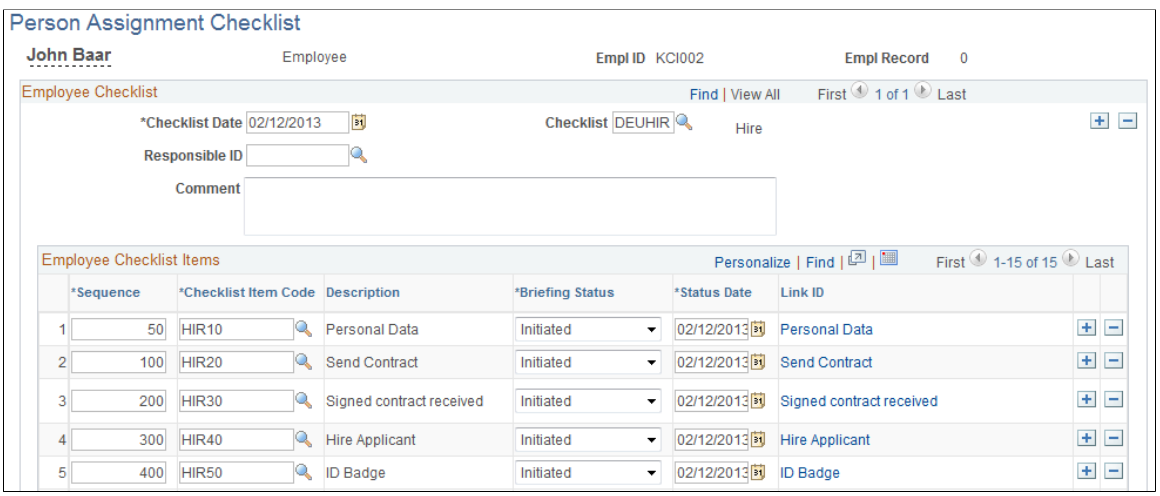
Use the Person Assignment Checklist page (EMPLOYEE_CHECKLIST) to ensure that the human resources administrators perform all the required administrative tasks for an employee, create a checklist listing all the items that need to be completed and the person responsible for completing them.

**Navigation**

Workforce Administration, Personal Information, Organizational Relationships, Person Assignment Checklist, Person Assignment Checklist

**Image: Person Assignment Checklist page**

This example illustrates the fields and controls on the Person Assignment Checklist page. You can find definitions for the fields and controls later on this page.




You can have more than one checklist active for an employee at any one time.

**Checklist** — Select the appropriate checklist. The system populates the list with the associated items.

**Responsible ID** — Select the person who is responsible for making sure the tasks on the checklist are completed.

### Employee Checklist Items

The system populates this table when you select a checklist. You can add additional items.

| | |
|---|---|
| **Checklist Item Code** | Displays the checklist item if you selected a checklist. To add items without a checklist, select the item. |
| **Briefing Status** | The system displays a status of *Initiated* for all new checklist items. Update the status from the following options as necessary:<br>• *Completed*<br>• *Initiated*<br>• *Notified*<br>• *Received* |
| **Link ID** | Displays a link to the component used to complete the listed item.<br><br>For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT). |

# Adding Additional Assignments

These topics provide an overview of the process of adding additional assignments, list prerequisites, and discuss how to:

- Work with multiple benefit record numbers.
- Enter additional assignments.

## Understanding the Process of Adding Additional Jobs

PeopleSoft Human Resources enables you to keep complete job information about workers who hold more than one job at a time in an organization.

If you set up PeopleSoft HCM security to allow workers to have multiple jobs, you can add an additional assignment to a worker's employment record. Use the Add Additional Assignment component (ADD_PER_ORG_ASGN) in Administer Workforce to add new jobs for workers who already have one or more jobs. From the Add Additional Assignment page (PER_ORG_INST_ASGN), access the Concurrent Job Data component (JOB_DATA_CONCUR) to enter data for the new job. The component consists of the same pages as the Job Data component. If all jobs are within the same company and meet certain criteria, you can combine earnings from multiple jobs on one paycheck if you are using PeopleSoft Payroll for North America.

---

**Note:** (USF) Use the Concurrent Hire USF component (EE_CONC_HIRE) instead of the Add Additional Assignment component.
Do not use the Add Additional Assignment component for adding temporary assignments where the substantive job must be suspended for the duration of the temporary assignment. Use the Job Data component instead.
Update job data for concurrent jobs on the Job Data component.

---

See Adding Organizational Instances for Employees, Contingent Workers, and POIs.

### Related Links

Organizational Relationships

Entering Temporary Assignments

## Understanding Multiple Benefit Record Numbers

In addition to an employment record number, you assign each concurrent job a benefit record number that tracks the worker's participation in benefit programs. Jobs that share the same benefit record number also share the same benefit programs.

The following tables show different ways to assign benefit record numbers in a situation where a worker has three concurrent jobs:

Apply Job 1's Benefits to All Jobs

| *Job* | *Employment Record Number* | *Benefit Record Number* |
|---|---|---|
| Job 1 | 0 | 0 |
| Job 2 | 1 | 0 |
| Job 3 | 2 | 0 |

Apply Job 3's Benefits to All Jobs

| *Job* | *Employment Record Number* | *Benefit Record Number* |
|---|---|---|
| Job 1 | 0 | 0 |
| Job 2 | 1 | 0 |
| Job 3 | 2 | 0 |

Apply Separate Benefits to Each Job

| *Job* | *Employment Record Number* | *Benefit Record Number* |
|---|---|---|
| Job 1 | 0 | 0 |
| Job 2 | 1 | 1 |
| Job 3 | 2 | 2 |

Apply Job 1's Benefits to Jobs 1 and 2 and Separate Benefits to Job 3

| *Job* | *Employment Record Number* | *Benefit Record Number* |
|---|---|---|
| Job 1 | 0 | 0 |

| Job | Employment Record Number | Benefit Record Number |
|---|---|---|
| Job 2 | 1 | 0 |
| Job 3 | 2 | 2 |

When you add a concurrent job, the system sets the default benefit record number on the Benefit Program Participation page to *0.* If you change the benefit record number, the system deselects and repopulates the Benefit Program field with the data attached to the benefit record number that you enter. If the benefit record number that you enter doesn't match any existing benefit record number for the worker, the system populates the Effective Date field with the worker's hire date and the Benefits Program field with the default benefit program for the worker's pay group.

**Note:** Use the Benefit Program Participation page to maintain benefits program information.

## Prerequisites

Before you can add multiple jobs for the workforce, you must update the user security so that users have access to the menu options that they need.

When a worker has more than one job, you might want to designate one job as primary and the others as secondary. The primary job designation is used for government reporting.

## Pages Used to Add Concurrent Jobs

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Add Additional Assignment | PER_ORG_INST_ASGN | Workforce Administration, Job Information, Add Additional Assignment, Add Additional Assignment | Enter additional worker assignments and access the Concurrent Job Data component to create new assignments. |
| Work Location | JOB_DATA1 | Click the Create Assignment button on the Add Additional Assignment page. | Enter position and location information for a person's concurrent job, including the regulatory region, company, department, and location. |
| Job Information | JOB_DATA_JOBCODE | Click the Create Assignment button on the Add Additional Assignment page and access the Job Information page. | Enter information about a person's concurrent job, including status, employee class, shift, or standard hours. |
| Job Labor | JOB_LABOR | Click the Create Assignment button on the Add Additional Assignment page and access the Job Labor page. | Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement. |

| **Page Name** | **Definition Name** | **Navigation** | **Usage** |
|---|---|---|---|
| Payroll | JOB_DATA2 | Click the Create Assignment button on the Add Additional Assignment page and access the Payroll page. | Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Compensation page. |
| Salary Plan | JOB_DATA_SALPLAN | Click the Create Assignment button on the Add Additional Assignment page and access the Salary Plan page. | Enter information about a person's salary plan. |
| Compensation | JOB_DATA3 | Click the Create Assignment button on the Add Additional Assignment page and access the Compensation page. | Enter compensation information. |
| Employment Information | EMPLOYMENT_DTA1 | Click the Create Assignment button on the Add Additional Assignment page and click the Employment Data link. | Enter optional data, such as an employee's business title. |
| Job Earnings Distribution | JOB_DATA_ERNDIST | Click the Create Assignment button on the Add Additional Assignment page and click the Earnings Distribution link. | Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center. |
| Benefit Program Participation | JOB_DATA_BENPRG | Click the Create Assignment button on the Add Additional Assignment page and click the Benefits Program Participation link. | Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Human Resources or PeopleSoft Benefits Administration. |

See Adding Organizational Instances for Employees, Contingent Workers, and POIs

## Add Additional Assignment Page

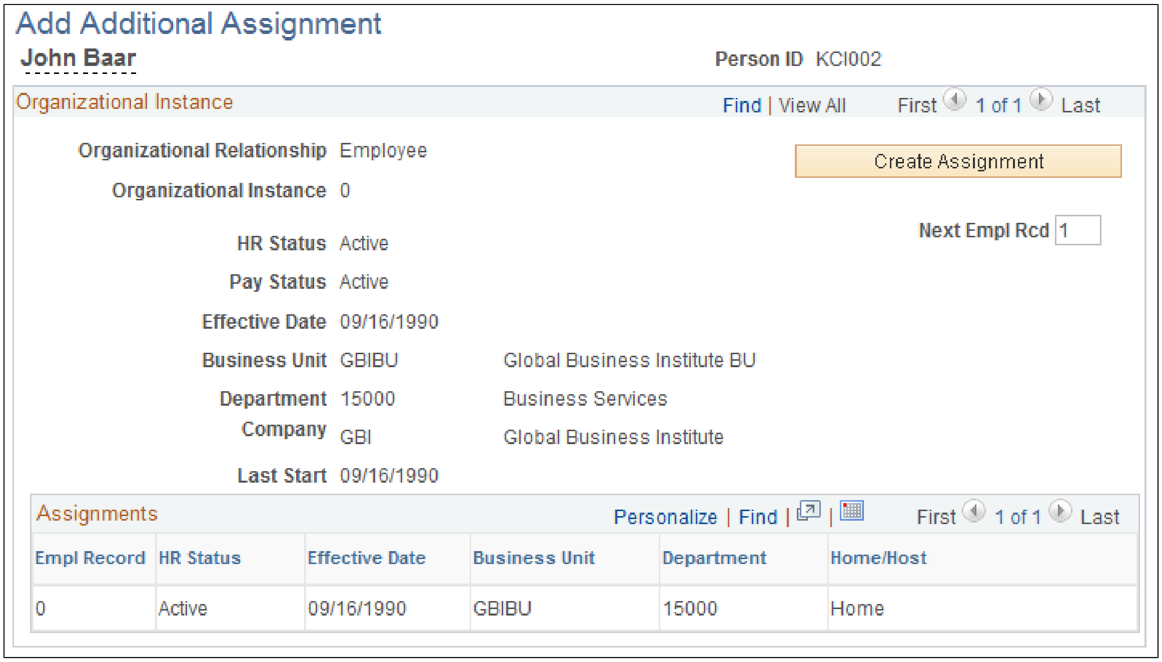
Use the Add Additional Assignment page (PER_ORG_INST_ASGN) to enter additional worker assignments and access the Concurrent Job Data component to create new assignments.

### Navigation

Workforce Administration, Job Information, Add Additional Assignment, Add Additional Assignment

### Image: Add Additional Assignment page

This example illustrates the fields and controls on the Add Additional Assignment page. You can find definitions for the fields and controls later on this page.




**Create Assignment**
Click to access the Job Data record to enter specific information about the new assignment.

**Org Relation (organizational relationship)**
Displays the person's organizational relationship.

**Organizational Instance**
Displays the instance number for this relationship.

**Next Empl Rcd (next employee record)**
Enter the employment record number for the next assignment. This number should be unique from all other employment record numbers currently held by this person.

**Assignments**
Lists the assignments under this organizational instance by employment record number.

## Hiring Job Applicants

To hire applicants, use the Manage Hires (HR_MANAGE_HIRES) component.

These topics discuss how to:

- Manage hires.

- Review hire details and initiate the hiring process for job applicants.

The Add Employment Instance and Add Contingent Worker components are commonly used to increase your workforce, but they are not the only components. You can also use the Manage Hires component for hiring applicants.

The Manage Hire page displays a list of applicants that have gone through the recruiting process and are ready to be hired. Selecting an applicant name on the Manage Hires page opens the Manage Hire Details page where you can review job information and transfer applicant information to the personal data and job data records to complete the hire.

**Note:** The Manage Hires component is also used with the Smart HR (template-based ) transactions process.

## Pages Used to Hire Job Applicants

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Manage Hires | HR_MANAGE_HIRES | Workforce Administration, Personal Information, Manage Hires, Manage Hires | Manage hires. Displays a list of people who are ready to be hired. The list includes applicants who have been readied for hire in PeopleSoft Recruiting Solutions. The list also includes persons who have gone through the template-based hire process. |
| Manage Hires Detail | HR_MNGHIRE_DET | Click the name link for a person whose Source is *Recruiting* on the Manage Hires page. | Review hire details and initiate the hiring process. View detailed data for job applicants. |

### Related Links

Using Smart HR Templates and Transactions

## Manage Hires Page

Use the Manage Hires page (HR_MANAGE_HIRES ) to manage hires.

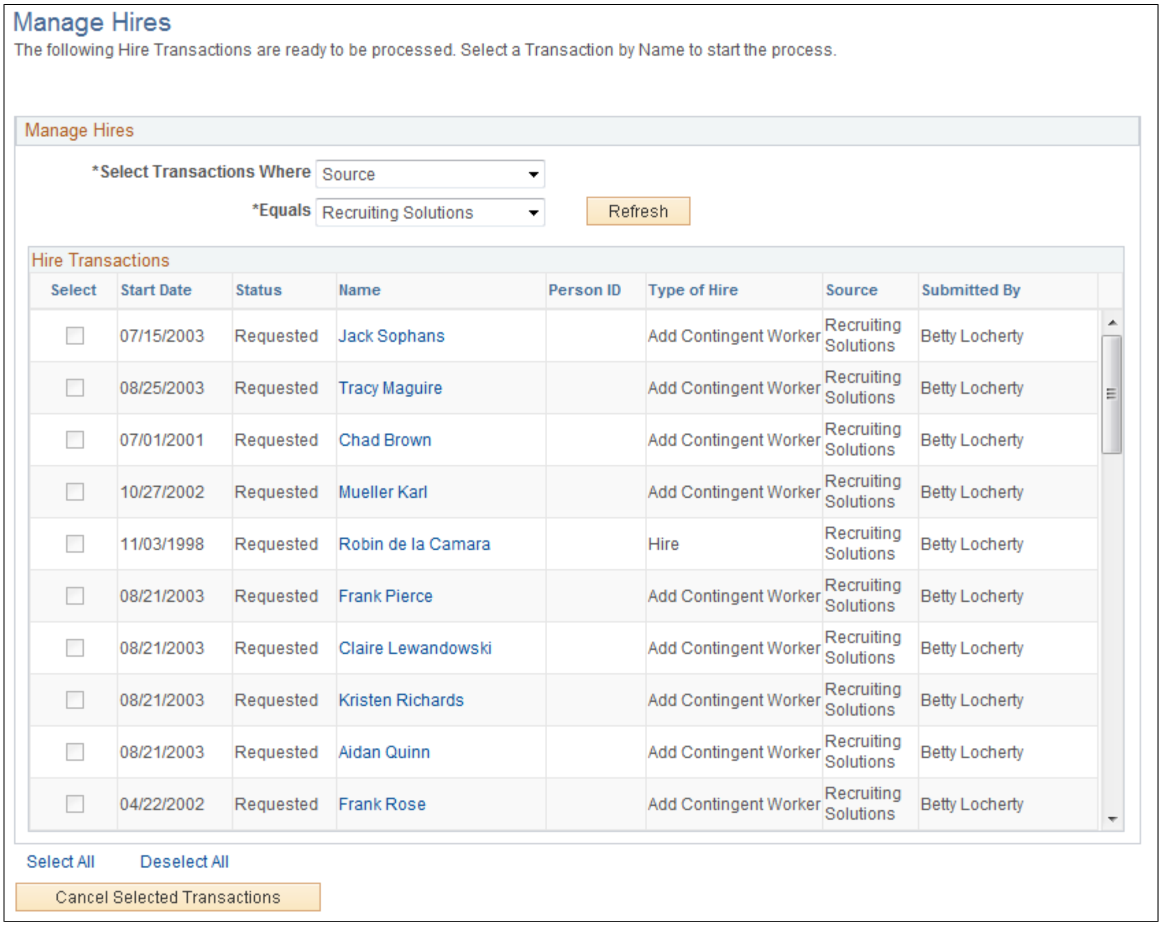
Displays a list of people who are ready to be hired. The list includes applicants who have been readied for hire in PeopleSoft Recruiting Solutions. The list also includes persons who have gone through the template-based hire process.

### Navigation

Workforce Administration, Personal Information, Manage Hires, Manage Hires

### Image: Manage Hires page

This example illustrates the fields and controls on the Manage Hires page. You can find definitions for the fields and controls later on this page.




**Select Transactions Where:**

Select the value that represents how you want the search to produce results.

Valid values are: *Source, Start Date, Status,* and *Type of Hire.*

**Equals:**

This field is visible if the when you select *Source, Status,* or *Type of Hire* in the Select Transaction Where: field.

When Select Transaction Where: is *Source,* the valid values for Equals are *Template–Based Hire* and *Recruiting Solutions.*

When Select Transaction Where: is *Status,* the valid values for Equals are *Action Required, All, Draft, Error,* and *Requested.*

When Select Transaction Where: is *Type of Hire,* the valid values for Equals are *Add Concurrent Job, Add Contingent Worker, Hire, Rehire,* and *Transfer.*

**From: andTo:** These fields are visible when you select *Start Date* in the Select Transaction Where field.

Enter the range of desired dates to retrieve a list of applicants to hire or a list of people in the template-based hire process.

**Refresh** Click to update the list of applicants or hires in the Hire Transactions region when you change the value of the Select Transaction Where field and/or the Equals field.

**Select** Use this check box to select transactions that you want to cancel. The check box is active only for rows where the Source is *Template* (template-based hire).

You cannot use this page to cancel transactions where the source is *Recruiting* (recruiting solutions); instead, you must cancel the transaction using the Withdraw from Hire action on the Job Opening page in PeopleSoft Recruiting Solutions.

**Status** Status values include *Action Required, Draft, Error, Requested,* and *All.*

The initial status for job applicants who were processed through PeopleSoft Recruiting Solutions is *Requested.* If the hiring request is cancelled from the Recruiting Solutions application when the hiring process is partially complete (you have created a personal data record, but not a job record), then the status changes to *Action Required,* indicating that an HR administrator needs to reverse the incomplete hiring process.

**Name** Click a person's name to access the person's data in the Manage Hires Detail page, where you can review job details and initiate the hiring process.

**Person ID** This field is blank when you have not yet begun the hire process for a person. Otherwise, it displays the person ID that was assigned when you created a personal data record for the person.

**Cancel Selected Transactions** Click to cancel the selected transactions. You cannot select transactions where the source is *Recruiting* (recruiting solutions).

Although you cannot cancel recruiting transactions from this page, recruiting users can withdraw a hire request. If the transaction request is *Requested* at the time the withdraw hire message is received, the system cancels the transaction and the transaction no longer appears on this page.

## Related Links

*PeopleSoft HCM 9.2: Talent Acquisition Manager*

## Manage Hires Detail Page

Use the Manage Hires Detail page (HR_MNGHIRE_DET) to review hire details and initiate the hiring process.

View detailed data for job applicants.

**Navigation**

Click the name link for a person whose Source is *Recruiting* on the Manage Hires page.

**Image: Manage Hires Detail page (1 of 2)**

This example illustrates the fields and controls on the Manage Hires Detail page (1 of 2). You can find definitions for the fields and controls later on this page.

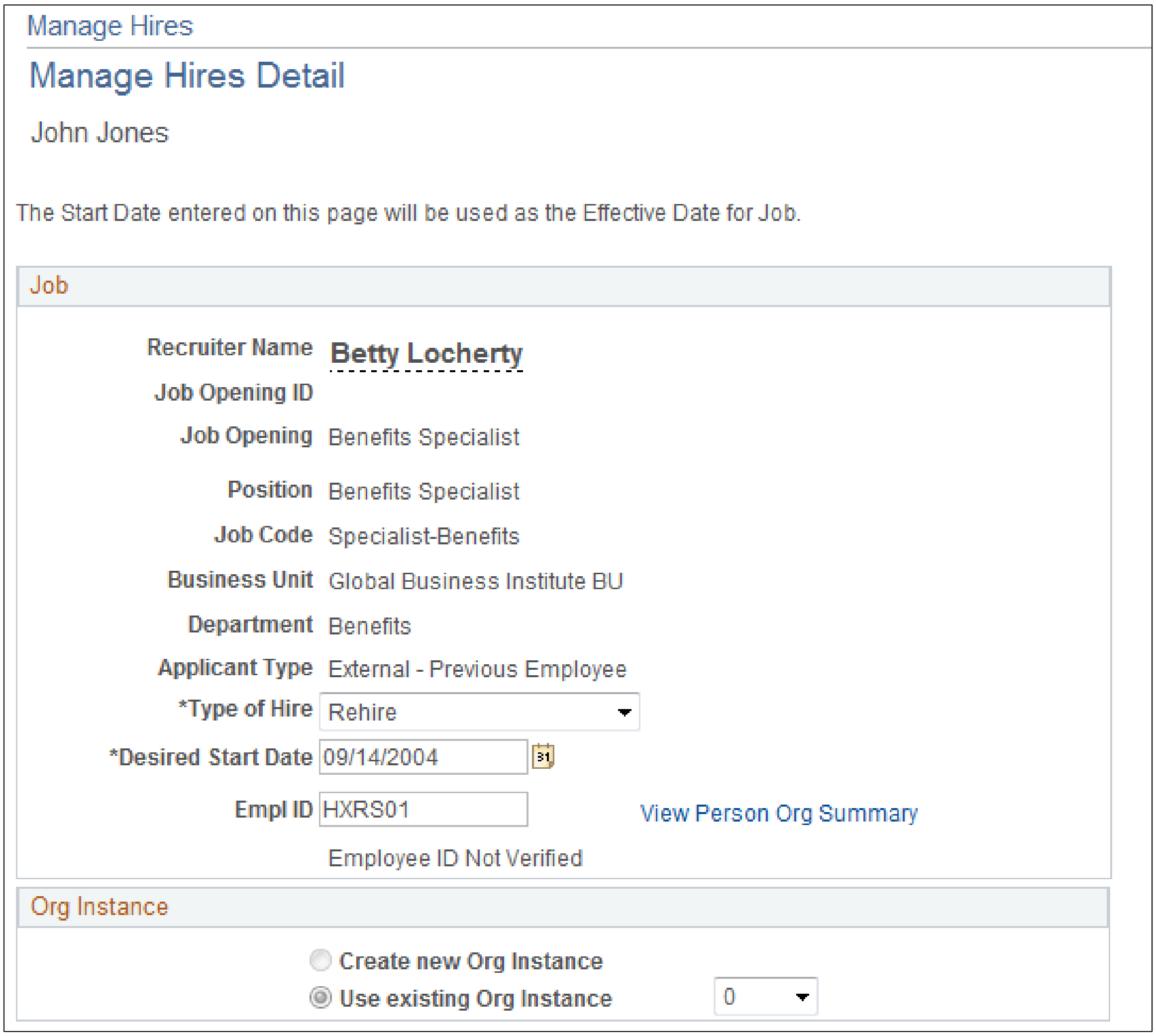
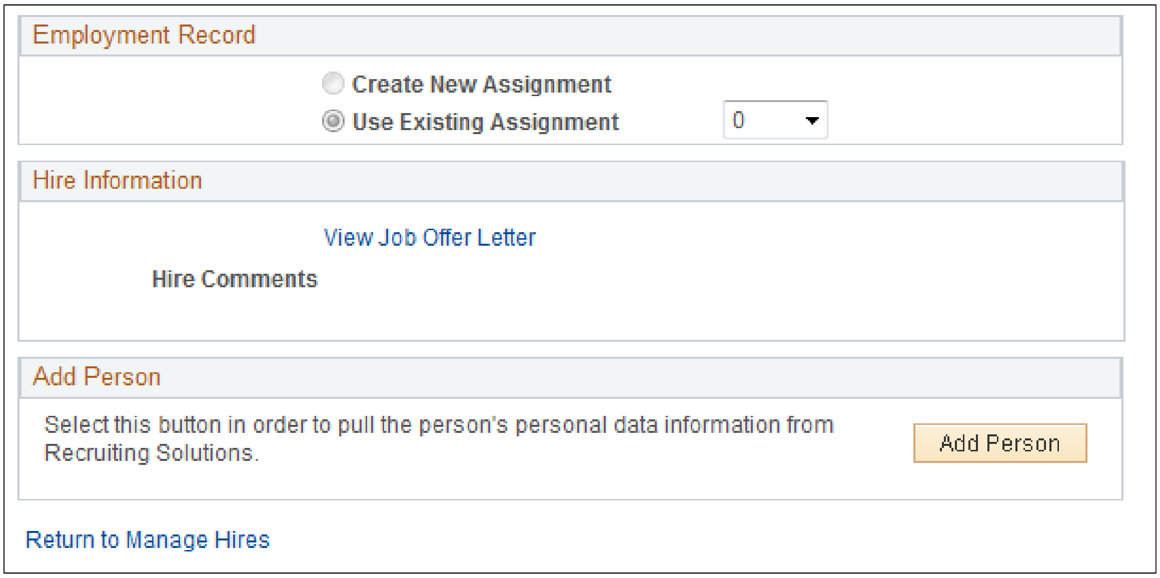


**Image: Manage Hires Detail page (2 of 2)**

This example illustrates the fields and controls on the Manage Hires Detail page (2 of 2). You can find definitions for the fields and controls later on this page.




## Job

The Job group box displays information about the job for which the person is to be hired.

**Type of Hire**

Select *Hire* or *Add Contingent Worker*. The default value comes from the recruiting application.

**Desired Start Date**

Displays a default start date that comes from the recruiting application. You can override this value.

This date becomes the default effective date of the job record that you create when you hire this applicant.

**Empl ID (employee ID)**

If you have initiated the hire process and saved a personal data record for the person, the person's employee ID is displayed, but is not editable.

If the field is blank, then the system generates a unique employee ID when you save the person's personal data record.

If an editable value appears, the system uses this value as the employee ID when you create the person's personal data record. If the employee ID already exists, a warning appears when you click the Add Person button to begin the hire process.

PeopleSoft Recruiting Solutions provides a default employee ID if the applicant was associated with an existing employee ID ( for example, the person is an internal transfer or a rehire). A text message on the page indicates whether the value provided by the recruiting application has been verified.

**View Person Org Summary**

If an employee ID exists, click this link to open the Person Organizational Summary page for the person in a new window.

## Hire Information

**View Job Offer Letter**

Click this link to open the applicant's offer letter in a new window.

PeopleSoft Recruiting Solutions users can choose whether to make offer letters available for viewing. If no offer letter has been made available, then the link does not appear on this page.

**Hire Comments**

Displays any hire-related comments that were sent from PeopleSoft Recruiting Solutions. These comments can come from two sources:

- A recruiter manually enters comments when submitting the person for hire.
- The system generates a message when a recruiter submits a request to withdraw the hire request but the hiring process has already begun.

  This message advises the HR administrator to use the Delete ID process to roll back the incomplete hire.

## Add Person

**Add Person andView/Edit Person**

If you have not yet begun the hiring process, click the Add Person button to access the Personal Data component where you can add the person to the system. The system transfers applicant data to the Personal Data component to simplify data entry.

After you save the personal data record, the Add Person group box and button become the View/Edit Person group box and link. Click the link to open the personal data component and review or update the data.

## Add Job

This group box appears only after you have created a personal data record for the applicant.

**Add Job**

If you have created the applicant's personal data, but you have not yet entered job data, click the Add Job button to access the Job Data component where you can complete the hire process. The system transfers applicant data to the Job Data component to simplify data entry.

After you save the job data record, the applicant no longer appears in the Manage Hires page.

# Using Smart HR Templates and Transactions

These topics provide an overview of Smart HR templates, list prerequisites, and discuss how to:

- Select a template or person to perform a Smart HR transaction.
- Enter transaction details.
- Enter employee information.
- Complete the transaction when a person match is found.
- Select an action when a person match is found.
- View the status of a Smart HR transaction.
- Manage transactions.
- Review transaction details
- Manage hires.
- Review hire details.

## Understanding Smart HR Templates and Transactions

The Smart HR process, or template-based transactions, enables you to expedite the hiring of individuals. Using a template-driven approach, it offers a way to streamline repetitive data entry by reducing the current data entry process through the Personal Data and Job Data pages.

There are three types of users that will facilitate Smart HR transactions:

- The template administrator creates various templates for use by the end users.
- The end user enters data for persons being added to the database. The amount of data an end user enters is dependant on the types of templates created. Security determines which templates the end user can access.
- The human resources administrator (HR administrator) determines at the template level whether the end user's data will automatically update the HR system, or if it requires an HR administrator to review it first. Also, the HR administrator is sent any errors that occur when the end user saves a person's data to the database for completion.

This table summarizes the pages used by each type of user:

<table>
<tr><th>Template Administrator</th><th>End User</th><th>HR Administrator</th></tr>
<tr>
<td><ul>
<li>Template Record/Field</li>
<li>Template Category Table</li>
<li>Template Section</li>
<li>Template Transaction Type<ul><li>Transaction Type</li><li>Components</li><li>Sections</li></ul></li>
<li>Copy Transaction Type</li>
<li>Template Creation:<ul><li>Configuration</li><li>Sections</li><li>Person Rules</li></ul></li>
<li>Copy Template</li>
</ul></td>
<td><ul>
<li>Smart HR Transactions<ul><li>Enter Transaction Details</li><li>Enter Transaction Information</li><li>Person Match Found</li><li>Select an Action</li><li>Confirmation</li></ul></li>
<li>Transaction Status</li>
</ul></td>
<td><ul>
<li>Manage Transactions</li>
<li>Manage Hires:<ul><li>Manage Hire Details</li><li>Error Transaction</li></ul></li>
<li>Add Person</li>
<li>Job Data</li>
<li>Person Profile</li>
</ul></td>
</tr>
</table>

**Note:** This topic focuses on the records the end user and HR administrator use in the Smart HR transaction process. Template setup by the template administrator is discussed in other topics.

See Setting Up Smart HR Templates.

To start the Smart HR transaction process, select a pre-configured template. This template will display a simple entry page or multiple data entry pages, depending upon how it was set up. The fields on this page may also be hidden or values will be provided by defaulted, based on how the template was set up by the template administrator. After the transaction data is entered it can be either saved directly to the HR system, reviewed by an human resources administrator, or saved for later.

When templates are created by the template administrator, the template status is set to *Test* (T). After the template is tested and ready for use, the status will need to be changed to *Active* (A). When you are searching for templates to use in the Smart HR transaction process, the only templates that are available are those with a status of *Active* (A). End users will only be able to see templates for which they have row-level security access.

When the data is submitted for processing, the appropriate service-oriented architecture (SOA) or component interface (CI) will be called to process the actual transaction. If an error occurs during processing, a line item will be added to the Manage Transactions component. If it is for a hire transaction it will also be added to the Manage Hires component. From these pages, a human resources administrator is able to review the data, make corrections, resubmit for processing, or cancel the transaction. The human resources administer is able to do this by accessing the transaction template as a whole, or though the Personal Data, the Job Data, and the Person Profile components. What the administrator accesses depends on the type of transaction that was performed. He or she can complete the transaction but can also modify the data entered by the end user, as needed, prior to committing the changes to the database.

### Smart HR (Template-Based Transaction) Process Flow

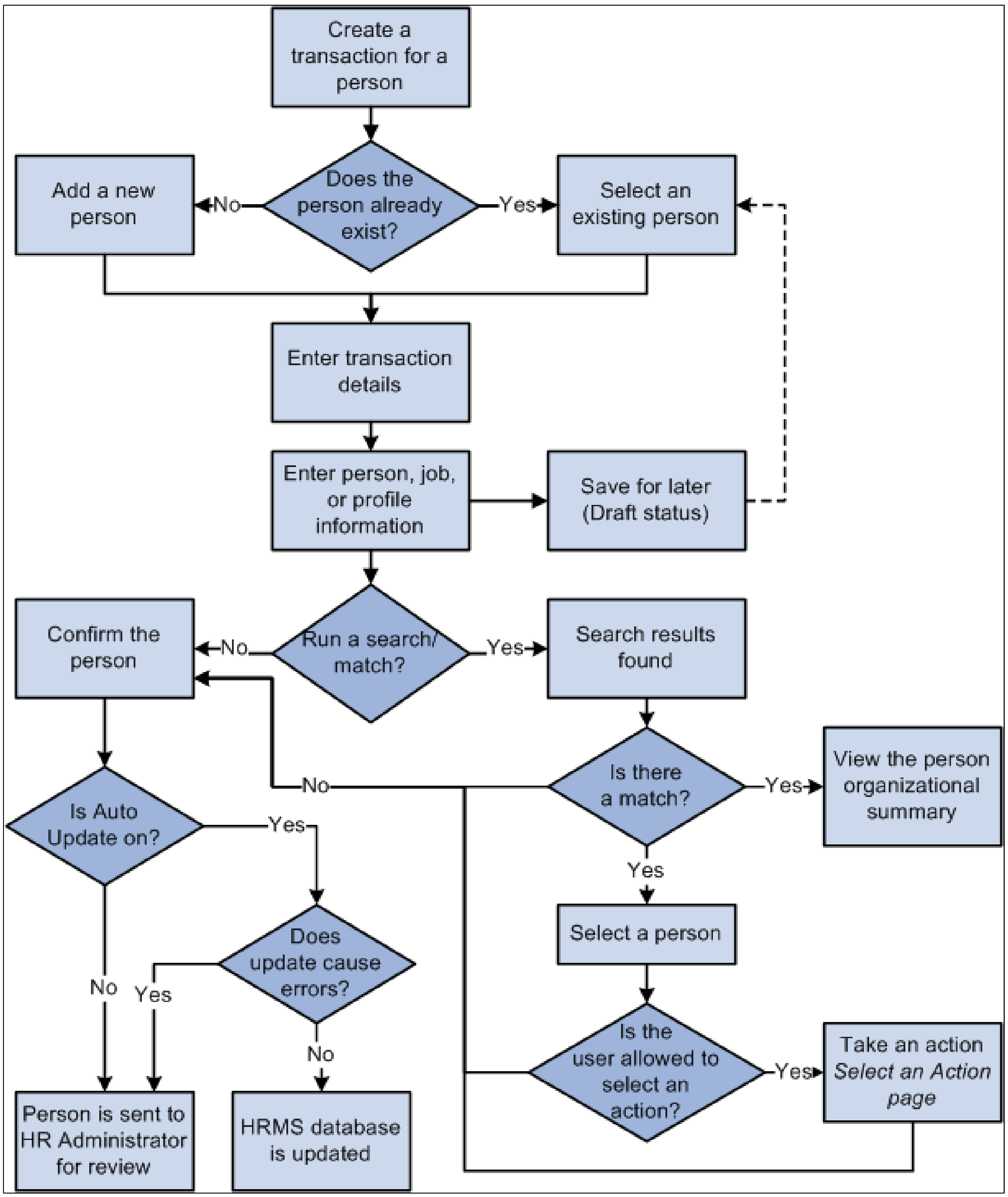
When hiring or updating a person's personal, job, or profile data using the Smart HR feature, you will use the following pages:

- Smart HR Transactions.
- Enter Transaction Details.
- Enter Transaction Information.
- Person Match Found.
- Select an Action.
- Confirmation.

- Transaction Status.

**Image: Smart HR transaction process flow includes person and job data entry, optional search for an existing person, and submission of confirmed data**

This diagram illustrates the Smart HR process, during which the user performs a transaction using the Smart HR Transactions components. Here the user, enters transaction details, such as person, job, and profile information, may determine if this person matches another person already in the system, and confirms the transaction data. Depending on the template definition, the confirmed information will either update the database directly, or it will be routed to an HR administrator for review.



## Smart HR Transactions

The Transactions in Progress grid on the Smart HR Transactions page displays the people who are in draft status within the Smart HR transaction process. The list of people is filtered based on the operator ID of the person accessing the page. The page will show only the entries that the end user has previously entered using their operator ID. On this page you can delete a person which will delete the person's information.

## Enter Transaction Details

On the Enter Transaction Details page, enter basic information for the transaction. On this page you may be required to enter information such as the:

- Person ID.
- Job effective date.
- Job action.
- Action reason code.
- Name and address formats.

---

**Note:** Depending on how the template administrator has set up the template configuration this information will be display only, visible and editable, or hidden.

---

Also, for informational purposes, this page will display such information as the:

- Template name.
- Country.
- Organizational relationship, which is the type of person for which you are performing a transaction, such as employee or contingent worker.
- Template category.

## Enter Transaction Information

The Enter Transaction Information page is where you will enter name details, home and mailing address details, National ID, and job details. The number of sections and fields on this page are dependent on how the template chosen has been configured by the template administrator.

## Person Match Found

The Person Match Found page displays the possible person matches. The match parameters are set up by the template administrator. If a match is found, select the person from the list and the EmplID is carried forward in the transaction. If no match is found, you can continue with the transaction by clicking the *Not a Match - Continue with Hire* button. The *Not a Match - Continue with Hire* button is not available for non-hire or non-rehire transactions; an employee must be in the system for these types of transactions.

## Select an Action

The Select an Action page displays only if a match is found during the search and you are allowed to take some action (defined at the template level). If the user is not allowed to take any action, the page will not display and a transaction request for the person is sent to the HR administrator.

## Confirmation

The Confirmation page displays if the user has successfully saved the data to the system. There are four different messages displayed on the conformation page based on the template level set up and the security access of the user's operator ID. The confirmation page will display one of the following four messages:

- *Save Confirmation.* The system displays this message if the user has access to save the person to the database and a Person ID is generated.
- *Save for Later Confirmation.* The system displays this message if the person entered is saved in draft status and a Person ID is not generated.
- *Submit Confirmation.* The system displays this message if the user has access to enter the data but not save it to the database. The person in the transaction is submitted to Human Resources for final processing.
- *Further Processing Required.* The system displays this message if errors were encountered while trying to save to the database. The person's transaction information is then sent to human resources to complete the transaction.

When the data has been confirmed it is stored in the staging tables HR_TBH_HDR and HR_TBH_DATA. The HR_TBH_HDR table stores the high-level information, which includes a unique sequence number representing the transaction ID, the template ID, the operator ID of the user who entered the data, the status representing various stages of the transaction, and the transaction date. The HR_TBH_DATA table stores the record name, field name, and value of the Record/Field with the unique transaction ID. This table is a child of the HR_TBH_HDR table.

The status field on the HR_TBH_HDR may have one of the values displayed in the table below:

| ***Status*** | ***Definition*** | ***Scenario*** |
|---|---|---|
| DFRT | Draft | The user has begun to enter data but saved to continue later. |
| SBMT | Submitted | The user entered all required data based on the template configuration. |
| ACTR | Action Required | The user decided to send the transaction request to the HR administrator to review or complete the rest of the information. |
| EROR | Error | The user encountered some error while saving the data in to the system. |

| ***Status*** | ***Definition*** | ***Scenario*** |
|---|---|---|
| HIRE | Hired/Added | Once the HR administrator completes the hire process by adding person and job information into the system, the status of the row will change to *Hire/Added.* |
| COMP | Completed | Once the row is deleted by the user, the status of the row will change to *Completed.* |

### Error Transaction

The Error Transaction page is displayed when the template administrator is testing the template and the test is unsuccessful. This page is also available to the HR administrator on the Manage Transaction Details and Manage Hire Details pages. This page will display the template used, the transaction causing the error, the transaction ID, and the start date. It will also give a description of the error found.

### Transaction Status

The Transaction Status page displays the persons being processed by the Smart HR transaction process and their status. The list is filtered based on the operator ID of the user. Also, the user has the option of deleting a row.

**Note:** This page does not show people in draft status. You can only view those individuals currently being processed by the HR department, view those who have been cancelled by the HR department, and those whose transactions have been successfully entered. You can remove people with the transaction status of *Cancelled* and *Processed* .

## Prerequisite

Smart HR templates provide a configurable, template-driven approach, where you can define default data for various sections in the transaction process, such as for a hire or to update a persons personal, job, or profile data. You will be able to create templates to meet different user needs by configuring the template to hide or display specific fields. This allows your Human Resources department to decentralize the HR hire or update transaction processes out to line managers or human resource representatives in the field.

Prior to performing a Smart HR transaction, a template administrator must set up the templates. The administrator must be a person who is very familiar with the hiring process. When creating a template, the administrator is responsible for determining:

- Logical groups of fields, which will be the sections to include on the template.
- The sequence of sections and fields within sections.
- Default values for fields.
- Which fields will be hidden, display-only, or enterable.
- Whether data entered by the end user can be directly submitted for processing or will need to be reviewed by a human resource administrator.

Sections and fields used within templates are delivered as system data. These delivered sections can be modified within your templates to suit your organization's needs. These sections are located in the Template Section component (Set Up HCM, Product Related, Workforce Administration, Smart HR Template, Template Section). A list of delivered Smart HR template sections are located in the Setting Up the Administer Workforce Business Process, Setting Up Smart HR Templates topic in this documentation.

The labels of the fields on the template sections typically reflect the actual field labels. However, the template administrator can create a text catalog entry for those fields in which they want to change the label.

When the templates are created, the template administrator will assign a transaction type and category to each template. These are used for row-level security of the template. This security will restrict end user access to the template. Also, PeopleTools permission lists and roles are used for security purposes.

When templates are similar, the template administrator can clone an existing template to eliminate duplicate entry.

See Setting Up Smart HR Templates.

## Pages Used to Increase the Workforce Through Templates

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Smart HR Transactions | HR_TBH_EULIST | • Workforce Administration, Smart HR Templates, Smart HR Transactions, Smart HR Transactions<br>• Manager Self Service, Job and Personal Information, Smart HR Template, Smart HR Transactions, Smart HR Transactions | Select a template or person to process a Smart HR transaction. |
| Enter Transaction Details | HR_TBH_ADD | • Select a template from the Select Template field on the Smart HR Transactions page and click Create Transaction.<br>• Select a name link from the Name field on the Smart HR Transactions page. | Enter transaction details, such as the persons's job effective date, to start the Smart HR transaction process for a person. |
| Enter Transaction Information | HR_TBH_DATA | Click Continue on the Enter Transaction Details page | Enter employee information details for the person’s transaction. The page will display the tabs and fields defined by the template you selected for this person. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Person Match Found | HR_TBH_SRMATCH | Click Save and Submit on the Enter Transaction Information page. | Identify if a person match is found in the system. When saving and submitting the person to the database, if a match is found on the person's name or national ID, this page displays and allows you to select an existing person in the database or continue with the transaction. |
| Select an Action | HR_TBH_ACTION | Click the Select button on the Person Match Found page. | Select an action if a matching person with an inactive status is found in the database. |
| Confirmation<br><br>Further Processing Required | HR_TBH_CONFIRM | Click Save and Submit on the Smart HR Transaction pages. | Displays information about the transaction status after performing a Smart HR transaction. |
| Transaction Status | HR_TBH_STATUS | • Workforce Administration, Smart HR Template, Transaction Status, Transaction Status<br><br>• Click the Transaction Status link on the Smart HR Transactions page. | View the status of a Smart HR transaction for those transactions with a pending, cancelled, or processed status. |
| Manage Transactions | HR_TBH_MANAGE_TXN | Workforce Administration, Smart HR Template, Manage Transactions, Manage Transactions | View Smart HR transactions ( hire and non-hire transactions) that are either in draft status, require HR review prior to committing to the database, encountered errors upon saving and require a HR administrator's review to complete the transaction, or to display a list showing all transactions with these statuses. |
| Manage Transaction Details | HR_TBH_HIREDET | Click the name link for a person on the Manage Transactions page . | View the transaction details entered during a Smart HR transaction and complete the process. |
| Manage Hires | HR_MANAGE_HIRES | Workforce Administration, Personal Information, Manage Hires, Manage Hires | View a list hires that have gone through either the recruiting process or persons hired through the Smart HR transaction process. |
| Manage Hire Details | HR_TBH_HIREDET | Click the name link for a person whose Source value is *Smart HR Transactions* on the Manage Hires page. | View hire details entered during a Smart HR hire transaction and complete the hire process. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Manage Transaction Details - Transaction Errors Detail<br><br>Manage Hire Details - Transaction Errors Detail | HR_TBH_ERRORS | Click View Errors from the Manage Transaction Details or Manage Hire Details page. | View the errors that occur during the save of the transaction. |
| Manage Transaction Details - Possible Person Matches<br><br>Manage Hire Details - Possible Person Matches | HR_TBH_HIRESM | Click the Search for Matching Persons link on the Manage Transaction Details or Manage Hire Details page. | Determine if a person in the Search Match process matches the person for which you are performing a transaction. |

## Smart HR Transactions Page

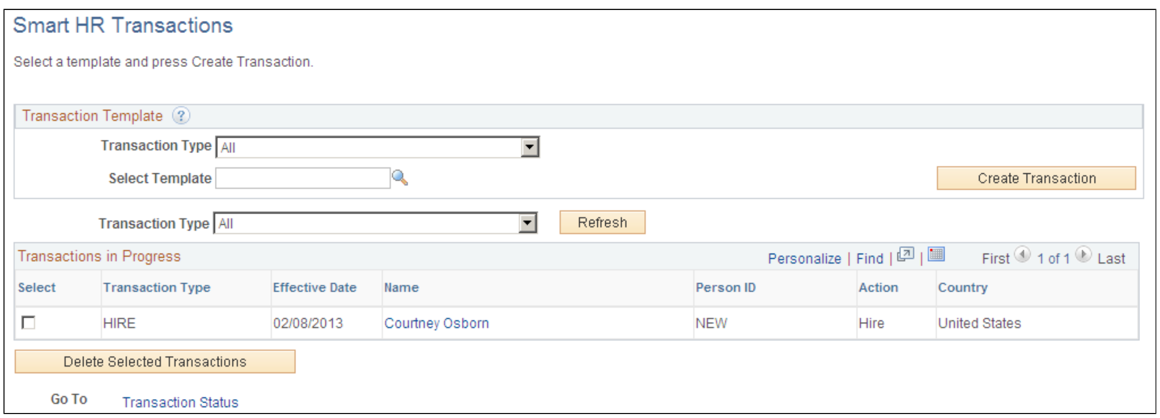
Use the Smart HR Transactions page (HR_TBH_EULIST) to select a template or person to process a Smart HR transaction.

**Navigation**

- Workforce Administration, Smart HR Template, Smart HR Transactions, Smart HR Transactions
- Manager Self Service, Job and Personal Information, Smart HR Template, Smart HR Transactions, Smart HR Transactions

**Image: Smart HR Transactions page**

This example illustrates the fields and controls on the Smart HR Transactions page. You can find definitions for the fields and controls later on this page.




Start or complete a Smart HR transaction. Click the Transaction Status link at the bottom of the page to access the Transaction Status page and view transactions pending HR processing, have been cancelled by HR, or people who have had Smart HR transactions performed in the system.

### Transaction Template

Select a template and click the Create Transaction button to start a transaction using the Smart HR process. The templates available for selection are those set up by the template administrator. You can narrow the search for a template by selecting a transaction type prior to searching for a template. Transaction types define if a transaction template is for a hire or rehire, a job update, a job and person data update, a profile update, and so on.

### Transactions in Progress

Displays the transactions that are in *Draft* status. You can only view those people you have added through the Smart HR Transactions pages but selected to save for later. The person will remain in *Draft* status until you submit the person, send them to HR for completion, or delete them by selecting the Delete Selected Names button after selecting them.

### Related Links

Setting Up Smart HR Templates

## Enter Transaction Details Page

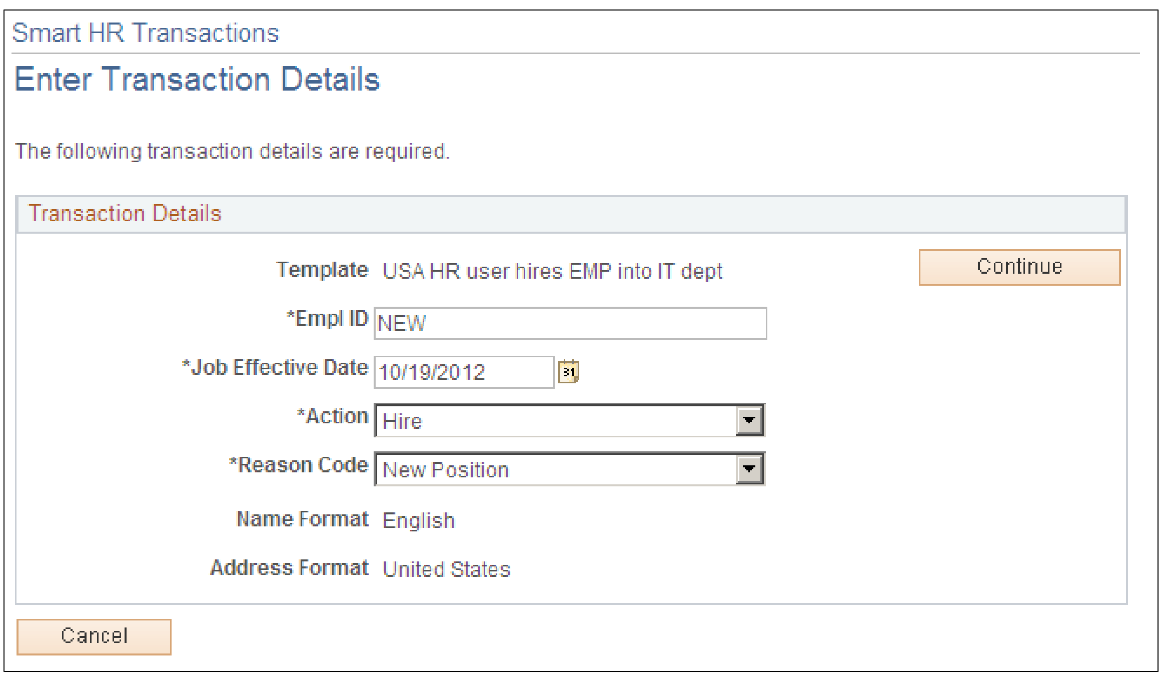
Use the Enter Transaction Details page (HR_TBH_ADD) to enter transaction details, such as the persons's job effective date, to start the Smart HR transaction process for a person.

**Navigation**

- Select a template from the Select Template field on the Smart HR Transactions page and click Create Transaction.
- Select a name link from the Name field on the Smart HR Transactions page.

**Image: Enter Transaction Details page**

This example illustrates the fields and controls on the Enter Transaction Details page. You can find definitions for the fields and controls later on this page.




---

**Note:** The fields you view or update vary depending on the template set up.

---

Enter transaction details to start the transaction process. Once the values on this page are entered, click Continue to access the Enter Transaction Information page.

Possible fields that may be visible or editable are Template ID, Organizational Relationship, Country, Category, EmplID, Job Effective Date, Action, Reason, Name Format, and Address Format.

| | |
|---|---|
| **Empl ID** | Displays the value *NEW* if you are adding a new person and are using system-assigned IDs. Otherwise, the system displays the value that you enter to access the page. |

## Enter Transaction Information Page

Use the Enter Transaction Information page (HR_TBH_DATA) to enter employee information details for the person's transaction.

### Navigation

Click Continue on the Enter Transaction Details page.

**Image: Example of the Enter Transaction Information page (1 of 3)**

This example illustrates an example of the Enter Transaction Information page (1 of 3). You can find definitions for the fields and controls later on this page, which varies according to the template you select.

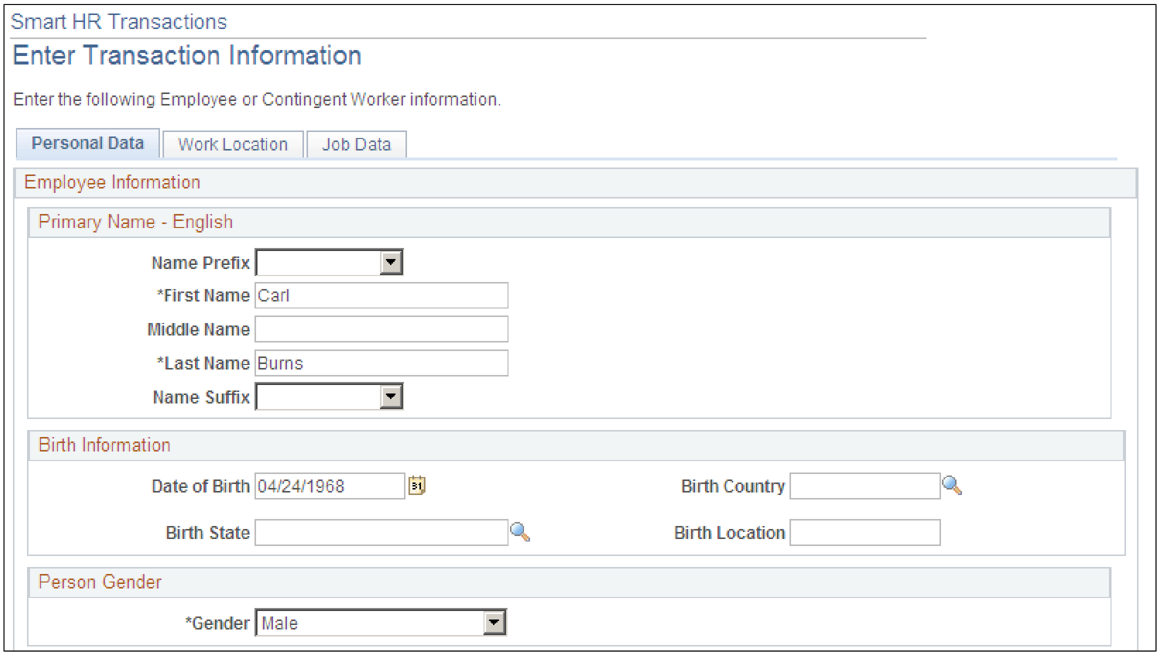



**Image: Example of the Enter Transaction Information page (2 of 3)**

This example illustrates an example of the Enter Transaction Information page (2 of 3). You can find definitions for the fields and controls later on this page, which varies according to the template you select.

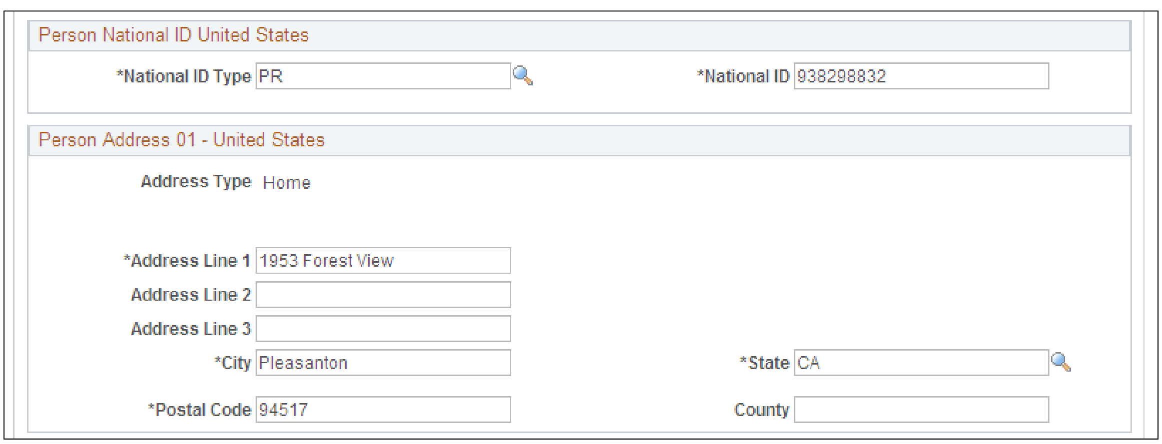
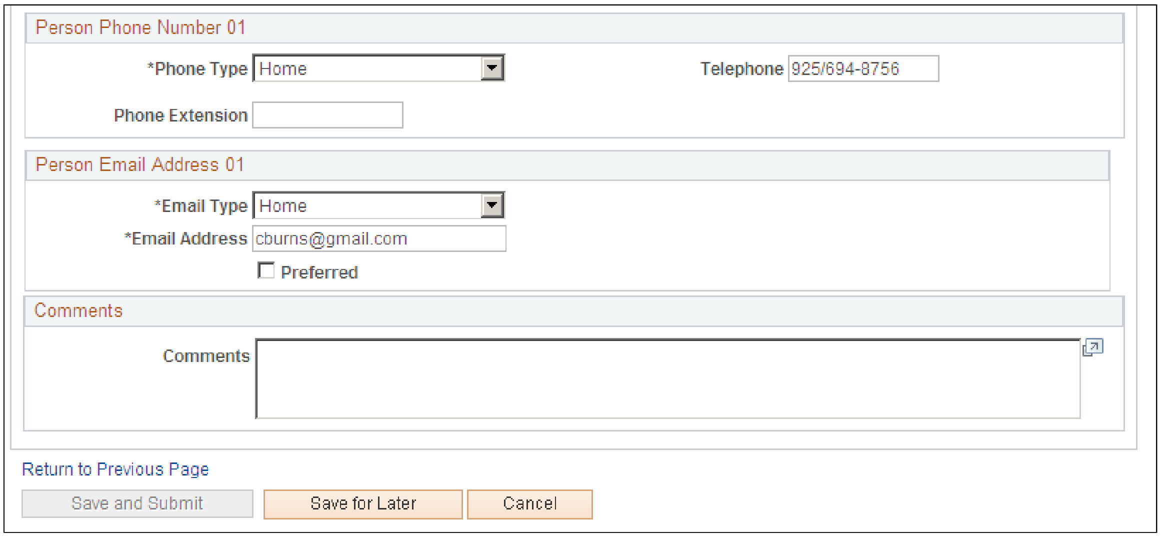


**Image: Example of the Enter Employee Information page (3 of 3)**

This example illustrates an example of the Enter Transaction Information page (3 of 3). You can find definitions for the fields and controls later on this page, which varies according to the template you select.




---

**Note:** The page tabs and fields you vary depending on the template set up.

---

Enter transaction information for the fields that are defined for the template chosen. This data will be used complete the transaction. If there is more than one page to the template, use the tabs to navigate between the pages.

See Understanding Job Data.

## Completing a Smart HR Transaction

Once all data is entered, you may be presented with these options:

- Save and Submit – Click this button to save and submit the information for the person to the database.
  - If Search Match is enabled for this template, the system will run the Search/Match process and display the Person Match Found page if a match is found.

    ---

    **Note:** For templates with a transaction type where the Person/Job Data Indicator field value is not equal to *Hire/Rehire,* the person must already be in the system.
    If no match is found, an error message appears stating that the personal information does not match a person in the system and to either edit the transaction details or send to HR for completion.

    ---

  - When the Automatic Database Updates check box is selected for the template and the transaction is saved successfully, the transaction updates the database and all information entered is updated in the appropriate tables.
  - When the Automatic Database Updates and the Show Update Contracts Link check boxes are selected on the template and the transaction is saved successfully, the system will display the Update Contracts link, which enables users with security permission to the contract pages to enter contract information for a person.

- If Automatic Database Updates is not selected on the template definition (and no matching person was found for a hire or rehire template), the Submit Confirmation page will appear stating that the transaction is being forwarded to HR for further processing.

- Save for Later – Click this button to place the transaction in draft status. Depending on the security access granted the end user, he or she can access the person later to complete the transaction, or the transaction can be completed by the HR representative.
- Submit to HR – Click this button to submit the person's information to HR for review, completion, or submission by the HR administrator.
- Cancel – Click this button to return to the initial Smart HR Transaction page and no data is saved.

---

**Note:** The save options will vary depending on the template setup and the end user's security access. For example, if the end user is not allowed to save and submit data to the database, the template administrator will set up the template so all hires will have to be saved for later or submitted to HR for completion.

---

## (USF) U.S. Federal Specific Considerations

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**Note:** The PeopleSoft application delivers the *U.S. Federal Hire/Rehire* template transaction type for Federal users. Federal customers use the PAR processing components, where the personal data and job data are in the same component and both sets of data will always be updated from the template. Therefore, the application does not deliver a template transaction type for Federal users where the person job data indicator is set to update job only or update person only.

---

In cases of U.S. Federal implementations, when the end user selects Save and Submit for a transaction, the following will occur:

- When Automatic Database Updates is selected.

  The employee goes to the first step in the PAR approval process. The data is not sent directly to Personal Data and Job Data.

- When Automatic Database Updates is deselected.

  The request will go to the Manage Transactions page to await HR action. When the HR administrator saves the person (in the HR Processing USF component), the data will go to the first step in the PAR approval process, not directly to Personal Data and Job Data.

There are two exceptions to this rule:

1. When Federal customers add contingent workers they do not go through the PAR approval process, instead they go directly to Personal Data and Job Data.
2. If the template administrator defaults the PAR Status field to *Processed by Human Resources* when setting up the template, then the data will be sent on to Personal Data and Job Data as part of the processing Federal Hire component interface.

## Related Links

Understanding Smart HR Templates

## Person Match Found Page

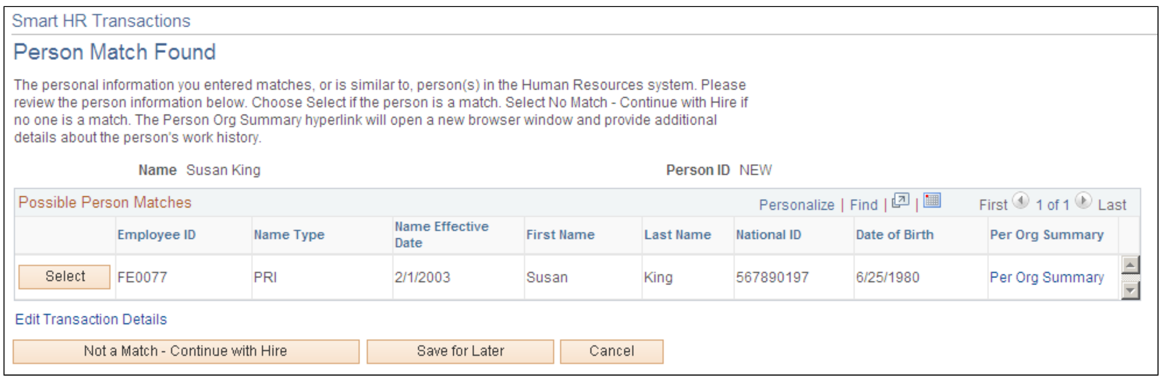
Use the Person Match Found page (HR_TBH_SRMATCH) to complete a transaction when a person match is found. When saving and submitting the person to the database, if a match is found on the person's name or national ID, this page displays and allows you to select an existing person in the database or continue with the transaction.

**Navigation**

Click Save and Submit on the Enter Transaction Information page.

**Image: Person Match Found page**

This example illustrates the fields and controls on the Person Match Found page. You can find definitions for the fields and controls later on this page.




This page appears only if Search Match is enabled for the template and a match is found on the person involved in the transaction.

**Select**

If a match is found, the end user can select one of the existing people to continue with the transaction. The system considers the following scenarios when processing the transaction:

- If the matching person selected is currently active in the system, the request is automatically sent to an HR administrator to complete.
- If the matching person selected is currently inactive in the system, the Select an Action page will appear and you will be presented different options on how to proceed, depending upon how the template rules are set up.
- When auto-update is enabled for a job data transaction and the person selected has no active job instances or more than one active job instance, the transaction is routed to an HR administrator to complete.

**Per Org Summary**

Click this link to open the Person Organizational Summary page in a new window to view more details about this person. This can be useful in deciding whether this transaction should be treated as a new hire, if this should be treated as a concurrent

| | |
|---|---|
| | job for an existing person, or if this is a rehire or update of someone already in the database. |
| **Not a Match - Continue with Hire** | Click this button if none of the search results are a match.<br><br>**Note:** This button is not available for non-hire or non-rehire transactions. These types of transactions require that a person be in the system. |
| **Save for Later** | Click this button to save this person in draft status and come back at a later time to decide whether the person is a match or not. |
| **Cancel** | Click this button to cancel this process. You will lose all data previously entered and the system will return you to the initial Smart HR Transactions page. |
| **Send to HR for Completion** | Click this button to submit this transaction to HR for completion. |
| **Enter Transaction Details** | Select to have the system return you to the Enter Transaction Details page of the Smart HR template and view or modify your data. |

See Reviewing Organizational Relationships.

## Select an Action Page

Use the Select an Action page (HR_TBH_ACTION) to select an action if a matching person is found in the database.

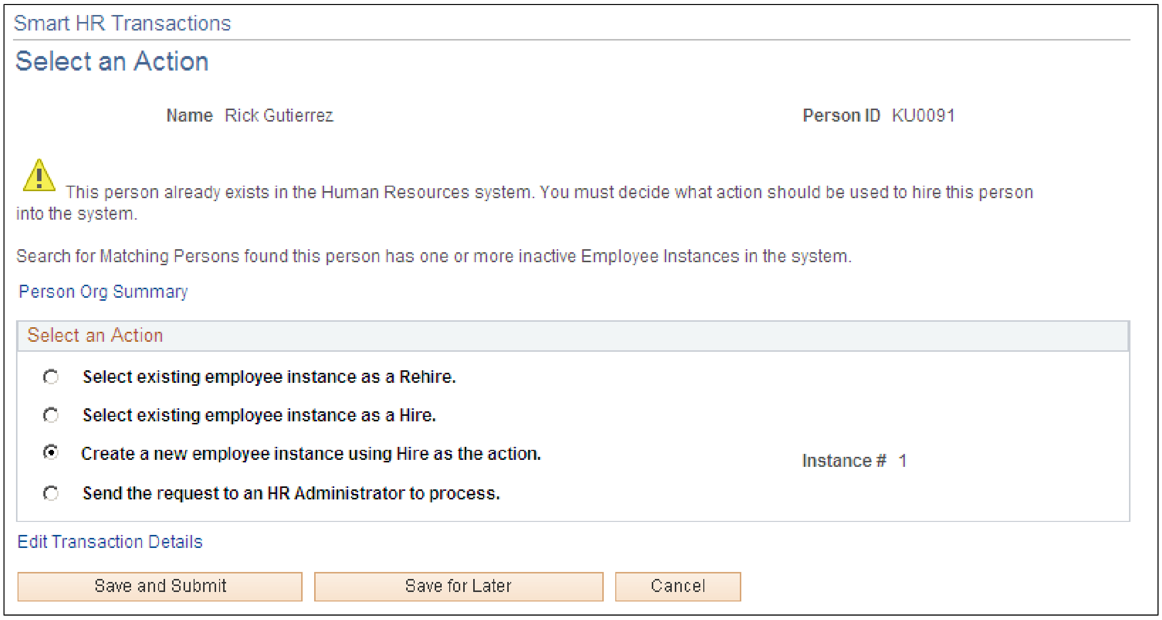
 

### Navigation

Click the Select button on the Person Match Found page (for a person with an inactive status).

**Image: Select an Action page**

This example illustrates the fields and controls on the Select an Action page. You can find definitions for the fields and controls later on this page.




This page is only available for templates with a transaction type where the Person/Job Data Indicator field value is equal to *Hire/Rehire*.

---

**Note:** The options on this page vary depending upon how the rules are set up for the template on the Template Creation - Person Rules Page.

---

## Search Match for Hire or Rehire Transactions

When no active organizational instance is found and the template administrator has set up the template to enable the end user to decide what action to take, options may include:

- Select existing employee instance as a Rehire or Select existing employee instance as a Hire.

  The system will default to the lowest employment instance. The end user has the option to select a different employee instance, if applicable. When an employee instance is selected, the system always defaults to the controlling instance employee record number behind the scenes.

- Create a new employee instance using Hire as the action.

  The action will always default to *HIR* (Hire) for employee templates and *ADD* (Add Contingent Worker) for contingent worker templates. The employee instance and employee record number is automatically calculated behind the scenes.

- Send the request to an HR Administrator to process.

When the end user does not get to decide what action to take, the template administrator must decide at the template level the options to take.

If only one inactive employment instance is found for the selected person when the Search Match process is run, the template administrator must decide between the following actions:

- Restart Employment Instance as a Rehire.
- Restart Employment Instance as a Hire.
- Create a New Employment Instance using Hire as the Action.
- Send the Request to an HR Administrator to Process.

When more than one inactive employment instance is found for the selected person when the Search Match process is run, the template administrator can chose from with of these option to have the system perform:

- Create a New Employment Instance using Hire as the Action.
- Send the request to an HR Administrator to process.

---

**Note:** When an active person is selected from the search results, the hire request will always be sent to HR to complete the process.

---

## Transaction Status Page

Use the Transaction Status page (HR_TBH_STATUS) to view the status of a Smart HR transaction for those with a pending, cancelled, or processed status.

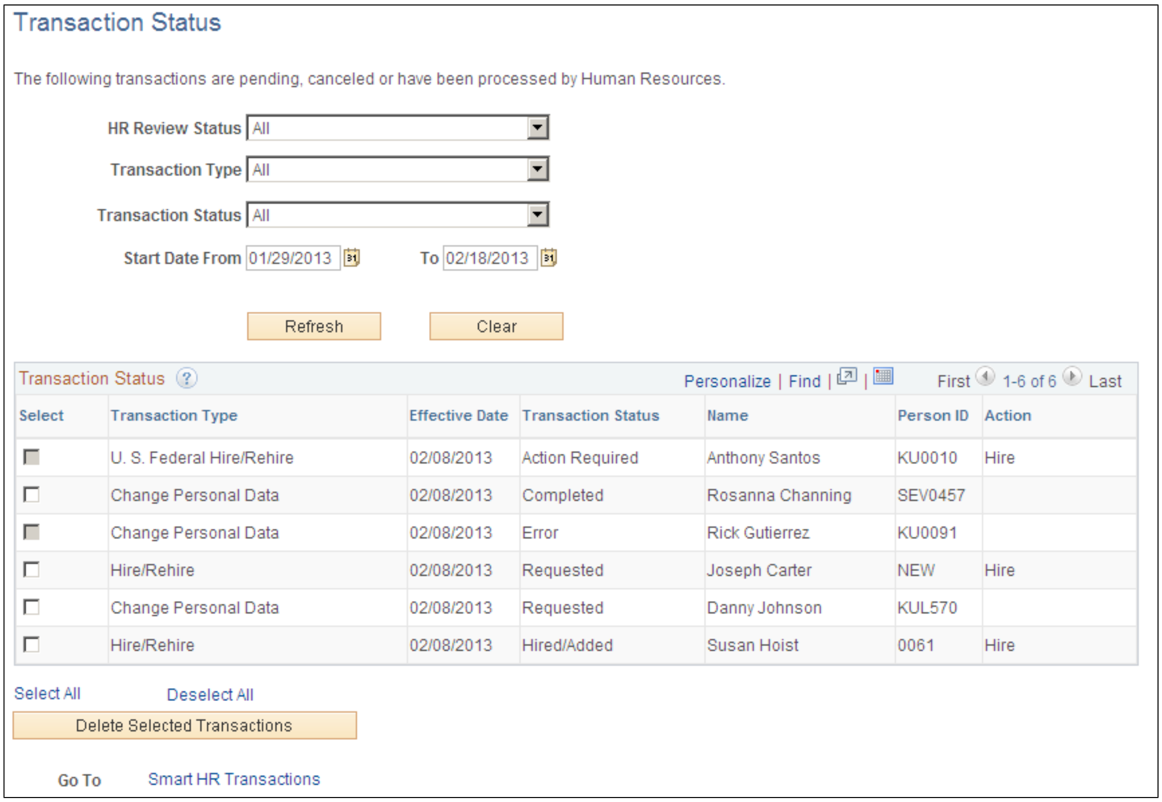
 

### Navigation

- Workforce Administration, Smart HR Template, Transaction Status, Transaction Status
- Click the Transaction Status link on the Smart HR Transactions page.

### Image: Transaction Status page

This example illustrates the fields and controls on the Transaction Status page. You can find definitions for the fields and controls later on this page.




View the status of Smart HR Template transactions. The end user will be able to view only the persons he or she have entered in the system.

## Manage Transactions Page

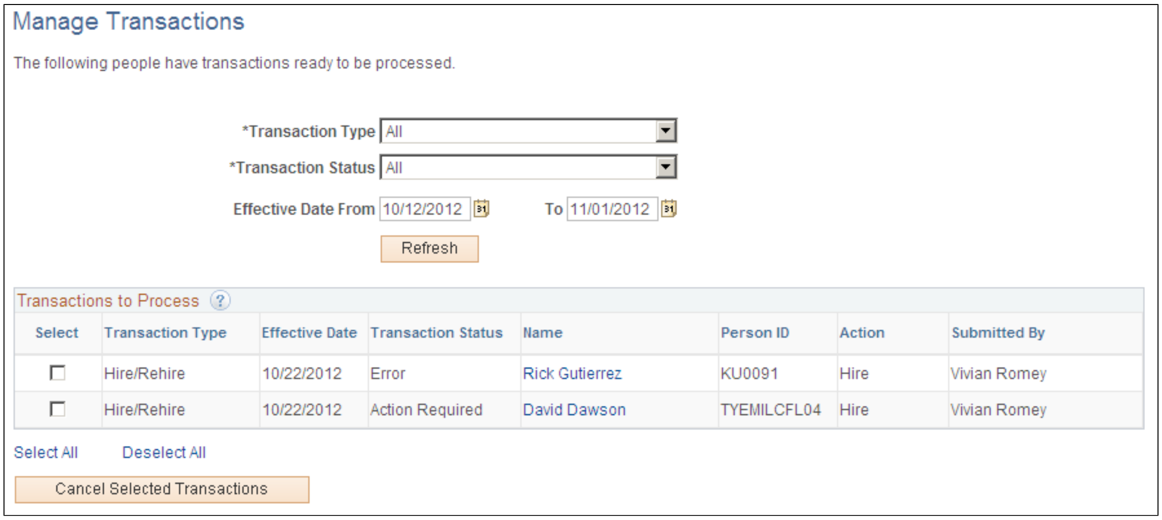
Use the Manage Transactions page (HR_TBH_MANAGE_TXN) to view the Smart HR transactions that are either in draft status, require HR review prior to committing to the database, encountered errors upon saving and require a HR administrator's review to complete the transaction, or to display a list showing all transactions with these statuses.

**Navigation**

Workforce Administration, Smart HR Template, Manage Transactions, Manage Transactions

**Image: Manage Transactions page**

This example illustrates the fields and controls on the Manage Transactions page. You can find definitions for the fields and controls later on this page.




The page will display, by default, all transactions with the previously mentioned statuses with effective dates in the previous 10 days as well as next 10 days. Use the Transaction Type and Effective Date From and To fields to narrow your search for a transaction.

When a Smart HR template for a transaction does not allow automatic database updates by the user, the transactions are available on this page with the status of *Requested*.

To review, update, and save a transaction to the HR system, select a person’s name link in the Transactions to Process grid. This will open the Manage Transaction Details page to enable you to complete the transaction.

## Manage Transaction Details Page

Use the Manage Transaction Details page (HR_TBH_HIREDET) to view details entered during a Smart HR transaction and complete the process.

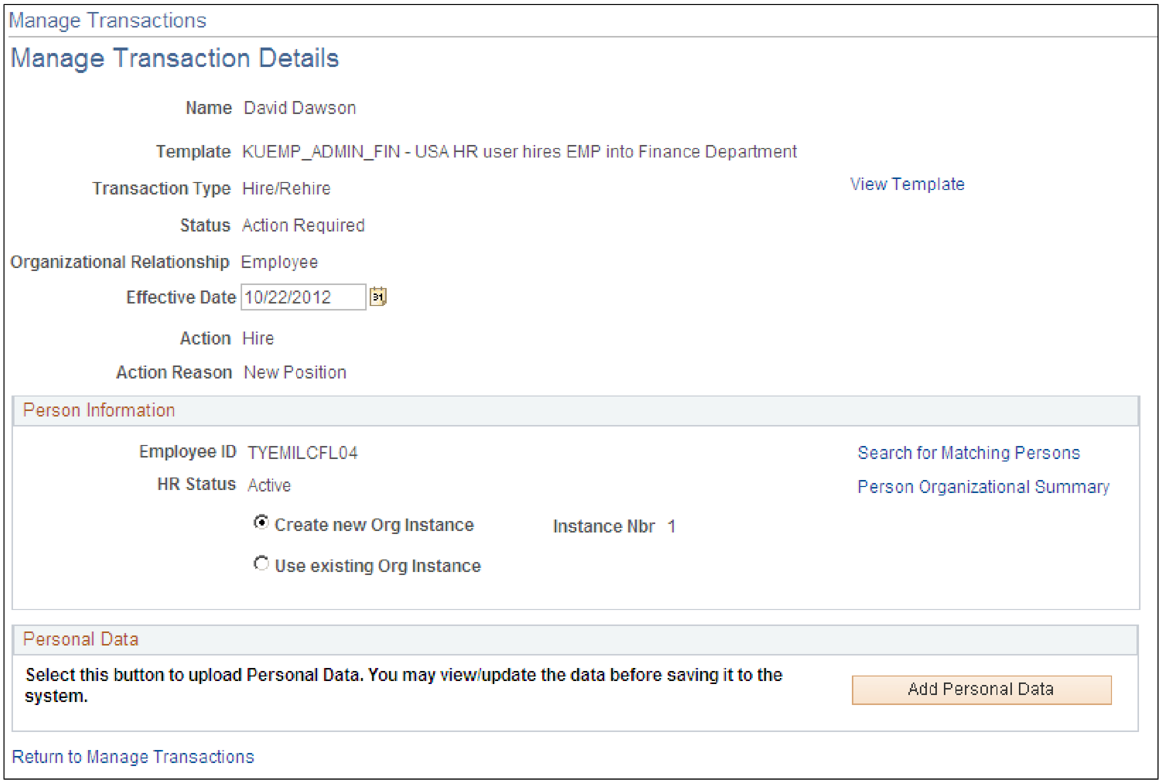
 

### Navigation

Click the name link for a person on the Manage Transactions page.

**Image: Manage Transaction Details page**

This example illustrates the fields and controls on the Manage Transaction Details page. You can find definitions for the fields and controls later on this page.




Use this page to change the transaction date, perform a search for matching persons, or select the appropriate buttons or links to complete the Smart HR transaction.

This table lists some examples of some of the buttons and links that are available based on status:

| ***Status*** | ***Available Button or Link*** | ***Description*** |
|---|---|---|
| *Requested* | Open Template<br><br>Add Person (button) | Automatic updates is off.<br><br>The person has not been added to the system. |
| *Requested* | View/Edit Person (link)<br><br>Add Job (button) | Automatic updates is off.<br><br>Personal information has been added to Personal Data.<br><br>The person still needs to be added to Job Data. |

| Status | Available Button or Link | Description |
|---|---|---|
| *Requested* | Add Profile (button) | Automatic updates is off.<br><br>The profile data has not been added to the system. |
| *Draft* | View/Edit Job Data (link)<br><br>Add Profile Data (button) | Job information has been added to Job Data.<br><br>The profile data still needs to be added to Person Profile. |
| *Action Required* | Add Person (button) | Automatic updates is on.<br><br>This person was submitted to HR for completion. |
| *Action Required* | View/Edit Person (link)<br><br>Add Job (button) | Automatic updates is on.<br><br>This person was submitted to HR for completion and personal data has been added.<br><br>The job information has not been added. |
| *Action Required* | View/Edit Person (link)<br><br>View/Edit Job (link)<br><br>Update Profile Data (button) | Automatic updates is on.<br><br>Personal data and job data has been updated.<br><br>The profile information has not been added. |
| *Error* | View Errors (link)<br><br>Add Person (button) | Automatic updates is on.<br><br>An error occurred when attempting to save the record to Personal Data. |
| *Error* | View Errors (link)<br><br>Add Person (button)<br><br>Add Job (button) | Automatic updates is on.<br><br>The person has been added to Personal Data.<br><br>An error occurred when attempting to save the record to Job. |

---

**Note:** (USF) When the database is federalized, only the Add Person/Job appears, which will update HR Processing USF. Depending on the PAR Status, Personal Data and Job Data may also be automatically updated. For example, if the PAR Status is *Processed* on the template, Personal Data and Job Data will be automatically updated when the Add Person/Job button is selected and the information is saved. However, if the PAR Status is *Requested* on the template, only the HR Processing USF page will be updated and the request will need to go through the standard PAR approval process. If applicable, U.S. Federal customers will also see the View Errors button on the Manage Transaction Details page.

---

**View Template**

Select this link to view the entire template for this transaction. This link is available when some of the core components have been updated for a transaction and therefore the Open Template button is now longer available on the page. This link opens the template transaction in view mode. In order to update a core component, use the other buttons and links located later on the page.

**View Errors** Click this link to open the Manage Transaction Details - Transaction Errors Detail page that displays error details and messages.

## Person Information

**Search for Matching Persons** Select this link to see if there are matching persons in the system.

**Person Organizational Summary** Select this link to open the Person Organizational Summary page if a person ID exists.

When the person has all inactive records, determine whether to create a new organizational instance when the record is added to Job or to use an existing organizational instance.

When a person has one or more active records in the system, the system enables you to create a new assignment.

**Create new Org Instance (create new organizational instance) and Instance Nbr (instance number)** Select to create a new organizational instance for a person. The system provides the next available instance number by default.

These fields are available for the *HIR* and *ADD* job actions.

**Use existing Org Instance and Instance Nbr** Select to specify the organizational instance and number that should be used to add a job for a person in the system. When a person exists in the system and you select to use an existing organizational instance, the page displays the Use Existing Assignment and Create New Assignment fields.

Select from the available values in the Instance Nbr field.

These fields are available for the *HIR, REH, ADD,* and *RNW* job actions.

When you select to use an existing org instance, you are presented with the following options:

**Use Existing Assignment, Empl Record, and Action** Select to use an employee assignment that already exists in the system. Select from the available employment record numbers and actions.

These fields are available for the *HIR, REH, ADD,* and *RNW* job actions.

**Create New Assignment and Empl Record** Select to have the system create a new assignment for the hire of a person that already has a job record in the system. The system provides the next available employment record number by default.

These fields are available for the *HIR* and *ADD* job actions.

### Complete Transaction

**Open Template**

Select this button to access the Manage Transaction component and view the template transaction pages in its entirety. This enables you to view, modify, and complete all details and sections of the template.

This button is only visible when none of the template data has been saved in any of the transaction's core components. When a portion of the transaction has been completed, such as updates to Personal Data, the Open Template button is hidden. Use the other group boxes on the page to access the appropriate core component and add content.

When the Open Template button is hidden, the View Template link appears near the top of the page. You can use this link to view the template in its entirety, but the view is display only.

### Additional Group Boxes that May Appear on the Page

The page may display various other group boxes depending on what data is being added or updated in the system. The template transaction type associated with the template defines which components will be updated during the transaction process. Each component will be associated with a different group box on this page. Some group boxes may not appear until after another task has been completed. For example, if you are hiring a person, you must add personal data before adding job data. Therefore the page will display the Add Personal Data button but not the Add Job Data button until after you have completed the personal data content. See Template Transaction Type - Components Page

The group boxes, field labels, buttons, and link text for this section will vary and are defined on the Template Transaction Type - Transaction Component Details page.

Select the appropriate link to view additional information specific to a component.

Select the appropriate button to open either the Personal Data, Job Data, or Personal Profile pages and view and update the corresponding data.

## Manage Hires Page

Use the Manage Hires page (HR_MANAGE_HIRES) to view a list of hire transactions that were either managed through the Smart HR transaction process or the recruiting process.

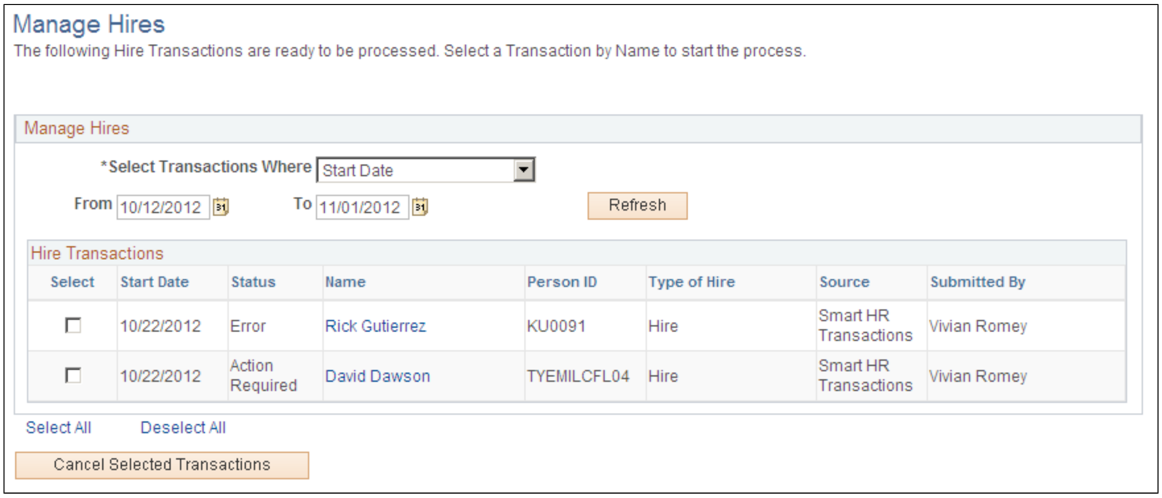
 

**Navigation**

Workforce Administration, Personal Information, Manage Hires, Manage Hires

**Image: Manage Hires page**

This example illustrates the fields and controls on the Manage Hires page. You can find definitions for the fields and controls later on this page.




The HR administrator uses the Manage Hires page to view hires that may be in draft status that the end user started, to view hires that require HR review prior to committing to the database, or to review hires that encountered errors upon saving and require an HR administrator's review to complete the hire process.

When the template administrator sets up the templates, he or she can select or deselect the Automatic Database Update check box. If selected, the end user is able to save the hire to the database or save the hire in draft status. If deselected, then the end user only has the option to save the hire as a draft or to submit the hire to HR. In these instances, the HR administrator uses the Manage Hires page to view people and continue with the hire process.

The Manage Hires page is also used by Recruiting Solutions to notify HR when a hire request has been submitted and needs to be processed.

**Select Transactions Where**

Select a value that will assist viewing and managing hires. Values are:

- *Source* – When selecting this option, the system displays the Equals field. Values in this field are *Recruiting Solutions* and *Smart HR Transactions.*
- *Start Date* – When selecting this option, the system displays the From and To date fields. Enter a date range for hire requests submitted within a specified time period.
- *Status* – When selecting this option the system displays the Equals field. Values in this field are *Action Required, All, Draft, Error,* and *Requested.*
- *Type of Hire* – When selecting this option the system displays the Equals field. Values in this field are *Add*

*Concurrent Job, Add Contingent Worker, Hire, Rehire,* and *Transfer.*

**Source**

View hire requests submitted by Recruiting Solutions *(Recruiting)* or by the Smart HR Templates *(Smart HR Transactions)* process.

**Select and Cancel Selected Transactions**

Select the check box for a person and click the Cancel Selected Transactions button to cancel the hire request.

### Related Links

"Hiring Applicants *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*"

## Manage Hire Details Page

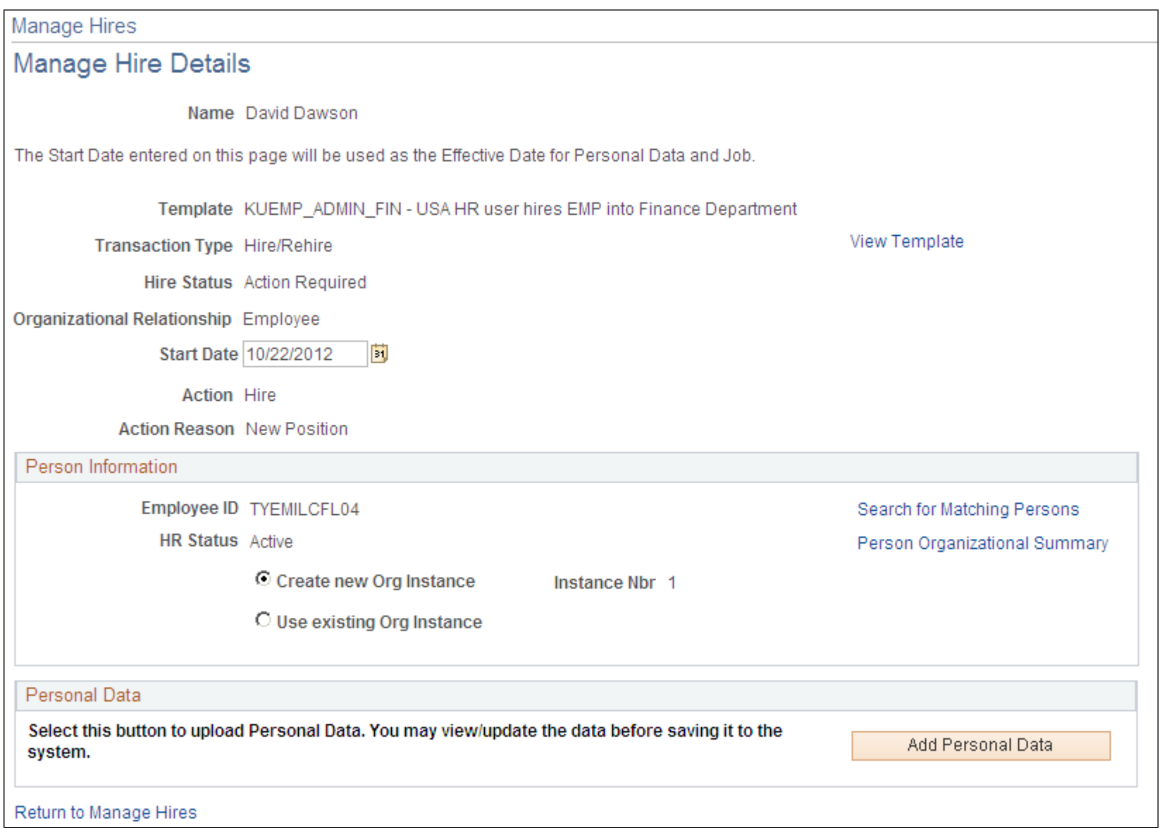
Use the Manage Hire Details page (HR_TBH_HIREDET) to view job details entered during a Smart HR hire and complete the hire process.

**Navigation**

Click the name link for a person whose Source value is *Smart HR Transactions* on the Manage Hires page.

**Image: Manage Hire Details page**

This example illustrates the fields and controls on the Manage Hire Details page. You can find definitions for the fields and controls later on this page.



Use this page to change the start date, perform a search for matching persons, or select the appropriate buttons or links to complete the transaction.

---

**Note:** The system displays this page slightly different for *Smart HR Transactions* source type than it does for the *Recruiting* source type. The Manage Hire Details page for a *Smart HR Transactions* hire displays the buttons and links in the various sections that are come upon the Smart HR transaction template. This page works like the Manage Transaction Details Page.

---

# Reviewing Organizational Relationships

This topic discusses how to view a person's organizational relationships.

## Page Used to View a Person's Organizational Relationships

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Person Organizational Summary | PERSON_SUMMARY | Workforce Administration, Personal Information, Person Organizational Summary, Person Organizational Summary | Review a summary of a person's organizational relationships. |

## Person Organizational Summary Page

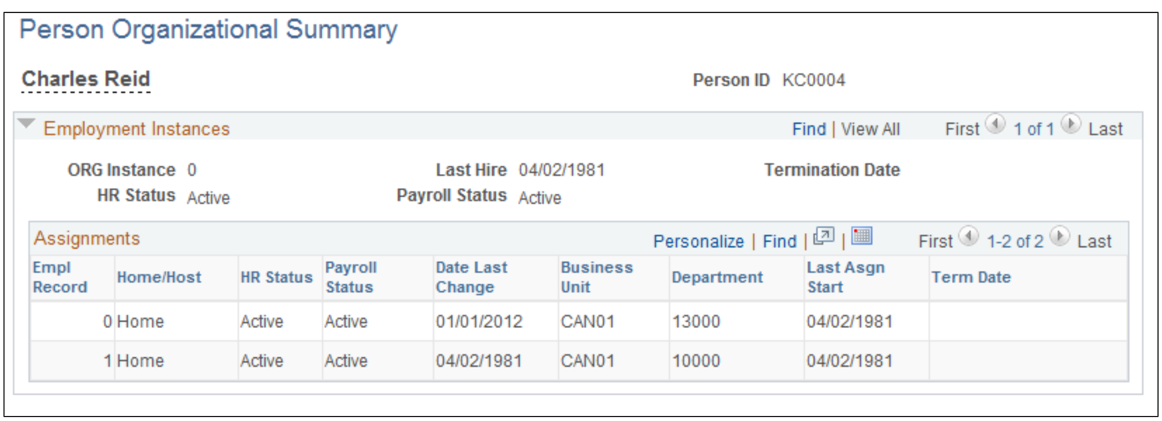
Use the Person Organizational Summary page (PERSON_SUMMARY) to review a summary of a person's organizational relationships.

**Navigation**

Workforce Administration, Personal Information, Person Organizational Summary, Person Organizational Summary

**Image: Person Organizational Summary page**

This example illustrates the fields and controls on the Person Organizational Summary page. You can find definitions for the fields and controls later on this page.



# (BRA) Running Brazil Employment Reports

These topics provide overviews of the CAGED report and employee registration and discuss how to:

- Generate CAGED reports.
- Generate employee registry reports.

## Understanding the CAGED Report

The *Cadastro Geral de Empregados e Desempregados* – CAGED (General Register of Employed and Unemployed Individuals) is a permanent register of employee hirings and dismissals. Every establishment that has had any type of turnover (hiring, dismissing, or transferring employees who have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.

The CAGED report generates a file containing the monthly turnover of employees by establishment.

## Understanding Employee Registration

Employee registration provides evidence of length of service and length of social security contribution and proves the relationship between employee and employer. This information affects social security pensions. Companies must record their employees' data in books or cards.

The employee registry report generates a flat file containing information about the employee's employment data (hire date, retirement date) and contributions. Keep the flat file as a record.

## Pages Used to Run Brazil Employment Reports

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| CAGED File/Report BRA | CAGED_RC_BRA | Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA, CAGED File/Report BRA | Generate CAGED reports. |
| Employee Registry Report BRA | EMPL_REG_RC_BRA | Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA, Employee Registry Report BRA | Generate employee registry reports. |

## CAGED File/Report BRA Page

Use the CAGED File/Report BRA page (CAGED_RC_BRA) to generate CAGED reports.

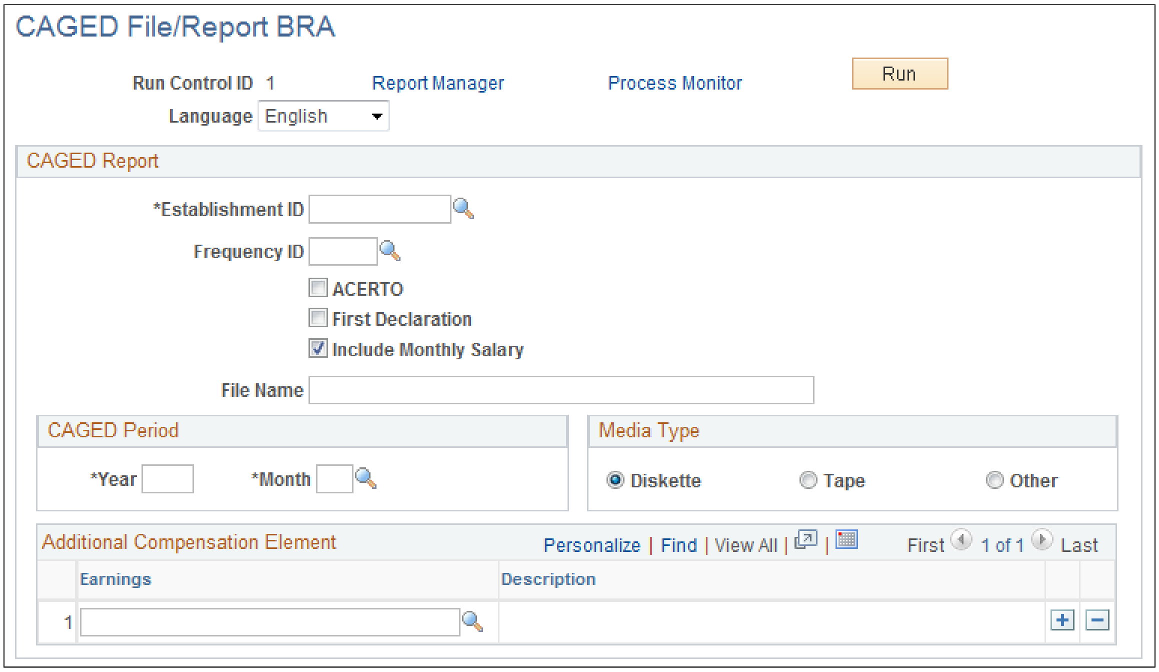
 

### Navigation

Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA, CAGED File/Report BRA

### Image: CAGED File/Report BRA page

This example illustrates the fields and controls on the CAGED File/Report BRA page. You can find definitions for the fields and controls later on this page.




**Frequency ID**

Select the frequency.

**Fix File**

Select to generate an Fix (rightness) file. You generate a Fix file to send corrections to a previously sent file; it contains the same information as CAGED.

**First Declaration**

Select to indicate that this is the first statement that the establishment is sending to CAGED.

**Include Monthly Salary**

Select to include monthly salary in the report.

**Media Type**

Indicate how you are sending the file to CAGED. Values are: *Diskette* (floppy disk), *Tape* (magnetic tape or cartridge), or *Other.*

**Additional Compensation Element**

If you use PeopleSoft Global Payroll, enter earning components other than salary to report to CAGED.

Run the BRCGED01 process to generate the CAGED report.

## Employee Registry Report BRA Page

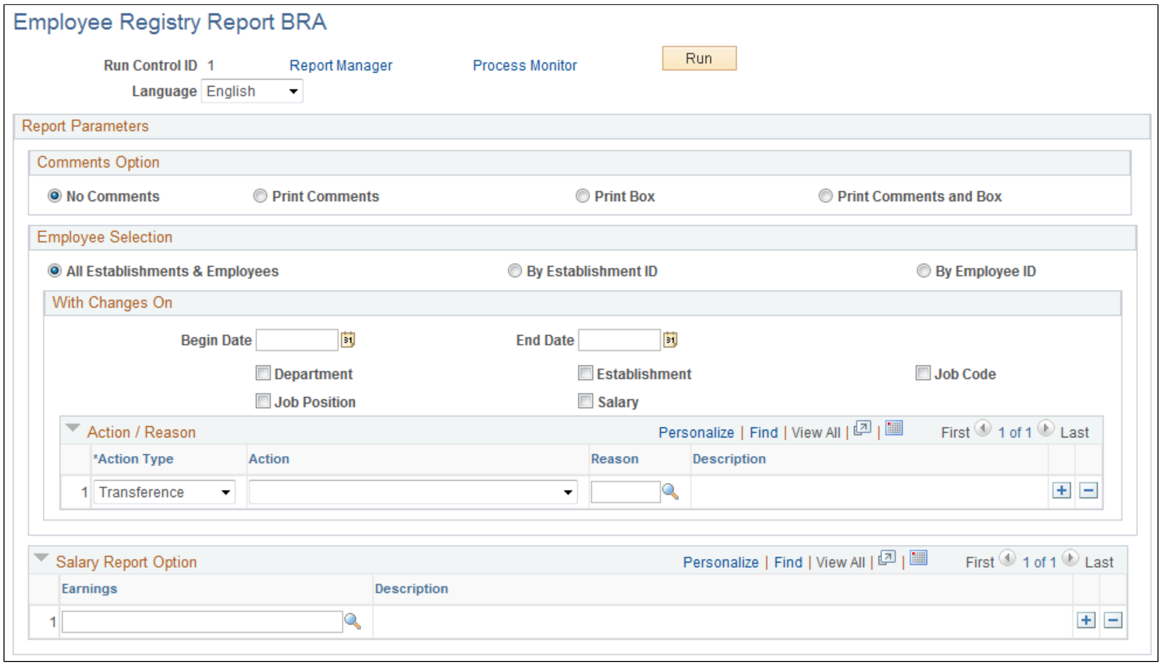
Use the Employee Registry Report BRA page (EMPL_REG_RC_BRA) to generate employee registry reports.

### Navigation

Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA, Employee Registry Report BRA

### Image: Employee Registry Report BRA page

This example illustrates the fields and controls on the Employee Registry Report BRA page. You can find definitions for the fields and controls later on this page.




**Comments Option**

Select whether the report should not include comments or if it should print comments, print box, or print comments and box.

**Employee Selection**

Select whether you want the report to include all employees and establishments or to include only a particular establishment or employee.

If you select the By Establishment ID option, the Establishment ID and Department fields appear.

If you select the By EmplID option, the Empl ID field appears.

**Establishment ID, Department, and Empl ID**

Use these fields to restrict the number of employees for whom you generate an employee registry report.

**With Changes On**

This group box appears when you select either All Establishments & Employees or Establishment.

**Begin Date and End Date**

Select the beginning and ending dates for the period for which you want to generate the Employee Registry report.

**Action and Reason**

Enter an action and reason to generate employee registry reports only for employees with the specified action reason.

| | |
|---|---|
| **Salary Report Option** | If you use PeopleSoft Global Payroll, you can include payroll information in this report. Enter earning components other than salary to include in this report. |

Run the BREREG01 process to generate the Employee Registry report.

# (CAN) Running the Canadian Hire List Report

This topic lists the page used to run the Canadian Hire List report.

## Page Used to Run the Canadian Hire List Report

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Hire Report CAN | RUNCTL_FROMTHRU | Workforce Administration, Job Information, Reports, Hire Report CAN, Hire Report CAN | Run the CAN Hire List report (PER100CN). This produces a hire list that provides information on social insurance numbers, effective dates, and badge or payroll numbers that are within the date range that is provided. |

# (NLD) Running the First Day Notification

These topics discuss how to:

- Set up the First Day Notification.
- Generate First Day Notifications.
- View the First Day Notification results.

## Understanding First Day Notifications

In the Netherlands, employers send First Day Notifications (*Eerstedagsmelding* [EDM]) to notify the Tax Authority when they hire or rehire employees.

Administer Workforce provides the First Day Notification NLD Application Engine process (HR_EDM_NLD) to generate the notifications. The run control page for the process enables you to search for employees who have been hired or rehired within a given period. You can review and adjust the list of employees before running the process, which creates XML files for transmission to the Dutch Tax Authority. You can view details of the First Day Notifications that have been generated using the Notification Results page.

Before you create First Day Notifications, use the Setup First Day Report NLD component (HR_SETUP_EDM_NLD) to define information required for each company.

## Pages Used to Set Up and Generate First Day Notifications

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Setup First Day Report NLD | EDM_TXR_NLD | Set Up HCM, Product Related, Workforce Administration, Setup First Day Report NLD, Setup First Day Report NLD | For each company that submits first day notifications, set up the tax number suffix to use and specify the employee classes that are not included in the notifications. |
| First Day Notification | RUNCTL_EDM_NLD | Workforce Administration, Workforce Reports, First Day Notification NLD, First Day Notification | Use this page to search for employees who were hired or rehired within a given period, and generate the First Day notification for those employees. You can also adjust the list of hires and rehires before you run the report. |
| Notification Results | EDM_RSLT_NLD | Workforce Administration, Workforce Reports, First Day Notification NLD, Notification Results | View details of First Day Notifications that were previously generated using the First Day Notification NLD process. |

## Setup First Day Report NLD Page

Use the Setup First Day Report NLD page (EDM_TXR_NLD) to for each company that submits first day notifications, set up the tax number suffix to use and specify the employee classes that are not included in the notifications.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Setup First Day Report NLD, Setup First Day Report NLD

**Image: Setup First Day Report NLD page**

This example illustrates the fields and controls on the Setup First Day Report NLD page. You can find definitions for the fields and controls later on this page.


**Federal Employer Tax ID**

Displays the company's employer tax ID that is specified on the Company — Default Settings page.

See "Default Settings Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

**Tax Number Suffix**

Enter the tax number suffix to use for the first day notification. When you run the first day notification, the system combines the tax number suffix and the federal employer tax ID to create the employer ID that is included in the first day notification.

The default suffix is *L01.* If you want to use additional suffixes, name them *L02, L03,* and so on.

## Exclude Employee Classes

Use this scroll area to define the classes of employees who are not included in first day notifications. Typically, temporary employees who are employed by an agency *(uitzendkrachten)* are not included in first day notifications, but your organization may have other classes of employees that are excluded from reporting.

**Employee Classification**

Select the employee classes that you want to exclude from reporting. Employee classes are defined by setID on the Employee Class page and assigned to employees on the Job Data - Job Information page.

# First Day Notification Page

Use the First Day Notification page (RUNCTL_EDM_NLD) to use this page to search for employees who were hired or rehired within a given period, and generate the First Day notification for those employees.

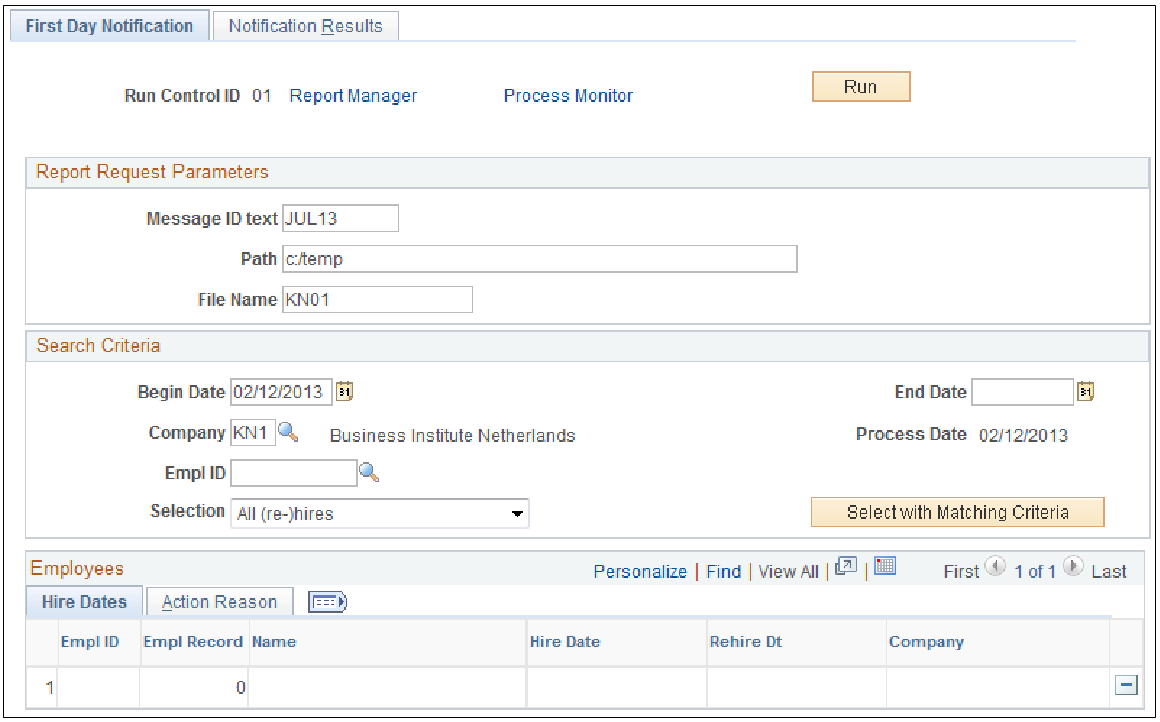
You can also adjust the list of hires and rehires before you run the report.

**Navigation**

Workforce Administration, Workforce Reports, First Day Notification NLD, First Day Notification

**Image: First Day Notification page**

This example illustrates the fields and controls on the First Day Notification page. You can find definitions for the fields and controls later on this page.




**Message ID text**

Enter free format text that is combined with the company's federal employer tax ID and the tax number suffix to form the message ID in the XML file. Use the First Day Report Setup page to define the tax number suffix to use.

**Path**

Enter the location of the XML file that is created by the First Day Notification NLD process. Enter an absolute path name, such as c:/temp/, or a relative path such as \\machinename\temp.

**File Name**

Enter the name of the XML file that is created by the First Day Notification NLD process. The process generates files with file names that combine the file name you enter here with the employee ID and employee record number.

### Search Criteria

Use this group box to specify the search criteria for the First Day Notification.

**Begin Date and End Date**
Enter the dates for the reporting period. The system searches for hires and rehires that occurred within this period.

**Company and Empl ID (employee ID)**
Select a company to search for hires and rehires within that company, or select an employee if you want to run the report for a specific person.

Leave this field blank to run the report for all companies.

**Selection**
Select one of these values:

*New (re-)hires:* To include only those hires and rehires that have not been previously reported.

*All (re-)hires:* To include all hires and rehires that occurred in the period defined by the begin and end dates. Use this option if you want to rerun the notification for a period. For example if you have changed employee data and you need to recreate the notification, use this option to run the report.

**Select with Matching Criteria**
Click this button to search for employees who match the criteria you entered in the Search Criteria group box. The system displays matching employees in the Employees scroll area.

### Employees

This scroll area lists the employees who matched the search criteria that you specified. Review the employee details and delete any employees you don't want to include in the report. When you click the Run button to run the First Day Notification NLD process, the system generates a notification for the employees that are listed in the scroll area.

---

**Note:** The system includes employees whose Regulatory Region is *NLD* only. Employees' regulatory region is defined on the Job Data - Work Location page.

---

**Hire Date and Rehire Dt (rehire date)**
Displays the employee's hire or rehire date.

**Action and Reason Code**
Displays the action and reason code that were used for the hire or rehire. The system includes employees with the HIR (hire) action or REH (rehire) action codes only.

**Empl Class (employee class)**
Displays the employee class that is assigned to the employee on the Job Data - Job Information page.

## Notification Results Page

Use the Notification Results page (EDM_RSLT_NLD) to view details of First Day Notifications that were previously generated using the First Day Notification NLD process.

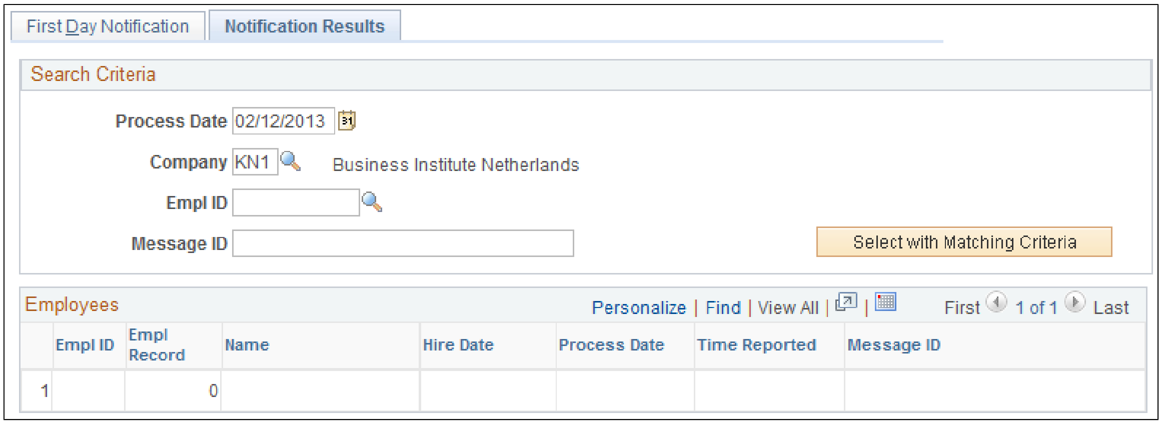
 

**Navigation**

Workforce Administration, Workforce Reports, First Day Notification NLD, Notification Results

**Image: Notification Results page**

This example illustrates the fields and controls on the Notification Results page. You can find definitions for the fields and controls later on this page.




## Search Criteria

**Process Date**

Enter a process date if you want to view details of the First Day Notifications generated on a given date.

**Company**

Select a company to view details of the First Day Notifications that have been generated for employees in that company.

**EmplID**

Select an employee ID to view details of that person's First Day Notification.

**Message ID**

Enter a message ID if you want to view the employees who were included in a specific message ID.

**Select with Matching Criteria**

Click this button to search for employees whose First Day Notifications match the criteria you entered in the Search Criteria group box.

## Employees

This scroll area lists the employees whose First Day Notifications match the search criteria.

**Hire Date**

Displays the employee's hire or rehire date.

**Time Reported**

Displays the time that the notification was generated.

**Message ID**

Displays the message ID. This is generated by the First Day Notification process by combining the message ID text you specified on the First Day Notification page, the company's employer tax ID, the tax number suffix, and the employee ID.

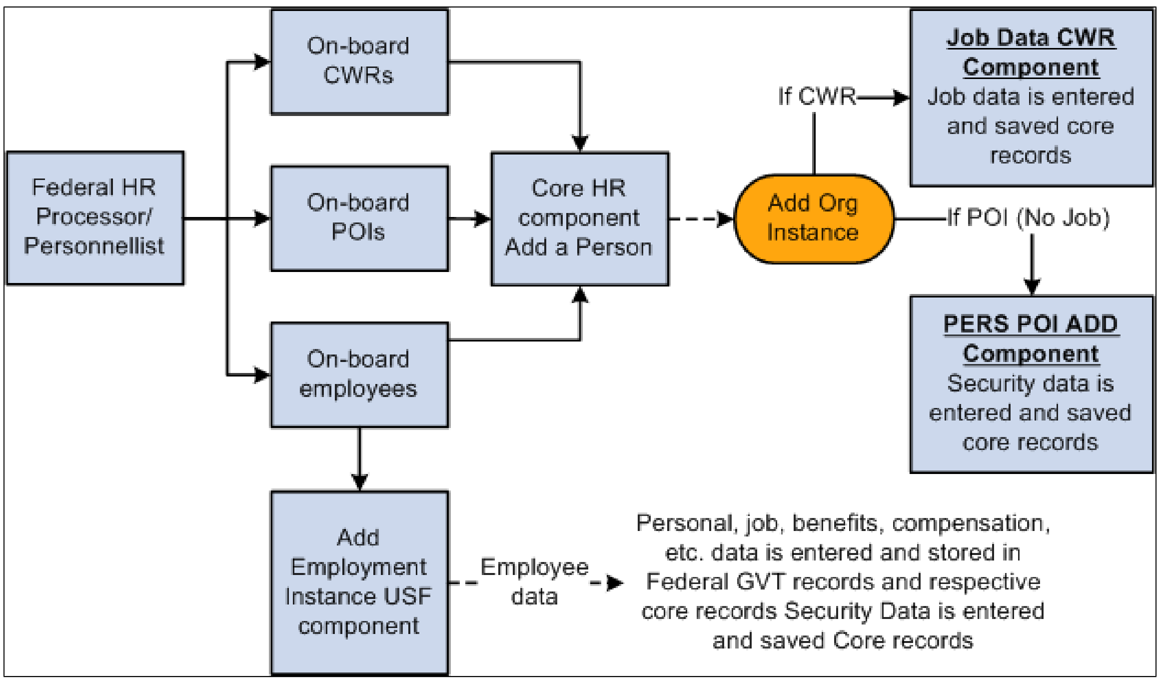
# Chapter 7

# (USF) Adding an Employment Instance

## Understanding U.S. Federal Hiring

**Image: Hiring U.S. federal government employees**

This diagram shows the process for hiring U.S. federal government employees, including hiring an existing person of interest (POI) or contingent worker (CWR) or creating additional appointments for existing federal employees:




Use the Add Employment Instance USF component to enter federal employment data for hiring an existing person of interest (POI) or contingent worker (CWR) as a federal employee. You also use this component to create additional appointments for existing federal employees.

See Adding a Person.

The pages that are included in the PAR process store specific information and contain links to supplemental pages that provide further details. The following table lists four components:

| ***Component*** | ***Navigation Path*** | ***When to Use*** |
|---|---|---|
| Add Employment Instance USF | Workforce Administration, Job Information, Add Employment Instance USF | To create a federal employment instance using an existing person of interest (POI) or contingent worker (CWR) data.<br><br>If a person is already an existing employee, this component will increment the employment record number to accommodate the new federal job. |
| Supervisor Request | Workforce Administration, Job Information, Supervisor Request USF | See Tracking and Routing a PAR Through Reviews and Completion.<br><br>See "Understanding Self-Service Transactions and Approvals *(PeopleSoft HCM 9.2: eProfile Manager Desktop)*". |
| Cancel Personnel Action | Workforce Administration, Job Information, Cancel Personnel Action USF | See Canceling or Correcting a Personnel Action Request.<br><br>This component is used when a cancellation (NOA 001) personnel action is necessary. |
| Correct Personnel Action | Workforce Administration, Job Information, Correct Personnel Action USF | See Canceling or Correcting a Personnel Action Request.<br><br>This component is used when a correction (NOA 002) personnel action is necessary. |

Enter personal information, employment information, job data, compensation, job earnings distribution information, and benefit program choices. You must enter this information before you can perform any other human resource tasks in PeopleSoft Human Resources. Because many of the fields on these pages are required, enter information in all the pages *before* saving your entries.

### Related Links

Understanding the Administering PAR System

Using Smart HR Templates and Transactions

## Common Elements Used When Adding a U.S. Federal Employment Instance

**Transaction Nbr and Sequence**

Set by default to *1/1*—the correct numbers for new employees. Your agency can use these numbers to track both the individual transactions for this employee and the multiple administrative actions that occur on the same day.

This field controls the order in which actions are processed internally and the order in which they are output across interfaces. After you save a request, the system automatically increments it by one for each new action effective on the same

| | |
|---|---|
| | day. If human resources personnel perform a correction of the original hire request, the correction's assigned value is *1/2 (1* is the transaction number for this particular action for this employee on this day and *2* is the sequence number for any correction of this action for this employee on this day). |
| **PAR Status (Personnel Action Request status)** | References the status of this request within the PAR request/approval process. On the Data Control page, this field is set by default to *PRO* (Processed by HR). If you choose to save with this (PRO) status, the personnel action information is saved and applied as its "finalized" state. The value that remains after you leave this page is the displayed status on other pages within the component. |
| **NOA Code (nature of action code)** | The Federal numerical code that applies to this personnel action. |
| **OK** | Click to close this page. |

## Adding an Employment Instance

These topics provide an overview of adding an employment instance and discuss how to:

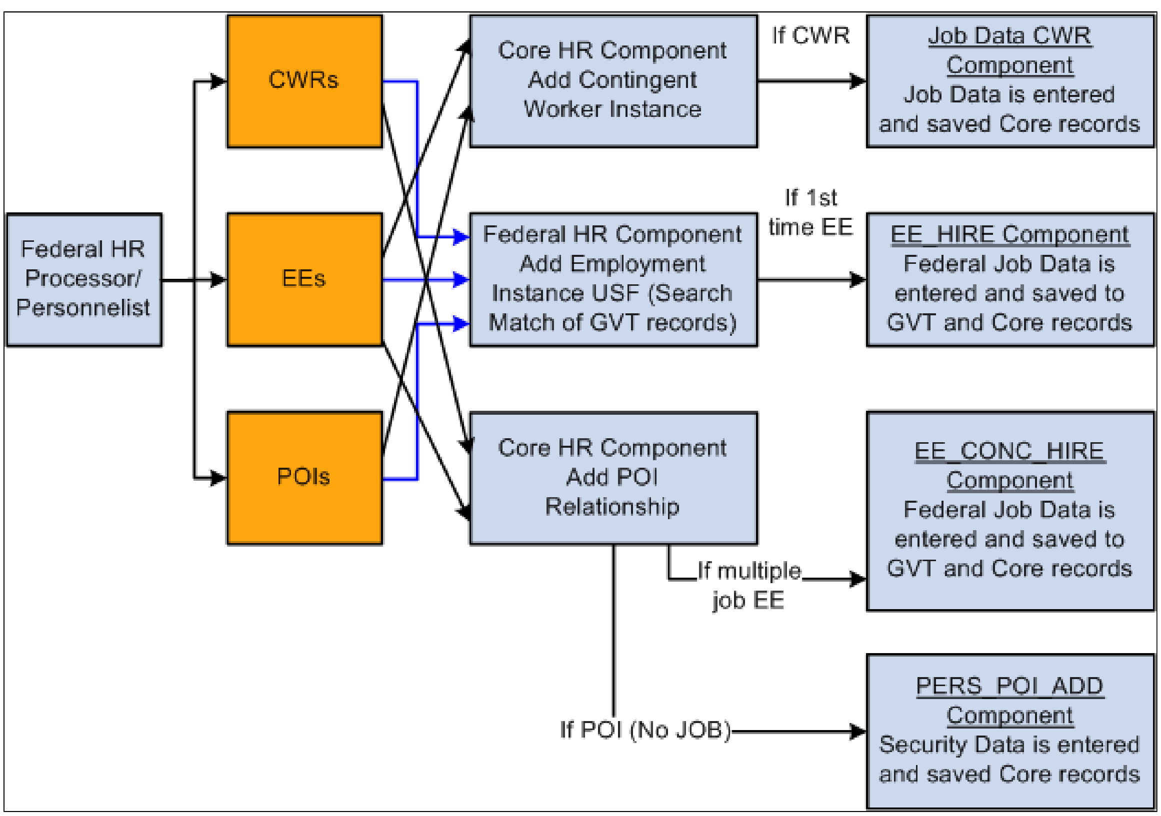
- Enter information for the employment instance.
- Enter PAR remarks.
- Enter job tracking information.
- Enter employee personal information.
- Enter birth information.
- Enter address information.
- Enter veteran information.
- Enter marital information.
- Enter education details.
- Enter job information.
- Specify benefit programs.
- Enter retirement data.
- Track information for employees on assignment.
- Enter NFC job information.
- Enter position information.
- Enter employee compensation information.

- Enter additional compensation information.
- View pay rate and compensation calculations.
- View job earnings distributions.
- Enter current and historical employment information.
- Enter expiration dates.
- Enter appointment limits.
- Enter additional employment information.
- Track probation dates.
- Track nonpay status information.
- Enter financial disclosure information.
- View Component Interface exceptions.

## Understanding Adding an Employment Instance

**Image: Process flow for adding different types of federal employment instances**

The following diagram shows the process flow of hiring an employee and shows the components that are used for hiring employees, contingent workers, and persons of interest:




Use the Core HR component "Add Person" as a common starting point for initially entering contingent workers and persons of interest. If your organization allows employees to hold more than one job, use the Concurrent Hire component to enter new jobs for employees who already have one or more jobs. The component consists of the Data Control, Job, Position, Compensation, Employment 1, and Employment 2 pages.

If an employee has more than one job, you may want to designate one job as primary and others as secondary. The primary job designation is used for government reporting.

Before you can add multiple jobs for your workforce, you must:

- Select the Multiple Jobs Allowed check box in PeopleTools.
- Update user security so that users have access to the menu options they'll need.

### Related Links

Adding a Person
"Understanding Group Build *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Pages Used to Add an Employment Instance

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Add Employment Instance USF | FEDERAL_EMP_ADD | Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF | This component uses existing data from a person of interest or contingent worker in the new federal employment instance. Use existing data for a person of interest or a contingent worker in the new federal employment instance. |
| Data Control | GVT_JOB0 | Enter a valid Person ID on the Add Employment Instance USF page and click Add. | Enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information. |
| PAR Remarks | GVT_PAR_PROCESS_RK | Click PAR Remarks link on the Data Control page. | Enter or look up comments specific to this position or employee situation. |
| Award Data | GVT_AWD_DATA | Click the Award Data link on the Data Control page.<br><br>This link is available only when the Action field is *AWD* (award - monetary) or *BON* ( bonus), and the Reason Code field is populated. | Assign an award to a federal employee and enter award, informational, and payroll details. |
| Job Tracking Information | GVT_EE_CNTRL_SEC | Click Tracking Data link on the Data Control page. | View or enter job-tracking information. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Personal Data | GVT_PERS_DATA1 | Select the Personal Data page within the Add Employment Instance USF component. If previous personal data exists that is associated with an individual as a Person of Interest or a Contingent Worker this information is displayed by default on the Personal Data page. | Enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap.<br><br>The Personal Data page does not appear when you are entering an additional assignment for a federal employee. |
| Additional Birth Information | GVT_BRTHINF_SEC | Click Additional Birth Info link on the Personal Data page. | Enter birth information. |
| Address Information | GVT_ADDRINF_SEC | Click Mailing Address link on the Personal Data page. | Enter contact (home) and mailing address information. |
| Personal Phone Numbers | GVT_PERS_PH_SEC | Click Personal Phone Numbers link on the Personal Data page. | Enter employee phone, fax, cellular, and other numbers. |
| Veterans Info | GVT_VETINF_SEC | Click Veterans Info link on the Personal Data page. | Enter veteran information. |
| Marital Status | GVT_MARITAL_SEC | Click Marital Info link on the Personal Data page. | Enter marital information. |
| Education Details | GVT_EDUCINF_SEC | Click Education Details link on the Personal Data page. | Enter education details.<br><br>This link is valid only for new hires. |
| Job Data | GVT_JOB1 | Select the Job page from within the Add Employment Instance USF component. | Enter job information, including the employee's position, agency, and department. |
| Benefits/FEHB Data ( Benefits / Federal Employees Health Benefits Data) | GVT_BENDATA_SEC | Click Benefits/FEHB Data link on the Job Data page. | Specify benefit programs in which the employee is enrolled in PeopleSoft Human Resources or in PeopleSoft Benefits Administration. |
| FEGLI/Retirement/FICA (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act) | GVT_BENDATA1_SEC | Click FEGLI/Retirement/ FICA link on the Job Data page. | Enter life insurance and retirement data. |
| Departmental Hierarchy | GVT_DEPTINF_SEC | Click Departmental Hierarchy link on the Job Data page. | View departmental hierarchy for the individual's position. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Detail Assignment | GVT_DETAIL_SEC | Click Detail link on the Job Data page. | Track information for employees on a detail assignment. You probably won't use this page when first hiring an employee. |
| NFC Job Information | GVT_NFC_JOB_SEC | Click the NFC Job Information link on the Job Data page. | Track required National Finance Center (NFC) information for employees. Enter Job, Benefits and Payroll values necessary for processing this employee at NFC. |
| Position Data | GVT_JOB2 | Select the Position Data page from within the Add Employment Instance USF component. | Enter position information like employee type, classification, appointment type, work schedule, and pay group. |
| Compensation Data | GVT_JOB3 | Select the Compensation page from within the Add Employment Instance USF component. | Enter employee compensation information, including pay rate determinant, pay plan/table/grade/step, frequency, and other pay. You can also enter retained pay plan/table/grade and step on this page. |
| Other Pay Information | GVT_OTH_PAY_SEC | Click Other Pay Information link on the Compensation Data page. | Enter compensation that employees receive that's in addition to base pay. |
| Expected Pay | GVT_LOC_PAY_SEC | Click Expected Pay link on the Compensation Data page. | View the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page. |
| Accounting Information | GVT_JOBDIST_SEC | Click Accounting Info link on the Compensation Data page. | View a summary of the employee's job earnings distribution. |
| Employment Data 1 | GVT_EMPLOYMENT1 | Select the Employment Data 1 page from within the Add Employment Instance USF component. | Enter employment information, such as employee service computation and conversion dates, and within-grade-increase data. |
| Expiration Dates | GVT_EXPIRDT_SEC | Click Exp Dates link on the Employment Data 1 page. | Enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Appointment Info | GVT_APPDATA_SEC | Click Appt Data link on the Employment Data 1 page. | Enter appointment limits and indicate if this person is in a special employment program. |
| Employment Data 2 | GVT_EMPLOYMENT3 | Select the Employment 2 page from within the Add Employment Instance USF component. | Enter additional employment data including union, probation, RIF, tenure, and security data. Also record the retained grade information. |
| Federal Probation Dates | GVT_EMPL_PROB_SEC | Click Probation Dates link on the Employee Data 2 page. | Document any probation start and end dates that apply to this person. |
| Non - Pay Data | GVT_NONPAY_SEC | Click Non Pay Data link on the Employment Data 2 page. | Track information related to a status of nonpay. Information on this page affects FEHB eligibility and FEGLI. |
| Financial Disclosure | GVT_SECURTY_SEC | Click Financial Disclosure link on the Employment Data 2 page. | Indicate if financial disclosure is required and the due date. |
| Time and Labor Data | TL_EMPL_DATA_FG_S | Click Time Reporter Data on the Employment 2 page. | Review PeopleSoft Time and Labor data for this employee. |
| CI Exceptions | GVT_PAR_CI_MSG | Select the CI Exceptions page from within the Add Employment Instance USF component. | Warning messages generated during the hire process are displayed on the CI Exceptions page after the transaction has been successfully saved. |

## Add Employment Instance USF Page

Use the Add Employment Instance USF page (FEDERAL_EMP_ADD) to this component uses existing data from a person of interest or contingent worker in the new federal employment instance.

Use existing data for a person of interest or a contingent worker in the new federal employment instance.

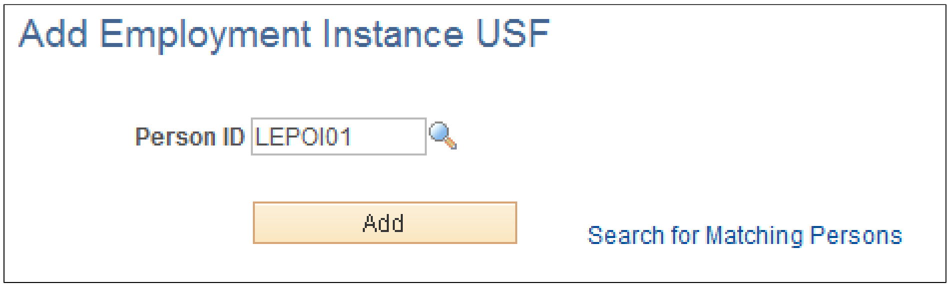
 

**Navigation**

Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF

**Image: Add Employment Instance USF page**

This example illustrates the fields and controls on the Add Employment Instance USF page. You can find definitions for the fields and controls later on this page.




Use this component if you have already entered information about a person, for example, in the Add a Person component.

Enter a Person ID and click Add to create a federal employment instance for a person of interest or to create a concurrent job for an existing federal employee.

See "Working with Search/Match *(PeopleSoft HCM 9.2: Application Fundamentals)*".

## Add Employment Instance USF - Data Control Page

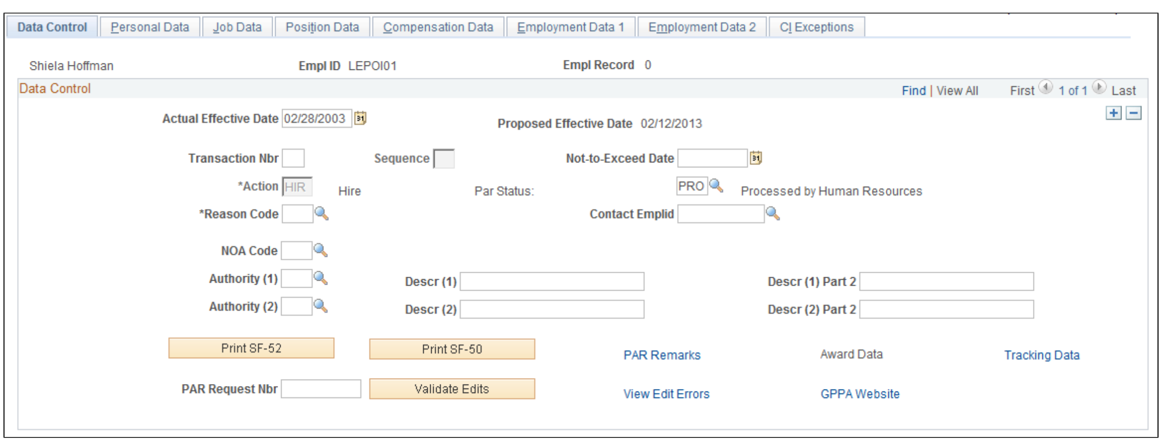
Use the Data Control page (GVT_JOB0) to enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information.

**Navigation**

Enter a valid Person ID and click Add.on the Add Employment Instance USF page

**Image: Data Control page**

This example illustrates the fields and controls on the Data Control page. You can find definitions for the fields and controls later on this page.



**Actual Effective Date**

Enter the actual effective date, which is used as the default effective date of the action throughout the system. If necessary, change this to reflect the effective date of the new employment instance. When working on other pages, these dates are unavailable, so if you need to change the effective date, return to the Data Control page.

**Proposed Effective Date**

This field is populated by default with the date that is entered in the Actual Effective Date field. Human resources personnel processing a request have final authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.

**Not to Exceed Date**

(Optional) Enter the ending date of a temporary action (for example, the date a temporary job expires).

**Action**

The default value for this field depends on whether the employment instance is for a new employee or is based on existing data for a current employee, person of interest, or contingent worker.

**Reason Code**

A default reason code may display in this field. Otherwise, enter the reason code for this employment instance, such as new position, temporary assignment, or trainee.

---

**Note:** For agency-to-agency transfers, the request may be submitted by both agencies, and the action and reason for each agency's request depends on whether the employee is arriving or leaving. If the employee is arriving, process the action as a hire. When an employee transfers into your agency from another agency, the action is *Hire* and the reason is *Transfer From* (another agency). When an employee transfers out of your agency to another agency, the action is *Terminate* and the reason is *Transfer To* (another agency).

---

**Contact Emplid (contact employee ID)**

Enter the employee ID of the person to contact with any questions regarding the hire.

**Authority (1) and Authority (2)**

Select the appropriate legal authority for this NOA code. This field is usually reserved for use by human resources specialists. PeopleSoft provides a list of common legal authority codes and descriptions as provided by the US Office of Personnel Management.

**PAR Request Nbr (PAR request number)**

(Optional) Enter a PAR request number for each employee request after you save this request. This field is for your agency's information only.

**PAR Remarks**

Click to view or enter comments specific to this position or employee situation.

| | |
|---|---|
| **Tracking Data** | Click this link to view or enter job-tracking information. |
| **Award Data** | This link is active only for award and bonus personnel actions.<br><br>See Award Data Page. |
| **Validate Edits** | Click this button to initiate online regulatory edits for this PAR row. Edits should be triggered after all hire information is entered.<br><br>**Note:** Validation is an optional step.<br>Depending on the state of the transaction, all edits may not run to completion because all data may not have been captured up to that point. |
| **View Edit Errors** | Click this link to view regulatory edit errors resulting from the validation process. Correct any errors and validate the transaction again. |
| **GPPA Website** | Click this link to open the Personnel Documentation page of the Office of Personnel Management website (http://www.opm.gov/feddata/gppa/gppa.asp). |

## PAR Remarks Page

Use the PAR Remarks page (GVT_PAR_PROCESS_RK) to enter or look up comments specific to this position or employee situation.

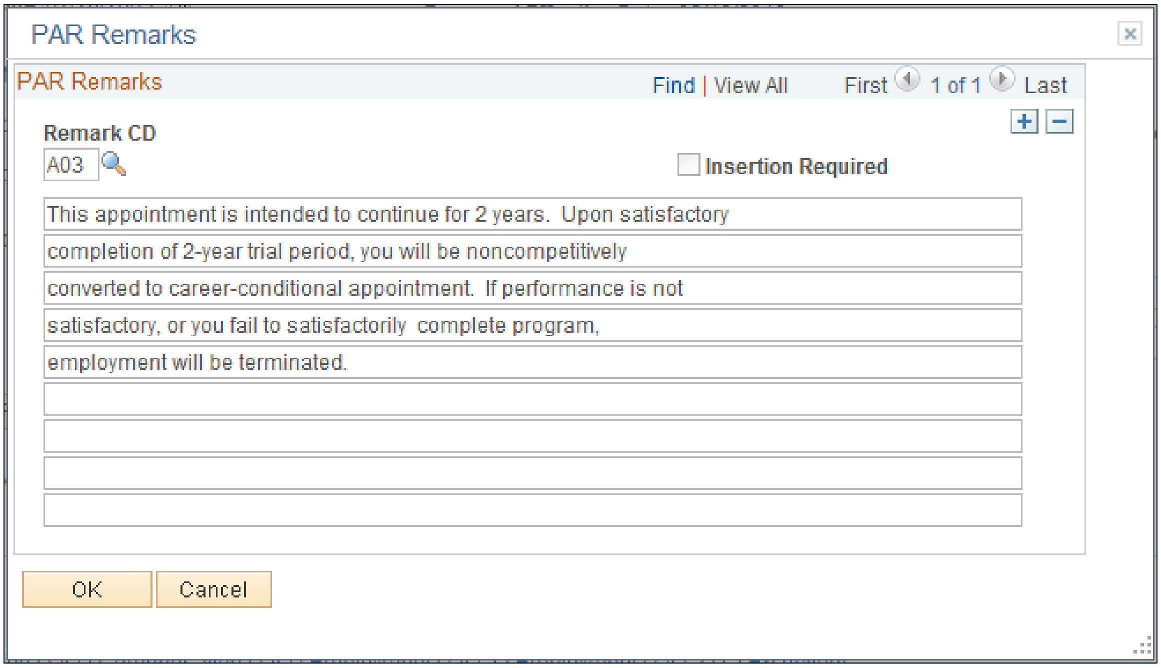
 

**Navigation**

Click PAR Remarks link on the Data Control page.

**Image: PAR Remarks page**

This example illustrates the fields and controls on the PAR Remarks page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Remark CD (remark code)** | Select from the list of descriptions, conditions, and comments about this position or employee action. The remarks that you select appear in the comments box. Edit them as necessary. |
| **Insertion Required** | If this remark needs employee-specific information, this check box is selected. The default settings for this box are defined with the codes on the PAR Remarks Table page. |

See "Setting Up Federal HCM Control Tables *(PeopleSoft HCM 9.2: Application Fundamentals)*".

## Job Tracking Information Page

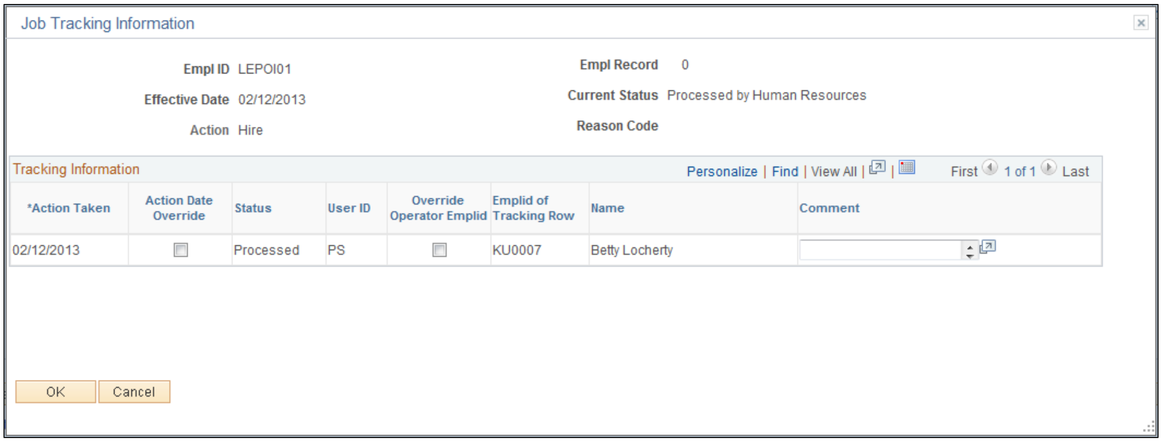
Use the Job Tracking Information page (GVT_EE_CNTRL_SEC) to view or enter job-tracking information.

**Navigation**

Click Tracking Data link on the Data Control page.

**Image: Job Tracking Information page**

This example illustrates the fields and controls on the Job Tracking Information page. You can find definitions for the fields and controls later on this page.




## Tracking Information

**Action Taken** Displays the date that the action request was entered.

**Action Date Override** Select to make the Action Taken field available for entry so that you can change the action date.

**Override Operator Emplid (override operator employee ID)** (Optional) Select this check box when an administrative assistant, for example, enters data on behalf of a supervisor.

**Emplid of Tracking Row (employee ID of tracking row)** When the Override Operator Emplid check box is selected, this field becomes available for entry. Enter the ID of the person actually performing the data entry.

# Personal Data Page

Use the Personal Data page (GVT_PERS_DATA1) to enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap.

The Personal Data page does not appear when you are entering an additional assignment for a federal employee.

**Navigation**

Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF.

Enter a Person ID and click Add. Select the Personal Data page.

If previous personal data exists that is associated with an individual as a Person of Interest or a Contingent Worker this information is displayed by default on the Personal Data page.

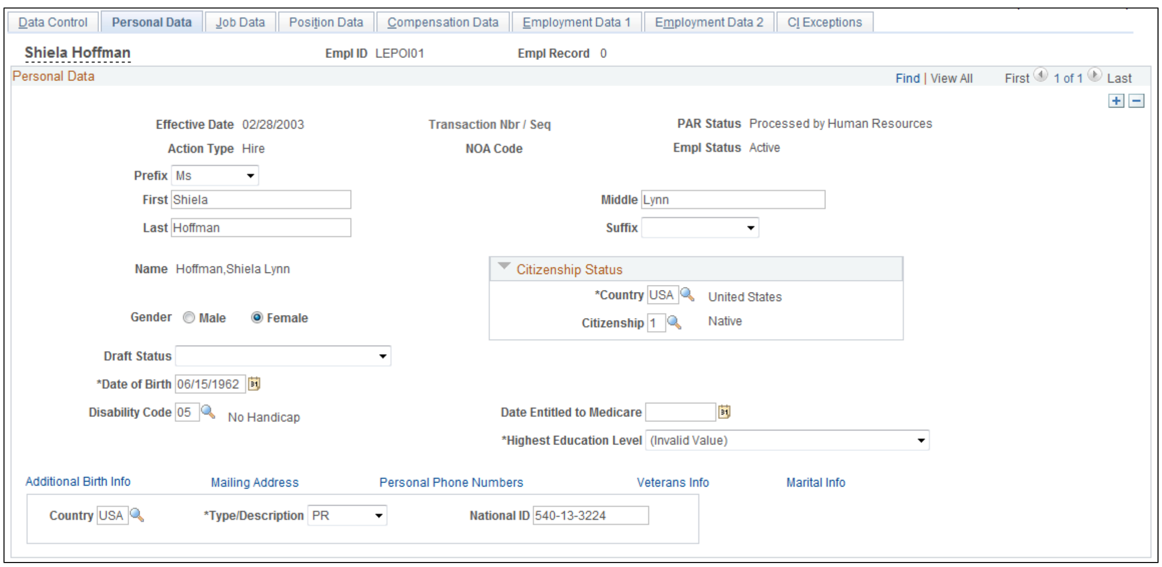
---

**Note:** If a person already exists in the system, as a contingent worker for example, default field entries are displayed in some of the fields on the Personal Data page when you access it through the Add Employment Instance USF component.

---

**Image: Personal Data page**

This example illustrates the fields and controls on the Personal Data page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **EmplID** | When you create a concurrent job, or an employment instance for a person of interest or contingent worker, the previously assigned Person ID is displayed. |
| **Effective Date** | The effective date for all of the pages in this group box is set by default to the effective date that is entered on the Data Control page. Change the effective date by returning to the Data Control page. |
| **Gender** | Indicate the employee's gender. |
| **Citizenship Status** | Select the appropriate citizenship status. |
| **Draft Status** | (Optional) Select a draft status. |
| **Ethnic Group** | Select the employee's ethnic group. Values are based on U. S. Federal Equal Employment Opportunity (EEO) ethnic categories. Use ethnic group information to compile the |

| | |
|---|---|
| | establishment's Affirmative Action (AA) plan and to generate several EEO reports. |
| **Date of Birth** | Enter the employee's date of birth. If you do not enter a birth date, a warning message appears when you save the record. Although this field isn't required for the Administering Workforce business process, the system uses the date in some benefit and payroll tasks to calculate an employee's age. If you do not have the birth date currently, after you acknowledge the message, you can continue entering information. However, it is recommended that you enter the information later. |
| **Date of Death** | Skip this field when hiring an employee. |
| **Disability Code** | Select the disability code from the list, or if none, select the value *No Handicap.* |
| **Date Entitled to Medicare** | (Optional) Enter the date the employee is entitled to Medicare. |
| **Country** | Many countries have unique name formats. Select the country with the name format you want to use for this person. When you move out of this field, the system displays the appropriate fields for the country you entered. |
| **Type/Description** | Enter the corresponding type/description of the employee's national ID. |
| **National ID** | Enter the employee's Social Security Number. |
| **Additional Birth Info** | Click to access the Addl Birth Info page and enter the employee's birth information. |
| **Mailing Information** | Click to access the Address Information page and enter home and mailing address information. |
| **Personal Phone Numbers** | Click to access the Personal Phone Numbers page and enter employee phone, fax, cellular, and other numbers. |
| **Veterans Info (veterans information)** | Click to access the Veterans Info page and enter veterans information. |
| **Marital Info (marital information)** | Click to access the Marital Status page and enter marital information. |
| **Education Details** | Click to access the Education Details page and enter information about the employee's education. |

## Related Links

Requesting Terminations Due to Death

"Understanding U.S. Regulatory Requirements *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"

"PeopleSoft Manage Base Benefits Overview *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

## Additional Birth Information Page

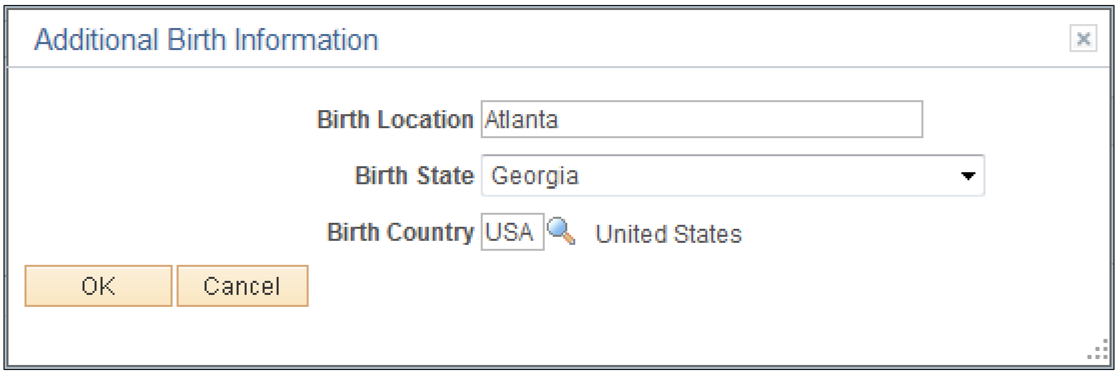
Use the Additional Birth Information page (GVT_BRTHINF_SEC) to enter birth information.

**Navigation**

Click Additional Birth Info link on the Personal Data page.

**Image: Additional Birth Information page**

This example illustrates the fields and controls on the Additional Birth Information page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Birth Location** | Enter the name of the city. |
| **Birth State** | Select the birth state. |
| **Birth Country** | Select the birth country. |

## Address Information Page

Use the Address Information page (GVT_ADDRINF_SEC) to enter contact (home) and mailing address information.

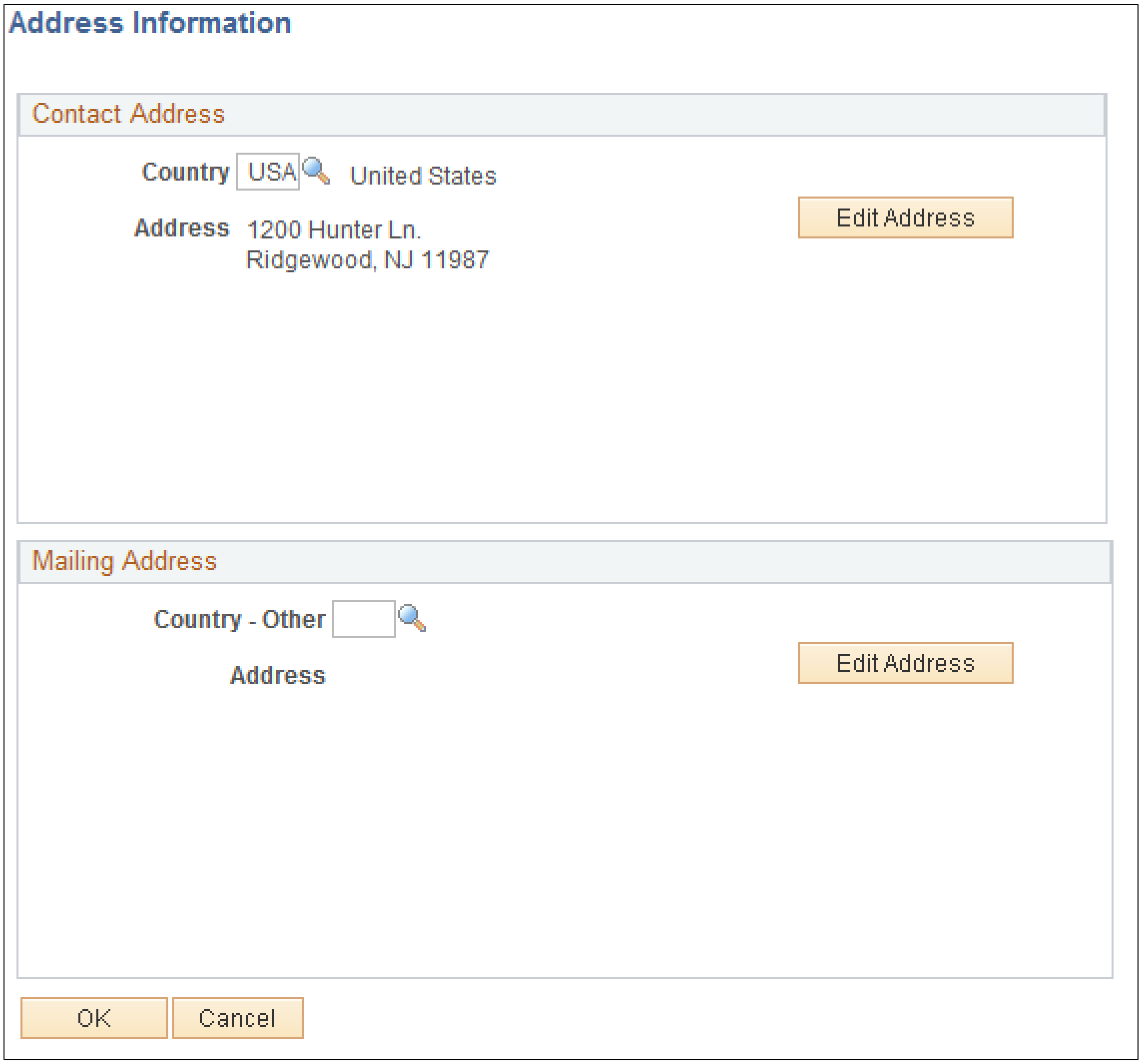
 

**Navigation**

Click Mailing Address link on the Personal Data page.

**Image: Address Information page**

This example illustrates the fields and controls on the Address Information page. You can find definitions for the fields and controls later on this page.




Select the country and then click Edit Address. Complete the address fields that appear on the page and click OK. The address information appears in the Address field.

## Veterans Info Page

Use the Veterans Info page (GVT_VETINF_SEC) to enter veteran information.

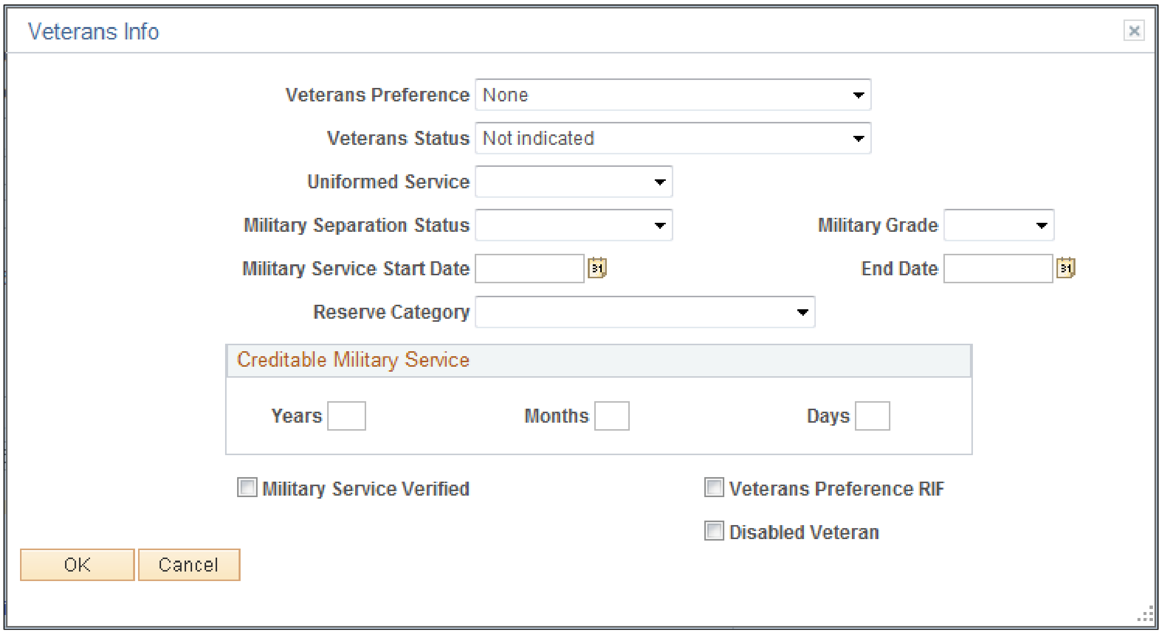
 

**Navigation**

Click Veterans Info link on the Personal Data page.

**Image: Veterans Info page**

This example illustrates the fields and controls on the Veterans Info page. You can find definitions for the fields and controls later on this page.




**Veterans Preference**

Select the veteran's hiring preference that applies. For information about preference guidelines refer to the *U.S. Office of Personnel Management's Vets Info Guide.*

**Veterans Status**

Select the veteran's status.

**Uniformed Service**

Select the type of uniformed service in which this veteran served.

**Military Separation Status**

Select the veteran's military separation status.

**Military Grade**

Select the veteran's military grade.

**Military Service Start Date and End Date**

Enter the veteran's military service start and end dates.

**Reserve Category**

Select the employee's reserve category, or select *Not Applicable.*

**Years, Months, and Days**

Enter the creditable military service in years, months, and days.

**Military Service Verified**

Select if you have received verification of service.

**Veterans Preference RIF (veterans preference reduction in force)**

Select to indicate the employee is eligible for veteran's preference in instances of Reductions In Force. See the *U.S. Office of Personnel Management's Vets Info Guide* for more information.

**Disabled Veteran** Select if the veteran is disabled.

**Notify Military Pay Center** This check box is visible only for personnel actions that were effective before October 1, 1999. For these personnel actions, the check box indicates whether the military pay center was notified of the personnel action. This check box is informational only and therefore not editable.

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**Note:** The system displays this field only when the personnel action effective date is prior to October 1, 1999. Due to S1059, the National Defense Authorization Act for FY 2000, Public Law 106-65, this information is no longer required as of October 1, 1999.

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## Marital Status Page

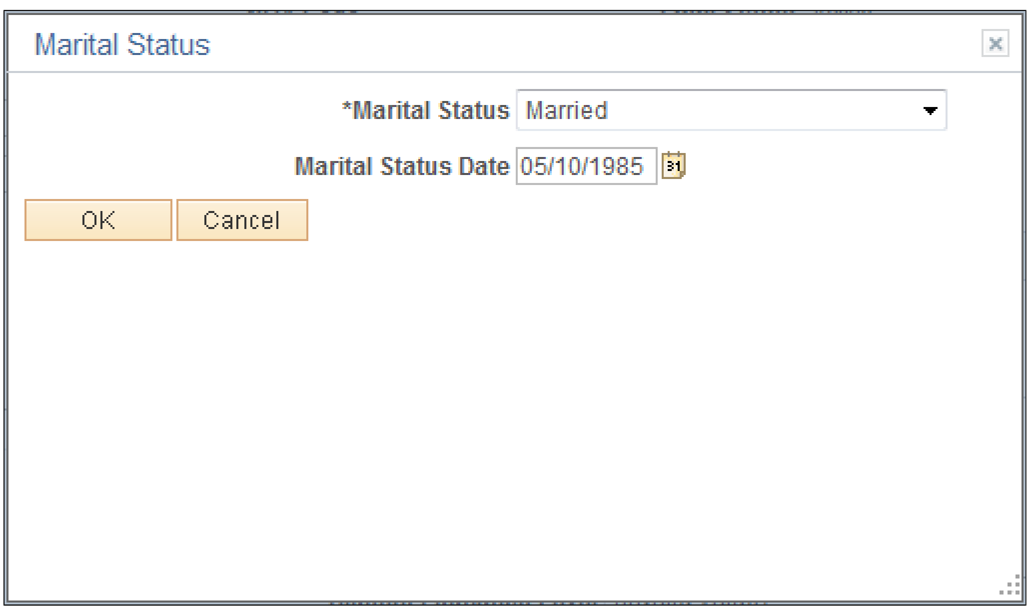
Use the Marital Status page (GVT_MARITAL_SEC) to enter marital information.

**Navigation**

Click Marital Info link on the Personal Data page.

**Image: Marital Status page**

This example illustrates the fields and controls on the Marital Status page. You can find definitions for the fields and controls later on this page.




**Marital Status** Select the person's marital status.

**Marital Status Date** Enter the date on which this status took effect.

## Education Details Page

Use the Education Details page (GVT_EDUCINF_SEC) to enter education details.

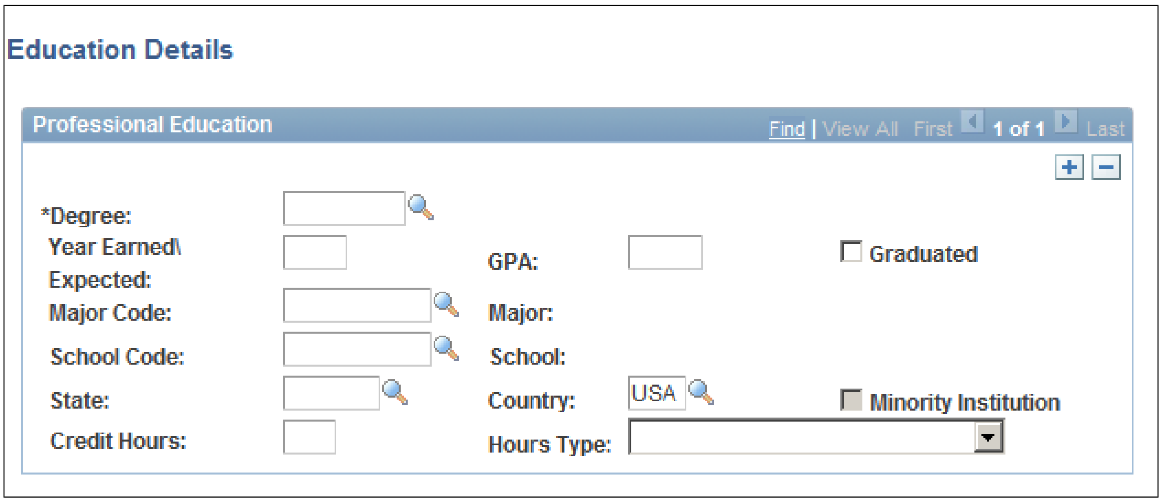
This link is valid only for new hires.

**Navigation**

Click Education Details link on the Personal Data page.

**Image: Education Details page**

This example illustrates the fields and controls on the Education Details page. You can find definitions for the fields and controls later on this page.

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**Note:** The Education Details page link is active only during the hiring process. A new profile is created for each new Federal hire when hiring information is saved and in a *PRO* (processed) PAR status. For existing employees, you update education information in the employee's profile.

---

| | |
|---|---|
| **Degree** | Select the degree earned or expected for the employee. Degrees are defined in the content catalog that is part of the Manage Profiles business process. |
| **Year Earned\Expected** | Enter the year the degree was earned or is expected to be earned if the employee has not graduated. |
| **GPA (grade point average)** | Enter the employee's grade point average from the school. |
| **Graduated** | Select if the employee has graduated. |
| **Major Code** | Select the major code for the degree earned or being earned. Define major codes on the Majors page. |
| **School Code** | Select the code designating the school the employee graduated from or currently attends. Define school codes on the Schools page. |
| **School** | Enter a school if there is not a code for it. |

**State**

Enter the state where the school is located.

**Country**

Select the country where the school is located.

**Minority Institution**

Select if the employee attended or attends a designated minority institution.

**Credit Hours**

Enter the credit hours earned either upon completion or to this point if not complete.

**Hours Type**

Select the hours type. Values are: *Continuing Education, Other Pay, Quarter Hours,* and *Semester Hours.*

See "Understanding the Content Catalog *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

## Add Employment Instance USF - Job Data Page

Use the Job Data page (GVT_JOB1) to enter job information, including the employee's position, agency, and department.

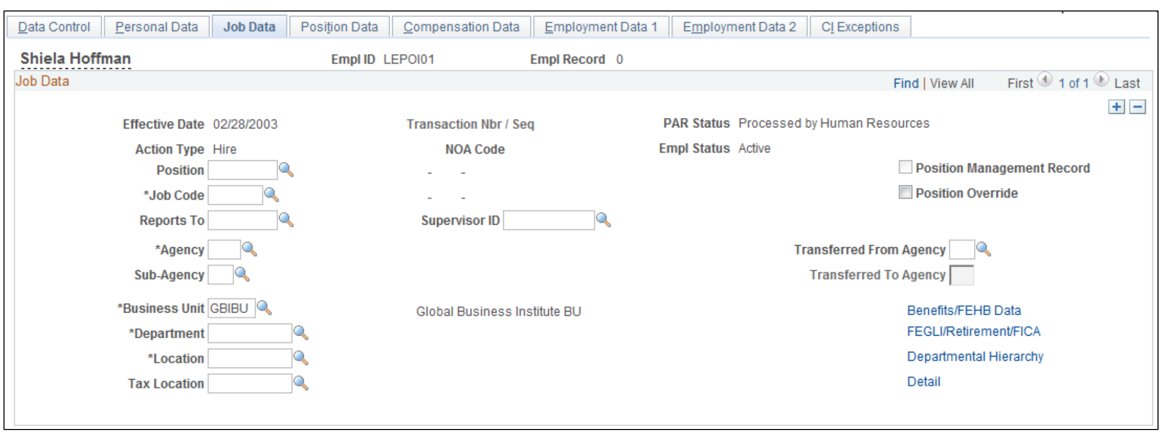
### Navigation

Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF.

Enter a Person ID and click Add. Select the Job Data page.

### Image: Job Data page

This example illustrates the fields and controls on the Job Data page. You can find definitions for the fields and controls later on this page.




Many values on this page are set by default from values you entered earlier on the Data Control page. If necessary, you can override most of these defaults.

**Action Type**

Set by default depending on the type of employment instance you are creating.

**Position**

Select a position. When you move out of this field, the system completes position-related fields with default data from the Add/Update Position Info component if the Manage Positions business process is being used. Job code, agency, subagency, business unit, department, and location all are set by default to position management data.

In addition, the system inserts a default value in the Supervisor's ID and Reports to Position fields on the Employment 2 page if these are entered when setting up the position.

If you've associated agencies with departments on the Department page, the system enters the agency code on the Job Data page and the field is unavailable for entry. It also enters default values on the Position Data page for the Pay Periods/ Year, Employee Type, Holiday Schedule (which you define in the Pay Group table), and Pay Group fields (which you associate with a position in the Add/Update Position Info component in the Organizational Development, Position Management, Maintain Positions/Budgets menu). On the Position Data page, the system enters the standard hours that correspond to the job code. If you've associated them with the job code on the Job Code page, the system also enters the pay plan/table/grade, and compensation frequency on the Compensation page. In addition, on the Compensation page, the system enters the grade/step entry (date), which is the date the employee was first assigned to the grade and step. The Position Number, Hire Date, and Position Override fields are discussed in Hiring Employees Into Positions.

**Position Management Record**

Selected by default if updates to the Position Management record exist. For an initial employment instance (for a new hire), the check box is deselected, as the new hire would not have information to update.

If your organization uses the Manage Positions business process and this position were updated, the check box would be selected. The option then would be to select the Position Override check box to make changes to position data that are otherwise locked in by the position data record.

**Job Code**

If you are not using the Manage Positions business process, enter the job code. Otherwise, the job code is derived from the value established in the Add/Update Position Info component.

**Position Override**

Select to change any of the position-related fields, such as the Job Code, Department, Agency, and Sub-agency.

PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee or if a new employee appointment exceeds the maximum head count for that position.

**Note:** After you have assigned an employee to a position, you must maintain all employee data manually while the employee is assigned to this position in the system. The system won't update position data automatically for the employee when position information is changed.

| | |
|---|---|
| **Agency, Sub-Agency, Business Unit, Department, and Location** | Select the ID types for these fields individually. If the position management hiring process is used, the system enters default values when the Position ID is selected. |
| **Transferred From Agency** | If the reason code entered on the Data Control page was *Transfer,* select the agency from which the employee is transferring.<br><br>**Note:** Not valid for a concurrent assignment. |
| **Transferred To Agency** | This is not a valid field in the hiring process. This field is used primarily in other types of PAR requests. It becomes active based on the action and reason code entered on the Data Control page.<br><br>**Note:** Not valid for a concurrent assignment. |
| **Tax Location** | Derived from the department-tax location relationship established on the Department page. You can also select the tax location for this person. |

### Related Links

Understanding PARs

Defining Personnel Actions and Reasons

"Understanding Payroll Schedules *(PeopleSoft HCM 9.2: Payroll Interfacechan)*"

"Understanding Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*"

## Benefits/FEHB Data Page

Use the Benefits/FEHB Data (Benefits / Federal Employees Health Benefits Data) page (GVT_BENDATA_SEC) to specify benefit programs in which the employee is enrolled in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.

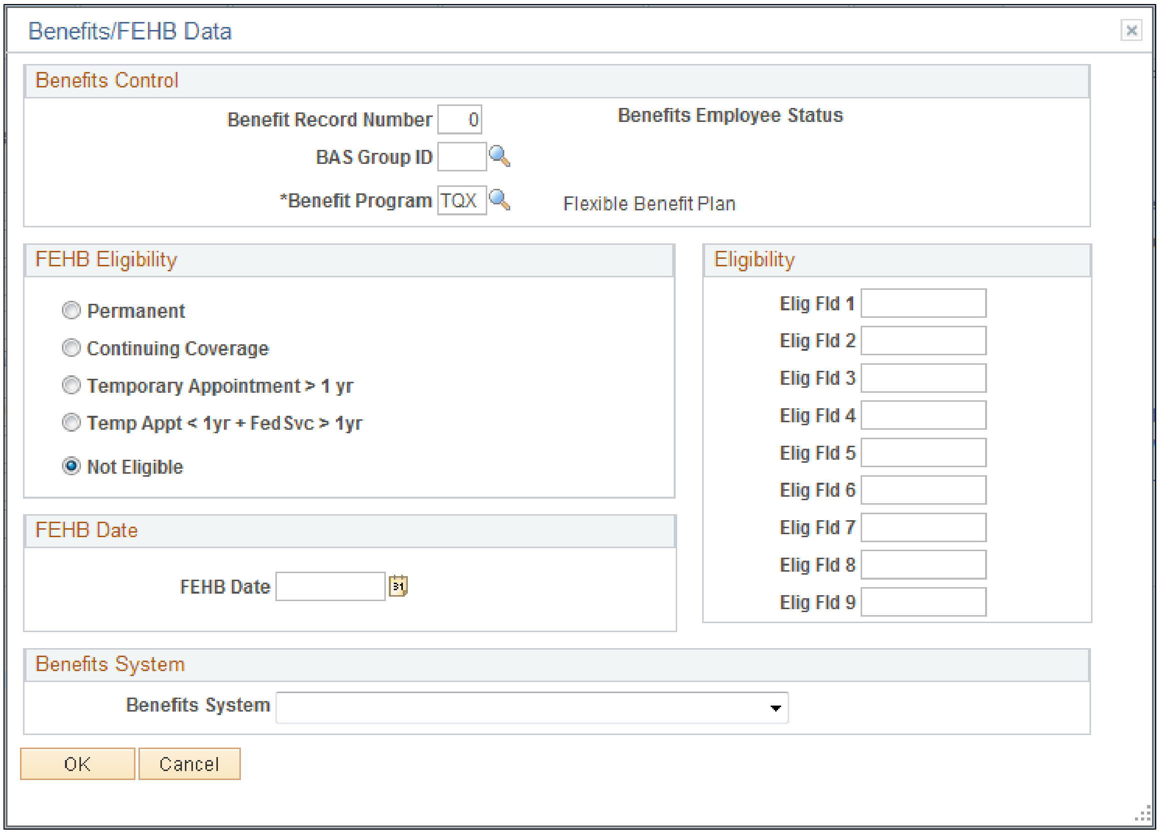
 

**Navigation**

Click Benefits/FEHB Data link on the Job Data page.

**Image: Benefits/FEHB Data page**

This example illustrates the fields and controls on the Benefits/FEHB Data page. You can find definitions for the fields and controls later on this page.




## Benefits Control

**Benefit Record Number**

Benefit record number is used to group several jobs together for benefit purposes. A benefit record number can be assigned to multiple employee record numbers. If the new job entitles the employee to a new set of concurrent benefits, you should use a new benefit record number. If the job does not entitle the employee to new benefits, you should use an existing benefit record number. Each benefit record number must have a designated primary job. The primary job is used to process the benefit information.

**BAS Group ID (benefits administration system group ID)**

(Optional) Enter a BAS group ID.

**Benefit Program**

Enter a benefit program. This is a required field for all PAR transactions.

### FEHB Eligibility

In the FEHB Eligibility (federal employees health benefits eligibility) group box, select the appropriate option to indicate the FEHB eligibility.

If you select *Not Eligible,* the FEHB Date field becomes available for entry. This typically applies to temporary employees.

### FEHB Date

In the FEBH Date group box, enter the date that the employee is eligible for FEHB.

### Eligibility

In the Eligibility group box, enter values in the Elig Fld 1–9 (eligibility field 1–9) fields to further define an employee's benefits eligibility.

Each agency determines its own use of these fields. Contact the agency's Personnel Policy Officials for instruction using these fields.

### Benefits System

In the Benefits System group box, enter the benefits system to use.

## FEGLI/Retirement/FICA Page

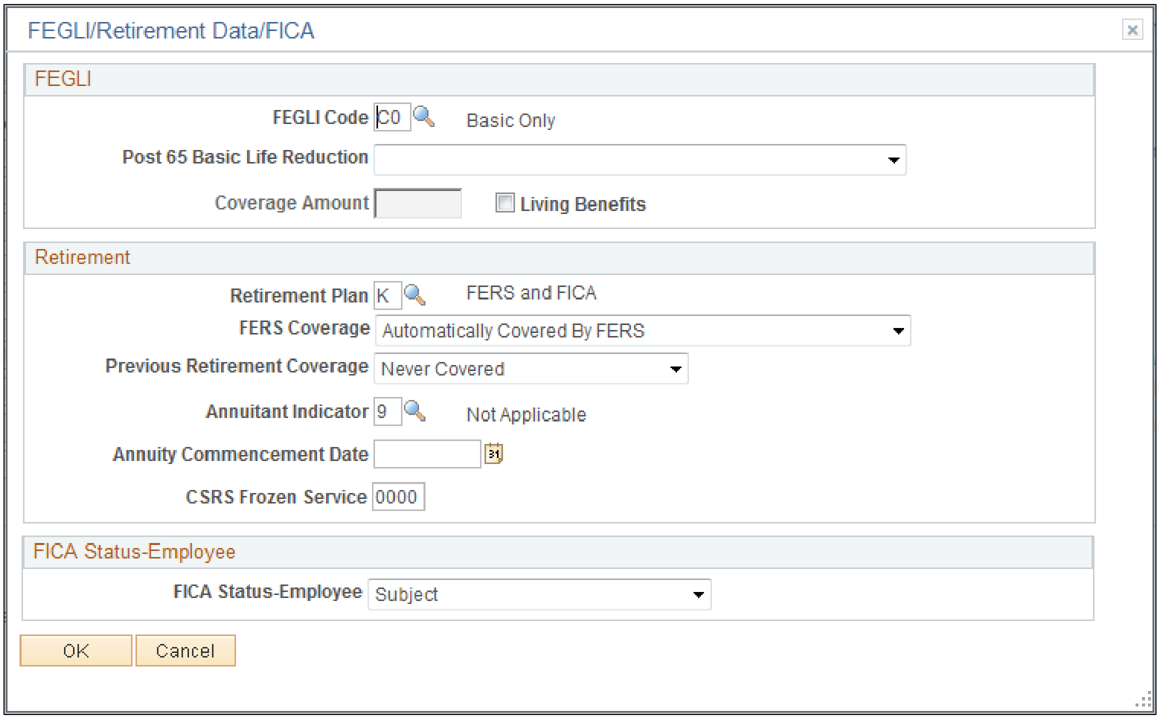
Use the FEGLI/Retirement/FICA (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act) page (GVT_BENDATA1_SEC) to enter life insurance and retirement data.

**Navigation**

Click FEGLI/Retirement/FICA link on the Job Data page.

**Image: FEGLI/Retirement Data/FICA page**

This example illustrates the fields and controls on the FEGLI/Retirement Data/FICA page. You can find definitions for the fields and controls later on this page.




## FEGLI

**FEGLI Code (federal employees group life insurance code)** — Enter the FEGLI code.

**Post 65 Basic Life Reduction** — Select the employee's post-65 basic life reduction coverage.

**Living Benefits and Coverage Amount** — Use these fields only when selecting living benefits (not during the hiring process).

## Retirement

**Retirement Plan** — Select the employee's retirement plan.

In addition to the retirement plans used for submission to Central Personnel Data File (CPDF), PeopleSoft supplies the following codes that you may use for documentation purposes only:

| *Code* | *Explanation* |
|---|---|
| 7 | For foreign national employees exempt from retirement and from social security and Medicare tax deductions. |

| ***Code*** | ***Explanation*** |
|---|---|
| 8 | U.S. Court of Veterans Appeals without election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only. |
| 9 | U.S. Court of Veterans Appeals with election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only. |
| A | Article III judges and justices. |
| B | Bankruptcy judges and justices under the Judicial Retirement System. |
| S | U.S. Claims Court Judges Retirement System. |
| V | Clerks/magistrates (CSRS). |
| U | Bankruptcy judges (full FICA/partial CSRS). |
| Y | Bankruptcy judges (full FICA/full CSRS). |

**FERS Coverage (Federal Employees Retirement System coverage)** Select the employee's FERS coverage.

**Previous Retirement Coverage** Select the employee's previous retirement coverage.

**Annuitant Indicator** Select the employee's annuitant indicator.

**Annuity Commencement Date** If a new employee is a reemployed annuitant, enter the annuity commencement date.

**CSRS Frozen Service (Civil Service Retirement System frozen service)** Enter the total years and months of civilian and military service that is creditable in a CSRS component of a FERS employee, or, in the case of a CSRS offset employee, the service that would be included in a CSRS component if the employee ever becomes covered by FERS.

## FICA Status-Employee

**FICA Status-Employee** Indicate whether the employee is exempt, subject, or subject to Medicare only.

## Related Links

Requesting Terminations Due to Death

"PeopleSoft Manage Base Benefits Overview *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

## Detail Assignment page

Use the Detail Assignment page (GVT_DETAIL_SEC) to track information for employees on a detail assignment.

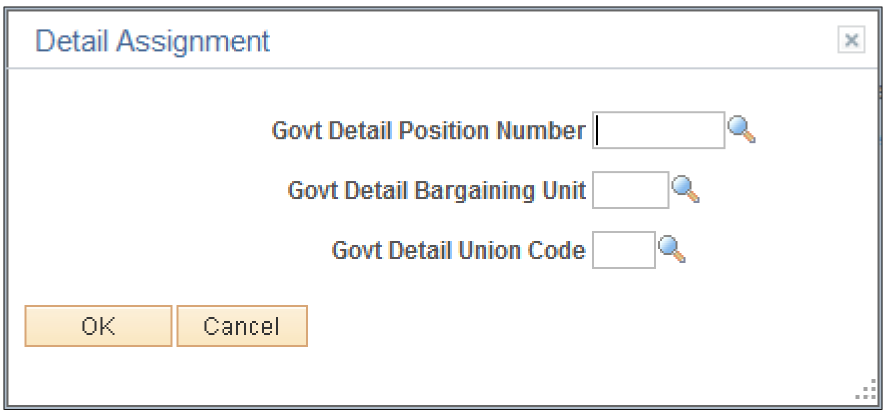
You probably won't use this page when first hiring an employee.

**Navigation**

Click Detail link on the Job Data page.

**Image: Detail Assignment page**

This example illustrates the fields and controls on the Detail Assignment page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **GVT Detail Position Number (government detail position number)** | Select the employee's detail position number. |
| **GVT Detail Bargaining Unit (government detail bargaining unit)** | Select the employee's detail bargaining unit. |
| **GVT Detail Union Code (government detail union code)** | Select the employee's detail union code. |

## NFC Job Information Page

Use the NFC Job Information page (GVT_NFC_JOB_SEC) to track required National Finance Center (NFC) information for employees.

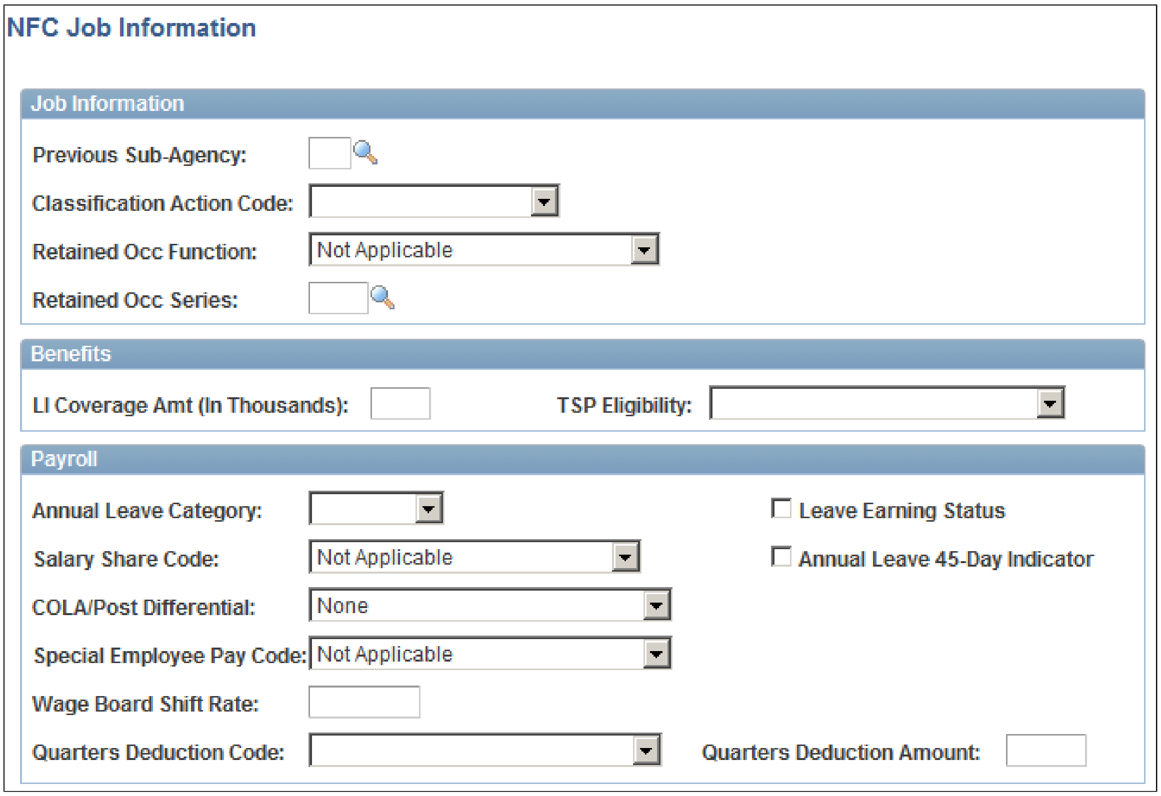
Enter Job, Benefits and Payroll values necessary for processing this employee at NFC.

**Navigation**

Click the NFC Job Information link on the Job Data page.

**Image: NFC Job Information page**

This example illustrates the fields and controls on the NFC Job Information page. You can find definitions for the fields and controls later on this page.

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**Note:** The NFC Job Information link appears on the Job Data page only if NFC (National Finance Center) product specific data is turned on at installation. The NFC Job Information  link must appear on the Job Data page for you to access the NFC Job Information page described here.

---

## Job Information

| | |
|---|---|
| **Previous Sub-Agency** | Enter the previous sub-agency when the employee moves to another sub-agency within the same Department. |
| **Classification Action Code** | Provides a method for processing a classification and personnel action at the same time. Used for reassignments, promotions or change to a lower grade. |
| **Retained Occ Function (retained occupational functional classification)** | Records the occupational functional classification corresponding to an employee's retained occupational series. This field is required only if the series specified as the retained occupational series is one for which OPM requires an occupational functional classification. |

| | |
|---|---|
| **Retained Occ Series (retained occupational series)** | Records the occupational series on which an employee's salary is to be based when that series is not the series of the position the employee held immediately before being placed on grade retention. This would occur, for example, when an employee was returned to an unexpired period of grade retention at the end of a temporary promotion. |

## Benefits

**LI Coverage Amt (In Thousands) [life insurance coverage amount (in thousands)]**

The amount of basic life insurance coverage for an employee who is covered under the Federal Employees Group Life Insurance (FEGLI) plan. Complete this field only if one or more of the following conditions are met:

- The employee works at such different rates of pay that the payroll/personnel system is unable to calculate or project the rates of pay on an annual basis.
- The employee is paid on a piecework basis.
- The employee is paid at different rates of pay during the year.

| | |
|---|---|
| **TSP Eligibility** | Specify the type of eligibility for the employee to participate in the Federal Thrift Savings Plan (TSP) for FERS, CSRS, or Offset employees. |

## Payroll

| | |
|---|---|
| **Annual Leave Category** | Select the code that identifies the annual leave earning status in the NFC payroll system. If the employee is eligible to earn annual leave, the code represents the appropriate earning category. |
| **Leave Earning Status** | Select the check box to identify employees who are entitled to leave accruals for the first and last pay period of employment in the NFC payroll system. |
| **Salary Share Code** | Identifies the source, in addition to the agency, that contributes to paying the employee's salary. |
| **Annual Leave 45-Day Indicator** | Select the check box to identify employees who are stationed at an overseas foreign post of duty and are entitled to carry forward from one leave year to another a maximum annual leave accumulation of 45 days. |
| **COLA/Post Differential** | Select the option that identifies the type of cost of living allowance (COLA) or post differential, in addition to the base salary, that the employee is entitled to receive. |
| **Special Employee Pay Code** | Identifies the employee as belonging to a special category of pay processing not accommodated in any other part of the NFC payroll/personnel system. This code enables certain operations |

 

to be performed which would not otherwise be applicable to this type of employee.

**Wage Board Shift Rate**

Enter the rate that NFC uses to compute pay for the varied shift time reported on the T&A for wage system employees.

**Quarters Deduction Code**

Select the code to identify the type of quarters deduction for the employee.

**Quarters Deduction Amount**

The monetary amount that is to be deducted through NFC payroll, either per day or per pay period, from the salary of an employee who is being furnished quarters, utilities, or other in kind allowances.

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**Note:** The information entered on this page is for NFC reporting purposes only. Benefit or payroll information that is entered on this page is *not* integrated with PeopleSoft benefit or payroll applications.

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## Add Employment Instance USF - Position Data Page

Use the Position Data page (GVT_JOB2) to enter position information like employee type, classification, appointment type, work schedule, and pay group.

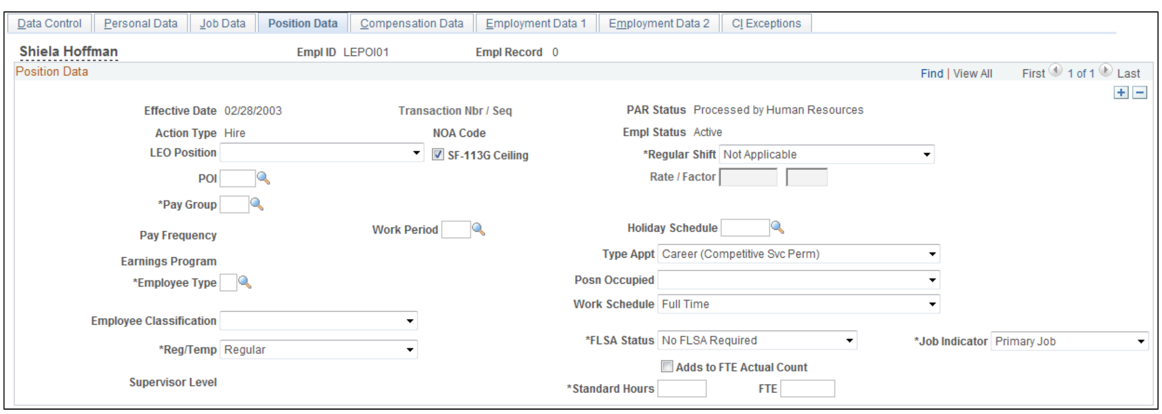
### Navigation

Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF.

Enter a Person ID and click Add. Select the Position Data page.

### Image: Position Data page

This example illustrates the fields and controls on the Position Data page. You can find definitions for the fields and controls later on this page.




**LEO Position (law enforcement officer position)**

If this is a law enforcement officer position, a value appears from the Job Code page.

**SF-113G Ceiling**

If this position is reportable for the SF-113G ceiling, select this check box.

| | |
|---|---|
| **POI (personnel office identifier)** | Set by default from the Add/Update Position Info component or the Job Code page. |
| **Regular Shift and Rate/Factor** | If the employee is working shifts, select the appropriate shift, and specify the rate or factor for that shift type. |
| **Pay Group** | (Required) A value appears here if you defined one on the Position Data page. Otherwise, select a pay group. |
| **Pay Frequency** | Set by default from the Pay Group page. |
| **Work Period** | Select the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period, in combination with the standard hours, to calculate FTE (full-time equivalency). |
| **Holiday Schedule** | If you linked an established holiday schedule on the Pay Group page, it appears here. |
| **Employee Type** | Depends on the pay group and is set by default from the Pay Group page. If an employee type doesn't exist for this pay group, establish one on the Pay Group page or enter one here. |
| **Employee Classification** | Provides another method of grouping employees. |
| **Reg/Temp (regular/temporary)** | Indicate whether the new hire is a regular or temporary employee. The Manage Base Benefits business process of PeopleSoft Human Resources uses this value when determining eligibility requirements. |
| **Supervisor Level** | If the employee is in a supervisory position, this value is set by default from the Position Data page. |
| **Type Appt (type of appointment)** | Enter the employee's type of appointment, such as *Career* (Competitive Service Permanent), *Limited, Executive,* or *Schedule A - C.* |
| **Posn Occupied (position occupied)** | This field identifies the type of appointment which can occupy the position. Values are *Competitive, Excepted Senior Executive Service (SES) Career Reserved* and *SES General.* This is a CPDF reported field. |
| **Work Schedule** | Set by default from the Add/Update Position Info – Description page. |
| **FLSA Status (Fair Labor Standards Act status)** | Set by default from the position data on the Job Code page. |
| **Adds to FTE Actual Count (adds to the full-time equivalency actual count)** | Select to include this employee's job when processing FTE edits for budgeting purposes. |

**Standard Hours**

The field is populated by default with the standard hours for the agency as specified in the Installation tables. You can change this information manually.

**FTE (full-time equivalency)**

The percentage of full-time the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter a new value less than 1.0.

### Related Links

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

## Add Employment Instance USF - Compensation Data page

Use the Compensation Data page (GVT_JOB3) to enter employee compensation information, including pay rate determinant, pay plan/table/grade/step, frequency, and other pay.

You can also enter retained pay plan/table/grade and step on this page.

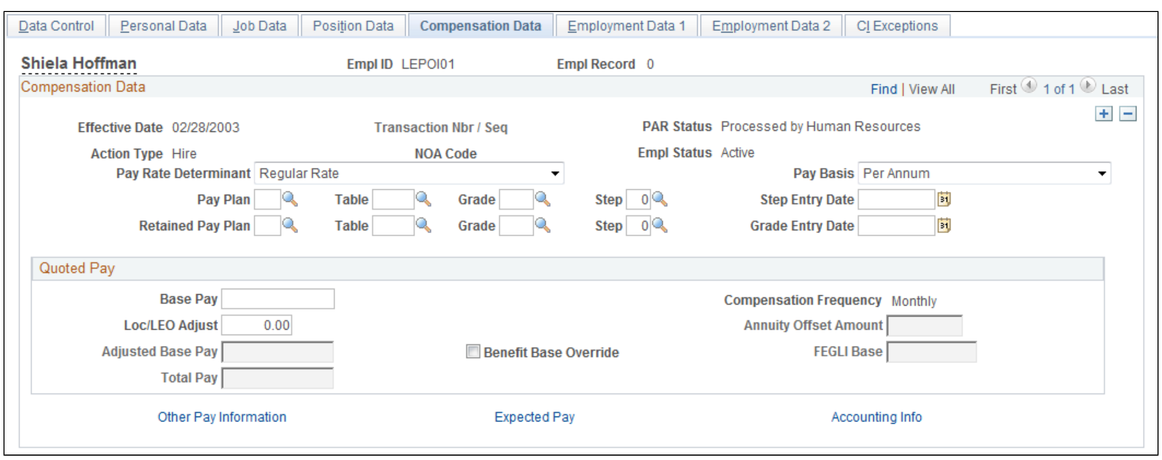
**Navigation**

Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF.

Enter a Person ID and click Add. Select the Compensation Data page.

**Image: Compensation Data page**

This example illustrates the fields and controls on the Compensation Data page. You can find definitions for the fields and controls later on this page.

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**Note:** Multiple Components of Pay, Derivation of Rates, and related features are not currently supported by PeopleSoft Human Resources USF functionality.

---

Many values on this page are set by default from values you entered in the Department and Job Code fields on the Job Data page. Override these values if necessary.

**Pay Rate Determinant**

Select a pay rate determinant.

**Pay Plan/Table/Grade**

Select the pay plan, table, and grade.

**Step**

Assign the correct step for the employee.

---

**Note:** For certain Pay Rate Determinants this is not an option and the field does not accept data.

---

**Step Entry Date**

The effective date of the request for this action.

If the Multi-Step/Grade check box is selected on the Installation table and you select a step on this page, the system automatically enters the base pay for that step.

**Rtnd PP/Table/Grade (retained pay plan/table/grade)**

There are several instances where retained grade or pay is authorized based on prior federal experience within the employing agency or at another federal agency. After selecting the appropriate pay rate determinant (for example, Retained Grade-Diff Posn), you can enter information in this field.

**Step and Grade Entry Date**

Enter the step and the date the employee was first assigned to the grade and step.

**Base Pay**

If you are using partial or full position management, a value is set by default here based on your prior assignment in the Step field.

A GM pay plan position is the exception to this rule. Because the GM pay plan has no steps, you must enter the base pay amount.

If you selected the Position Override check box on the Job Data page, you may also enter a base pay amount for a position with steps. This is appropriate in cases where the base pay amount is beyond the step 10 level.

Enter the base pay amount based on the compensation frequency period indicated. For example, if the frequency period is one month, the base pay entered would be the pay earned for one month. The system calculates and displays the value in the Loc/LEO Adjustment (if appropriate) and Total Pay fields after you have provided the compensation data.

**Adjusted Base Pay**

The system calculates and displays the adjusted base pay by applying the Loc/LEO adjustments to the employee's base pay. This field is used for pay limits computation of the locality pay.

**Compensation Frequency**

Set by default from the Job Code page; override if necessary.

**Annuity Offset Amount**

If the employee is an annuitant, enter a CSRS annuity offset amount.

| | |
|---|---|
| **Benefit Base Override and FEGLI Base** | The system calculates the FEGLI base rate. Select the Benefit Base Override check box to override this default and then enter a new amount. |
| **Other Pay Information** | Click to access the Other Pay Information page and enter compensation that employees receive that's in addition to base pay. |
| **Expected Pay** | Click to access the Expected Pay page and view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency that you enter on this page. |
| **Accounting Info** | Click to access the Accounting Information page and view a summary of the employee's job earnings distribution. |

If you selected the Multi-currency check box on the Installation table and entered the base pay in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.

### Default Values for Employment Data

After you enter job and position data, pay information is populated by default on the Compensation Data page. If you associated pay plans with job codes, the Pay Plan field is populated by default from the data in the Job Code table. The Grade field is populated by default from the Job Code page. After the values in the Pay Plan and Grade fields appear, the system also displays the Grade Entry Date field, which is the date the employee first joined the grade. When a value is entered in the Step field, the value in the Step Entry Date field populates by default. You can override these values if you choose.

The system verifies any combinations of pay plans and grades that you select. If the combination doesn't exist, a warning message appears.

## Other Pay Information Page

Use the Other Pay Information page (GVT_OTH_PAY_SEC) to enter compensation that employees receive that's in addition to base pay.

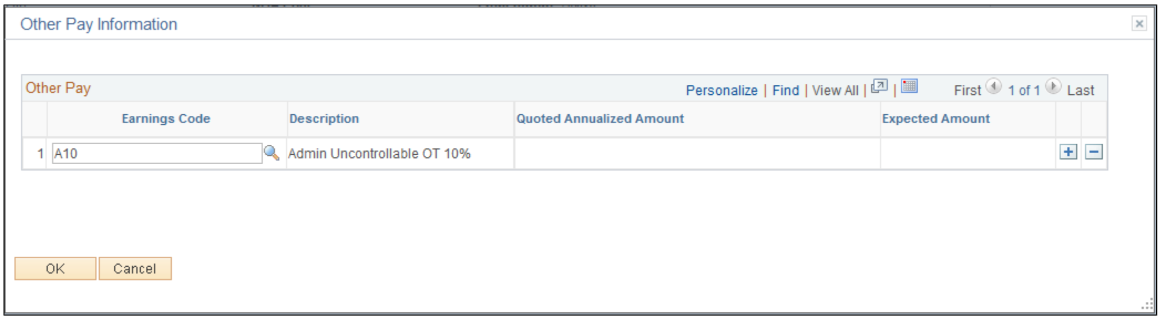
 

**Navigation**

Click Other Pay Information link on the Compensation Data page.

**Image: Other Pay Information page**

This example illustrates the fields and controls on the Other Pay Information page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Earnings Code** | Select the code for the additional pay type, such as automobile and beeper allowances. The system issues a warning indicating that the earnings code may be applicable to pay limits, at which time the employee's earnings calculation within payroll may be reduced. |

---

**Note:** A message appears when you enter premium pay that is subject to a pay limit. During payroll calculation, if the premium earnings plus adjusted base pay exceed the pay limit, the premium pay is reduced.

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## Expected Pay Page

Use the Expected Pay page (GVT_LOC_PAY_SEC) to view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page.

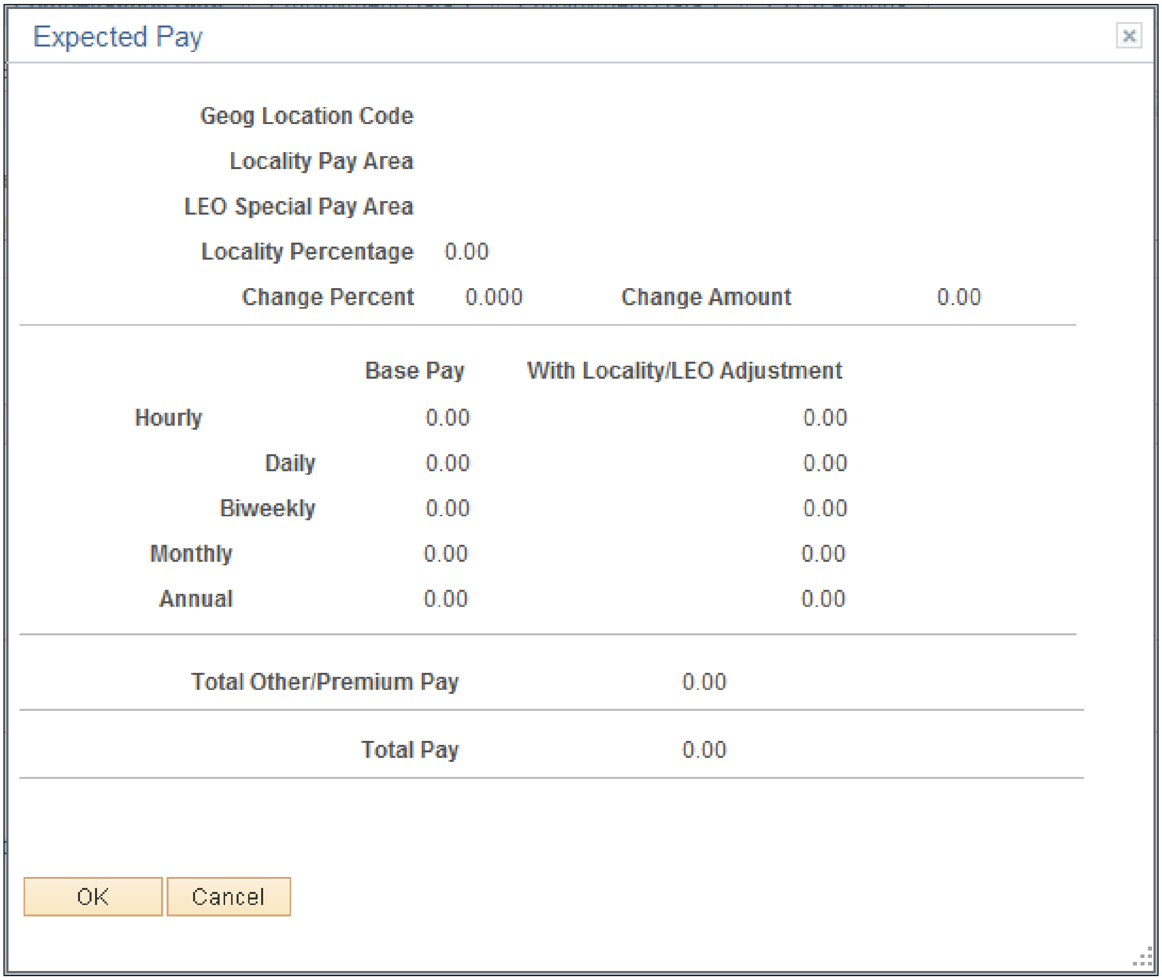
 

**Navigation**

Click Expected Pay link on the Compensation Data page.

**Image: Expected Pay page**

This example illustrates the fields and controls on the Expected Pay page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Locality Percentage or LEO Percentage (law enforcement officer percentage)** | Displays the locality or LEO percentage. This field shows the LEO Percentage label when the *Primary FEPCA* or *Secondary FEPCA* is selected in the LEO Position field. |
| **Change Percent** | Displays information regarding a percent change when new rows are inserted that change the base salary amounts. |
| **Base Pay** | Based on the base pay and compensation frequency you enter, the system calculates and displays the hourly, daily, biweekly, monthly, and annual rates for this employee. |
| **With Locality/LEO Adjustment** | The system calculates the same base pay figures using the locality/LEO adjustment listed at the top of the page. |

**Total Other/Premium Pay** The total of annual expected pay for the items you entered on the Other Pay Information page.

**Total Pay** The system calculates total pay by summing the annual pay with the locality/LEO adjustment and the total other/premium pay contributions.

---

**Note:** The Rate Change Amount and Rate Change Percent fields are used when awarding increases (not for new hires).

---

If expected pay exceeds the pay cap, a message appears at the bottom of the page warning that the pay cap has been reached and pay was reduced.

---

**Note:** In the case of an employee that is subject to reaching a pay cap/limit, the compensation rate is displayed correctly, however, the change amount and change percent are displayed differently depending on whether you view this information on the USF Compensation Data – Expected Pay page or on the commercial compensation pages.

---

### Understanding Expected Pay and Quoted Pay Within PeopleSoft Human Resources Management for U.S. Federal Government

The difference between expected pay and quoted pay occurs as a result of the conversion factors used when comparing yearly and hourly pay rates on the Pay Plan page in the Pay Plan Table component and the Expected Pay Rate page.

Rather than using the hourly conversion factor of 2080, as is often used as a business calculation factor, the U.S. federal government uses 2087.

The Expected Pay page calculates the daily, biweekly, monthly, and annual rates using the base pay amount from the Compensation Data page. These figures are based on the hourly conversion factor you set for the pay plan on the Pay Plan table, typically 2087.

It also breaks out into separate columns the pay into base pay (no locality, no adjustments), pay with locality, and LEO pay. Total other/premium pay is also calculated based on the amounts entered on the Other Pay Information page. So, as a result of using 2087 in these calculations, the estimated quoted pay on the Compensation Data page is slightly higher than what the federal employee actually receives in a year.

These two fields for expected and quoted pay may not match. The procedures that the federal government has for deannualizing and reannualizing quoted compensation rates are the cause of the difference. To deannualize a quoted rate of pay (convert to hourly), you divide the quoted rate of pay by 2087. To reannualize a quoted rate of pay to determine the expected pay, you multiply the derived hourly rate by the employee's scheduled weekly tour of duty and then multiply that by 52 weeks.

Following are two examples:

#### Example 1

Full-time employee (40 hours per week) with quoted rate of 41,740 USD per year.

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 weeks = 20 USD/hour × 40 hours/week × 52 weeks = 41,600 USD.

Difference between quoted and expected pay on an annual basis = 140 USD.

### Example 2

Part-time Employee (20 hours per week) with quoted rate of 41,740 USD per year

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 Weeks = 20 USD/hour × 20 hours/week × 52 weeks = 20,800 USD.

Difference between quoted and expected pay on an annual basis = 20,940 USD.

### Related Links

Understanding PARs

## Accounting Information Page

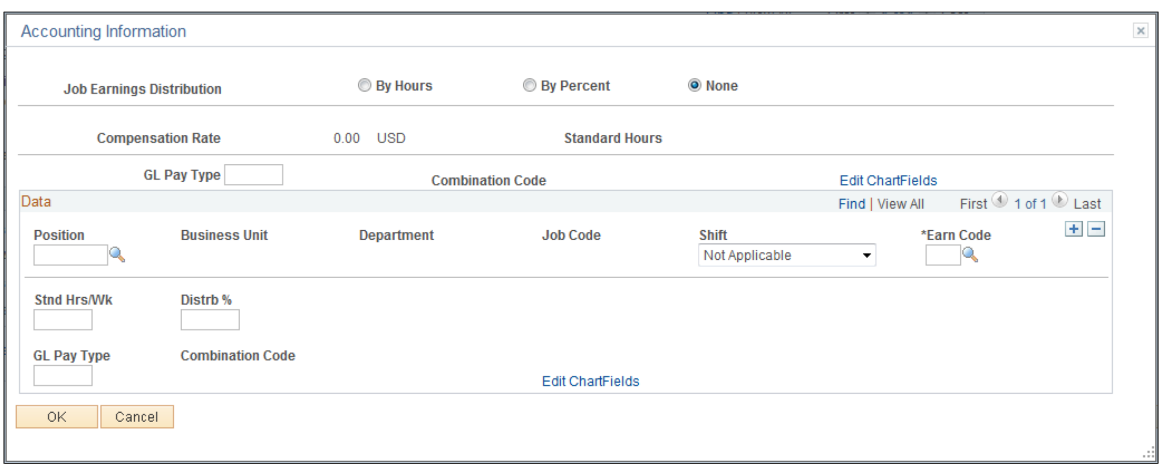
Use the Accounting Information page (GVT_JOBDIST_SEC) to view a summary of the employee's job earnings distribution.

**Navigation**

Click Accounting Info link on the Compensation Data page.

**Image: Accounting Information page**

This example illustrates the fields and controls on the Accounting Information page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Job Earnings Distribution** | Select the appropriate option to indicate the job earnings distribution frequency: by hours, by percent, or not at all. |

| | |
|---|---|
| | When you select the By Hours or By Percent options, the GL Pay Type and Account Code fields are unavailable for entry. Use the scroll bar to distribute earnings among departments.<br><br>If you select the By Hours option, then enter the hours to be distributed to each department in the Standard Hours field corresponding to each department entered.<br><br>If you select the By Percent option, enter a percentage corresponding to each department in the Percent of Distribution field. Percentages must total 100 percent and must equal the value in the Standard Hours field. |
| **Compensation Rate** | The annual salary, including the locality and LEO adjustments. |
| **Standard Hours** | Set by default from the Job Code page. |
| **GL Pay Type (general ledger pay type)** | Enter the GL pay type that has been established by your agency. |
| **Position, Business Unit, Department, Job Code, and Shift** | Select the business unit, department, job code, position, and shift to which to charge the earnings. |
| **Earn Code (earnings code)** | Specify the earnings code. This will default to the Regular Earnings code defined on the Paygroup Table. |
| **Stnd Hrs/Wk (standard hours per week)** | If you select the By Hours option, then specify how many hours will be charged to the corresponding earnings code. |
| **Distrb % (percent of distribution)** | If you select the By Percent job earnings distribution option, enter the percent to be charged to the corresponding earnings code. |

## Employment Data 1 Page

Use the Employment Data 1 page (GVT_EMPLOYMENT1) to enter employment information, such as employee service computation and conversion dates, and within-grade-increase data.

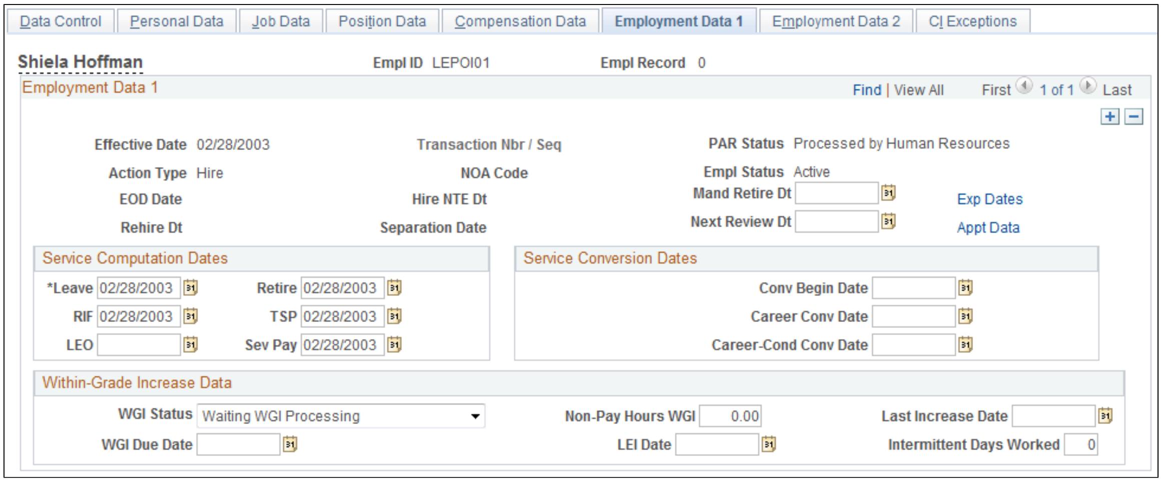
**Navigation**

Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF.

Enter a Person ID and click Add. Select the Employment Data 1 page.

**Image: Employment Data 1 page**

This example illustrates the fields and controls on the Employment Data 1 page. You can find definitions for the fields and controls later on this page.




Many values on this page are set by default from values entered in the Department and Job Code fields on the Job Data page. When adding an employment instance, the system populates most of the dates on this page with the effective date of the action. These dates are used later in various ways to calculate the employee's service time. Override these values as necessary.

If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data pages, the system will display the rehire date.

The Separation Date field is display-only, and shows the date that the employee left employment.

| | |
|---|---|
| **EOD Date (entered on duty)** | Reflects the effective date of the hire request after you save the request. This date is distinct from the SCD dates in that it describes when the employee started federal employment with the employing agency; it does not reflect total federal service involving the employee's total career. |
| **Hire NTE Dt (hire not to exceed date)** | Set by default from the Not to Exceed Date field on the Data Control page. In the case of a temporary hire, it designates the length of time the temporary employment can last. |
| **Mand Retire Date (mandatory retirement date)** | If applicable, enter the employee's mandatory retirement date. |
| **Exp Dates (expiration dates)** | Click to access the Expiration Dates page and enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments. |

**Next Review Dt (next review date)** — Enter the next review date. This date, while informational only, can serve as a tickler date for employee performance review.

**Appt Data (appointment data)** — Click to access the Appointment Info page and enter appointment limits.

## Service Computation Dates

**Leave** — Enter the service computation date for beginning the employee's leave computation.

**Retire** — Enter the service computation date for beginning the employee's retirement computation.

**RIF (reduction in force)** — Enter the computation date for establishing the employee's RIF position.

**TSP (thrift savings plan)** — Enter the computation date for beginning the employee's thrift savings plan eligibility computation.

**LEO (law enforcement officer)** — Enter the computation date for beginning the employee's law enforcement officer retirement computation.

**Sev Pay (severance pay)** — Enter the service computation date for establishing the employee's severance pay computation.

## Service Conversion Dates

**Conv Begin Date (conversion begin date), Career Conv Date (career conversion date), and Career Cond Conv Date (career-conditional conversion date)** — Enter the conversion begin date, the career conversion date, and the career-conditional conversion date. If the employee is hired using a career-conditional appointment, the conversion begin date is the effective date of the hire. Upon completion of the three-year period, the personnel office processes a PAR converting the employee to a career appointment and enters that effective date in the Career Conv Date field. If the employee was hired under a temporary appointment, the conversion begin date is the effective date of the hire. When the personnel office processes a PAR to convert the temporary employee to a permanent employee with a conversion to career conditional competitive appointment, the Career-Cond Conv Dt field is the effective date for that transaction.

## Within-Grade Increase Data

**WGI Status (within-grade increase status)** — Enter the WGI status, such as *(none), Approved, Waiting, Denied, N/A,* or *Postponed.* For a new employee, the default value is *Waiting. Created* is an option for WGI status, which is reserved for the automatic WGI process. Do not change this online, as the WGI process won't select it unless the status is *Waiting* or *Approved.*

**Non Pay Hours WGI and Intermittent Days Worked**

Leave these informational fields blank at hire. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the Non Pay Hours WGI field with nonpay hours from the WGI/Tenure Update report.

**Note:** The WGI/Tenure Update process is a North American Payroll process specific to U.S. Federal government customers.

**Last Increase Dt (last increase date), WGI Due Date, and LEI Date (last equivalent increase date)**

The system automatically enters the last increase date, LEI date, and WGI due date. For certain actions, the WGI Due Date field is set by default to the pay period begin date based on the pay calendar tables that your organization has established. For WGI due date calculation, it is imperative that you set up your pay calendars for this year, plus three years in advance of the current year. For example, if the current year is 1999, then your pay calendars need to be set up for 1999, 2000, 2001, and 2002.

If you enter a date that isn't the beginning of a pay calendar, the system displays a message suggesting valid pay calendar begin dates into which your date falls. If the system suggests a date of January 1, 1899, this indicates that your pay calendars do not exist. See your implementation project manager about creating additional pay calendars.

After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the WGI Due Date field with the extended due date from the WGI/Tenure Update report.

### Related Links

Understanding Automatic Action Processing

"Creating Balance IDs *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Expiration Dates Page

Use the Expiration Dates page (GVT_EXPIRDT_SEC) to enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.

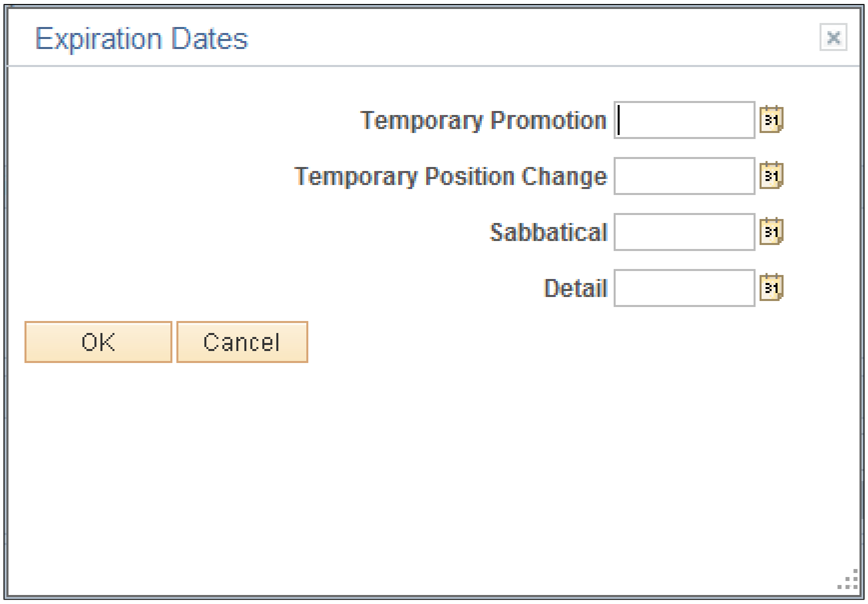
 

**Navigation**

Click Exp Dates link on the Employment Data 1 page.

**Image: Expiration Dates page**

This example illustrates the fields and controls on the Expiration Dates page. You can find definitions for the fields and controls later on this page.




The following fields, which are updated by the user, are informational only.

| | |
|---|---|
| **Temporary Promotion** | Enter the temporary promotion date. |
| **Temporary Position Change** | Enter the temporary position change expiration date. |
| **Sabbatical** | Enter the sabbatical expiration date. |
| **Detail** | Enter the detail assignment expiration date. |

## Appointment Info Page

Use the Appointment Info page (GVT_APPDATA_SEC) to enter appointment limits and indicate if this person is in a special employment program.

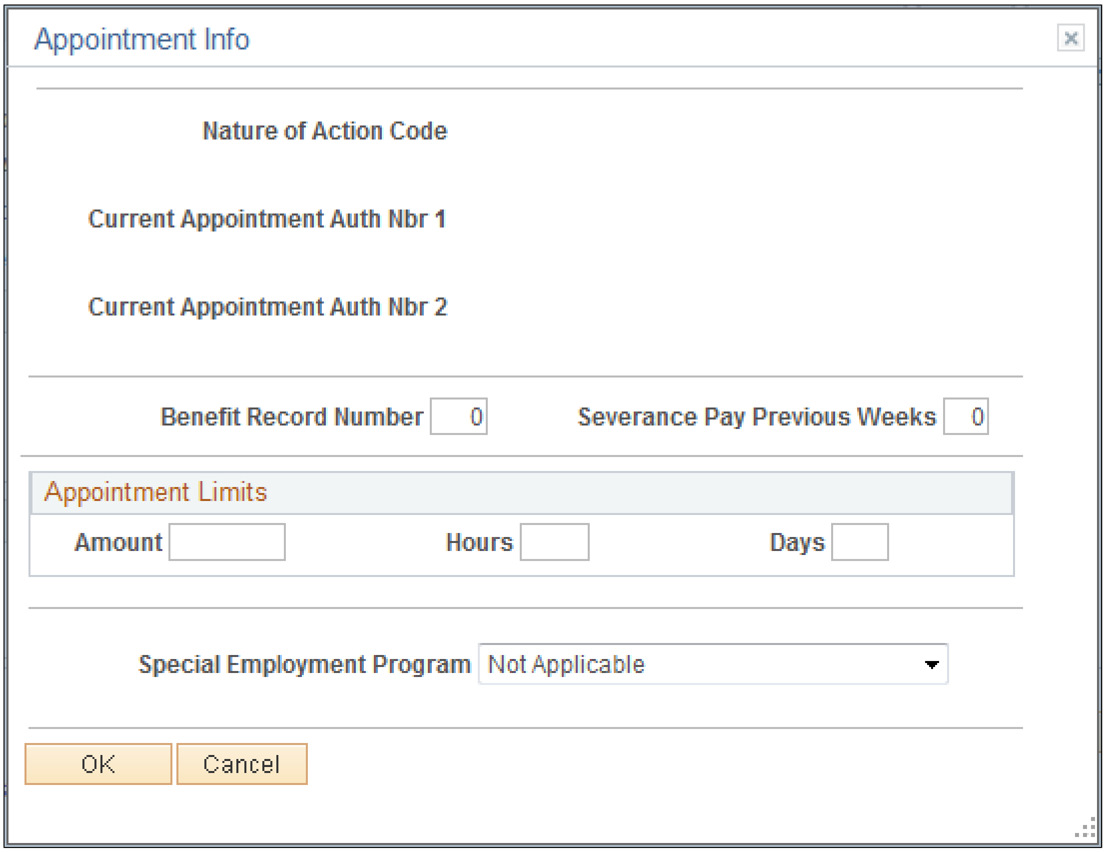
 

**Navigation**

Click Appt Data on the Employment Data 1 page.

**Image: Appointment Info page**

This example illustrates the fields and controls on the Appointment Info page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Nature of Action Code, Current Appointment Auth Nbr 1 (current appointment authorize number 1) and Current Appointment Auth Nbr 2 (current appointment authorize number 2)** | CPDF reportable fields maintained to reflect historic data on the employee's current appointment authority used to authorize the employee's hire. |
| **Benefit Record Number and Severance Pay Previous Weeks** | For a new hire, you do not need to enter the benefit record number and the number of severance pay previous weeks. If changes occur to the employee's employment status, you must update these fields (for example, RIF). |
| **Special Employment Program** | Indicate the special employment program: *Not Applicable, Other, Presidential Management Intern, SES Candidate Development,* or *Veteran's Readjustment Program.* |

### Appointment Limits

| | |
|---|---|
| **Amount, Hours, and Days** | Depending on the type of appointment used to hire the employee, enter the appointment limits amount, hours, or days. |

## Employment Data 2 Page

Use the Employment Data 2 page (GVT_EMPLOYMENT3) to enter additional employment data including union, probation, RIF, tenure, and security data.

Also record the retained grade information.

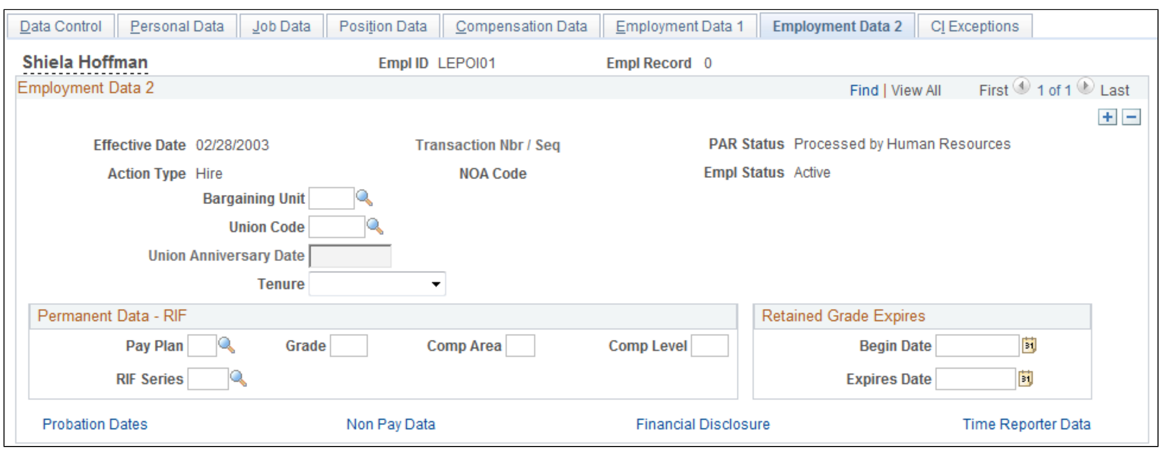
**Navigation**

Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF.

Enter a Person ID and click Add. Select the Employment Data 2 page.

**Image: Employment Data 2 page**

This example illustrates the fields and controls on the Employment Data 2 page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Bargaining Unit** | Select a code representing the bargaining unit to which the employee belongs. |
| **Union Code** | If your new employee belongs to a union, select the appropriate union code. |
| **Union Anniversary Date** | If the bargaining unit covers the position and the employee has elected to join, enter the date on which the employee's seniority ranking within the union is based. |
| **Tenure** | Indicate the type of tenure. |

### Retained Grade Expires

| | |
|---|---|
| **Begin Date and Expires Date** | Where appropriate, enter the employee's retained grade begin date and expires date. These are informational fields provided |

for the agency to track the employee's eligibility to maintain retained grade.

### Permanent Data-RIF

These informational fields enable the agency to track the employee relative to RIF processing.

| | |
|---|---|
| **Pay Plan/Grade** | Enter the employee's pay plan and pay grade. |
| **Comp/Area Level** | Enter the employee's compensation area and level. |
| **RIF Series** | Select the employee's RIF series. |

### Links

| | |
|---|---|
| **Probation Dates** | Click to access the Federal Probation Dates page and enter information related to probation periods. |
| **Non Pay Data** | Click to access the Non Pay Data page and enter information related to a status of non-pay. |
| **Financial Disclosure** | Click to access the Financial Disclosure page and enter information related to the employee's financial disclosure requirement. |
| **Time Reporter Data** | Click to review PeopleSoft time and labor data for this employee. If you aren't using PeopleSoft Time and Labor, the link is unavailable. |

### Related Links

Understanding Automatic Action Processing

## Federal Probation Dates Page

Use the Federal Probation Dates page (GVT_EMPL_PROB_SEC) to document any probation start and end dates that apply to this person.

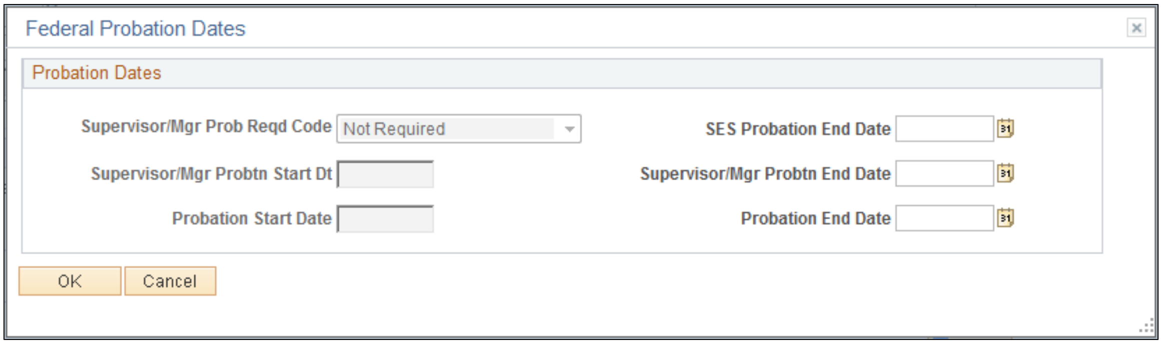
 

**Navigation**

Click Probation Dates on the Employee Data 2 page.

**Image: Federal Probation Dates page**

This example illustrates the fields and controls on the Federal Probation Dates page. You can find definitions for the fields and controls later on this page.




**Supervisor/Mgr Probtn Req Cd (supervisor manager probation required code)**

Identifies whether a supervisory/managerial probationary period is required, served, or waived.

**SES Probation End Date (Senior Executive Service probation end date)**

Enter the applicable probation end date.

**Supervisor/Mgr Probtn Start Dt (supervisor/manager probation start date)**

The starting date for the supervisory/managerial probationary period, or for the SES probationary period.

**Supervisor/Mgr Probtn End Dt (supervisor/manager probation end date)**

Enter the applicable probation end date.

**Probation Start Date**

Identifies whether the employee's appointment is subject to completion of a one year probationary (or trial) period and to show the commencing date of the probationary period.

**Probation End Date**

Enter the applicable probation end date.

## Non - Pay Data Page

Use the Non - Pay Data page (GVT_NONPAY_SEC) to track information related to a status of nonpay.

Information on this page affects FEHB eligibility and FEGLI.

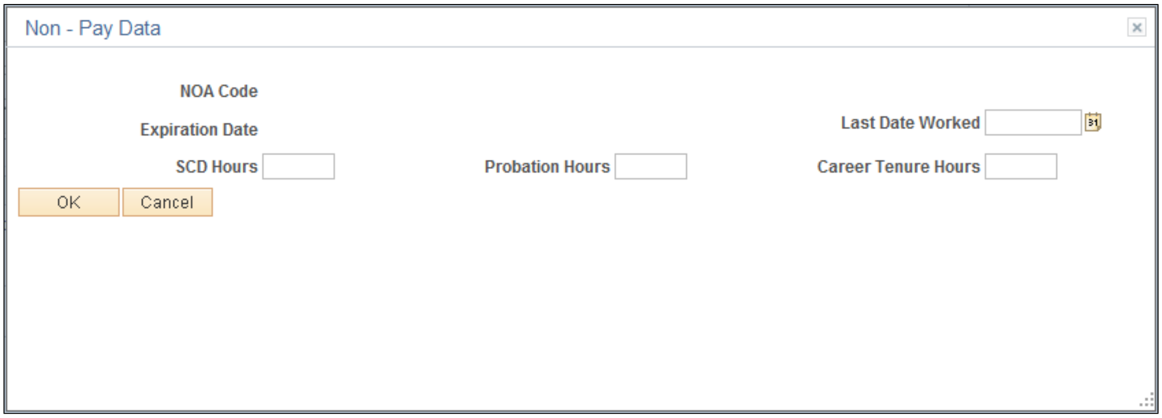
 

**Navigation**

Click Non Pay Data link on the Employment Data 2 page.

**Image: Non - Pay Data page**

This example illustrates the fields and controls on the Non - Pay Data page. You can find definitions for the fields and controls later on this page.




**NOA Code** Indicates the PAR processed to place the employee in a nonpay status.

**Expiration Date** The nonpay expiration effective date, which reflects the projected expiration of nonpay status and consequent processing of a PAR to return to pay status.

**Last Date Worked** Enter the date last worked prior to being placed in a nonpay status.

**SCD Hours, Probation Hours, and Career Tenure Hours** Enter and track SCD hours, probation hours, and career tenure hours in these informational fields.

## Financial Disclosure Page

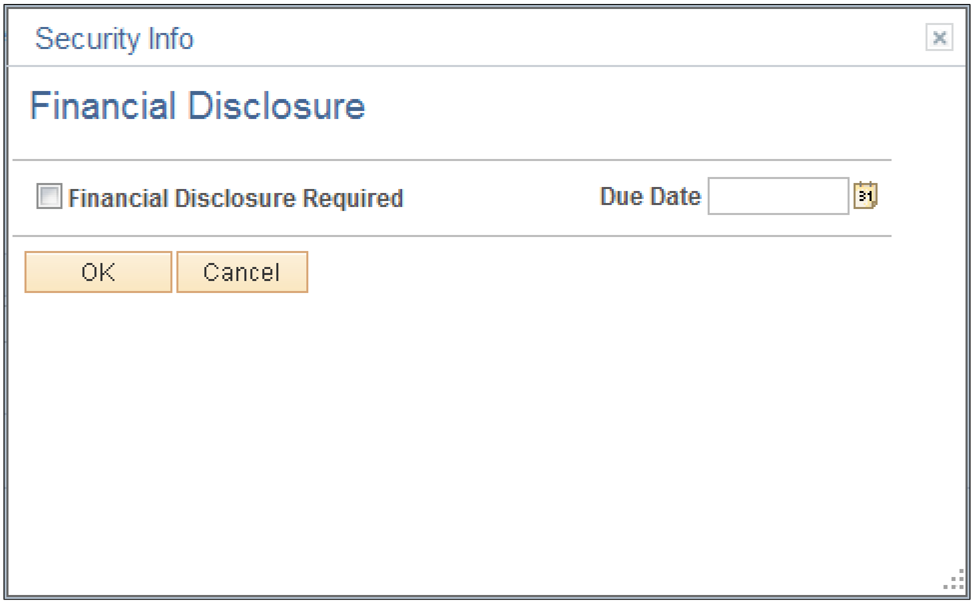
Use the Financial Disclosure page (GVT_SECURTY_SEC) to indicate if financial disclosure is required and the due date.

**Navigation**

Click Financial Disclosure link on the Employment Data 2 page.

**Image: Financial Disclosure page**

This example illustrates the fields and controls on the Financial Disclosure page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Financial Disclosure Required and Due Date** | If a financial disclosure is required, select this check box, and enter the due date for receipt. |

### Related Links

"(USF) Setting Up Position Titles *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*"
"Creating Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*"
"Classifying Jobs *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## CI Exceptions Page

Use the CI Exceptions page (GVT_PAR_CI_MSG) to display the warning messages generated during the hire process after the transaction has been successfully saved.

**Navigation**

Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF.

Enter a Person ID and click Add. Select the CI Exceptions page.

After you insert your personnel action, and have completed it to the best of your knowledge, update the PAR status to *PRO* (processed), and click the Savebutton. The system updates all the relevant tables with the new data. The system uses a series of Component Interfaces (CIs) to make these updates. Should the CIs encounter an Error, the personnel action update will stop and roll back to the original state and thus no updates will be saved until you address the Error and click Save again.

Should the CIs encounter any warning messages, the update will continue while the warning messages are displayed for you in the CI Exceptions page after the transaction has been successfully saved. These warnings are relevant to the processed transaction and will be automatically deleted after another personnel action is processed. It is good practice to note the warnings and contact your PeopleSoft Technical Administrator to help resolve them. The CI Exceptions page displays an auto-generated step-by-step documentation of what the CIs are executing which provides valuable insight into the back-end technology used in the Federal product.

## Assigning Employees to Positions

If you organizing part or all of PeopleSoft Human Resources by position (using PeopleSoft Human Resources Manage Positions), you can hire some or all new employees into positions on the Hire Employee pages, accessed from the Workforce Administration, Increase Workforce menu. If you're not using PeopleSoft Human Resources Manage Positions, you can also use position numbers but the system won't process position-related data.

### Related Links

"Understanding Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*"

## Hiring Job Applicants

You can initiate the hire process from the Recruiting component. After an applicant is selected you can take the action of "Prepare for Hire" to submit the hire request. The hire transaction is completed using the Manage Hires transaction in the Workforce Administration component. Both Recruiting and Template-Based Hire use the Manage Hires page.

See Using Smart HR Templates and Transactions.

See "Hiring Applicants *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*".

### Related Links

*PeopleSoft HCM 9.2: Talent Acquisition Manager*

## Printing Appointment Affidavits and Preliminary Employment Data Forms

This topic lists the pages used to run the Appointment Affidavits (FGSF61) and Request for Prel Employ Data (request for preliminary employment data) (FGSF755) reports.

## Pages Used to Print the Forms

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Appointment Affidavits USF | RUNCTL_FGSF61 | Workforce Administration, Job Information, Reports, Appointment Affidavits USF | Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee. |
| Request Prelim Empl Data USF | RUN_CNTL_FGSF75 | Workforce Administration, Job Information, Reports, Request Prelim Empl Data USF | Produces a Request for Preliminary Employment Data form. |

## Chapter 8

# Entering Additional Data in Human Resources Records

## Understanding Additional Worker Data

After you've entered a worker's basic personal information and created one or more organizational instances for them, use other pages in the Workforce Administration menu to add and track a broad range of other information for that person.

While many of the pages covered in these topics are optional, you may find them useful for tracking and reporting, and for maintaining compliance with government regulations. You can also provide other people, such as your employees or industrial relations representatives, with information that helps them perform their jobs more effectively.

## Locating Personnel Records

When you open an additional information page, the system displays the dialog box for you to select the person. If you don't know the person's employee ID, there are alternate ways to locate the person's record:

- Use the search dialog box to search for the correct record by name or partial last name or middle name.

  Advanced search options may also be available.

- Use the Search for People page to search for a person ID by name, address, city, date of birth, gender, or national ID.
- Use the Search by National ID page to find a person's person ID by using a national ID.

  After you have the person's employee ID, enter it in the dialog box for the page you are accessing.

These topics discuss how to:

- Search with the search dialogue.
- Search for person information.
- Search by national ID.

## Pages Used to Locate Personnel Records

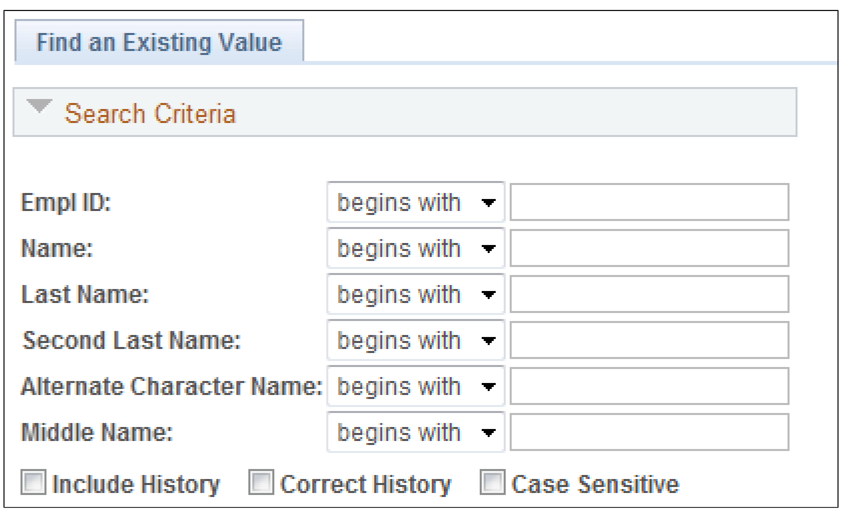
| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Search/Match | HCR_SM_SEARCH | Workforce Administration, Personal Information, Search for People | Search for and select a person. |
| Search by National ID | NID_LOOKUP | Workforce Administration, Personal Information, Biographical, Search by National ID | Locate a person's employee ID by using the national ID. When you find the person's employee ID, use it when you move to other search pages. |

## Searching with the Search Dialogue

Use the following search dialog box to find a person's information. You encounter this sort of dialog box when you enter most pages in the Workforce Administration menu. You can also enhance the component's underlying search record to expose other fields as alternate search criteria or as list box items. These fields may include relevant additional fields such as: middle name, alternate character name, department, setID, organizational relationship, POI type, military rank, and so on.

**Image: Search dialogue**

This example illustrates the fields and controls on the Search dialogue. You can find definitions for the fields and controls later on this page.




You must have already created job records in PeopleSoft Human Resources for the person for whom you are searching. In other words, you must have already added the person to the system and created an organizational instance for the person.

**Empl Record**

If the person has more than one organization instance or job record, enter the record that you want to access.

If you do not know which record you want to access, do not enter a value in this field. The system lists all the job records in the search results, enabling you to select the appropriate one.

| | |
|---|---|
| **Name, Last Name, and Middle Name** | If you're not sure of the entire employee ID or name, make a partial entry in one of these fields and click Search to search for the correct name and ID.<br><br>You cannot use this field to search for last names using special characters, such as double-byte Japanese characters. |
| **Alternate Character Name** | If you selected the Alternate Character option for your user ID on the Primary Permission List Preferences table, you can also search for employee names by using the Alternate Character search feature in PeopleSoft Human Resources. |
| **Organizational Relationship** | Select the organizational relationship to narrow your search to *Employees, Contingent Workers,* or *Person of Interest.* |
| **Military Service, Rank, and Worn Rank** | Enter the military information to search for people associated with a military service or rank. The military fields must be activated after installation or upgrade if you choose to have these fields appear as an alternate search key or list box attribute. |

### Related Links

"Understanding PeopleSoft HCM System Data Regulation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Working with Alternate Character Sets *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Search/Match Page

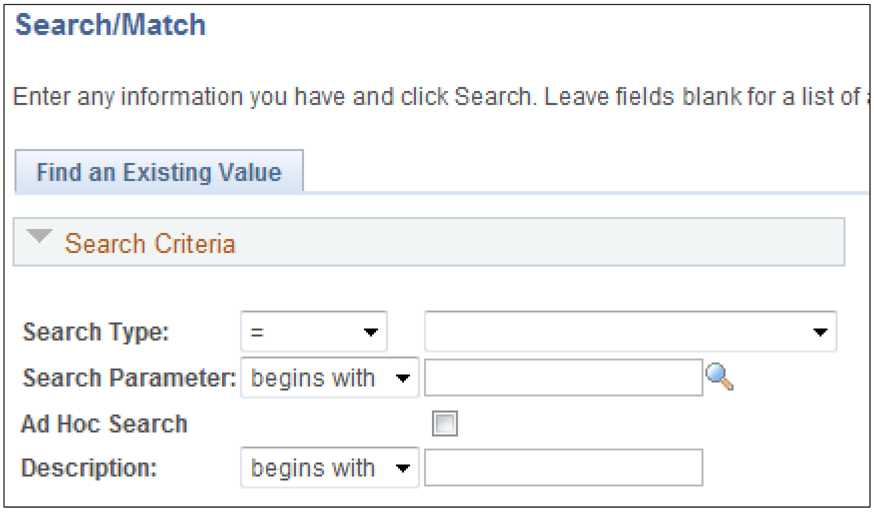
Use the Search/Match page (HCR_SM_SEARCH) to search for and select a person.

**Navigation**

Workforce Administration, Personal Information, Search for People

**Image: Search/Match page**

This example illustrates the fields and controls on the Search/Match page. You can find definitions for the fields and controls later on this page.




This page enables users of an application to search for and select a person to process. Using this system, an application can easily render a UI that prompts the user for partial names and displays a list of candidates from which the user can select. Additional features include optional drill-down to additional non-sensitive data.

See "Configuring Person Search *(PeopleSoft HCM 9.2: Application Fundamentals)*".

## Search by National ID Page

Use the Search by National ID page (NID_LOOKUP) to locate a person's employee ID by using the national ID.

When you find the person's employee ID, use it when you move to other search pages.

**Navigation**

Workforce Administration, Personal Information, Biographical, Search by National ID

**Image: Search by National ID page**

This example illustrates the fields and controls on the Search by National ID page. You can find definitions for the fields and controls later on this page.


**National ID**

Enter the national ID of the person whose records you want to view.

**Search In**

Select *Employees / Contingents / POI* or *Dependents and Beneficiaries* to narrow your search.

---

**Note:** *Employees / Contingents / POI* includes all people who were added to the system on the Personal Information component, including contingent workers and people of interest.

---

**Search**

Click to have the system display a list of the records that match the ID that you entered.

# Tracking Workforce Contracts

These topics discuss how to:

- Add basic contract information.
- Add special contract clause information.
- View task order information.
- Add signature date, responsible party, and probation information.
- Generate the Contract Information report.

---

**Note:** Contracts are driven by regulatory region (and that region's setID) on the job data record associated with the contract. On the Update Contracts component, you must select the regulatory region that is on the person's job data record and the system only makes available contract clauses and types that share the setID of this regulatory region.

---

## Pages Used to Track Workforce Contracts

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Contract Status/Content | CONTRACT1 | Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/ Content | Add or update basic information about the contract between your organization and a worker, including the contract duration, type, and content.<br><br>You must have previously set up contract template IDs on the Define Contract Templates page. |
| Contract Type/Clauses | CONTRACT2 | Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/ Clauses | Add or update any special contract clause information to the standard contract language for this worker. |
| Original Contract Data | CONTRACT_BEL_SEC | Click Original Contract on the Contract Type/Clauses page. | (BEL) Enter information about the original contract that the new contract is replacing. |
| Task Order Information | CONTRACT4 | Workforce Administration, Job Information, Contract Administration, Update Contracts, Task Order Information | Track contractor work to a more detailed line item, rather than at the contract level. This may enable more accountability and tracking of contractors. This page is optional. |
| Signature Date/Probation Info | CONTRACT3 | Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature Date/ Probation Info | Add or update the signature date, responsible party, and probation information. View basic job data. |
| Contract Information Report | RUNCTL_CNT001 | Workforce Administration, Job Information, Contract Administration, Contract Information Report | Generate the Contract Information report (CNT001) that lists all contracts and task orders (subcontracts) for a worker or the contract history for all workers within a designated period. |

### Related Links

"Understanding Contract Pay Processing *(PeopleSoft HCM 9.2: Payroll for North America)*"
"Understanding Contract Earnings *(PeopleSoft HCM 9.2: Payroll for North America)*"
Setting Up Workforce Contracts

## Contract Status/Content Page

Use the Contract Status/Content page (CONTRACT1) to add or update basic information about the contract between your organization and a worker, including the contract duration, type, and content.

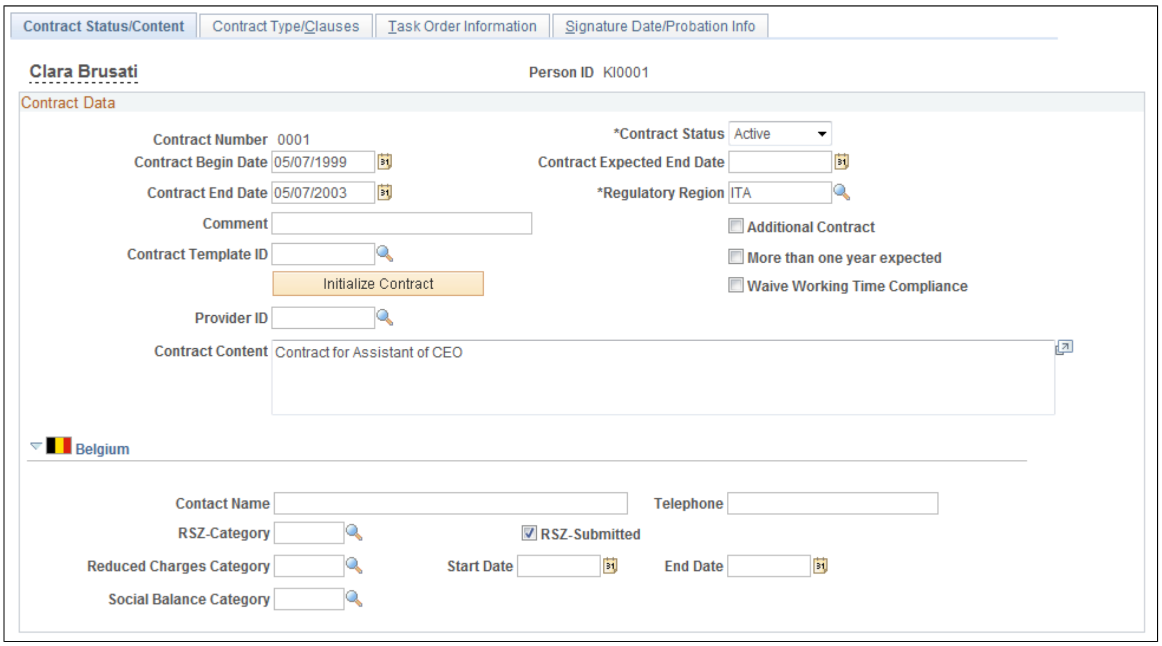
You must have previously set up contract template IDs on the Define Contract Templates page.

**Navigation**

Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content

**Image: Contract Status/Content page**

This example illustrates the fields and controls on the Contract Status/Content page. You can find definitions for the fields and controls later on this page.




**Contract Status**

Indicate whether the contract is *Active* or *Inactive.*

**Contract Begin Date**

Enter the date when the contract begins. The current date is the default.

**Contract Expected End Date**

Enter the date when you expect the contract will end.

**Contract End Date**

Enter the date when the contract actually ended. This date may differ from the date that you expect the contract to end.

**Regulatory Region**

Enter a regulatory region. The regulatory region must share the setID of the contract type and be the regulatory region on the person's job data record for this contract.

**Comment**

Enter a comment for this contract.

**Additional Contract**

Select if the worker already has at least one contract. Leave this field blank if this is the worker's only contract.

**More than one year expected**

Select if you expect that this contract will result in more than one year of employment for this worker.

**Note:** This field is required for contracts with Japanese workers.

**Waive Working Time Compliance**

Select if the contract allows working time compliance to be waived by the worker.

**Contract Template ID and Initialize Contract**

If you have defined a template for the contract, select an ID from the list of valid templates stored on the Define Contract Templates page, and click Initialize Contract. The system displays a description of the contract and its default contents.

**Note:** If there are any task orders associated to the contract template, only those task orders with an effective date on or after the individual's Contract Begin Date will default to the individual contract level.

**Provider ID**

If this contract is with a contingent worker, specify the person's provider, agency, or employer.

**Contract Content**

If you entered a contract template code and clicked the Initialize Contract button, the system automatically completes this field with the content that was entered on the Define Contract Templates page. Otherwise, enter the contract language.

## (BEL) Belgium

**RSZ-Category**

If you're entering a contract and you selected *Employment* as the contract type on the Contract Type / Clauses page, choose an RSZ category from the valid RSZ category codes stored on the RSZ Categories page (CNT_RSZ_TBL_BEL).

**RSZ-Submitted**

Select to indicate that social insurance premiums need to be paid by the worker to the Belgian RSZ governing body for this job contract.

**Reduced Charges Category**

Select from among the categories, if appropriate.

Employers can lower their RSZ premium contributions if they are offering a job for one of the two reduced charges categories. Companies that employ workers who qualify for the reduced charges category enjoy lower employee costs.

**Social Balance Category**

Select the appropriate social balance category. This information is included on the BEL Social report.

## Related Links

(ESP) Setting Up Spanish Workforce Tables

Social Security Scheme Table - Scheme page

## Contract Type/Clauses Page

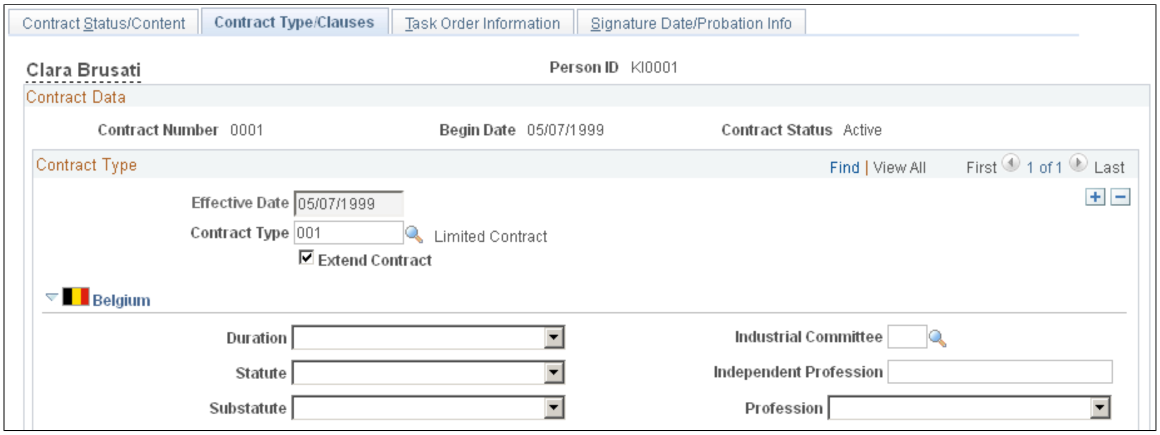
Use the Contract Type/Clauses page (CONTRACT2) to add or update any special contract clause information to the standard contract language for this worker.

### Navigation

Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/Clauses

### Image: Contract Type/Clauses page (1 of 3)

This example illustrates the fields and controls on the Contract Type/Clauses page (1 of 3). You can find definitions for the fields and controls later on this page.




### Image: Contract Type/Clauses page (2 of 3)

This example illustrates the fields and controls on the Contract Type/Clauses page (2 of 3). You can find definitions for the fields and controls later on this page.

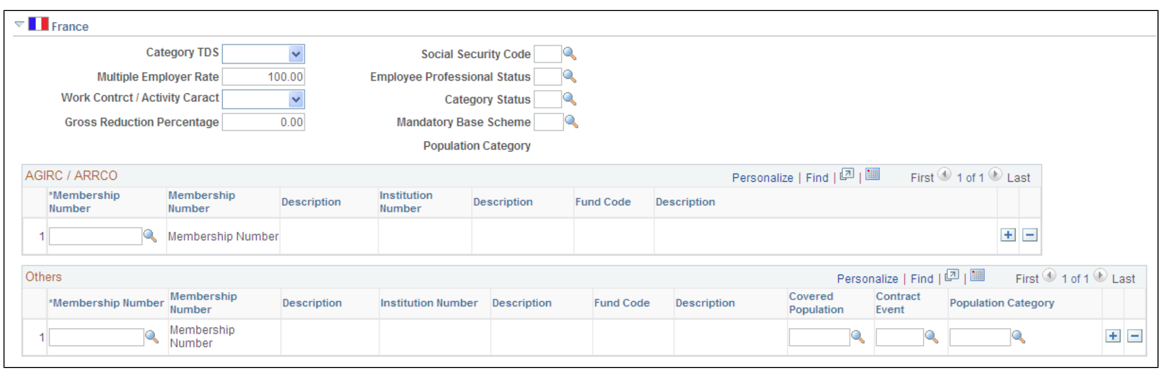


**Image: Contract Type/Clauses page (3 of 3)**

This example illustrates the fields and controls on the Contract Type/Clauses page (3 of 3). You can find definitions for the fields and controls later on this page.


**Contract Type** — Select the contract type.

**Extend Contract** — Indicate if the individual's original contract has been extended beyond it's original date or purpose.

## Contract Clauses

**Seq Nbr (sequence number)** — When you add a clause to the contract, the system assigns a sequence number automatically.

**Clause** — Select a clause.

**Clause Status** — The status that is associated with the clause that you selected appears by default.

## (BEL) Belgium

**Duration** — Select a duration period for the workforce contract.

**Original Contract** — If *Replacement* defines the duration period, the Original Contract link appears. Click to access the Replace Contract BEL page to enter the employee ID and original contract number.

**Statute** — Select a contract statute, or employment category, for this worker.

**Independent Profession** — If you selected *Self employed* as the contract type, provide the worker's independent profession here.

**Substatute** — Select a substatute, or employment subcategory. The system displays only those substatutes that are associated with the statute code that you selected.

**Profession** — If you selected *Member of the Professions* as the contract type, indicate additional profession information here.

## (FRA) France

**Category TDS**

Select a worker category: *Apprentice, Executive,* and *Manager.* This field is used to prepare the DADS TDS report.

**Social Security Code**

Select a social security code. The social security code is the contribution class, or régime, of the worker. Any worker who is eligible for a contribution must be associated with a social security code.

**Multiple Employer Rate**

The earnings ceiling is reduced if an employee has multiple contracts active at the same time. The reduction appears here as a percentage.

If a worker has more than one employer, use the multiple employer rate to indicate the percentage of contributions that should be taken from each employer to avoid over-taxing. The earnings ceilings are prorated using this rate. For example, suppose that a worker has two employers, and he receives 40 percent of his salary from employer A and 60 percent of his salary from employer B. In the Multiple Employer Rate field, employer A enters *40* and employer B enters *60.*

**Employee Professional Status**

Select the profession that is designated for this worker.

**Work Contrct/Activity Caract**

Used to prepare the DADS TDS report. Values are *Full Time, Home, Intermitt., Part Time, Seasonal W, Temporary,* and *Wo Ctc Cpl.*

**Category Status**

Select the category status. The category status affects the type of pension/contingency fund to which the employee contributes.

**Gross Reduction Percentage**

The gross reduction percentage is applied to the gross salary for specific job categories, such as for journalists and artists. These workers do not pay their contributions on their gross salaries. Instead, their gross salaries are reduced by the percentage indicated here. For example, suppose that a worker is entitled to a 30 percent reduction. If he has a salary of 1500 EUR, he contributes for only 1000 EUR. This field has a default value of *0.*

**Mandatory Base Scheme**

Select the base compensation scheme for this workforce contract.

**Population Category**

Displays the population category that applies to the employee. The system determines the population category from the INSEE code associated with the employee's job code. INSEE codes are linked to population categories on the INSEE Table page.

**AGIRC / ARRCO**

Use this group box to assign the employee to an AGIRC or ARRCO pension contract, if you want to override the contracts defined for the employee's company or establishment. Use the Pension/Cont. Contracts Review page to view a list of the pension and contingency funds for which an employee is eligible.

Select the AGIRC/ARRCO contract in the Membership Number field and the system completes the remaining fields in this group box.

Click the link in the Membership Number column to view the contract details. The system displays the Pension/Contingency Contracts page.

---

**Note:** Employees should be assigned to only one contract with an institution type of AGIRC or ARRCO on any given date.

---

See (FRA) Setting Up French Workforce Tables.

See (FRA) Providing Additional Information for French Workers.

**Others**

Use this group box to assign the employee to a contingency fund contract. Contingency funds defined on this page are in addition to any contingency funds defined for the employee's company or establishment. Use the Pension/Cont. Contracts Review page to view a list of the pension and contingency funds for which an employee is eligible.

Select the contingency contract in the Membership Number field and the system completes the contract details fields.

Click the link in the Membership Number column to view the contract details. The system displays the Pension/Contingency Contracts page.

Select a value in the Covered Population field that indicates who is covered by the contract.

Select a value in the Contract Event field to indicate whether this is a new contract or the type of change in contract. Contract events are required for DADS reporting.

Select a value in the Population Category field to indicate the population category that applies. This value is required for DUCS reporting. The default value is the population category for the employee's job code but you can override it.

See "Extracting DADS Data *(PeopleSoft HCM 9.2: Global Payroll for France)*".

See "Understanding DUCS Processing *(PeopleSoft HCM 9.2: Global Payroll for France)*".

## (ITA) Italy

**Plan ID**

If the worker was assigned a contract type of *Training and Labor,* you must select a plan ID.

**Reason**

If the worker was assigned a contract type of *001: Limited Contract,* you must enter a reason for the contract.

**Empl ID Replaced**

If the reason for the determined period contract type is *Maternity* or *Replacement,* select the employee ID of the worker who is being temporarily replaced by this contract worker.

The following fields appear in the Target Categorization group box only if the contract type is *Training and Labor.*

**Labor Agreement**

Select the labor agreement for this contract and plan ID.

**Category**

Select the labor category for this contract.

**Subcategory**

Select the subcategory for this contract.

**Subcategory 2**

If the subcategory selected above has further divisions, select the subcategory 2 here.

### Related Links

Statutes Page

## Contract Data - Task Order Information Page

Use the Task Order Information page (CONTRACT4) to track contractor work to a more detailed line item, rather than at the contract level.

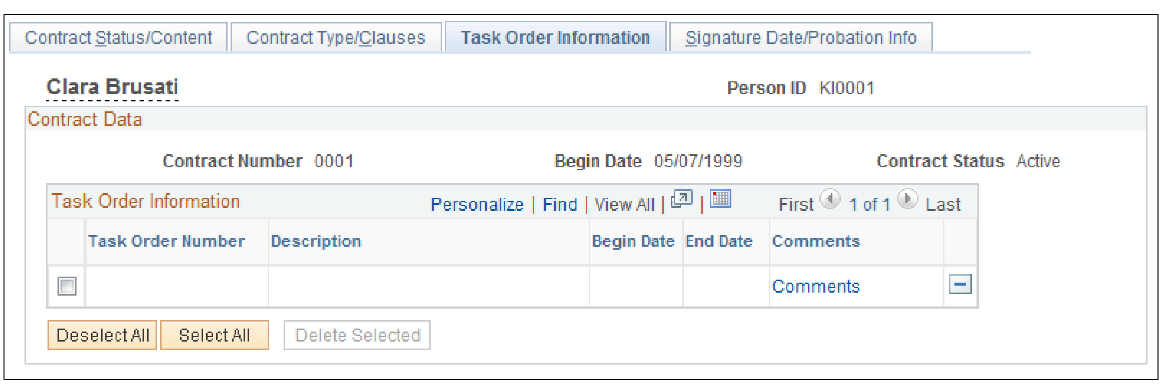
This may enable more accountability and tracking of contractors. This page is optional.

**Navigation**

Workforce Administration, Job Information, Contract Administration, Update Contracts, Task Order Information

**Image: Contract Data - Task Order Information page**

This example illustrates the fields and controls on the Contract Data - Task Order Information page. You can find definitions for the fields and controls later on this page.




If you are using Contract Templates, this page enables you to manage the task orders, such as subcontracts, with which an individual is associated with under the primary contract template. Once you enter the contract template ID and initialize the contract, the system will enter any task orders that have a begin date on or after the contract begin date. You can then manage the specific task orders and enter comments associated with this person.

## Contract Data - Signature Date/Probation Info Page

Use the Signature Date/Probation Info page (CONTRACT3) to add or update the signature date, responsible party, and probation information.

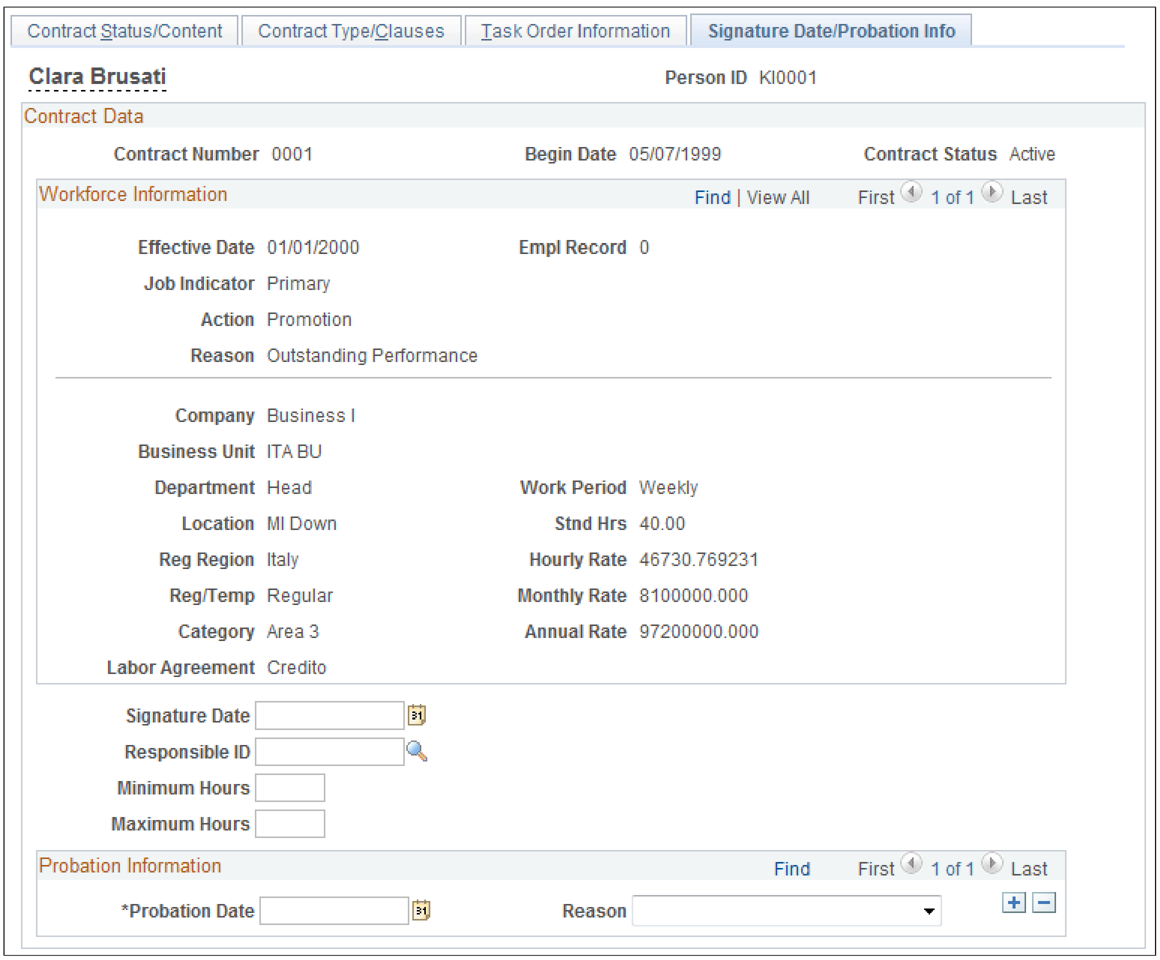
View basic job data.

**Navigation**

Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature Date/Probation Info

**Image: Contract Data - Signature Date/Probation Info page**

This example illustrates the fields and controls on the Contract Data - Signature Date/Probation Info page. You can find definitions for the fields and controls later on this page.




The display-only data at the top of this page is derived from the Job Data component.

**Signature Date**

Enter the contract's signature date. This information is required in some European countries, including Germany.

**Responsible ID**

Enter the company agent who drafted the contract and who is responsible for its language.

**Minimum Hours and Maximum Hours**

The system supplies default values from the Installation table for this contract.

**Probation Date**

Enter multiple probation dates if they are required for this worker.

The probation date that you enter here also appears on the job data record for this worker.

**Reason**

Indicate a probation reason, including *New Date* and *Un-perform* (indicating additional probation time for failure to perform within expectations for the position).

## Contract Information Report Page

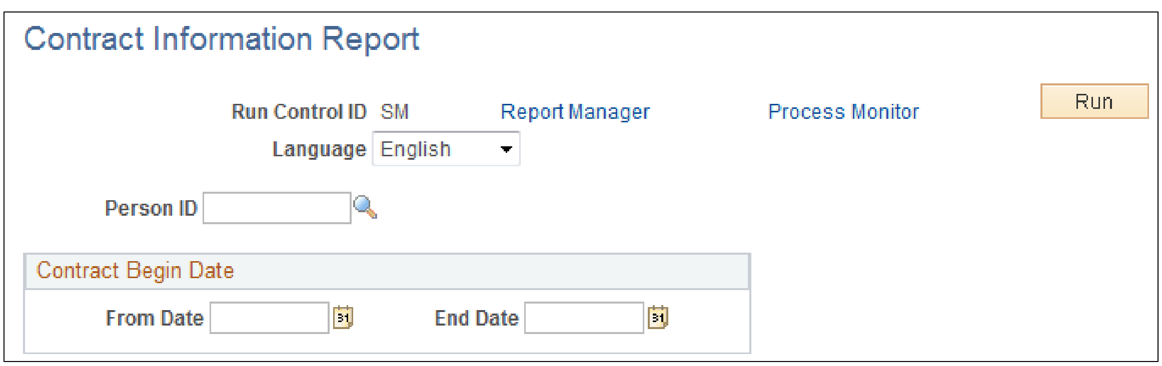
Use the Contract Information Report page (RUNCTL_CNT001) to generate the Contract Information report (CNT001) that lists all contracts and task orders (subcontracts) for a worker or the contract history for all workers within a designated period.

**Navigation**

Workforce Administration, Job Information, Contract Administration, Contract Information Report

**Image: Contract Information Report page**

This example illustrates the fields and controls on the Contract Information Report page. You can find definitions for the fields and controls later on this page.




**Person ID**

Enter the person ID of the worker for whom you want to list contracts. If you leave this field blank, the report prints the contract history (within the date range that you specify) for all workers.

**From Date and End Date**

Enter the date range for which you want contract information.

# (ESP) Tracking Spanish Contracts

These topics discuss how to:

- Add basic details of a Spanish contract.
- Create and update the contract clauses.
- Add signature details to the contract.
- Manage Contrata Communications.
- Add details for AFI reporting.
- Track payroll details.

## Pages Used To Track Spanish Contracts

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Contract Data | CONTRACT1_ESP | Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, Contract Data | Add or update basic information about the contract between your organization and a worker, including the contract duration, type and content. |
| Contrata Status ESP | CNT_CTTA_SEC_ESP | Click the Contrata Status link on the Contract Data page. | Manage the status of Contrata communications being sent to the Employment Agency. |
| Contract Clauses | CONTRACT2_ESP | Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, Contract Clauses | Add or update special clauses to the contract.<br><br>You must have previously set up an SPEE template in the Define SPEE Templates ESP page. |
| Job Data Details | CONTRACT2_SEC_ESP | Click the Job Data Details link on the Contract Clauses page. | View the job data details of the contract. |
| Contract Signature | CONTRACT3_ESP | Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, Contract Signature | • Add or update the contract signature information.<br><br>• Manage Contrata communication.<br><br>• Print a contract. |
| AFI Events | CONTRACT4_ESP | Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, AFI Events | Add or update AFI reporting details. |

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| AFI Data Details | CONTRACT4_SEC_ESP | Click the AFI Data Details link on the AFI Events page. | View or update AFI event details. |
| Payroll Data | CONTRACT5_ESP | Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, Payroll Data | Add or update payroll details for GP Spain customers. |

## Contract Data Page

Use the Contract Data page to add or update basic information about the contract between your organization and a worker, including the contract duration, type and content.

**Navigation**

Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, Contract Data

**Image: Contract Data page**

This example illustrates the fields and controls on the Contract Data page. You can find definitions for the fields and controls later on this page.


### Labor Relationship Data

**Labor Relation ID**

Displays the identifier of the labor relationship to which the contract is being associated. A person can have multiple labor relationships with the same organization during different period of time, and each of them has separate contracts defined in the system.

**Contract Status**

Indicates whether the contract is Active or Inactive.

**Labor Relation Begin Dt**

Enter the date on which the labor relationship between the person and the organization begins.

**Labor Relation End Dt**

Enter the date on which you expect the labor relationship to end.

## Contract Data

**Effective Date**

Enter the date from which the contract is effective.

**Contract Action**

Select the action you need to perform. The possible actions are:

- *New Contract:* Select this action to initiate a labor relationship. This action must be communicated to all Government agencies like Social Security (via AFI), Employment Agency (via Contrata), Unions (via Basic Copy of the contract), and also to the employee (via the Official Template Contract).
- *Extension:* Select this action when the employee signs an Extension contract. In this case, you need to communicate the extension details to the Employment Agency via Contrata. This option is possible only for contract types that are of fixed duration and has extensions allowed.
- *Termination:* Select this action to end or freeze the labor relationship. On termination of a contract, a communication must be sent to Social Security via AFI. For AFI reporting, the Termination Date is the first day in the new situation.
- *Calling:* Select this action to communicate to Employment Agency via Contrata and AFI. In such cases, the employee must sign the calling contract. This option is available only for Permanent Intermittent type of contracts.
- *End Calling:* Select this action when the Calling contract ends. You can select this action only after an action of calling. For Intermittent-Permanent contracts, the activity period starts with the Calling action, and the inactivity period starts with the End of Calling action. Both these actions (Calling and End Calling) must be communicated to Social Security via AFI

**Contract Type**

Select the type of legal contract to be associated with the employee. The contract type determines the contract's characteristics. The fields on the next page change depending on the type of contract you select in this field. The values selected in the Contract Action and Contract Type fields decide the fields populated in the page.

**Contract Reference ID**

Enter the unique identification number of the contract provided by the Spanish authorities. This field can be edited only while creating a new contract.

**Contract Begin Dt**

Enter the date from which the contract is effective.

**Contract End Dt**

Enter the date on which the contract is expected to end. This field is not available for permanent contract types.

**Total Contract Duration**

Displays the duration in years, months and days of the contract based on the dates mentioned in the Contract Begin Dt and

Contract End Dt fields. This field is not available for permanent type of contracts.

**Create AFI Action**

Click the button to create an Affiliation Event for the contract. You can view the events created in the AFI Events page. This button is available when the contract action is either New Contract or Termination, as only these actions must be reported to Social Security via AFI.

**Contrata Status**

Click this link to track the Contrata communication status. This opens the Contrata Status ESP page.

**Extension Begin Dt**

Displays the effective date of contract extension. This field is visible only when the contract action is extension.

**Extension End Dt**

Enter the date by which you expect the extension to end. This field is visible only when the contract action is extension.

**Extension Number**

Displays the ordinal of the contract extension. Example values are First Extension, Second Extension, etc.

**Extension Duration**

Displays the duration of the contract based on the Extension Begin date and the Extension End Date. The field displays the duration in Years, Months and Days, but is not available for permanent type of contracts.

## Contrata Status ESP Page

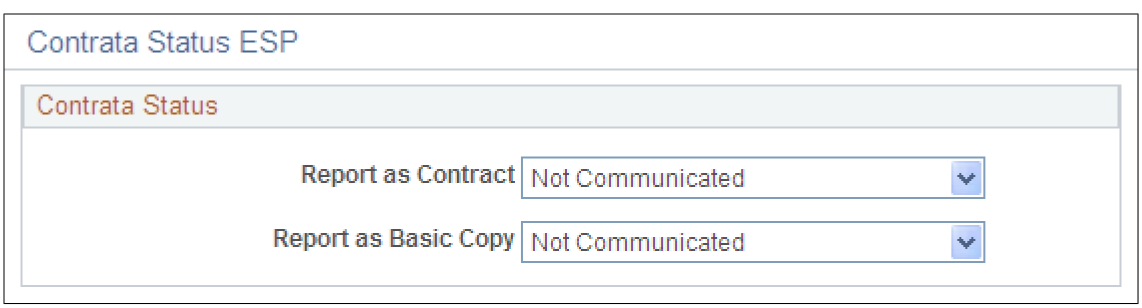
Use the Contrata Status ESP page to manage the communication being sent to the Employment Agency via Contrata.

**Navigation**

Click the Contrata Status link on the Contract Data page.

**Image: Contrata Status ESP page**

This example illustrates the fields and controls on the Contrata Status ESP page. You can find definitions for the fields and controls later on this page.




**Report as Contract**

If you are communicating information about newly created contracts, select the Contrata status in this field. The values available are *Not Available, Not Communicated, XML Generated* and *XML Sent/Confirmated.*.

**Report as Basic Copy**

If you are communicating clauses of an existing contract, select the Contrata status in this field. The values available are *Not Available, Not Communicated, XML Generated* and *XML Sent/ Confirmated.*

**Report as Extension**

If you are communicating extensions of an existing contract, select the Contrata status in this field. The values available are *Not Available, Not Communicated, XML Generated* and *XML Sent/Confirmated.*

**Note:** If the Contract Action selected on the Contract Data page is *Extension*, this is the only field available on the Contrata Status ESP page.

**Report as Transformation**

If you are communicating transformation of an existing contract, select the Contrata status in this field. The values available are *Not Available, Not Communicated, XML Generated* and *XML Sent/Confirmated..*

**Note:** If the contract type selected in the Contract Data page is eligible for transformation, the Contrata Status ESP page displays the fields: Report as Basic Copy and Report as Transformation.

## Contract Clauses Page

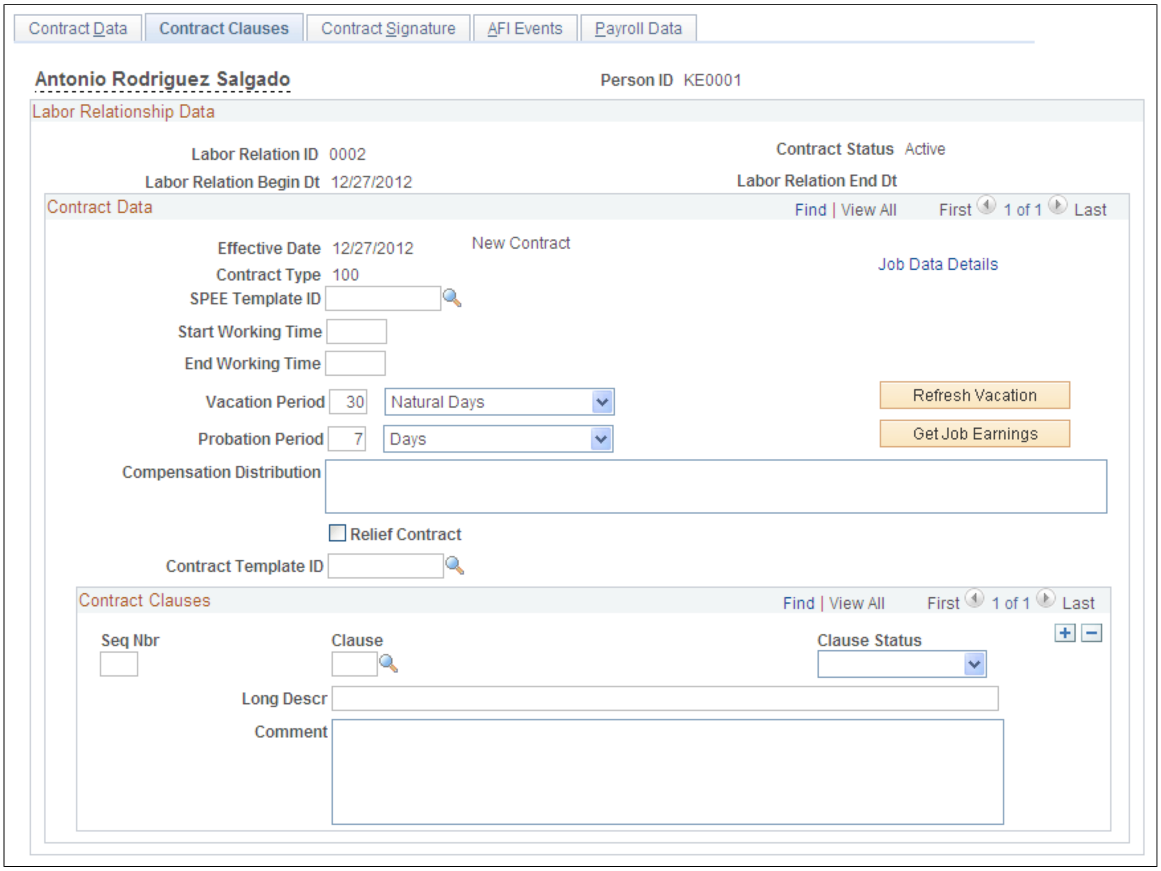
Use the Contract Clauses page to add or update special clauses to the contract. You must have previously set up an SPEE template in the Define SPEE Templates ESP page.

### Navigation

Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, Contract Clauses

### Image: Contract Clauses page

This example illustrates the fields and controls on the Contract Clauses page. You can find definitions for the fields and controls later on this page.




## Contract Data

**Job Data Details**

Click this link to access the Job Data Details page.

**SPEE Template ID**

Select the template to be used for printing the contract. This template is defined in the Define SPEE Templates ESP page.

**Vacation Period**

Use the two fields to specify how much vacation the worker receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *Days, Labor Days, Months, Natural Days* and *Weeks.* For example, if the vacation period is 20 work days, enter *20* in the first field, and then select *Work Days* from he options in the second field. Enter the vacation entitlement of the person per year as per the contract. You can enter the vacation period as *Days, Labor Days, Months, Natural Days* or *Weeks.*

**Refresh Vacation**

Click this button to enter the default value for vacation periods from the Labor Agreement page in the Vacation Period field.

**Probation Period**

If the person’s contract includes a probation period, use these two fields to specify how long it is. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *Days, Months,* or *Weeks.* For example, if the probation period is six months, enter *6* in the first field, and then select *Months* in the second field.

**Compensation Distribution**

Enter the earning details included in the compensation.

**Get Job Earnings**

Click this button to retrieve the Compensation details from the Job Data page. You can update the retrieved data, by either adding or removing the earnings.

**Contract Template ID**

Select a contract template for the Contract Clauses. These templates are defined in the Contract Printing Mapping page. When you select a contract template ID, if the template has clauses associated, the system copies them to the below Contract Clauses scroll area. You can add, update or delete these clauses to suit the current requirement.

**Tax Incentives**

Select this check box if tax incentives are applicable for the contract. On selecting this check box, the page displays the Promotion Reason field, where you can select the reason for the tax incentive.

**Note:** This check box is visible only if you have selected a contract type that has Tax Incentives check box selected.

**Contract with Bonification**

Select this check box if bonifications are applicable for the contract. When you select this check box, the page displays the Bonificated Collective field, where you an select the collective for which the bonification is applicable. bonificated collectives are applicable for specific contract types, as defined in the Define Contract Benefits ESP page.

**Note:** The Bonificated Collective field is available only for promotion contracts

## Contract Clauses

**Seq Nbr**

Enter the order in which you would like to add the contract clauses to the contract.

**Clause**

Select a contract clause from among those you have defined on the Contract Clause Table page. For example, a contract for a limousine driver requires that the employee have a driver's license

| | |
|---|---|
| **Clause Status** | Select the status of the clause to indicate if it is *Optional* or *Required.* |
| **Long Descr** | Enter a description of the clause. The system uses this while printing the contracts. |
| **Comment** | Enter your comments regarding the clause. |

---

**Note:** For contract printing, you need to select *PE-170* from the SPEE Template ID field on the Contract Clauses page. Based on the contract type selected, the page displays several additional fields that are used for the contract printing functionality. Some of the common scenarios and the fields available are explained below:

---

## Contract Employees - Full Time

The following table lists the additional field seen on the page, when the contract type is Full Time.

| | |
|---|---|
| **Start Working Time and End Working Time** | Enter the time when the person's work hours start and end. Use the format hh:mm for hours and minutes. |

## Contract Employees - Part Time or Fixed Duration

The following table lists the additional field seen on the page, when the contract type is Part Time or Fixed Duration.

| | |
|---|---|
| **Part Time Hours Minutes** | Enter the number of hours worked as a part time employee. If the part time hours is not an integer, you can specify it in minutes |
| **Frequency** | Enter the frequency in which the part time hours are followed. You can set the frequency to *Daily, Weekly, Monthly,* or *Yearly.* |
| **Compared with** | Select the schedule to which you need to compare. You can select either *Full Time Schedule, Labor Agreement Max Schedule,* or *Legal Max Schedule.* |
| **Maximum Hours** | Enter the maximum hours for the selected schedule. |
| **LA allows Duration above Limit** | Select this check box if the contract exceeds the duration limit and the labor agreement allows it. The check box is available when the contract is a fixed duration contract. |
| **Permanent Intermittent** | Select this check box if the contract is a Permanent Intermittent contract. |
| **Schedule Distribution** | Enter the time distribution applicable for the contract. |

## Contract Employees - Permanent

The following table lists the additional field seen on the page, when the contract type is Permanent.

| | |
|---|---|
| **Relief Contract** | If the Permanent Contract is signed to relieve an employee in a situation of partial retirement, select this check box. |
| **Replaced Empl Id** | Enter the Employee ID of the person being relieved. This field is visible if the Relief Contract check box is selected. |
| **Proposed Job Code** | Enter the job code to be assigned to the new employee. By default, the job code of the employee being relieved is displayed; but you can modify it, if needed. |

### Contract Employees - Fixed Duration

The following table lists the additional field seen on the page, when the contract type is Fixed Duration.

| | |
|---|---|
| **Service Reason** | Enter the service reason for the contract. This field is available only for service contracts. |
| **Production Reason** | Enter the seasonal peak production reason for the contract. This field is available only for production reason contracts. |
| **Replaced Reason** | This field is available only for interinity contracts. Select the substitution reason for the Fix Duration contract. When you select the replaced reason, the page displays the Replaced Empl ID and the Proposed Job Code fields. |
| **Replaced Empl ID** | Select the employee ID of the person being relieved. |
| **Proposed Job Code** | Enter the job code in which the new employee will develop their role. The system proposes the job code of the relieved employee, but you can modify it, if needed. |

## Job Data Details Page

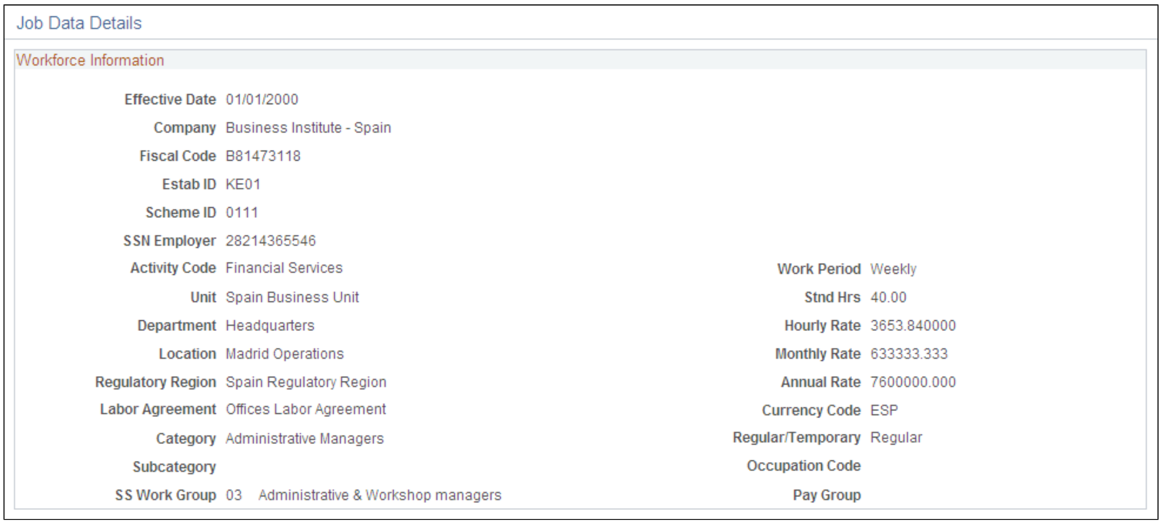
Use the Job Data Details page to view the job data details.

### Navigation

Click the Job Data Details link on the Contract Clauses page.

### Image: Job Data Details page

This example illustrates the fields on the Job Data Details page.




## Contract Signature Page

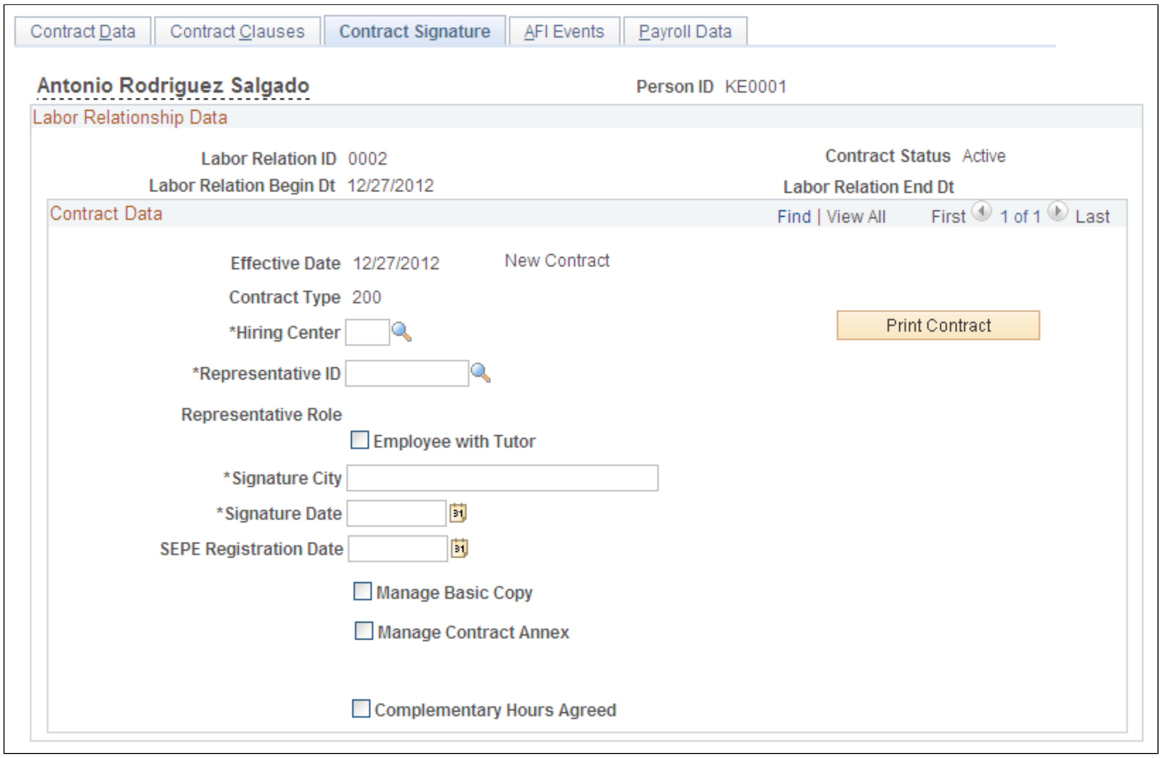
Use the Contract Signature page to add or update the contract signature information. You can also manage the Contrata communication being sent to Employment Agency. The page also provides you an option to print the contract.

### Navigation

Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, Contract Signature

### Image: Contract Signature page

This example illustrates the fields and controls on the Contract Signature page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Print Contract** | Click the button to print a hard copy of the contract, based on the SPEE template selected. |
| **Hiring Centre** | Select the hiring center that is responsible for hiring the employee. |
| **Representative ID** | When you select the representative ID, the role of the person is displayed in the Representative Role field. |
| **Employee with Tutor** | If the employee is having a legal tutor, select this check box. You need to then specify the ID and a role description of the employee's tutor in the Tutor ID and Tutor Role fields. |
| **Signature City** | Spanish contracts must be stamped with the date and the name of the city where the contract was signed. Enter the name of the city here. |
| **Signature Date** | Enter the date on which the contract was signed. |
| **SEPE Registration Date** | Enter the date on which the person has registered with the employment agency (SEPE). |

| | |
|---|---|
| **Manage Basic Copy** | Select this check box to manage the basic copy of a contract. The basic copy is automatically generated, but it allows you to override the content. On selecting the check box, the page display the following fields and buttons: Signature Type, Create Basic Copy, Print Basic Copy, and Basic Copy Text. |
| **Signature Type** | Select the signature type from the list of values. The values available are: *Declined to Sign, Not exist Legal Representative, Sent without Copy,* and *Signed by Legal Representative.* |
| **Create Basic Copy** | Click this button to automatically generate a proposal of basic copy. You can view the details in the Basic Copy Text field, and if needed, can override the details. |
| **Print Basic Copy** | Click this button to print a hard copy of the basic copy. |
| **Basic Copy Text** | When you click the Create Basic Copy button, this field is automatically populated with the contract details used in the Contrata communications. However, you can override the details. |
| **Manage Contract Annex** | Select this check box to manage the contract annexes. |
| **Previous Status** | In case of a Relief contract, select the source of the new employee in this field. If you select *Unemployed* in this field, the page displays the Employment Office Code field |
| **Employment Office Code** | Enter the employment office where the new employee is registered. |
| **Complementary Hours Agreed** | Select this check box if there is an agreement about complementary hours. The check box is visible only for Part Time type of contracts. On selecting this check box., the page displays the following additional fields: Maximum Annual Hours, Agreed Hours Percent, and Notification Days. |
| **Maximum Annual Hours** | Enter the maximum number of complementary hours that the employee can avail per year. This is applicable only if there is a complementary hours agreement in place. |
| **Agreed Hours Percent** | Enter the percentage of hours agreed by the employee. This is applicable only if there is a complementary hours agreement in place. |
| **Notification Days** | Enter the number of days to be notified. This is applicable only if there is a complementary hours agreement in place. |

## AFI Events Page

Use the AFI Events page to add or update AFI reporting details.

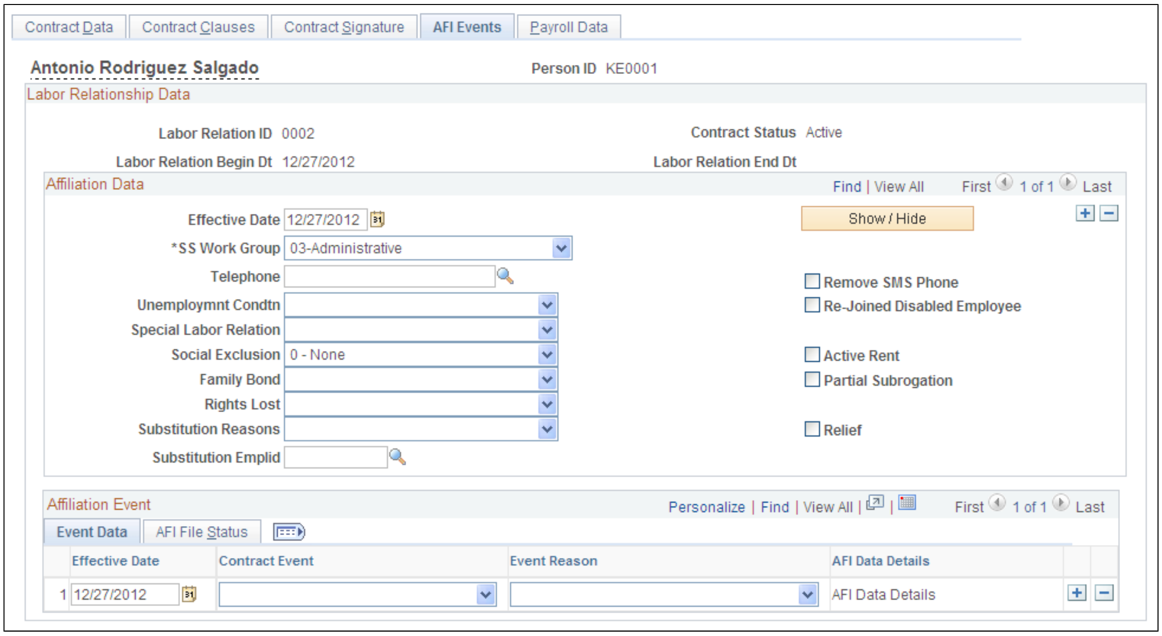
 

### Navigation

Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, AFI Events

### Image: AFI Events page

This example illustrates the fields and controls on the AFI Events page. You can find definitions for the fields and controls later on this page.




**Show/Hide**
Click the button to show or hide the affiliation data fields.

**SS Work Group**
Select the Social Security group to which the person belongs.

**Telephone**
Select the primary phone number for the employee. All phone numbers and types collected from the person during hiring are listed here.

**Unemploymnt Condtn**
If you are hiring an unemployed person, you need to select the appropriate unemployment condition in this field.

**Special Labor Relation**
In case of a special labor relationship, select the appropriate value in this field.

**Social Exclusion**
If the person comes from an environment of gender violence or social exclusion, select an appropriate value in this field.

**Family Bond**
You can select family ties, if any.

**Rights Lost**
In case of loss of rights, select the reason in this field.

**Substitution Reasons**
Select the reason why you are substituting the person. Based on the data entered in the previous pages, the field displays a substitution reason, but you can override it.

**Substitution Empl ID**

Select the ID of the substitute worker. Based on the data entered in the previous pages, the field displays a substitution Employee ID.

**Remove SMS Phone**

Select the check box to delete any phone number previously stored in the Social Security system for the employee.

**Re-joined Disabled Employee**

Select the check box to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract.

**Active Rent**

Select the check box to indicate that the worker receives a specific support called *Income for placement*.

**Partial Subrogation**

Select the check box to indicate that the contract is a partial subrogation. When you select this check box, the page displays the Contract Begin Date field.

**Relief**

Select the check box to indicate that the contract is a relief contract. By default, the check box is either selected or not, based on the data entered in the previous pages.

If you have generated AFI events from the Contract Data page, you can view them in the fields below. You can also generate new Affiliation Events using the fields below.

## Affiliation Event

**Contract Event**

Select the contract event that triggers the communication. The values available are:

- *Affiliation:* Use this event to communicate a new hire or rehire, or to add an employee to the social security system.
- *Change in Contract:* Use this event to communicate a change in the data of the social security system, like a change in contract, a strike, a schedule reduction, etc.
- *Unregister:* Use this event to communicate a termination or unregistering of an employee from the social security system.
- *Additional Situations:* Use this event to communicate a period of special situations like a long term leave.

**Event Reason**

Select the event reason to be stored or communicated. The values available for this field vary based on the contract event selected.

**AFI Data Details**

Click this link to enter additional data for AFI reporting. The link is visible depending on the contract event and the event reason selected.

### AFI File Status

The AFI File Status tab helps you manage the AFI communication status.

**Communicate By**

Select whether you are communicating the selected row of AFI data for the employee by entering the data online through the social security web site, or by generating an AFI File that includes the data. By default, the field displays *AFI File.* You can select *On Line,* if you do not want the employee AFI data to be eligible for communication through the AFI file generation process.

**Time Stamp**

For AFI data communicated by AFI file, the field displays the time and date of the AFI flat file generation. In case of AFI data communicated online, the field displays the system time and date, which you can modify.

**AFI File Name**

If you have already processed the row of AFI data for the employee in an AFI file, the field displays the name of that file. Otherwise, the field is unavailable unless you select *On Line* in the Communicate By field. Having a value in this field ensures that the AFI file generation process does not include this data in other AFI files that you generate. You can liberate this data row from the AFI flat file, and thus make the data available again for inclusion in an AFI flat file, by unlinking the data row from the AFI file name through the Review AFI Files page.

**Node Status**

The field displays the communication status for reporting the employee's AFI data. Possible values are:

- *Included in AFI:* The row of AFI data has been included in an AFI file. The AFI file name is available on the Reporting tab.
- *Not Communicated:* The row of AFI data that has not been communicated to social security.

## AFI Data Details Page

Use the AFI Data Details page to view or update the AFI event details.

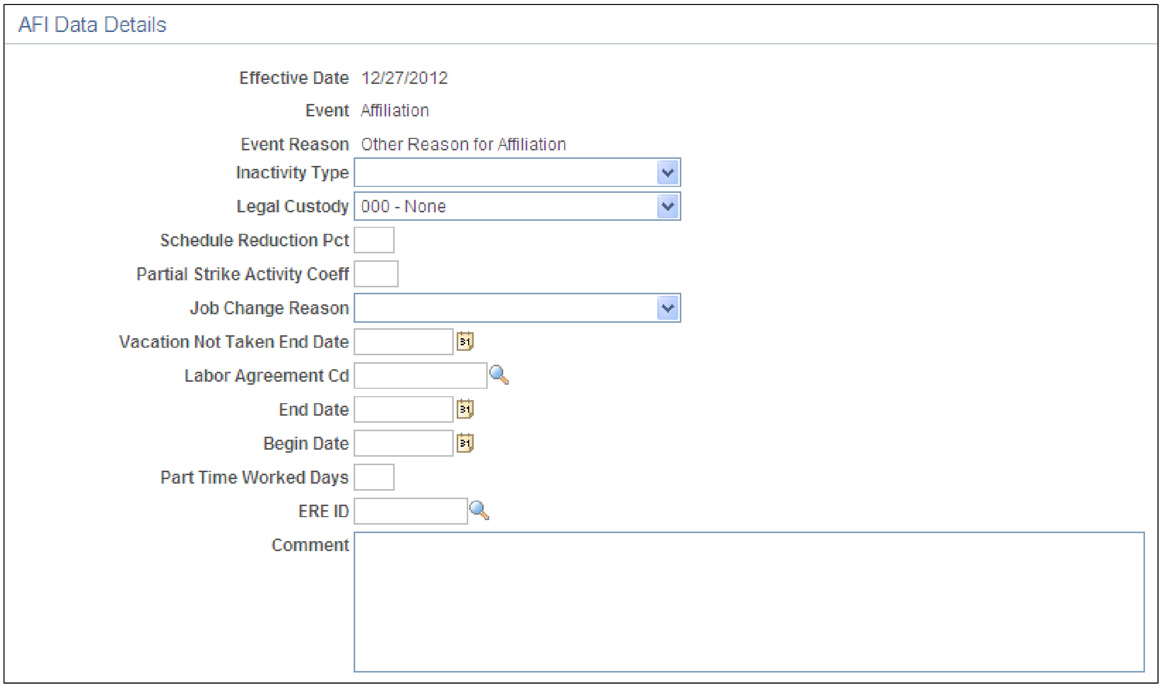
 

### Navigation

Select the AFI Data Details link on the AFI Events page.

### Image: AFI Data Details page

This example illustrates the fields and controls on the AFI Data Details page. You can find definitions for the fields and controls later on this page.




**Inactivity Type**

Select the type of inactivity in this field. You can use this field to communicate strikes, ERE periods, or any other inactivity periods. The value in this field indicates that the worker is inactive, but must remain registered in the social security system.

**Schedule Reduction**

Use this field to communicate the type of legal custody or the schedule reduction reason.

**Schedule Reduction Pct**

If you have selected a schedule reduction reason in the above field, enter the percentage of schedule reduction.

**Partial Strike Activity Coeff**

In case of Partial Strike, enter the activity coefficient as a decimal, with three figures. For example, if the coefficient is 0. 40, you need to enter 400 in the field.

**Job Change Reason**

Select the reason for which the worker has changed job. For example, risk during pregnancy or occupational disease.

**Vacation Not Taken End Date**

Enter the date that would extend paid leave, and not taken. This is applicable in case of un-registration due to a termination.

**Labor Agreement Cd**

Enter the code applicable for the employee collective.

**Begin Date**

Enter the start date for the following situations:

- For the registration, modification and removal of contingent workers or assigned, enter the start date of the contract or assignment.
- For additional situations, enter the start date of the period of this situation.
- For annotation of days worked, enter the start date of the period referred to in days worked.

**End Date**

Enter the end date for the following situations:

- For the registration, modification and removal of contingent workers or assigned, enter the end date of the contract or assignment.
- For Additional Situations, enter the end date of the period of this situation.
- For annotation of days worked, enter the end date of the period referred to in the days worked.

**Part Time Worked Days**

In case of part-time contracts, enter the actual number of days worked in a given month.

**ERE ID**

Select the *Expediente de Regulación de Empleo* (ERE) event ID, if applicable. For more details, see Understanding ERE

**Comments**

Enter any comments to be saved with the AFI details.

## Payroll Data Page

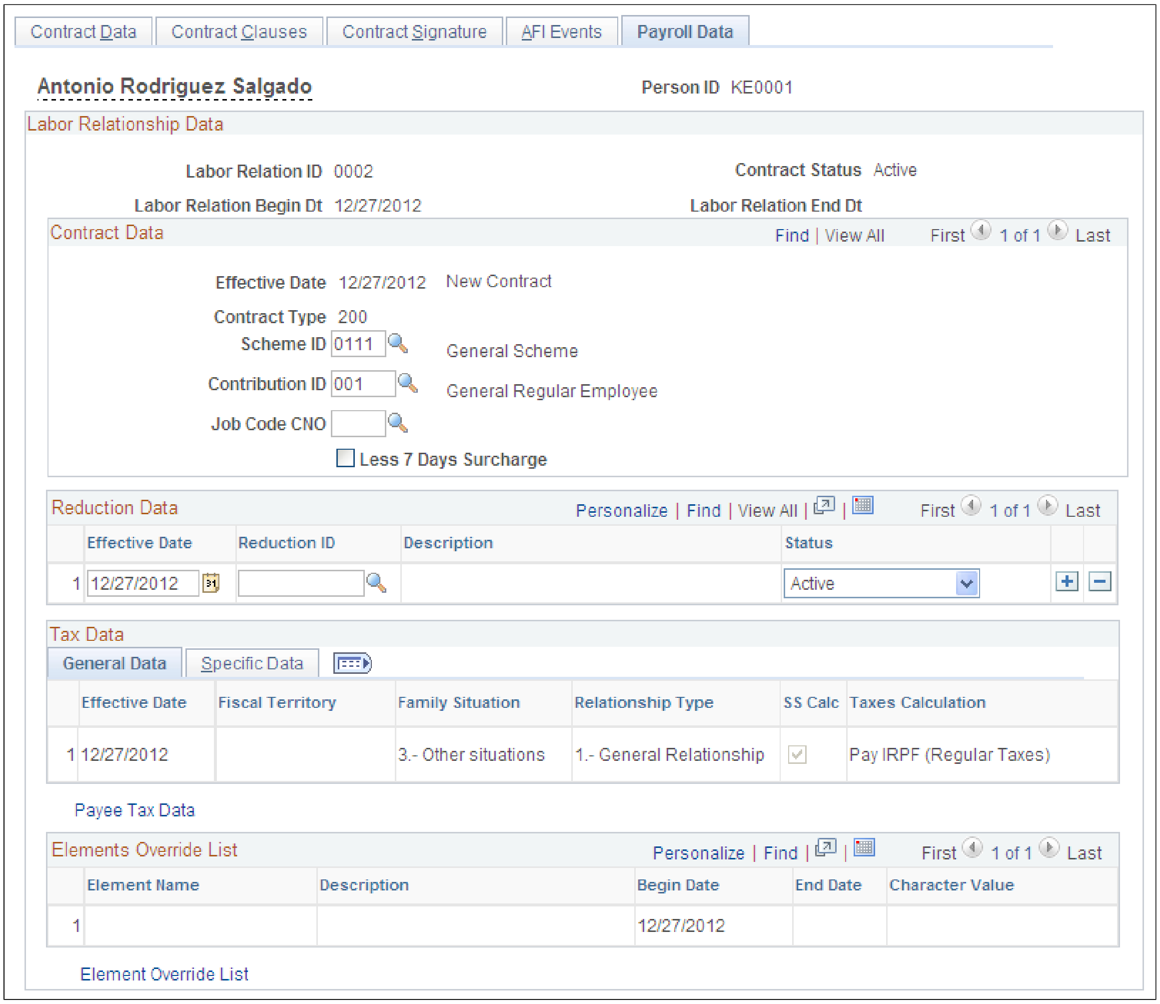
Use the Payroll Data page to add or update payroll details for GP Spain customers.

### Navigation

Workforce Administration, Job Information, Contract Administration, Update Contracts ESP, Payroll Data

### Image: Payroll Data page

This example illustrates the fields and controls on the Payroll Data page. You can find definitions for the fields and controls later on this page.




**Scheme ID**

Select a social scheme ID for the selected contract.

**Contribution ID**

Select a social security contribution ID for the selected contract and scheme ID. The social security calculations use the scheme ID and the contribution ID to determine the percentage or fixed amount that is applied to the calculation of a worker's contribution.

**Job Code CNO**

Select a job code CNO for the selected contract. Each job code is mapped to a Job Code CNO value (National Occupation Code). However, if needed, you can override the Job Code CNO using this field.

## Reduction Data

**Effective Date**

Enter the effective date of the specified reduction.

**Reduction ID**

If the worker is entitled to a reduction in social security contributions, select the reduction that applies. You can define reduction ID values on the Reductions ESP component. See the Defining Reductions *(PeopleSoft HCM 9.2: Global Payroll for Spain)* topic.

**Description**

This field displays the description of the reduction ID selected in the above field.

**Status**

Select the status of the specified reduction. The values available are *Active* and *Inactive*.

## Tax Data

The Tax Data group box displays the details for an employee as they relate to tax calculation. If you want to change data in this group box, click the Payee Tax Data link. A new window opens up to make the changes on the Maintain Tax Data page. After making changes in the page, you need to refresh the data by clicking the Refresh link. The Refresh link is visible only after clicking the Payee Tax Data link.

**Fiscal Territory**

Displays the fiscal territory to which the employee pays tax. The values available are: *Alava Fiscal Territory, Guipuzcoa Fiscal Territory, Navarra Fiscal Territory, State Fiscal Territory,* and *Vizcaya Fiscal Territory.*

**Family Situation**

Displays the family situation of the employee as defined by the government. This is applicable only if the fiscal territory is *State Fiscal Territory*. The values available are: *With fiscal dependent, With spouse to support,* and *Other situations.*

**Relationship Type**

Displays the contract type as agreed between the employee and the company. The values available are: *General Relationship, Less 1 year relationship,* and *Special Relationship.*

**SS Calc**

Determines how the payroll process calculates social security contributions for the employee and the employer. PeopleSoft Global Payroll for Spain provides functionality to allow reimbursement of the amount paid directly by the employee to the social security agency. The system selects this check box by default. If you do not want the payroll process to calculate social security contributions, deselect this check box .

**Taxes Calculation**

Displays how the payroll process calculates taxes for the employee. You can find more details in the Transnational Mobility *(PeopleSoft HCM 9.2: Global Payroll for Spain)* topic.

**Payee Tax Data**

Click this link to open the Maintain Tax Data page and edit the details. "Maintain Tax Data Page *(PeopleSoft HCM 9.2: Global Payroll for Spain)*".

### Elements Override List

This group box allows the user to track the elements used in the last payroll calculation for this employee. If you want to change the data in this group box, you can click the Element Override List link and access the Supporting Elements *(PeopleSoft HCM 9.2: Global Payroll)* page in a new window. After making the required changes, you can refresh the data by clicking the Refresh link. The Refresh link will be visible only after clicking the Element Override List link.

# Entering Temporary Assignments

These topics provide an overview of temporary assignments and substantive jobs and discuss how to:

- Enter a temporary assignment.
- Run the temporary assignment termination and substantive job reactivation process.
- Add a partial temporary assignment.

## Understanding Temporary Assignments and Substantive Jobs

These topics discuss:

- Substantive jobs.
- Temporary assignments.
- Data row impacts.
- Additional considerations for temporary assignments and data processing.

### Substantive Jobs

The substantive job assignment is the worker's original job, created when the first employment or contingent worker instance was added.

### Temporary Assignments

When a worker covers the responsibilities of another job besides the substantive job, the worker works a temporary assignment. Temporary assignment data must be tracked the same way that substantive job data is tracked.

For example, a person hired into a teaching appointment takes this as the substantive job. The person then receives a one month temporary assignment as a department head. The original teaching position is suspended for the duration of the temporary assignment.

It is also possible that the person takes a temporary assignment on a partial basis. The person might retain the substantive teaching position for twenty hours a week while also working the temporary assignment as department head for the other twenty hours. The person cannot work beyond the forty-hour workweek, but any combination of assignments might be entered to fill the forty hours.

### Data Row Impacts

The Temporary Assignments feature requires that the system insert data rows at various stages throughout the process. For example, when selecting *Temporary Assignment* as the action or reason, the system inserts a second data row that puts the substantive job on hold. When a data row has been inserted by the system, the word *system* appears next to the employment record number (ERN) when viewed later. These data rows show an action or reason of *SUB* (hold substantive job), *RFA* (return from temporary assignment), or *RTS* (return to substantive job).

The substantive job retains its ERN while it is suspended and the temporary assignment is identified by a new ERN. This process enables the system to uniquely identify both job data records and maintain them simultaneously.

### Additional Considerations for Temporary Assignments and Data Processing

Review these additional considerations when creating temporary assignments:

- When position data changes, the system updates position data for all workers in the affected position regardless of whether the assignment is temporary or substantive.

  This update does not alter the active or inactive status of the workers in the affected position.

  Similarly, when the substantive position changes, the system does not change the temporary assignments for the worker. The only exception is the unlikely possibility that a worker's temporary and substantive assignments are in the same position.

- The worker's pay rate matches the active assignment.

  If a worker works multiple assignments beyond the substantive job, the system prorates the pay for each assignment. For example, if the employee teaches for twenty hours a week and acts as department head for twenty hours a week, payroll processes each job at 50% of the standard pay. To change the pay rate, you can override the position data manually on the Compensation Data page.

---

**Note:** Use the Job Data component pages for creating temporary assignments. For temporary assignments, to put the substantive job on hold, the handler Copy_SubstantiveJob and WORKFORCE_SYNC service operation must be active on the PERSON_DATA Message Channel, which comes with the PeopleSoft Application Messaging feature.

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### Related Links

Entering a Temporary Assignment

"Identifying Integrations for Your Implementation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Pages Used to Process Temporary Assignments

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Work Location | JOB_DATA1 | Workforce Administration, Job Information, Job Data, Work Location | Enter a temporary assignment. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Add Additional Assignment | PER_ORG_INST_ASGN | Workforce Administration, Job Information, Add Additional Assignment, Add Additional Assignment | Add a partial temporary or additional assignment. |
| Reactivate/Update Termination | RC_TEMP_ASSGN_UPDT | Workforce Administration, Job Information, Temporary Assignments, Reactivate/ Update Termination, Reactivate/Update Termination | Run the temporary assignment termination and substantive job reactivation process. |
| Temp Assignmnt w/out End Date | RUNCTL_TAS001 | Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date, Temp Assignmt w/out End Date | Run the Temp Assignment w/out End Date report (TAS001). The report lists workers currently on temporary assignment where end dates have not been defined. |
| Temp Assignmt due to Complete | RUNCTL_TAS002 | Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete, Temp Assignmt due to Complete | Run the Temp Assignment due to Complete report ( TAS002). This report lists workers due to complete temporary assignments within the user specified date range. |

### Related Links

Entering a Temporary Assignment

## Entering a Temporary Assignment

Use the Work Location page (JOB_DATA1) to enter a temporary assignment.

**Navigation**

Workforce Administration, Job Information, Job Data, Work Location

To enter a temporary assignment:

1. Locate the substantive job that will be put on hold during the temporary assignment.
2. Insert a new data row with the following parameters:
    - Enter the effective date that the temporary assignment begins.
    - Enter *Temporary Assignment* in the Action/Reason field.

      When you use this value in the Action/Reason field, the system suspends the worker's substantive job, transferring the substantive job data, including payroll and benefits information, to the next job record for this worker. The Reactivation/Termination process reactivates the substantive job upon termination of the temporary assignment.

- Enter the temporary assignment position number, if applicable.

3. (Optional) On the Job Data − Job Information page (Workforce Administration, Job Information, Job Data, Job Information), enter the termination date for the temporary assignment in the Expected Job End Date field.
4. (Optional) Select the End Job Automatically check box to end the job on the termination date.

   This action also reactivates the substantive job when you run the Reactivation/Termination process.
5. Select the type of duties in the Duties Type field for this temporary assignment.

---

**Note:** You must enter the expected job end date *and* select the End Job Automatically option for the Reactivation/Termination process to run automatically for each assignment. If you do not complete these fields, the termination of the temporary assignment and reactivation of the substantive job must be handled manually.

---

Whereas the previous procedure outlines the required actions for entering temporary assignments, you can also make other adjustments, as necessary, on any of the pages in the component. For example, it might be necessary to adjust the pay rate on the Compensation Data page. You should make this adjustment while creating the temporary assignment. When you save this information, the system suspends the substantive position.

## Reactivate/Termination Update Page

Use the Reactivate/Update Termination page (RC_TEMP_ASSGN_UPDT) to run the temporary assignment termination and substantive job reactivation process.

**Navigation**

Workforce Administration, Job Information, Temporary Assignments, Reactivate/Update Termination, Reactivate/Update Termination

Complete the Company and Expected Job End Date up to fields and run the Reactivate/Termination Update process (HR_REACTVTER).

This process must be run periodically to terminate temporary assignments (with job end dates) and to reactivate substantive positions. This process inserts new data rows into the job data record. These data rows have reason codes of *SUB* (hold substantive job), *RFA* (return from temporary assignment) and *RTS* (return to substantive job), and the designation *system* next to the employee record number when viewed later.

## Adding a Partial Temporary Assignment

Use the Temp Assignmnt w/out End Date page (RUNCTL_TAS001) to run the Temp Assignment w/out End Date report (TAS001). The report lists workers currently on temporary assignment where end dates have not been defined.

**Navigation**

Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date, Temp Assignmt w/out End Date

Use the Temp Assignmt due to Complete page (RUNCTL_TAS002) to run the Temp Assignment due to Complete report (TAS002). This report lists workers due to complete temporary assignments within the user specified date range.

**Navigation**

Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete, Temp Assignmt due to Complete

You can add a temporary assignment that is fewer than 40 hours per week while maintaining the substantive job that fills the remaining hours. For example, an employee who is assigned to a temporary position that requires only 10 hours a week retains the substantive position for the other 30 hours. In this case, both jobs must remain active.

To allow both jobs to remain active, use the Add Additional Assignment component to enter the temporary assignment. You must then adjust the standard hours of the substantive position so that the hours for both jobs—substantive and temporary—equal 40 hours. You can still enter an end date for the temporary assignment and have that job end automatically. However, you must manually readjust the standard hours for the substantive position after the temporary assignment ends.

To replace a substantive job with two or more temporary assignments, choose one of the temporary assignments to replace the substantive job following the same procedure for assigning one temporary job, adjusting the hours appropriately. Then assign the second temporary position as a concurrent job.

If a worker has multiple substantive positions and is assigned one temporary position, the temporary assignment can only be assigned to one of the substantive positions. The other substantive positions must be manually suspended and reactivated using *Hold Substantive Job* and *Return to Substantive Job* as the action or reason.

---

**Note:** When assigning any combination of temporary assignments, you can still select the End Job Automatically check box on the Job Information page for the temporary assignment. However, if you have adjusted the standard hours for the substantive position, you must manually set the standard hours to the original setting when the temporary assignment has ended.

---

### Related Links

Adding Additional Assignments

## Tracking Teleworkers

These topics provide an overview of the teleworker tracking functionality and prerequisites, and discuss how to:

- Maintain teleworker status.
- Identify teleworkers actual location.
- Enter teleworker agreement data.

## Understanding Tracking Teleworkers

Telecommuting is often a recruiting and retention factor for many organizations. The teleworker functionality in Human Resources enables you to track jobs, positions, and workers that are allowed to work remotely. This feature is also useful for US customers that may base local or state tax based on a person's typical work location.

This feature addresses US Federal Government regulations that require federal organizations to provide the U.S. Congress with information regarding legislatively-required teleworker data.

---

**Note:** Agreement details can be captured as a contract within Contract Administration or documented in other forms and locations, depending upon your organization's rules and policies regarding teleworkers and telecommuting. This feature only captures the fact that there is an agreement in place.

---

### Prerequisites

Before you can use the new teleworker functionality with your employees and contingent workers, you must:

- Identify jobs eligible for telework arrangements.

  Use the Available for Telework field on the Job Code Table - Job Code Profile page to indicate that a job is available for telework.

  See "Job Code Profile Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- Identify positions eligible for telework arrangements, if your organization uses the Position Management business process.

  Use the Available for Telework field on the Position Data - Specific Information page to indicate that a position is available for telework.

  See "Position Data - Specific Information Page *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*".

- Specify any telework locations.

  Your organization may have dedicated locations for the express purpose of teleworkers. A location may also be considered a "Telework Location" if staff that may not normally report out of that location are able to work from that office. Indicate this using the Telework Location field on the Location Profile page.

  See "Location Profile Page *(PeopleSoft HCM 9.2: Application Fundamentals)*".

## Pages Used to Enter Telework Details

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Maintain Teleworkers - Telework Status | TELEWORK_STATUS | Workforce Administration, Job Information, Maintain Teleworkers, Telework Status | Capture the telework dates and recurrence information. Identify if the telework arrangement is due to a permanent or temporary disability.<br><br>Only temporary disabilities are identified here. Permanent disabilities should be captured under Personal Information, Disability, Disabilities. |
| Maintain Teleworkers - Location | TELEWORK_LOCATION | Workforce Administration, Job Information, Maintain Teleworkers, Location | Identify the worker's actual work location when telecommuting. |
| Maintain Teleworkers - Agreement | TELE_AGREEMENT | Workforce Administration, Job Information, Maintain Teleworkers, Agreement | Note how telecommuting equipment and services costs are handled, and monitor and track status changes associated to a telework request. |

## Maintain Teleworkers - Telework Status Page

Use the Maintain Teleworkers - Telework Status page (TELEWORK_STATUS) to capture the telework dates and recurrence information.

Identify if the telework arrangement is due to a permanent or temporary disability. Only temporary disabilities are identified here. Permanent disabilities should be captured under Personal Information, Disability, Disabilities.

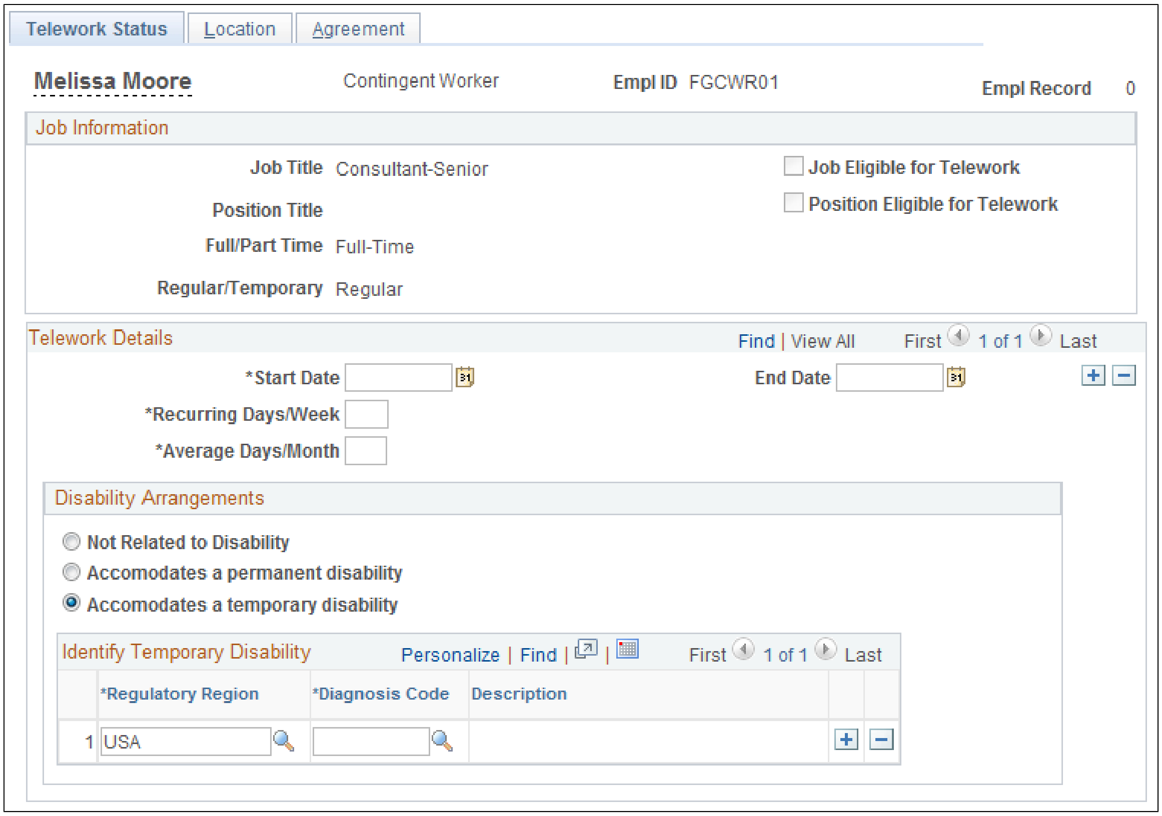
 

**Navigation**

Workforce Administration, Job Information, Maintain Teleworkers, Telework Status

**Image: Maintain Teleworkers - Telework Status page**

This example illustrates the fields and controls on the Maintain Teleworkers - Telework Status page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Job Eligible for Telework** | Displays as selected if the Available for Telework field is selected at the Job Code |
| **Start Date** | Enter the date that the telework arrangement begins. |
| **End Date** | Enter the date that the telework arrangement is anticipated to end. No end date implies that this arrangement is on-going. |
| **Recurring Days/Week** | Enter the anticipated days per week that the teleworker works remotely. The maximum value is 7. |
| **Average Days/Month** | Enter the anticipated days per month that the teleworker works remotely. The maximum value is 31. |
| **Disability Arrangements** | Select an option to specify whether this teleworker arrangement is to suit a person's permanent or temporary disability. Select Accommodates a temporary disability to display the Identify Temporary Disability region. |

**Identify Temporary Disability**

Enter information regarding the temporary disability. This is an existing grid from the Disabilities component on the Accommodations Request (ACCOMM_REQUEST) page.

**Note:** PeopleSoft captures a person's permanent disabilities in other components. Due to the potentially sensitive and private nature of that information, it is not displayed in this component.

## Maintain Teleworkers - Location Page

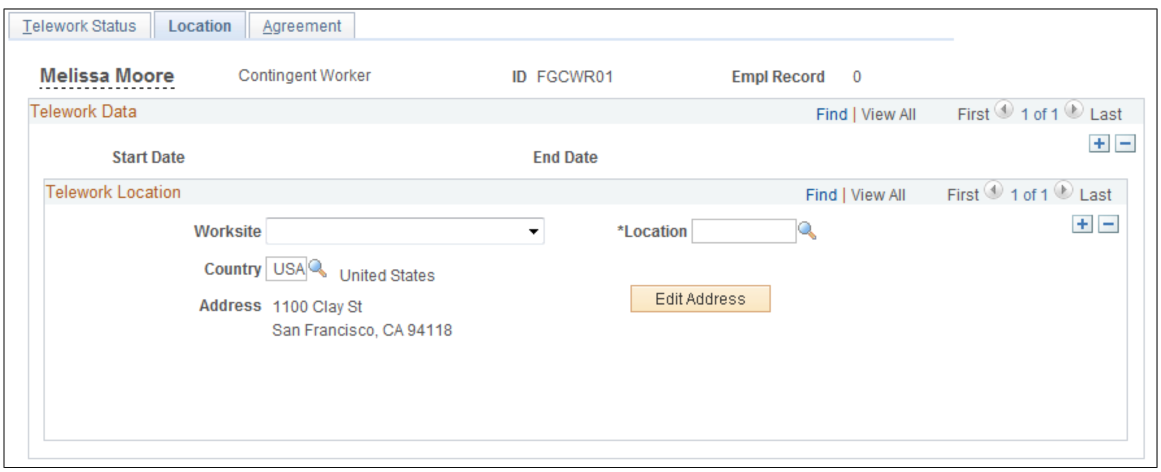
Use the Maintain Teleworkers - Location page (TELEWORK_LOCATION) to identify the worker's actual work location when telecommuting.

**Navigation**

Workforce Administration, Job Information, Maintain Teleworkers, Location

**Image: Maintain Teleworkers - Location page**

This example illustrates the fields and controls on the Maintain Teleworkers - Location page. You can find definitions for the fields and controls later on this page.




**Worksite**

Choose the regular worksite for this teleworker. Values are *Home, Other,* or *Telework Location.*

**Location**

Select the teleworker's commuting location, if the worksite is a designated as Telework Location. The page displays the address information when a value is entered in this field. Values are only available if the location is specified as a valid telework location in the Location Table.

**(USF) Geographic Location**

Displays the teleworker's geographic location code. This appears only for US Federal and Military installations.

**(USF) View Location**

Select to access the Location Description page, based on the selected geographic location. This link only appears for US Federal and Military installations.

## Maintain Teleworkers - Agreement page

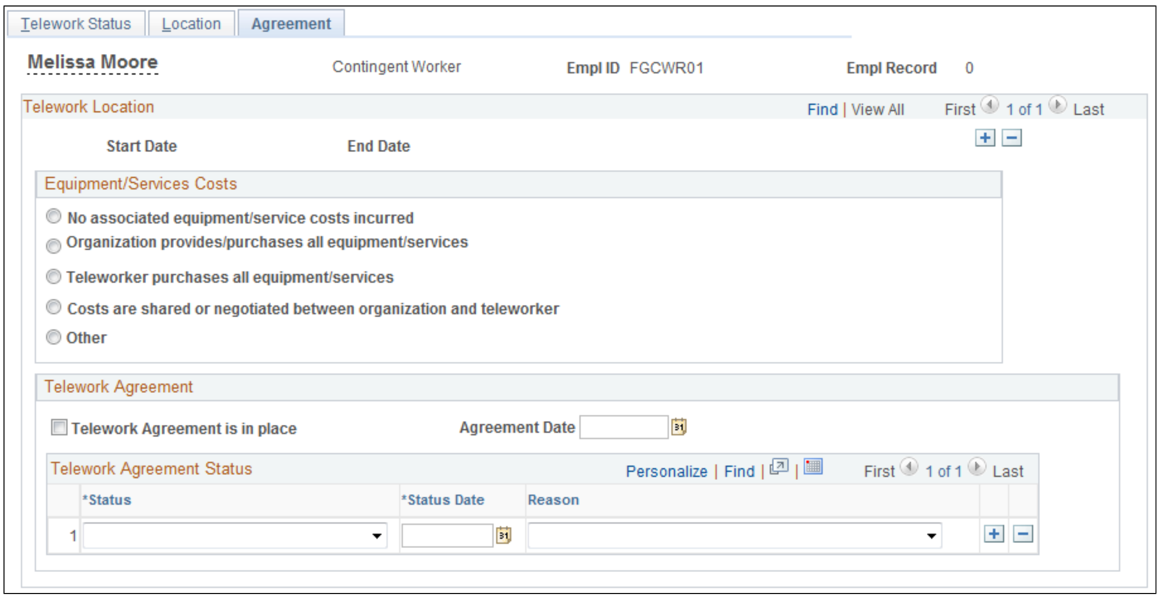
Use the Maintain Teleworkers - Agreement page (TELE_AGREEMENT) to note how telecommuting equipment and services costs are handled, and monitor and track status changes associated to a telework request.

**Navigation**

Workforce Administration, Job Information, Maintain Teleworkers, Agreement

**Image: Maintain Teleworkers - Agreement page**

This example illustrates the fields and controls on the Maintain Teleworkers - Agreement page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Equipment/Services Costs** | Select an option to denote how the telecommuting equipment and services costs will be handled. This section allows users to capture who the responsible party is based on the Telework agreement, or company policy. This should be agreed upon between the organization and the teleworker ahead of time, as part of the Telework Agreement. |
| **Telework Agreement Status** | Organizations may want to monitor and track status changes associated to a telework request. There are four delivered statuses for this feature. The US Federal Government requires these values and reasons. Other customers can modify or use these values as their organizational policy deems fit.<br><br>For the *Approved* status, a value in the Reason field is not required.<br><br>For the *Denied* status, the values in the Reason field are: *Handles secure materials, Perform on-site activities, Performance or conduct issues,* or *Other.* |

For the *Terminated by Employee* status, the Reason values are: *Change in work assignments, Decreased performance or conduct issues,* and *Other.*

For the Terminated by Manager status, the Reason values are: *Change in work assignments, Decreased performance or conduct issues,* and *Other.*

# Tracking Disabilities

To set up tracking disabilities, use the Accommodation Type (ACCOM_TYPE_TABLE) component.

You can track any disabilities that your workers may have, as well as check your own facilities' accessibility. Administer Workforce includes a number of reports that list disability information.

These topics discuss how to:

- Enter disability information.
- Document disability accommodations.
- (ITA) Run the ITA Disability report.

## Pages Used to Track Disabilities

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Accommodation Types | ACCOM_TYPE_TABLE | • Set Up HCM, Product Related, Workforce Administration, Labor Administration, Accommodation Types<br>• Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Accommodation Types, Accommodation Types | Define the types of workplace accommodations that your organization makes for disabled workers. |
| Disability | DISABILITY | Workforce Administration, Personal Information, Disability, Disabilities, Disability | Enter disability information. Indicate if a worker is disabled and record details of the disability. |
| Accomm Request | ACCOMM_REQUEST | Workforce Administration, Personal Information, Disability, Disabilities, Accomm Request | Enter accommodation requests that a worker or applicant makes of your organization. You can also enter diagnosis codes for worker disabilities. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Accomm Option | ACCOMM_OPTION | Workforce Administration, Personal Information, Disability, Disabilities, Accomm Option | Enter the options that the organization or the person with a disability is considering to resolve each accommodation request. |
| Accomm Job Task | ACCOMM_JOB_TASK | Workforce Administration, Personal Information, Disability, Disabilities, Accomm Job Task | Enter the job tasks that you are accommodating, classified by job code and, where necessary, by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation. |
| Disability BRA | DISABILITY_BRA | Workforce Administration, Personal Information, Disability, Disabilities BRA, Disability BRA | Enter disability details. |
| Disability Category Setup DEU | DSB_EMP_CAT_SETUP | Workforce Administration, Personal Information, Disability, Disability Category Setup DEU, Disability Category Setup DEU | Set up disability categories. |
| Heavily Disabled DEU | RUNCTL_PER039GR | Workforce Administration, Personal Information, Disability, Heavily Disabled DEU, Heavily Disabled DEU | Run the Heavily Disabled report (PER039GR). This report lists heavily disabled workers and additional information about their disabilities. |
| Disability Report ITA | RUNCTL_PER060 | Workforce Administration, Personal Information, Disability, Disability Report ITA | Run the Disability Report - ITA (PER060). This run control page runs the Annual, Name List, or Disability Statistics reports. |

## Disability Page

Use the Disability page (DISABILITY) to enter disability information. Indicate if a worker is disabled and record details of the disability.

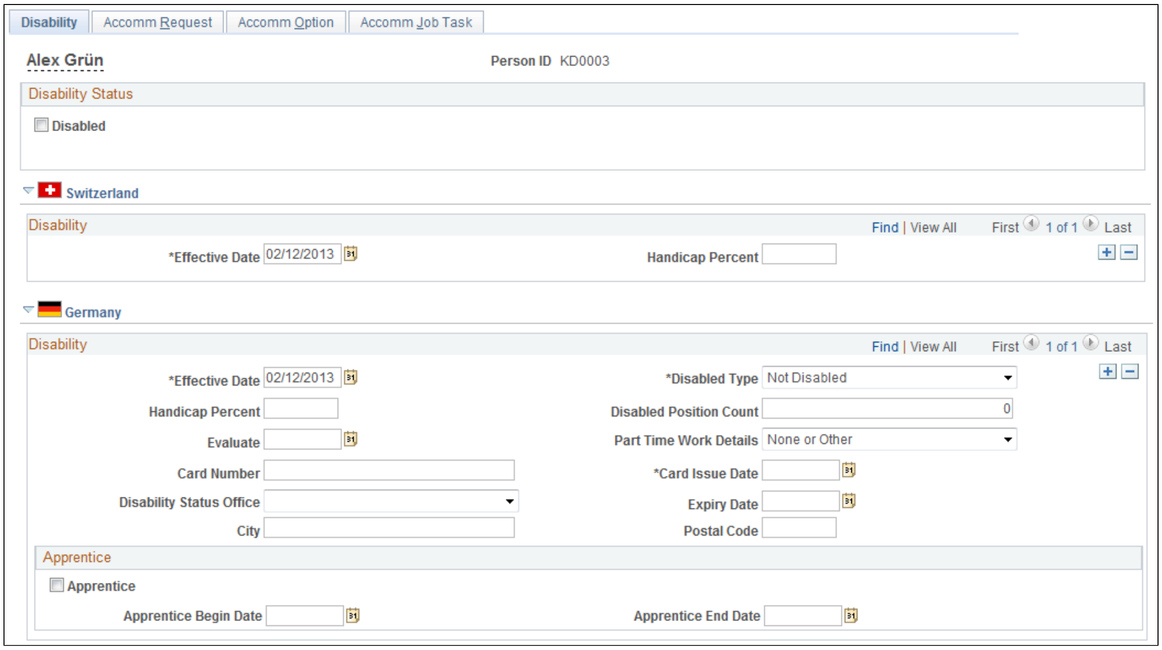
 

### Navigation

Workforce Administration, Personal Information, Disability, Disabilities, Disability

### Image: Disability page (1 of 4)

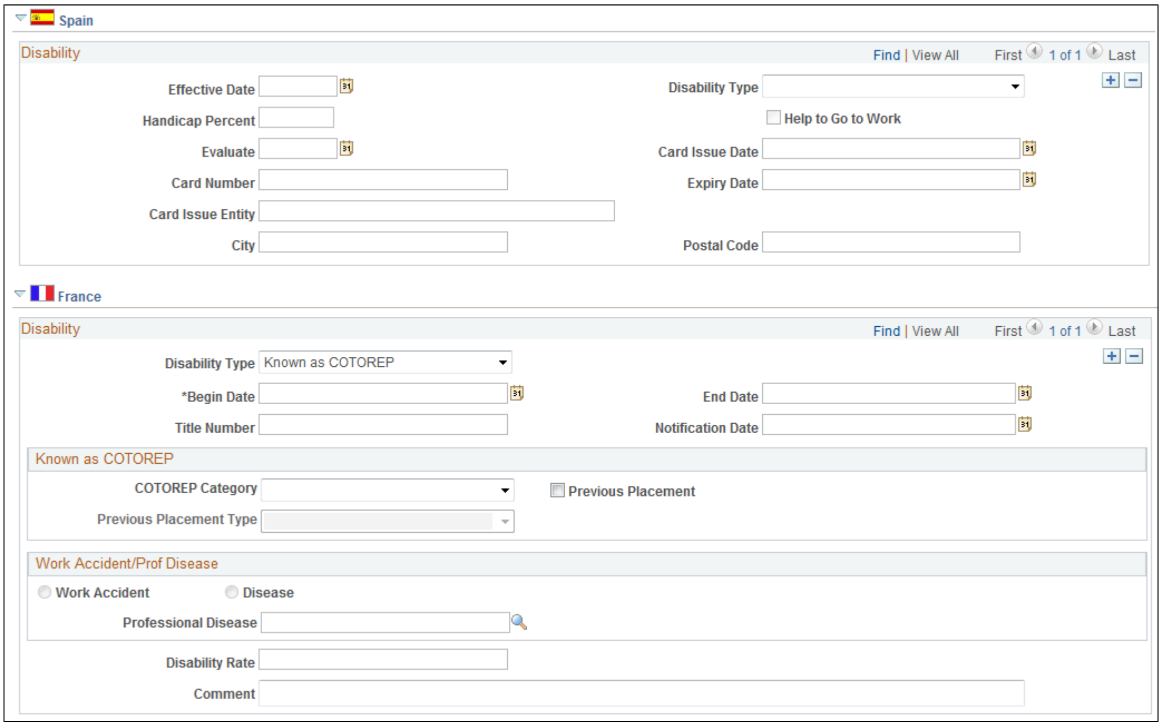
This example illustrates the fields and controls on the Disability page (1 of 4). You can find definitions for the fields and controls later on this page.



### Image: Disability page (2 of 4)

This example illustrates the fields and controls on the Disability page (2 of 4). You can find definitions for the fields and controls later on this page.




### Image: Disability page (3 of 4)

This example illustrates the fields and controls on the Disability page (3 of 4). You can find definitions for the fields and controls later on this page.

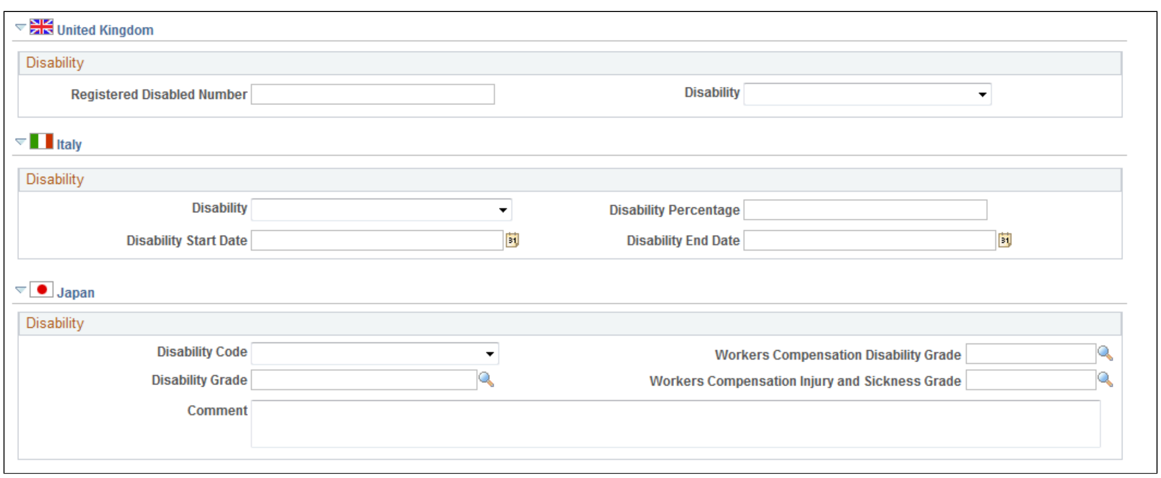
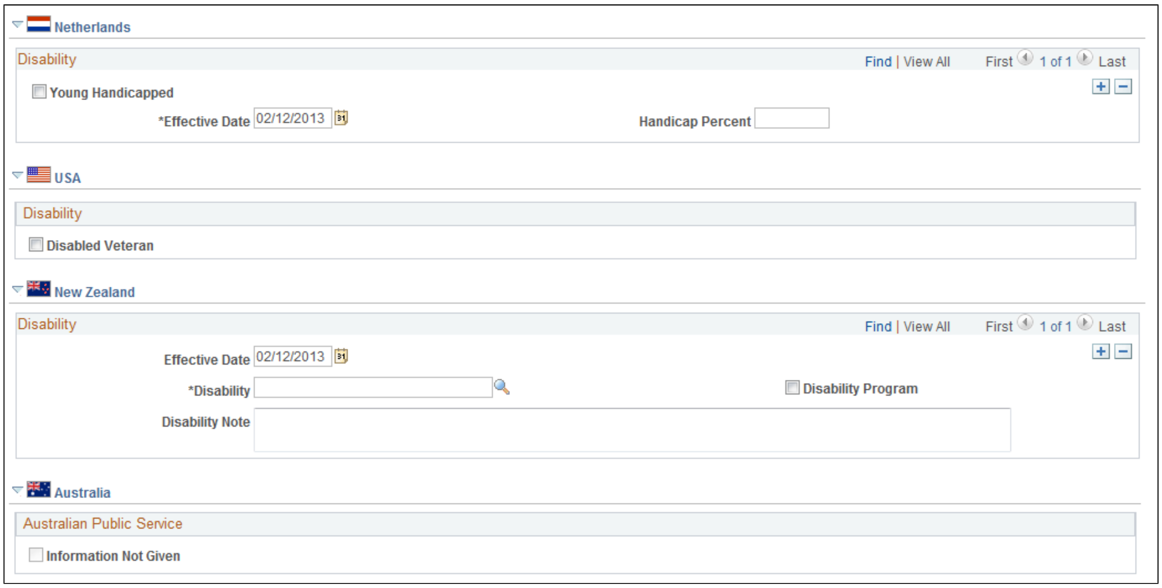


**Image: Disability page (4 of 4)**

This example illustrates the fields and controls on the Disability page (4 of 4). You can find definitions for the fields and controls later on this page.




Track information regarding worker disabilities using the Disability component, which consists of the Disability page and the three Accommodation Data pages. Using these pages, record information regarding disabled workers, and the impact on accommodation requirements for your organization. The information can also be used for regulatory reporting and protecting your organization from claims of disability discrimination.

| | |
|---|---|
| **Disabled** | Select if the worker is disabled. |

## (CHE) Switzerland

| | |
|---|---|
| **Handicap Percent** | Enter a percentage of disability from *0* to *100.* |

## (DEU) Germany

Use this group box to track worker disability information that your company needs to demonstrate compliance with the Handicapped Workers Act of 1961. For your company's purposes, the act defines a handicapped person as someone who is registered as handicapped and who is disabled to the degree that it impacts earning capacity. When registered as handicapped, the individual is issued a disability card, and your company must track the disability card number, who issued the card, the issue date, and the expiration date.

| | |
|---|---|
| **Disabled Type** | Identify the worker's disability type. |
| **Handicap Percent** | Enter the degree of the disability. |
| **Disabled Position Count** | Enter the degree to which this worker's disability can be applied to the total number of positions filled by disabled workers. Not every disabled worker may count as a full disabled position. |

| | |
|---|---|
| **Evaluate** | Enter the date that the person's disability was evaluated or reviewed. The evaluation date can be different from the effective date for the disability entry. To maintain a history of evaluation date records, such as past and future evaluations, insert additional data rows and use the scroll bar to navigate between rows. |
| **Part Time Work Details** | Identify the workers part time work details. |
| **Card Number, Card Issue Date, and Expiry Date** | Enter the worker's disability card number, card issue date, and card expiration date. |
| **Disability Status Office** | For each disability card, enter the disability status office that issued the card. |
| **City andPostal Code** | Enter the city and postal code of the disability office. |
| **Apprentice** | Select the check box if the person is or has been an apprentice. |
| **Apprentice Begin Date andApprentice End Date** | Select the begin and end dates of the apprenticeship. |

## (ESP) Spain

| | |
|---|---|
| **Disability Type** | Select a disability type:<br>• *Non Disability* (none)<br>• *Physical Disability*<br>• *Psychological Disability*<br>• *Sensorial Disability* |
| **Handicap Percent** | Spanish law requires you to track a disabled worker's percentage of disability. Enter a percentage from *0* to *100*. |
| **Help to Go to Work** | Select if the worker needs physical assistance to go to work. This check box is available only to workers whose disability percentage is between 33% and 65%, and is used to calculate a tax deduction for that worker. |
| **Evaluate** | Enter the date when the disability was evaluated. |
| **Card No. (card number),Card Issue Date, and Exp. Date (expiration date)** | The Spanish government issues to people with disabilities a card that certifies their percentage of disability. Enter the card number, the date when the disability card was issued, and the disability card's expiration date. |
| **Disability Status Office** | Select the office in charge of monitoring the worker's disability status. |
| **City andPostal Code** | Enter the city and postal code of the disability office. |

## (FRA) France

Use this group box to track worker disability information that your company needs to demonstrate compliance with French regulations regarding disability hiring quotas, and to provide notifications to the disabled worker's social security commission, or *Commission Technique d'Orientation et de Reclassement Professionnel* (COTOREP).

**Disability Type**

Indicate the worker's disability type, which identifies whether the worker is classified by COTOREP as disabled, or instead collects a financial stipend from the social security commission for some other similar reason. These reasons may include widows, orphans, or spouses of a disabled person, and war widows. This information is tracked so that your company can complete the required report of this information in a manner similar to the French Disability report.

**Begin Date**

Enter the date that the disability started.

**End Date**

If the disability wasn't permanent, enter the disability end date.

**Title Number**

Enter the worker's disability number, assigned by COTOREP.

**Notification Date**

Record the date that your company notified the social security commission that you hired the worker.

**Disability Rate**

In the specific case of a disability due to a work accident or a professional disease, the National Social Security Administration (not COTOREP) assigns a percentage of disability to the worker. The purpose of this percentage is to enable a calculation for an allowance that is paid by the National Social Security Administration. A worker can be recognized as a disabled person by COTOREP and also be a victim of a work accident or disease.

When applicable, enter the percentage of disability *(0* to *100* percent).

## (FRA) Known as COTOREP

When you open the page, the fields in this group box are display-only. If you select *COTOREP* as the disability type, the fields become available.

**COTOREP Category**

Enter the level of severity of the worker's disability, as defined by the social security commission. Values are:

*COTOREP A:* Light disability.

*COTOREP B:* Medium disability.

*COTOREP C:* Severe disability.

**Previous Placement**

Select to indicate that the worker had a prior disability placement through COTOREP.

| | |
|---|---|
| **Previous Placement Type** | If the worker had a previous placement, indicate the previous placement type. |

### (FRA) Work Accident/Prof. Disease

When you first open the page, the fields in this group box are display-only. If you select *WrkAcc/Dis* (work accident/disabled) as the disability type, the fields become available.

| | |
|---|---|
| **Work Accident andDisease** | Select whether the disability is the result of a work accident or a disease. |
| **Prof. Dis. (professional disease)** | If the disability is the result of a disease, select the type of disease. |

### (GBR) UK

Use this group box to track disability data for United Kingdom (UK) workers and to demonstrate compliance with the fair hiring and employment provisions of the Disability Discrimination Act of 1995.

| | |
|---|---|
| **Registered Disabled Number** | Enter the worker's Registered Disabled Number. |
| **Disability** | Select the worker's disability type. |

### (ITA) Italy

| | |
|---|---|
| **Disability** | Select the worker's disability type. |
| **Disability Percentage** | Enter the worker's disability percentage, as determined by the examining doctor. |

### (JPN) Japan

Use this group box to track a worker's disability category and grades. This information is used for regulatory and tax reporting purposes.

| | |
|---|---|
| **Disability Code** | Enter the worker's disability code (values are legal disability categories that are set by the Ministry of Labor): *Disabled, Heavily disabled, Heavy mental disorder,* and *Mental disorder.* |
| **Worker Comp Disability Grade (workers' compensation disability grade)** | Select a value from *Grade 1* through *Grade 14.* |
| **Disability Grade** | Select a value from *Grade 1* through *Grade 7.* |
| **WC Injury and Sickness Grade (workers' compensation injury and sickness grade)** | Select a value from *Grade 1* through *Grade 3.* |

### (NLD) Netherlands

Use this group box to record disability information for your workforce, and then use this information to document compliance with regulations under the Disabled Employees Act of 1985 *(Wet Arbeid Gehandicapte Werknemers)*.

| | |
|---|---|
| **Handicap Percent** | Enter the percentage degree to which the worker is handicapped. |
| **Young Handicapped** | Select to indicate that the worker qualifies for the tax reduction rule for young handicapped people *(Wet arbeidsongeschiktheidsvoorziening jonggehandicapten, Wajong)*. |

### (USA) USA

| | |
|---|---|
| **Disabled Veteran** | Select only if the worker is a disabled veteran. |

### (NZL) New Zealand

| | |
|---|---|
| **Disability** | Select the worker's disability type. These values come from the NZL Disability table. |
| **Disability Program** | Select if there is an association between the worker and a disability program. |
| **Disability Note** | Enter additional comments about the disability. |

### (AUS) Australia

| | |
|---|---|
| **Information Not Given** | Select if worker disability information is not provided. |

## Documenting Disability Accommodations

Use these three accommodation data pages to document that your company doesn't have discriminatory practices against people with disabilities:

- Accomm Request page

  Use the Accomm Request page (ACCOMM_REQUEST ) to enter accommodation requests that a worker or applicant makes of your organization. You can also enter diagnosis codes for worker disabilities.

  **Navigation**

  Workforce Administration, Personal Information, Disability, Disabilities, Accomm Request

- Accomm Option page

  Use the Accomm Option page (ACCOMM_OPTION ) to enter the options that the organization or the person with a disability is considering to resolve each accommodation request.

**Navigation**

Workforce Administration, Personal Information, Disability, Disabilities, Accomm Option

- Accomm Job Task page

  Use the Accomm Job Task page (ACCOMM_JOB_TASK ) to enter the job tasks that you are accommodating, classified by job code and, where necessary, by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.

  **Navigation**

  Workforce Administration, Personal Information, Disability, Disabilities, Accomm Job Task

When workers or applicants request that you make accommodations to enable them to perform job tasks, you can track all the steps that are involved in resolving those requests.

### Related Links

"Managing Accommodation Data *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"

## Disability Report ITA Page

Use the Disability Report ITA page (RUNCTL_PER060) to run the Disability Report - ITA (PER060).

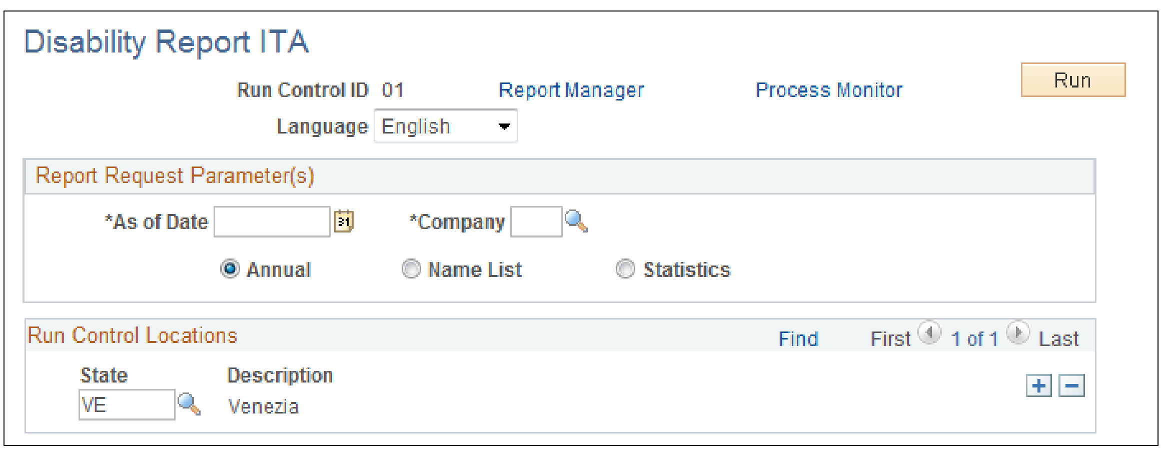
This run control page runs the Annual, Name List, or Disability Statistics reports.

**Navigation**

Workforce Administration, Personal Information, Disability, Disability Report ITA

**Image: Disability Report ITA page**

This example illustrates the fields and controls on the Disability Report ITA page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Annual** | Select this option if you want to run the annual report, which lists the number of disabled workers sorted by disability type and gender. |

| | |
|---|---|
| **Name List** | Select this option if you want to run the report that lists the names of disabled workers by location and gender. |
| **Statistics** | Select this option if you want to run the report that lists locations and the number of disabled and able-bodied workers. Part and full-time disabled workers are counted as one. Part-time, able-bodied workers are counted using their full time equivalent (FTE) value. If an able-bodied employee has an FTE value of 0.5, then that employee is counted as 0.5 on this report. Full-time, able-bodied workers are counted as 1. |
| **State** | Select the Italian state for which you are reporting disability statistics. |
| **Description** | Displays the description of the selected state for which you are reporting disability statistics. |

# Handling Company Credit Cards

In PeopleSoft Human Resources, you can identify company credit cards and then assign those cards to employees.

These topics provide an overview of credit card encryption, list prerequisites, and discuss how to:

- Enter credit card vendors.
- Assign cards to workers.
- Encrypt preexisting credit card numbers.

## Understanding Credit Card Encryption

PeopleSoft Human Resources uses PeopleTools Pluggable Cryptography framework and encryption/decryption profiles (called encryption schemes) to encrypt and decrypt all credit card numbers stored in the database.

PeopleTools Pluggable Cryptography is an advanced security framework that provides a security model for applications to encrypt credit card data. Pluggable Cryptography provides a way for you to secure critical PeopleSoft data and communicate securely with other businesses. It enables you to extend and improve cryptographic support for your data in PeopleTools, giving you strong cryptography with the flexibility to change and grow, by incrementally acquiring stronger and more diverse algorithms for encrypting data. In PeopleTools, pluggable cryptography capability is provided by PeopleSoft pluggable encryption technology (PET).

By using the PeopleTools Pluggable Cryptography for strong encryption/decryption, the Human Resources system encrypts data using 3DES algorithms and 168-bit encryption keys. The system displays an *X* in place of each credit card number other than the last four digits. This includes credit card numbers that are display-only as well as those that are editable. The system encrypts all credit card numbers as soon as they are entered into the system on the Maintain Employee Credit Card page.

Use of the stronger Credit Card Encryption solution supports compliance with the cardholder data protection requirements of the Payment Card Industry (PCI) Data Security Standard and with Visa's Cardholder Information Security Program (CISP).

PeopleSoft Human Resources delivers the system data necessary for credit card encryption. Encryption of credit card numbers within the Human Resources system requires no additional setup.

---

**Note:** When the system publishes any messages that contain a credit card number (such as the CORPORATE_CARD_DATA_SYNC message) the systems uses clear text rather than encrypted data for the credit card number because the message is being sent via a secured queue. The secured queue likewise meets the requirement of the PCI Data Security Standard. The message CORPORATE_CARD_DATA_FULLSYNC also comes delivered but is not implemented in the system. To use this message you must write code to decrypt the credit card number before publishing the message.

---

For information on cryptography, see the “Securing Data with Pluggable Cryptography” topic in the documentation, *PeopleTools: Security Administration*

## Prerequisite

You must have defined credit card types on the Translate table before entering credit card vendors.

## Pages Used to Handle Company Credit Cards

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Credit Card Vendors | CC_CARD_TBL | Set Up HCM, Product Related, Workforce Administration, Credit Card Vendors, Credit Card Vendors | Enter vendors of credit cards that you'll assign to workers. A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table. |
| Maintain Employee Credit Card | CC_CARD_DATA | Workforce Administration, Job Information, Maintain Employee Credit Card, Maintain Employee Credit Card | Assign company credit cards to workers. |
| Process Credit Card Encryption | CC_ENCRYPT_CRD_NBR | Set Up HCM, System Administration, Utilities, Process Credit Card Encryption | Encrypt preexisting credit card numbers according to the latest encryption standards of the system. |

## Credit Card Vendors Page

Use the Credit Card Vendors page (CC_CARD_TBL) to enter vendors of credit cards that you'll assign to workers.

A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table.

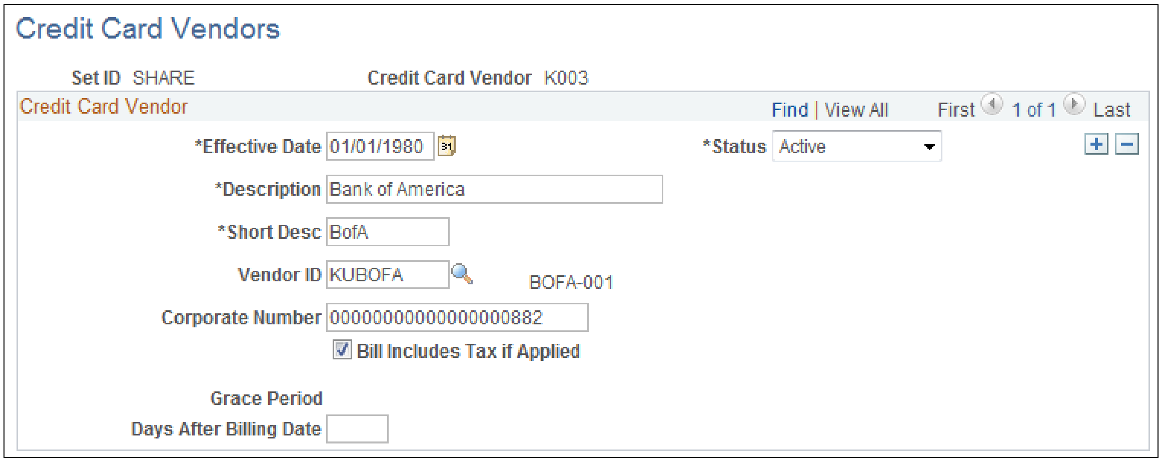
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Credit Card Vendors, Credit Card Vendors

**Image: Credit Card Vendors page**

This example illustrates the fields and controls on the Credit Card Vendors page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Vendor ID** | Enter the vendor ID. |
| **Corporate Number** | Enter your company's corporate number. This isn't a credit card number. |
| **Bill Includes Tax if Applied** | Select if the bill includes tax. |
| **Grace Period andDays After Billing Date** | Enter the number of days allowable after the billing date to avoid additional charges. |

## Maintain Employee Credit Card Page

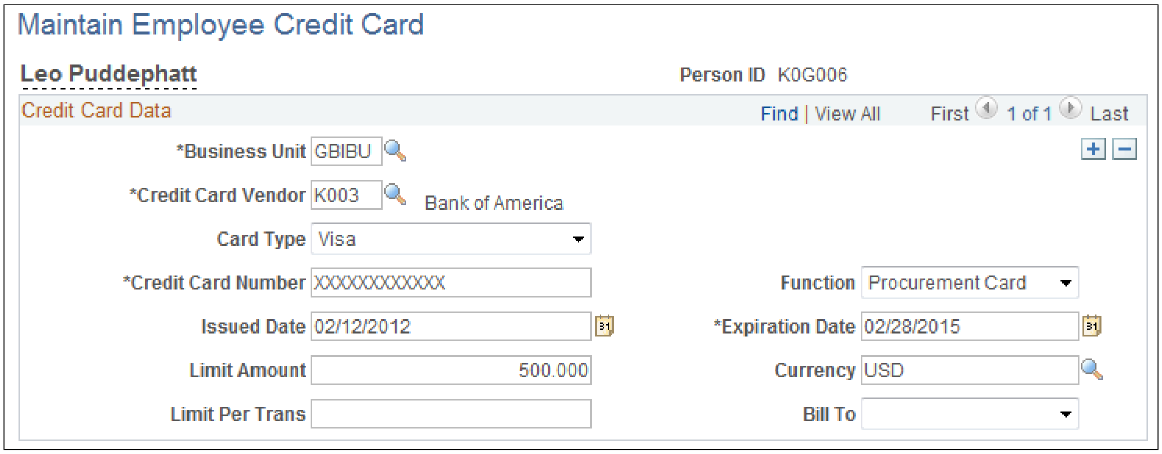
Use the Maintain Employee Credit Card page (CC_CARD_DATA) to assign company credit cards to workers.

### Navigation

Workforce Administration, Job Information, Maintain Employee Credit Card, Maintain Employee Credit Card

### Image: Maintain Employee Credit Card page

This example illustrates the fields and controls on the Maintain Employee Credit Card page. You can find definitions for the fields and controls later on this page.




**Credit Card Vendor**

Select the card's vendor.

**Card Type**

Select the card type.

**Credit Card Number**

Enter the card number. The system masks the credit card number except for the last four digits. The masking of the credit card number is visible only after saving the data and then accessing the page again for that employee. To update an existing credit card number you must delete the existing number and enter the new number in its entirety, even if you are only modifying the last four digits.

See Understanding Credit Card Encryption.

**Function**

Select the main function for this card (for example, debit card, phone card, or corporate card).

**Issued Date**

Enter the date that the card was issued.

**Expiration Date**

Enter the date that the card expires.

**Limit Amount**

Enter the credit card limit amount.

**Currency**

Enter the currency of the credit card.

**Limit Per Trans (limit per transaction)**

Enter the limit amount per transaction.

**Bill To**

Select whom to bill for this credit card.

## Process Credit Card Encryption Page

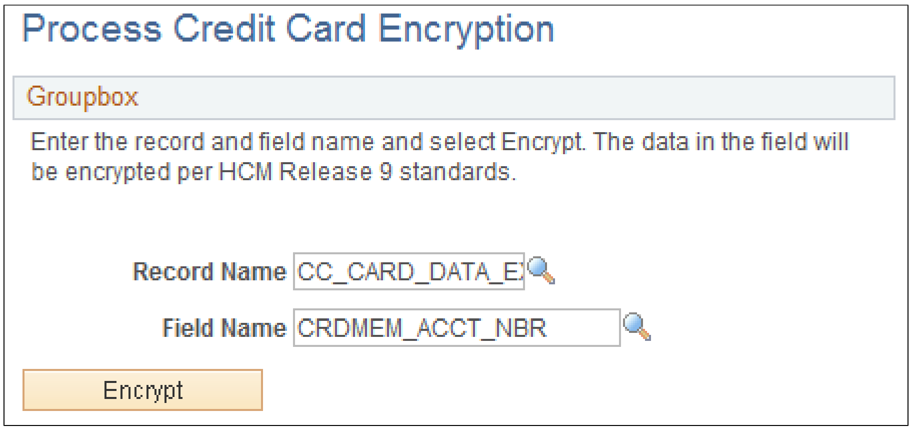
Use the Process Credit Card Encryption page (CC_ENCRYPT_CRD_NBR) to encrypt preexisting credit card numbers according to the latest encryption standards of the system.

**Navigation**

Set Up HCM, System Administration, Utilities, Process Credit Card Encryption

**Image: Process Credit Card Encryption page**

This example illustrates the fields and controls on the Process Credit Card Encryption page. You can find definitions for the fields and controls later on this page.




---

**Note:** Run this process one time to encrypt preexisting credit card numbers only if you have unsecured data in the Credit Card Number field on the Maintain Employee Credit Card page.

---

| | |
|---|---|
| **Record Name** | Select the record that contains the field for which you want to encrypt preexisting data with the system's latest encryption standards. To encrypt preexisting credit card numbers found on the Maintain Employee Credit Card page, select the *CC_CARD_DATA_EX* record. |
| **Field Name** | Select the field (within the selected record) for which you want to encrypt preexisting data with the system's latest encryption standards. To encrypt preexisting credit card numbers found on the Maintain Employee Credit Card page, select the *CRDMEM_ACCT_NBR* field. |
| **Encrypt** | Click this button to encrypt the preexisting data for the selected field. |

# Handling Company Property

To set up the handling of company property, use the Company Property (COMPANY_PROP_TBL) component.

These topics discuss how to:

- Identify company property.
- Assign values to company property.
- Assign company property to workers.

## Pages Used to Handle Company Property

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Company Property - Company Property | COMPANY_PROP_TBL1 | Set Up HCM, Product Related, Workforce Administration, Company Property, Company Property | Identify company property, such as vehicles, computer equipment, tools, or uniforms. |
| Property Value | COMPANY_PROP_TBL2 | Set Up HCM, Product Related, Workforce Administration, Company Property, Property Value | Assign values to company property. |
| Job Information - Company Property | COMPANY_PROPERTY | Workforce Administration, Job Information, Company Property | Assign company property to workers. |

## Company Property Page

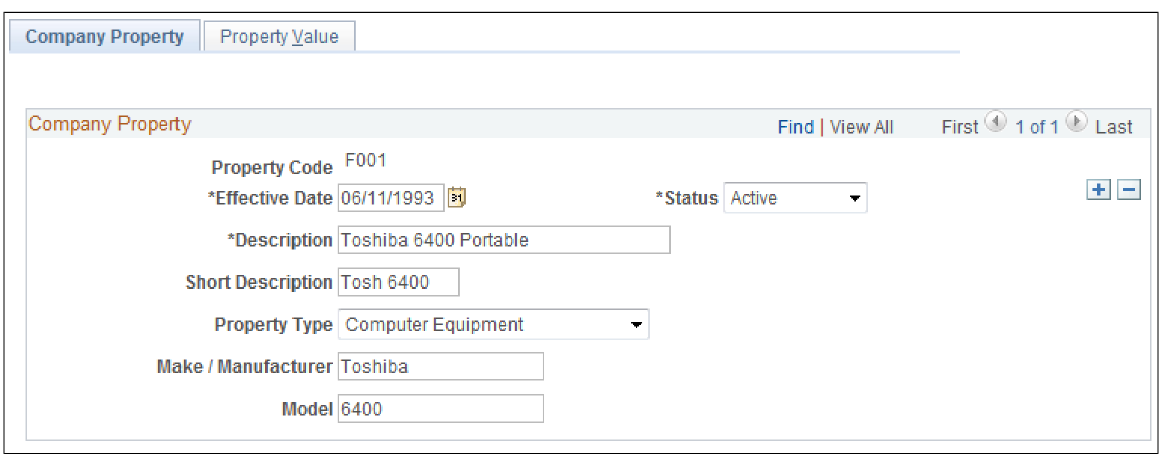
Use the Company Property - Company Property page (COMPANY_PROP_TBL1) to identify company property, such as vehicles, computer equipment, tools, or uniforms.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Company Property, Company Property

**Image: Company Property - Company Property page**

This example illustrates the fields and controls on the Company Property - Company Property page. You can find definitions for the fields and controls later on this page.



| | |
|---|---|
| **Property Code** | Displays the property code for this item. |
| **Property Type** | Select a type of property, such as *Vehicle* or *Computer Equipment.* |
| **Make / Manufacturer** | Enter the make and manufacturer for this item. |
| **Model** | Enter the model. |

### Car Identification

If you select *Vehicle* as the property type, this group box appears in place of the Make/Manufacturer and Model fields.

| | |
|---|---|
| **Car Identification** | When you enter a car ID, the system automatically completes the Registration Number, Make/Model, and Color fields based on the values stored for that car ID. |
| **Make/Model** | Enter the make and model for this car. |
| **Registration Number** | Enter the car's registration number. |
| **Color** | Enter the car's color. |

### Related Links

*PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions*

"Entering Non-Employee Data *(PeopleSoft HCM 9.2: Human Resources Monitor Health and Safety)*"

## Property Value Page

Use the Property Value page (COMPANY_PROP_TBL2) to assign values to company property.

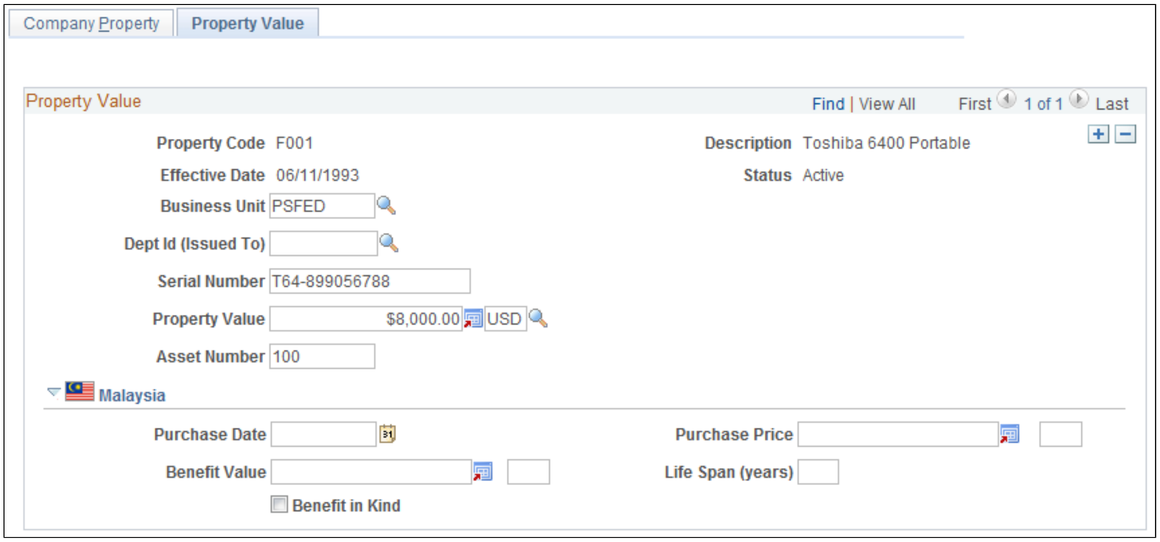
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Company Property, Property Value

**Image: Property Value page**

This example illustrates the fields and controls on the Property Value page. You can find definitions for the fields and controls later on this page.




**Dept ID (Issued To)**

Enter the identification number of the department to which the property was issued.

**Serial Number**

Enter the serial number.

**Property Value**

Enter the value of the property and the currency that you are using.

**Asset Number**

Enter the asset number.

### (MAL) Malaysia

**Purchase Date**

Enter the date the company property was purchased.

**Purchase Price**

Enter the purchase price.

**Benefit Value**

Enter the value of the benefit to be used in calculations.

**Life Span (years)**

Enter the number of years expected for the life span of the company property.

**Benefit in Kind**

Select to specify if this property is a Benefit in Kind (BIK).

## Job Information - Company Property Page

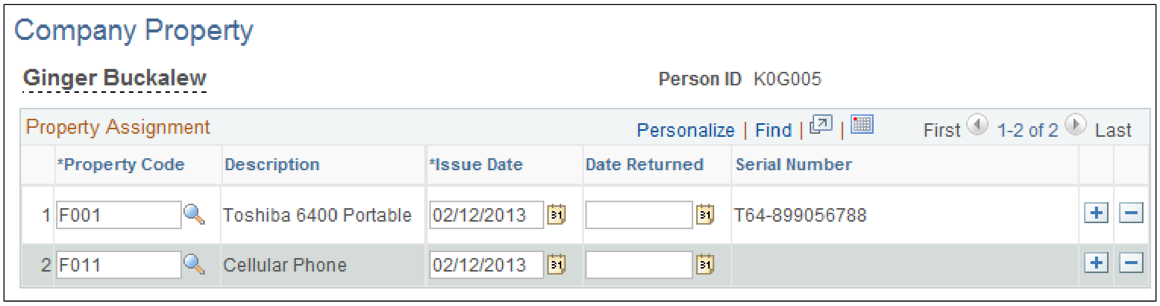
Use the Job Information - Company Property page (COMPANY_PROPERTY) to assign company property to workers.

**Navigation**

Workforce Administration, Job Information, Company Property

**Image: Job Information - Company Property page**

This example illustrates the fields and controls on the Job Information - Company Property page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Property Code** | Enter the property code for the item that you've assigned to the worker. |
| **Issue Date** | Enter the date that you issued the property to the worker. |
| **Date Returned** | After the worker returns the property, enter the date that it was returned. |
| **Serial Number** | The system displays the serial number of the item that you've assigned to the worker. |

### Related Links

"Entering Non-Employee Data *(PeopleSoft HCM 9.2: Human Resources Monitor Health and Safety)*"

# Managing Names Data

These topics provide an overview of additional name types and discuss how to:

- Enter additional name types.
- Maintain name history.

## Understanding Additional Name Types

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of names and titles as part of your records.

When you create a Personal Data record, the system automatically creates a primary name for the person you have added. The system also enables you to track other name types such as legal, preferred, maiden, or some other name for the person. For example, when the divorced Ms. Edith Jones advises your organization that she has remarried and changed her last name to Brown, you can maintain her preferred and primary name, Edith Carter; her former name, Edith Jones; and her maiden name, Edith Brown. You can determine when these name changes occurred by reviewing the history of each name type in the Additional Names component.

## Pages Used to Enter Additional Names

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Additional Names | NAMES_OTHER | Workforce Administration, Personal Information, Biographical, Additional Names, Additional Names | View or create additional name types and names for an individual. |
| Name History | NAME_HISTORY_SEC | Workforce Administration, Personal Information, Biographical, Additional Names<br><br>Click the Add Name Data, View Name History, or Edit Name History, link on the Additional Names page. | View the history of an individual's name type and update or add a new effective date for that name type. |

## Additional Names Page

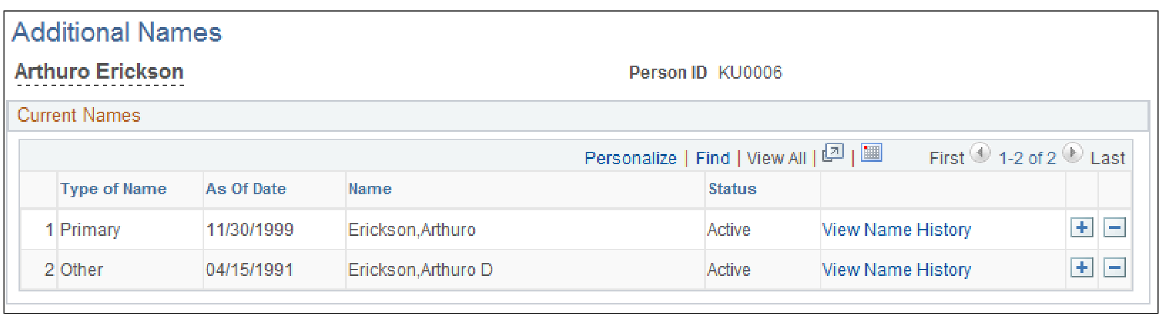
Use the Additional Names page (NAMES_OTHER) to view or create additional name types and names for an individual.

**Navigation**

Workforce Administration, Personal Information, Biographical, Additional Names, Additional Names

**Image: Additional Names page**

This example illustrates the fields and controls on the Additional Names page. You can find definitions for the fields and controls later on this page.




**Type of Name**

Displays the individual's current name types. The *Primary* name type displays from personal data. To add another name type, insert a new row and select the type of name, such as *Preferred, Legal,* or *Maiden,* to add for this individual. Only those remaining name types that are not yet displayed on the page will be available for selection. Values for this field are set up on the Name Type Table page.

**Note:** Although the Additional Names page displays the *Primary* name information for the person, maintenance of this name type should be done in personal data in the Modify a Person component. When you click the link to view or edit name history, you are unable to add additional rows for the *Primary* type row from this component.

**Name**

Displays the individual's name as it appears in the default display name format for the selected name type.

**Add Name Data, View Name History, orEdit Name History**

The name of the link varies depending up on if you have inserted a new type of name row or entered the page using the Correct History action.

Click the link to access the Name History page and view or update data for an existing name type.

## Name History Page

Use the Name History page (NAME_HISTORY_SEC) to view the history of an individual's name type and update or add a new effective date for that name type.

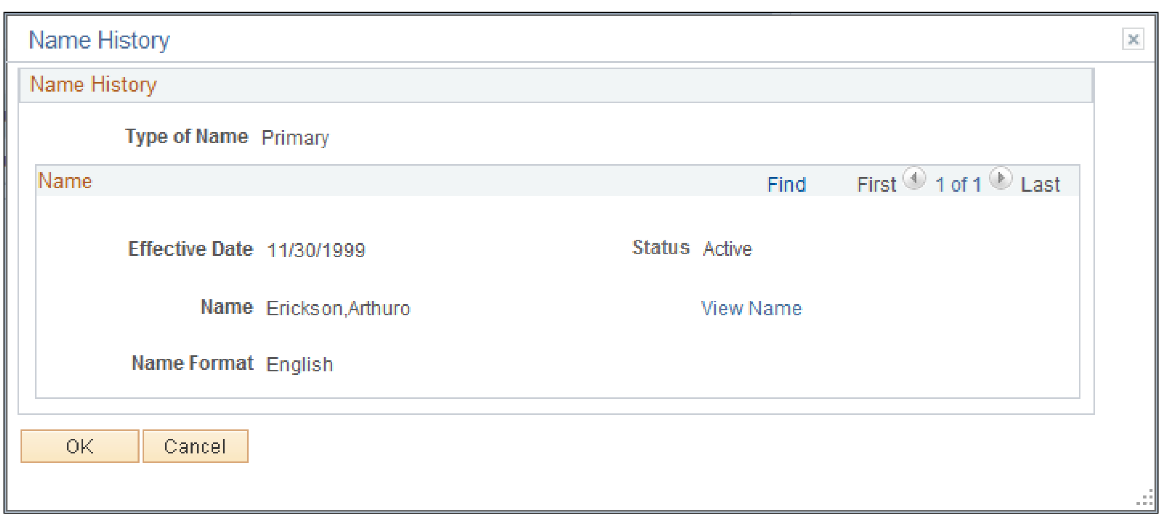
**Navigation**

Workforce Administration, Personal Information, Biographical, Additional Names

Click the Add Name Data, View Name History, or Edit Name History, link on the Additional Names page.

**Image: Name History page**

This example illustrates the fields and controls on the Name History page. You can find definitions for the fields and controls later on this page.




The system displays the history of the selected name type. You can view or add data as permitted by the mode (add, update/display, include history, or correct history) that you select. To update the current name type for the individual, insert a new row, specify the effective date, name format, and status, and click the Edit Name link to update the related name fields.

| | |
|---|---|
| **Edit Name or View Name** | Click this link to view or edit related name fields.<br><br>The name of the link varies depending on if you are adding a new name type, correcting a name, or viewing an existing name.<br><br>**Note:** When viewing the *Primary* name type of an individual, the add a new row and delete buttons are not available. Updates to the *Primary* name of an individual should be done in personal data in the Modify a Person component. |

# Tracking Dependent and Beneficiary Data

These topics provide an overview of dependent and beneficiary data and discuss how to:

- Enter dependent and beneficiary name information.
- Enter dependent address information.
- Enter dependent and beneficiary information.
- Enter information about court-ordered benefits for dependents.
- (NLD) View an employee's dependents and beneficiaries.
- Enter dependent citizenship and passport information.
- Enter dependent visa and permit data.

## Understanding Dependent and Beneficiary Data

Use the Dependent Information component to record important information for dependents that may accompany an employee on an international assignment or international travel. You must also have these pages set up prior to enrolling employees in specific benefit programs.

The Name and Address pages define the relationship of the person to the employee and determine whether the person is a dependent, beneficiary, or both. This definition affects the person's eligibility to be enrolled in health benefits or to be assigned as a beneficiary in certain benefit plans.

The Personal Profile page defines the personal information about the person. This data also affects whether the person is eligible for benefits.

## Pages Used to Track Dependent Identification Data

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Dependent Information - Name | DEPEND_BENEF1 | • Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Name<br>• Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name | Enter or update information about a dependent's name. |
| Dependent Information - Address | DEPEND_BENEF_ADDR | • Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Address<br>• Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Address | Enter or update information about a dependent's address. |
| Dependent Information - Personal Profile | DEPEND_BENEF2 | • Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Personal Profile<br>• Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Personal Profile | Enter or update information about a dependent. |
| Dependent/Beneficiary Riders | DEPBEN_RIDERS | Click the Riders/Orders link on the Dependent Information - Personal Profile page. | Enter detailed information about the court-ordered benefit for the specified dependent or beneficiary. |
| Personal Profile - Phone Numbers | DEP_BENEF_PHON_SEC | Click Phone Numbers on the Dependent Information - Personal Profile page. | Enter additional dependent and beneficiary phone numbers. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Dependent/Beneficiary Summary<br><br>Review Dep/Ben Summary | DEPEND_BENEF_SUMM | • Workforce Administration, Benefit Information NLD, Review Benefits, Dependent/Beneficiary Summary, Dependent/ Beneficiary Summary<br><br>• Benefits, Employee/ Dependent Information, Review Dep/Ben Summary, Dependent/ Beneficiary Summary | View an employee's beneficiaries and dependents. |
| Depdnt Identification Details - Depdnt Citizenship/Passport | CITIZEN_PP_DEP | Workforce Administration, Personal Information, Personal Relationships, Depdnt Identification Details, Depdnt Citizenship/Passport | Enter or update dependent citizenship and passport data. |
| Depdnt Identification Details - Depdnt Visa/Permit Data | VISA_PERMIT_DEP | Workforce Administration, Personal Information, Personal Relationships, Depdnt Identification Details, Depdnt Visa/Permit Data | Enter or update dependent visa and permit data. |
| Dependen Benf History FPS | FPADEPENLK_PNL | Workforce Administration, Personal Information, Personal Relationships, Dependent Benef History FPS | Maintain dependent and beneficiary history for French Public Sector employees. |

## Dependent Information - Name Page

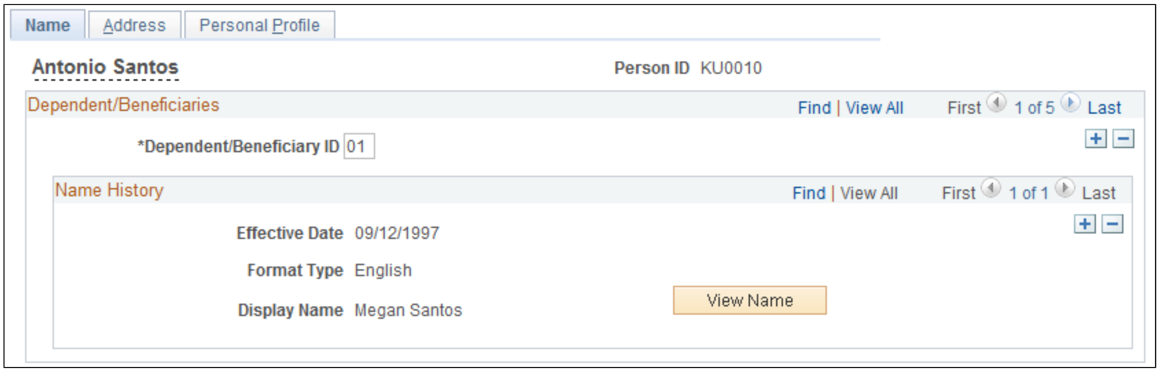
Use the Dependent Information - Name page (DEPEND_BENEF1) to enter or update information about a dependent's name.

### Navigation

- Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Name
- Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name

**Image: Dependent Information - Name page**

This example illustrates the fields and controls on the Dependent Information - Name page. You can find definitions for the fields and controls later on this page.




The system displays the name and the employee ID for the employee.

**Dependent/Beneficiary ID**

The system assigns the dependent or beneficiary ID. You can change it, although you can't have duplicate IDs for dependents or beneficiaries of the same employee. You can, however, use these same IDs for a different employee's dependents and beneficiaries.

**Effective Date**

The system enters the current system date in this field, and this date is carried through to all pages of the component. You can change this date if necessary, however in the first row of data for this dependent/beneficiary, the effective date must be the same on all of the pages in this component.

**Edit Name**

Click to access the Edit Name page. On this page, enter the dependents name and click Refresh to update the fields that display the dependents' name.

---

**Note:** When running a calculation, the system determines if an employee is married by reviewing the dependent and beneficiary table to determine whether there is a dependent identified as the spouse. It is possible for the dependent and beneficiary pages to show more than one spouse, to show a former spouse as a current spouse, to show no spouse even if the employee's marital status is married, or to show a spouse even though the employee's marital status is single. These and other inconsistencies in the dependent and beneficiary data can cause problems with pension calculations. It is best to verify dependent and beneficiary information when calculating pension benefits.

---

## (FRA) French Public Sector

The page displays this section when French Public Sector is enabled on the Installation Table.

| | |
|---|---|
| **Civil Servant Status** | Select to indicate that this dependent is a civil servant. |
| **Same Public Service** | Select if the dependent is in the same public service as the employee. |
| **Employee ID of the Dependent** | When the Same Public Service field is selected, this field is editable. Select the Employee ID of the dependent that is in the same public service as the employee. |
| **Employer Name** | Enter the employer name of the dependent. |

### Related Links

"Entering Dependent and Beneficiary Information *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

## Dependent Information - Address Page

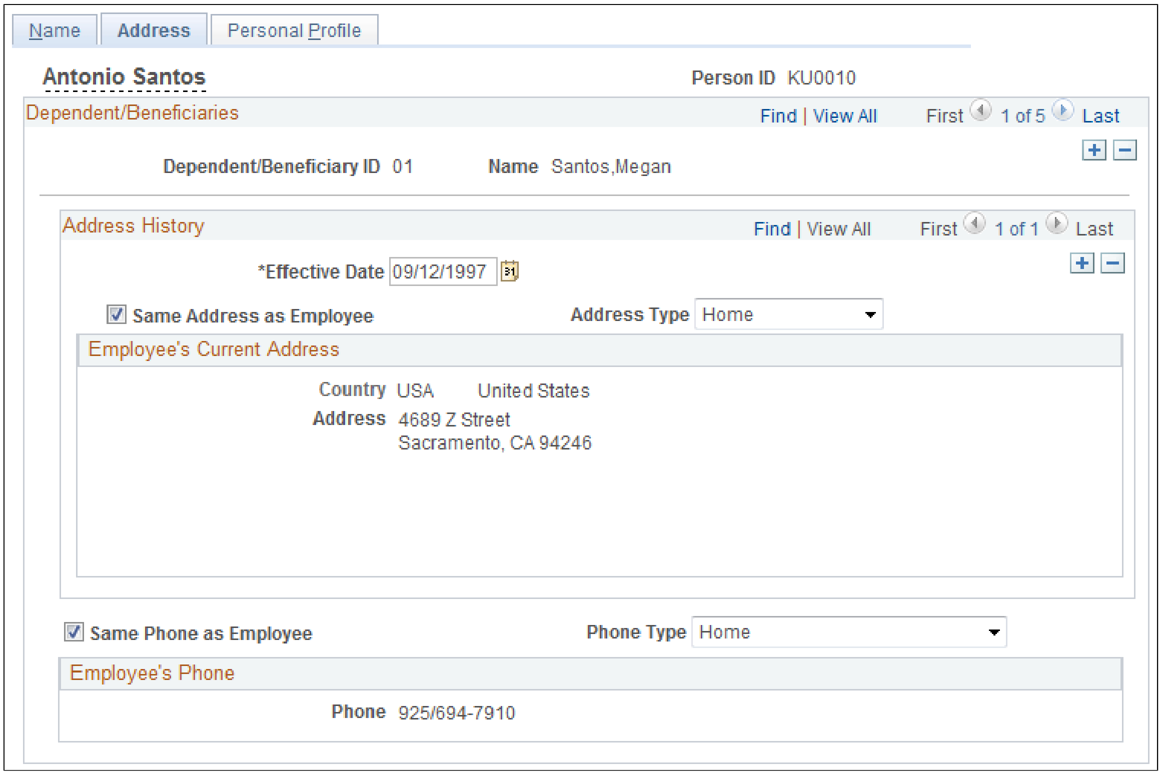
Use the Dependent Information - Address page (DEPEND_BENEF_ADDR) to enter or update information about a dependent's address.

### Navigation

- Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Address
- Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Address

### Image: Dependent Information - Address page

This example illustrates the fields and controls on the Dependent Information - Address page. You can find definitions for the fields and controls later on this page.




The employee's name and employee ID, as well as this dependent or beneficiary's ID, relationship to the employee, and dependent or beneficiary type appear at the top of the page.

**Same Address as Employee and Address Type** — Select if the dependent has the same address information as the employee, and then select the employee's address type that matches the dependent or beneficiary's address. If selected, you don't need to complete any of the address fields.

**Same Phone as Employee and Phone Type** — Select if the dependent has the same phone information as the employee and then select the employee phone type that is the same as this beneficiary's. If selected, you don't need to complete any of the phone fields. A beneficiary can have the same address as the employee but a different phone number.

**Edit Address** — Click to enter or edit the dependent's contact address information.

**Contact Phone** — Enter the dependent's contact phone information in this group box.

### Related Links

"(NLD) Loading Dutch Postal Codes *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Dependent Information - Personal Profile Page

Use the Dependent Information - Personal Profile page (DEPEND_BENEF2) to enter or update information about a dependent.

### Navigation

- Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Personal Profile
- Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Personal Profile

### Image: Dependent Information - Personal Profile page (1 of 6)

This example illustrates the fields and controls on the Dependent Information - Personal Profile page (1 of 6). You can find definitions for the fields and controls later on this page.

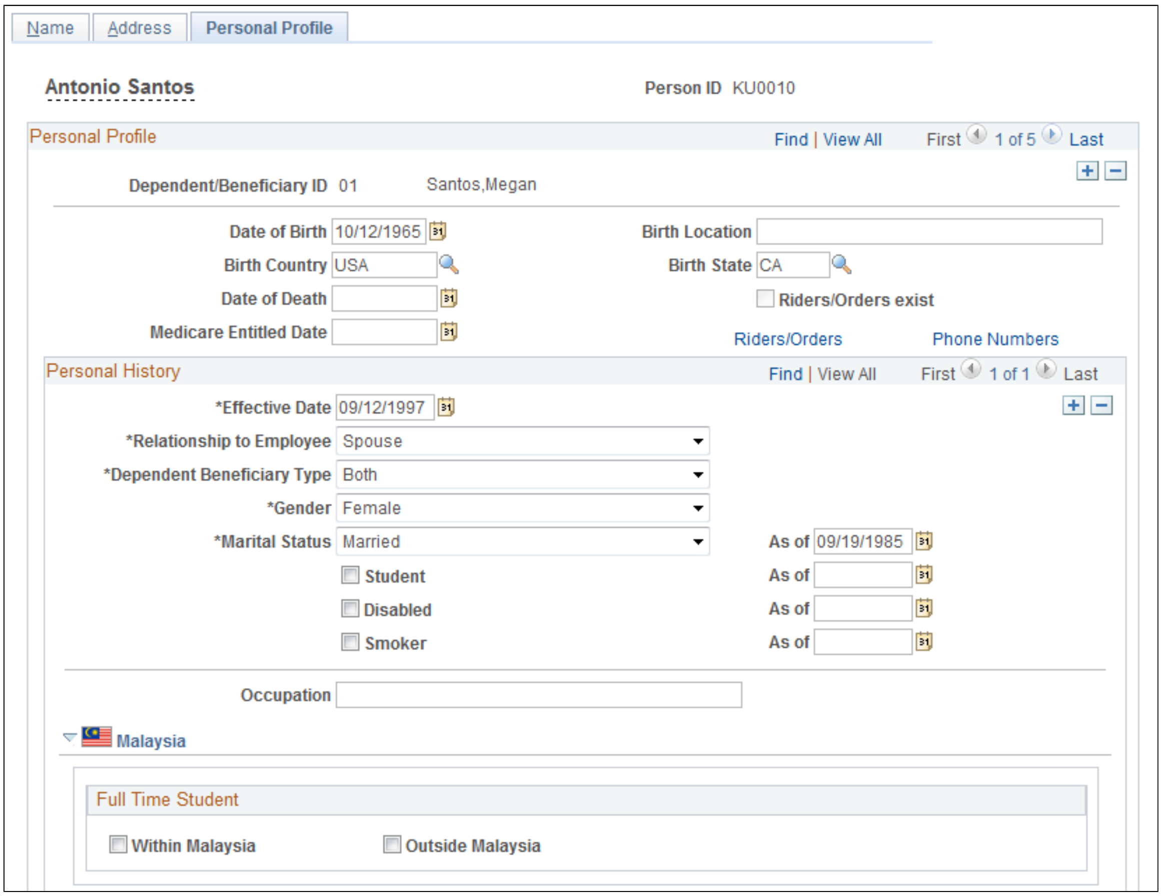


**Image: Dependent Information - Personal Profile page (2 of 6)**

This example illustrates the fields and controls on the Dependent Information - Personal Profile page (2 of 6). You can find definitions for the fields and controls later on this page.

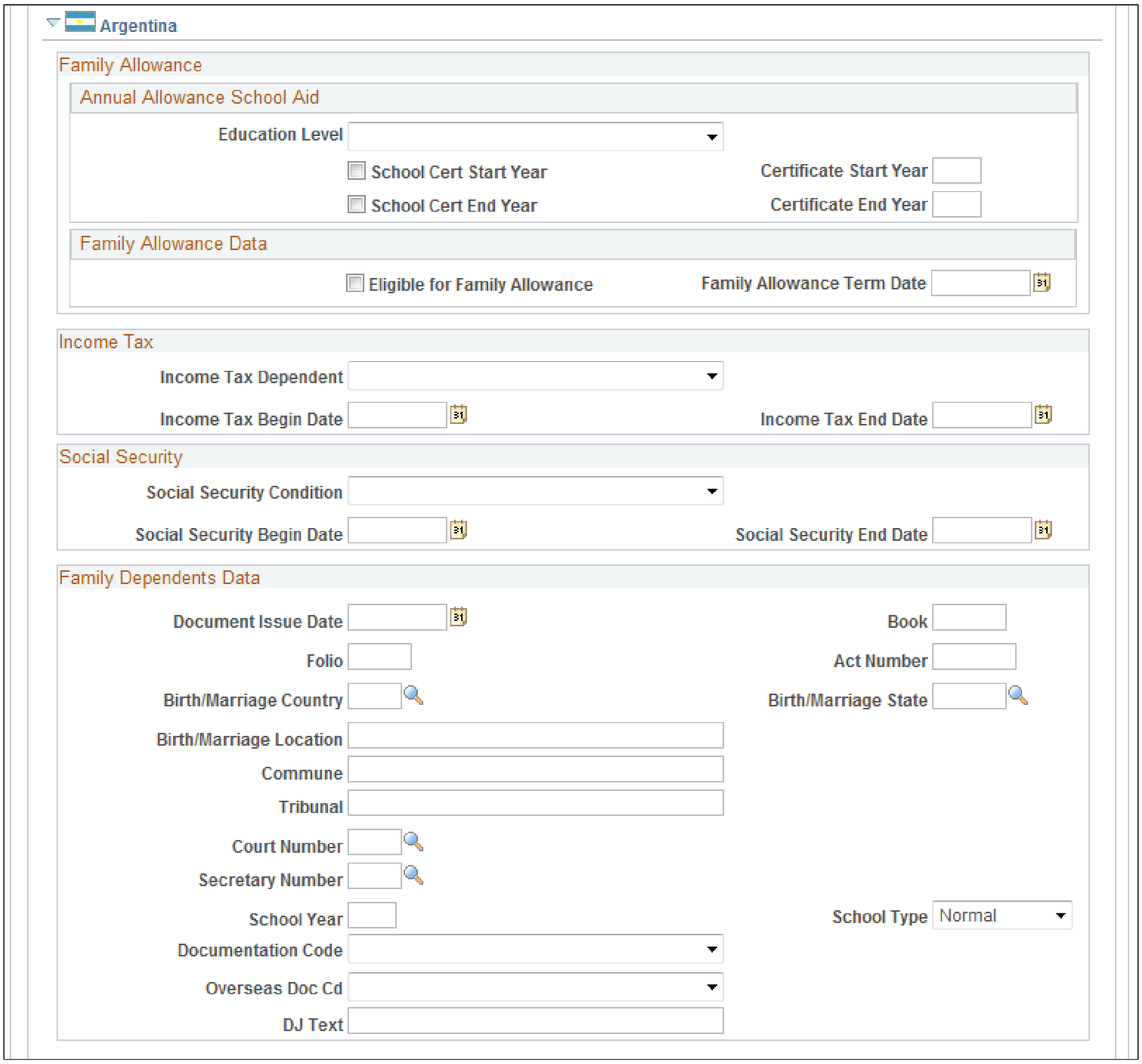


**Image: Dependent Information - Personal Profile page (3 of 6)**

This example illustrates the fields and controls on the Dependent Information - Personal Profile page (3 of 6). You can find definitions for the fields and controls later on this page.

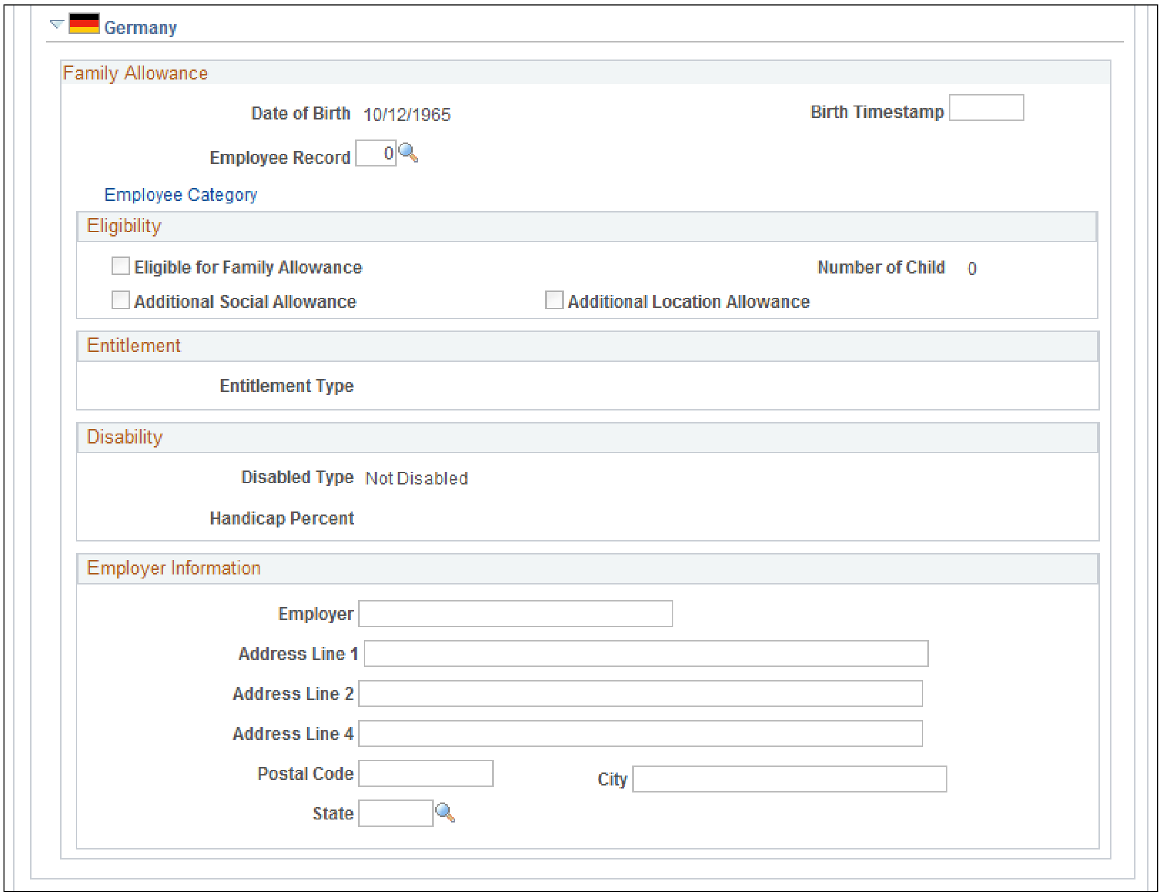
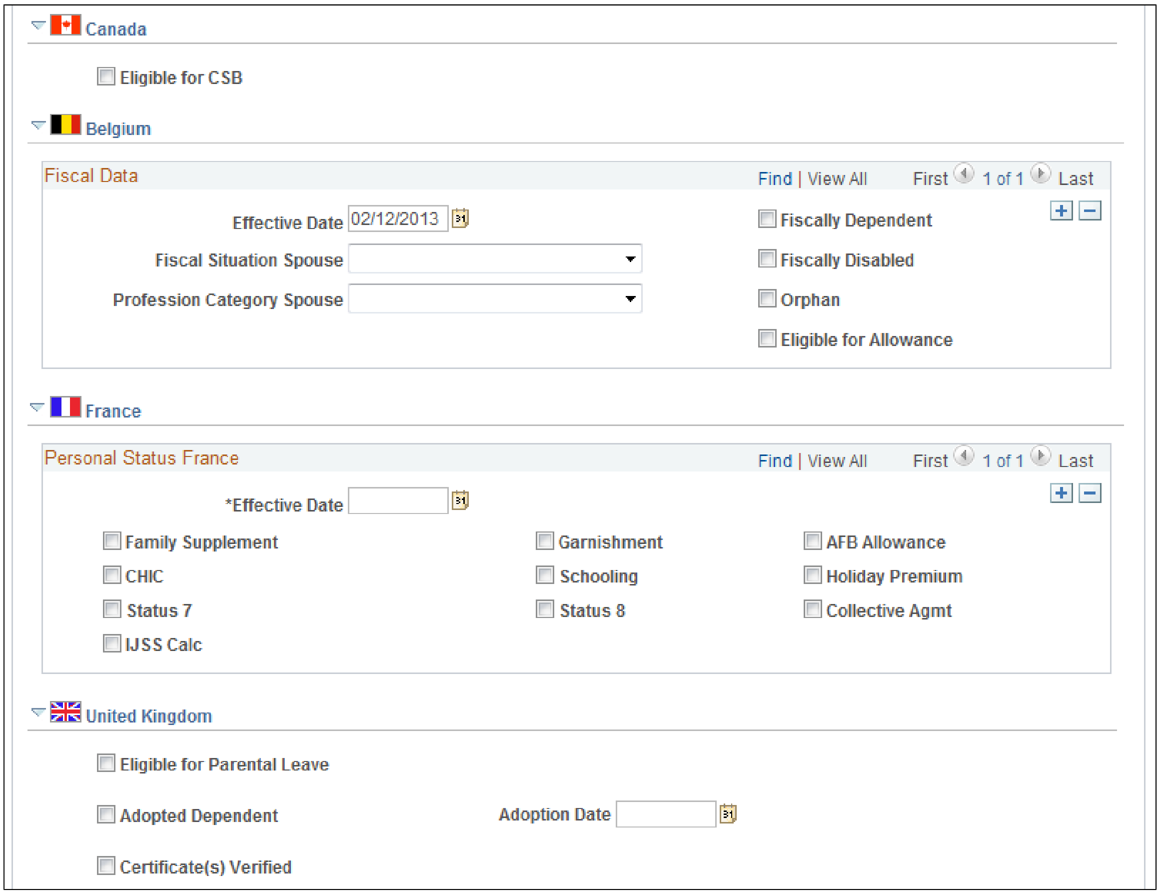


**Image: Dependent Information - Personal Profile page (4 of 6)**

This example illustrates the fields and controls on the Dependent Information - Personal Profile page (4 of 6). You can find definitions for the fields and controls later on this page.



### Image: Dependent Information - Personal Profile page (5 of 6)

This example illustrates the fields and controls on the Dependent Information - Personal Profile page (5 of 6). You can find definitions for the fields and controls later on this page.

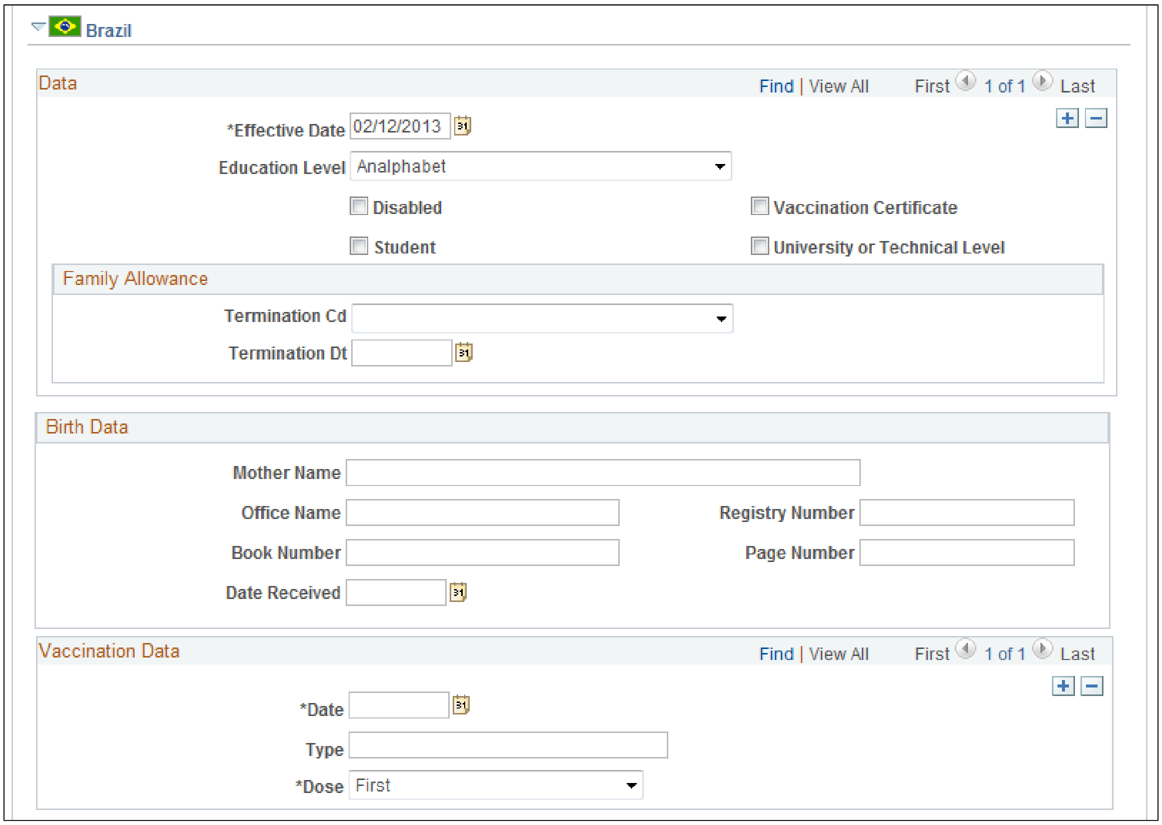
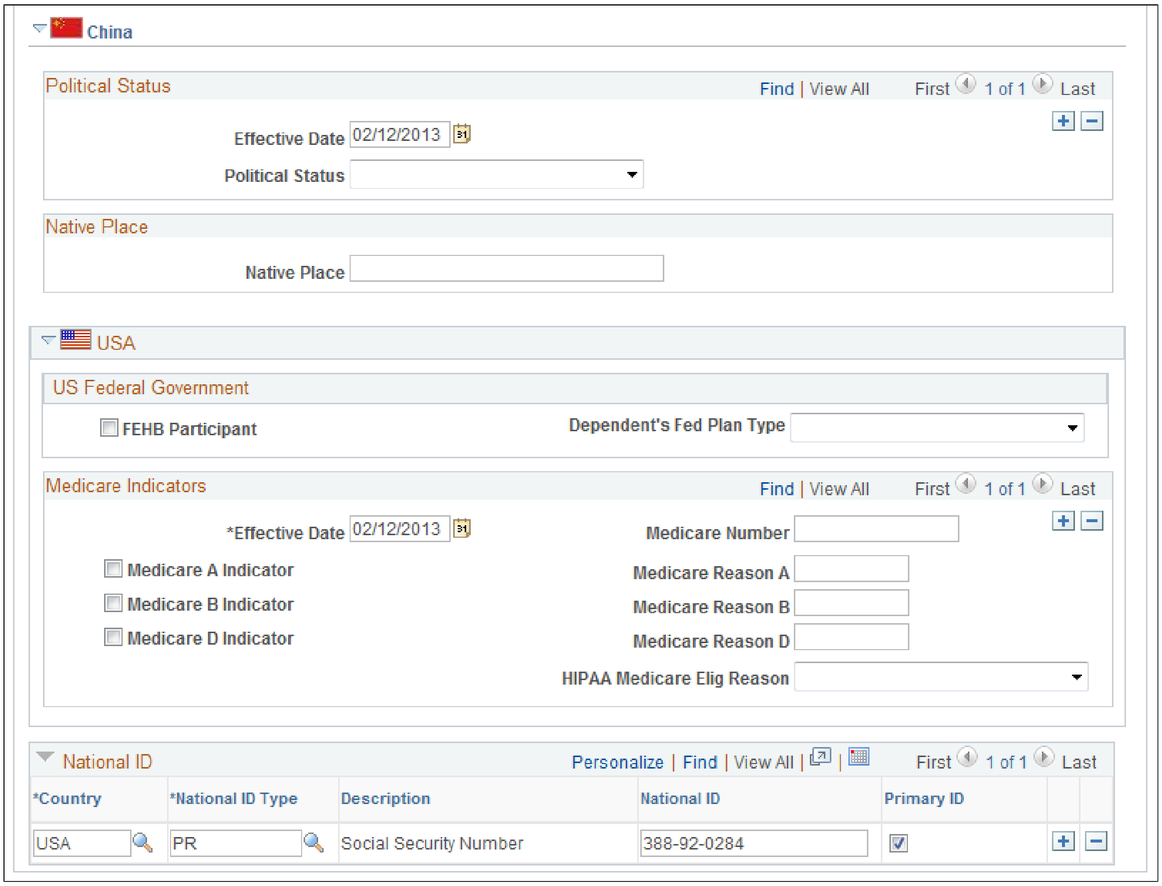


**Image: Dependent Information - Personal Profile page (6 of 6)**

This example illustrates the fields and controls on the Dependent Information - Personal Profile page (6 of 6). You can find definitions for the fields and controls later on this page.




**Date of Birth** Enter the dependent or beneficiary's birthdate. Certain benefit plans, such as life insurance, require the birthdate to determine an individual's eligibility.

**Birth Location** Enter a city, county, or both, to further define the place in which the dependent or beneficiary was born.

**Birth Country** Enter the country in which the dependent or beneficiary was born. Depending on the country you enter, additional fields may appear that require more data entry.

**Date of Death** When the dependent or beneficiary dies, enter the date of the death.

**Medicare Entitled Date** Enter the date on which the dependent or beneficiary will become eligible for Medicare coverage.

**Riders/Orders** Click to access the Dependent/Beneficiary Riders page.

**Phone Numbers** Click to access the Dependent Information - Personal Profile: Phone Numbers page.

**Relationship to Employee**

Enter the dependent or beneficiary's relationship to the employee. If you've set up the Dependent Relationship table, the system automatically completes the Relationship to Employee field according to the relationships in the table.

**Dependent Beneficiary Type**

Select the type of dependent or beneficiary. Your selection determines whether you can enroll this person into a benefit plan as a dependent or assign this person as a beneficiary.

If you have set up the Dependent Relationship table, the system uses that information to populate and validate this field. Values are:

*Beneficiary:* Beneficiary only.

*Both:* Dependent and beneficiary. If you plan to enroll the person as a dependent *and* assign the person as a beneficiary, you must select this option.

*COBRA Dependent Only:* COBRA dependent or beneficiary only.

*Dependent:* Dependent only.

*None:* The person is neither a dependent nor a beneficiary. This option is typically used when the person is a co-owner of a U.S. savings bond, or to make a person ineligible to participate in a benefit plan.

*QDRO Estate:* If the beneficiary of a life plan is the estate of an employee, enter this value.

*QDRO Representative - Employee:* Used for PeopleSoft Pension Administration.

*QDRO Representative - Recipient:* Used for PeopleSoft Pension Administration.

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**Note:** (USA) (CAN) The values *COBRA Dependent Only, None, QDRO Representative - Employee,* and *QDRO Representative - Recipient* are Canadian and United States values only.

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**Marital Status**

Enter the dependent or beneficiary's marital status.

**Marital Status - As of**

When adding a new dependent, enter the as of date for marital status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

**Student**

Select if the dependent or beneficiary is a student.

**Student - As of**

When adding a new dependent, enter the as of date for the individual's student status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

**Disabled**

Select if the dependent or beneficiary is disabled.

**Disabled - As of**

When adding a new dependent, enter the as of date for the individual's disability status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

**Smoker**

Select if the dependent or beneficiary smokes. The Smoker check box is necessary for dependents who are enrolled in benefit plans that use calculation rules. The system calculates age-graded rates for individuals differently depending on whether they smoke.

**Smoker - As of**

When adding a new dependent, enter the as of date for the individual's smoker status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

**Occupation**

Enter the dependent or beneficiary's occupation, if known.

## National ID

Use this group box to enter the dependent or beneficiary's national identification number. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add as many rows as required.

**Country**

Select the country that issued the dependent's national ID.

**National ID Type**

The system populates this field automatically with the default value that you established for this country on the National ID Type Table page. You can select another valid type.

**National ID**

Enter the dependent's national ID number. The system automatically checks the format of your entry against the default format that you entered on the National ID Type Table page.

**Primary ID**

Select if the national ID is the dependent's primary ID. If this is the only data row for this person, the system selects the check box by default. You can override this default.

## (MYS) Malaysia

**Full Time Student - Within Malaysia** Select if the dependent is a full time student in Malaysia.

**Full Time Student - Outside Malaysia** Select if the dependent is a full time student outside of Malaysia.

## (ARG) Argentina

**Education Level** Select the dependent's education level. Values are:

- *Two Years Old Kindergarten*
- *Three Years Old Kindergarten*
- *Four Years Old Kindergarten*
- *Five Years Old Kindergarten*
- *Elementary First Year*
- *Elementary Second Year*
- *Elementary Third Year*
- *Elementary Fourth Year*
- *Elementary Fifth Year*
- *Elementary Sixth Year*
- *Elementary Seventh Year*
- *Elementary Eighth Year*
- *Elementary Ninth Year*
- *Polimodal First Year*
- *Polimodal Second Year*
- *Polimodal Third Year*
- *High School First Year*
- *High School Second Year*
- *High School Third Year*
- *High School Fourth Year*
- *High School Fifth Year*
- *High School Sixth Year*
- *Special Education*

| | |
|---|---|
| **School Cert Start Year (school certificate start year)** | Select to indicate that the employee has presented the dependent's school certificate for the current year. |
| **Certificate Start Year** | Enter the year of the current year certificate. |
| **School Cert End Year (school certificate end year)** | Select to indicate that the employee has presented the dependent's school certificate for the previous year. |
| **Certificate End Year** | Enter the year of the previous year certificate. |
| **Eligible for Family Allowance** | Select to indicate that the dependent is eligible for family allowance. The dependent must be a child, disabled child, or spouse |
| **Family Allowance Term Date** | Enter the end date for the dependent to be eligible for family allowance. |
| **Income Tax Dependent** | Select the type of taxable dependents for income tax. Valid Values are *Child, Other Dependents,* and *Spouse.* |
| **Income Tax Begin Date** | Enter the begin date for the dependent to be eligible for income tax. |
| **Income Tax End Date** | Enter the end date for the dependent to be eligible for income tax. |
| **Social Security Condition** | Specify whether the dependent is part of the primary family group or is an adherent of the employee for Social Security benefits. |
| **Social Security Begin Date** | Enter the starting date of Social Security benefits for the dependent. |
| **Social Security End Date** | Enter the end date of social security benefits for the dependent. |

## (DEU) Germany

Use the Germany section to enter dependent information that is used for processing family allowances (both marriage-based and child-based).

| | |
|---|---|
| **Eligible for Family Allowance** | Select to indicate that the dependent (child) is entitled to the child-based family allowance. This option is available for edit if the dependent is listed as a child or grandchild of any kind of the employee. |
| **Number of Child** | Enter a number that represents the birth order of the child, *1* for the first child, *2* for the second, and so on. |
| **Additional Social Allowance** | Select to indicate that the dependent (child) is entitled to child-related *Orts- und Sozialzuschlag*.<br><br>This allowance is applicable to all employees (excluding civil servants and apprentices) meeting the entitlement conditions. |

**Additional Location Allowance**

Select to indicate that the dependent (child) is entitled to location-based allowance.

**Entitlement Type**

Select an applicable entitlement type for the child. Values are:

*No Entitlement*

*School Education*

*Search for Education*

*Trainee*

*Transition Period*

*Under 18 Years*

*Unemployed*

*Vocational School*

*Voluntary Ecological Year*

Children under the age of 18, and children between the age of 18 and 25 who are currently attending school or apprenticeship, are entitled to child allowance if the income they receive, if any, doesn't exceed the amount set by the legislation.

**Disabled Type and Handicap Percent**

Select an applicable disability type for the child and associated disability percentage.

Disabled children are eligible for continued child allowance regardless of the age limitation.

---

**Note:** This section is available for edit if you select the Disabled field in the Personal History section.

---

**Employer Information**

Enter the employer information for the spouse or child, if applicable.

## (CAN) Canada

**Eligible for CSB**

If you are entering dependent and beneficiary information for a Canadian employee, select this check box to indicate that the dependent or beneficiary is an eligible registrant for an employee who is purchasing Canadian Savings Bonds (CSBs). The PeopleSoft Payroll-CSB Registrant page verifies the selection of this check box.

## (BEL) Belgium

**Fiscally Dependent**

Select if the employee is fiscally responsible for the dependent.

| | |
|---|---|
| **Fiscal Situation Spouse** | Select the appropriate fiscal situation from the list. |
| **Fiscally Disabled** | Select if applicable. |
| **Profession Category Spouse** | Select the appropriate category from the list. |
| **Orphan** | Select if applicable. |
| **Eligible for Allowance** | Select to track whether the dependent is eligible for a (family) allowance. This field is used for data tracking, there is no validation associated to it |

## (FRA) France

Use this group box to store information that can be passed to your payroll system for payroll processing.

| | |
|---|---|
| **Family Supplement** | For numerous families, payroll calculates the family allowance amount that your organization gives to an employee based on their family dependents. This calculation is based on the number and type of employee dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the supplemental family allowance. |
| **Garnishment** | This option is for court orders that require that an employee's wages be garnished. When an employee is under a court order, payroll can calculate the percentage and amount of the employee's salary that has to be transferred to the relevant government agency in each pay period.<br><br>Depending on the number of dependents, this amount is reduced. The greater the number of dependents, the lower the percentage of frozen salary. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the frozen garnishment amount. |
| **AFB Allowance (French Banking Association allowance)** | The French Banking Association delivers a special allowance based on the number of dependents. Select to indicate that the corresponding dependent has to be considered in the calculation of this allowance. |
| **CHIC** | CHIC is a medical insurance company that employees can opt to use to supplement their medical insurance coverage. This insurance company delivers a special allowance based on the number of dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of this allowance. |
| **Schooling** | See Family Supplement. |
| **Holiday Premium** | See Family Supplement. |
| **Status 7 andStatus 8** | Configure these fields to capture additional payroll related status information. |

**Collective Agmt** Select if applicable.

**IJSS Calc.** ***(Indemnités Journalières de Sécurité Sociale)*** IJSS is the social security daily allowances. Select if the dependent should be taken into account in the calculation of the employee's entitlement for IJSS. The IJSS is calculated by PeopleSoft Global Payroll for France.

## (GBR) United Kingdom

**Eligible for Parental Leave** Select if the dependent qualifies the employee for parental leave. Select the Disabled check box on the top page if it also applies here.

**Adopted Dependent** Select if the employee adopted the dependent.

**Adoption Date** If adopted, enter the adoption date.

**Certificate(s) Verified** Select to indicate that appropriate certificates have been provided to verify this dependent information.

## (BRA) Brazil

**Education Level** Select the education level of the dependent.

**Disabled** Select to indicate that the dependent is disabled and the employee can receive the family allowance and income tax benefits for the dependent for additional years.

**Vaccination Certificate** Select if you have received the dependent's vaccination certificate. This information is used for reporting purposes.

**Student** Select to indicate that the dependent is a student. Employees receive income tax benefits for all students up to 21 years old. If the dependent is a student and is less than six years old, the employee should provide a vaccination certificate to the company to receive the income tax benefit.

**University or Technical Level** Select to indicate that the dependent is a student at the university or technical level and the employee can receive the income tax benefit for the dependent for additional years (for students up to 24 years old).

**Termination Cd (termination code)** Enter the reason code for the family allowance termination. Values are:

*Child Abandonment:* Abandonment of child.

*Dependent exceeds ceiling:* Dependent's age exceeds maximum age.

*Court Decision:* Court decision (in case of divorce or separation).

*Dependent's Death:* Dependent's death.

*End Disability:* Disability ended.

*Child Custody:* Custody has been awarded to the other parent.

*Termination:* Termination.

**Termination Dt (termination date)** Enter the family allowance termination date.

Enter information from the dependent's birth certificate in the Birth Data group box. This information is used for reporting purposes.

In the RG - Additional Data group box, be sure to enter for this individual the Registro Geral (RG) issuing agency as well as the issued date and issued state, if a national ID is specified in the National ID group box with a national ID type of *RG* for the country of Brazil.

Enter the type of vaccination, the dose, and the date received for each vaccination on the dependent's vaccination certificate in the Vaccination Data group box. This information is used for reporting purposes.

### (USA) US Federal Government

**FEHB Participant** Enter a value to indicate that the dependent has Federal Employee's Health Benefits (FEHB).

**Dependent's Fed Plan Type** If the dependent is a FEHB Participant, enter the federal plan type. Valid Values are:

- *CHA*: Campus.
- *FEH*: FEHB.
- *MCA*: Medicare Plan A.
- *MCB*: Medicare Plan B.
- *OTH*: Other Federal Health Plans.

**Medicare Number** If the dependent is on Medicare, enter their Medicare number.

**Medicare A Indicator, Medicare B Indicator, and Medicare D Indicator** Select if the indicator if the dependent is in a Medicare A, Medicare B, or Medicare D program.

**Medicare Reason A, Medicare Reason B, and Medicare Reason D** If the dependent is a Medicare recipient, enter the reason they have Medicare A, Medicare B, or Medicare D.

### Related Links

*PeopleSoft HCM 9.2: Human Resources Manage Base Benefits*

## Dependent/Beneficiary Riders Page

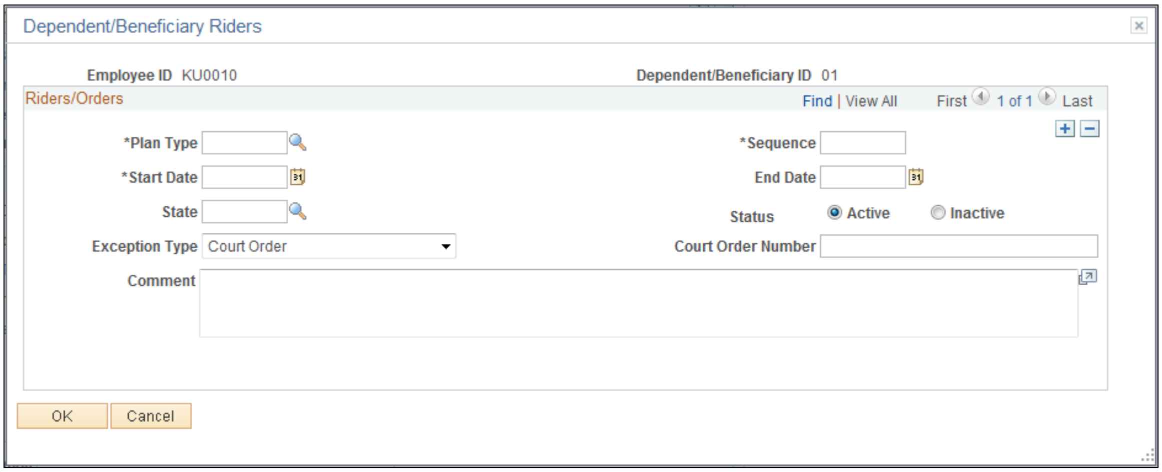
Use the Dependent/Beneficiary Riders page (DEPBEN_RIDERS) to enter detailed information about the court-ordered benefit for the specified dependent or beneficiary.

### Navigation

Click the Riders/Orders link on the Dependent Information - Personal Profile page.

### Image: Dependent/Beneficiary Riders page

This example illustrates the fields and controls on the Dependent/Beneficiary Riders page. You can find definitions for the fields and controls later on this page.




The Dependent/Beneficiary Riders page enables you to enter any court-ordered benefits or spousal waivers. This page enables the system to validate any changes or omissions in benefit enrollments with a recorded rider. When an employee enrolls in a benefit plan and there is a court-ordered mandate specifying that a benefit be provided, the system does not complete the enrollment.

| | |
|---|---|
| **Plan Type** | Enter the type of plan to which the court order relates. |
| **Start Date** | Enter the date on which the court order becomes effective. |
| **Sequence** | Prioritizes court orders when you have more than one that takes effect on the same day. Enter a number that indicates which court orders take precedence over others. If there is only one court order, enter a sequence of *1.* |
| **Status** | Select whether the court order is *Active* or *Inactive.* This field is typically used to void a court order before the end date takes effect. If the status is *Inactive,* the system won't enforce any validations against this court order. |
| **Exception Type** | Select whether this is a court order (a legal document that grants a dependent the right to receive benefit coverage), spousal waiver (document that formally waives a spouse's claim to a minimum beneficiary allocation of funds from a life insurance policy or savings plan), or neither. |
| **End Date** | Enter the date on which the court order ends. When the court order expires, the system won't enforce any validations against this court order. |
| **Court Order Number** | Enter the official number that is issued by the state for this court order. |

## (NLD) Dependent/Beneficiary Summary Page

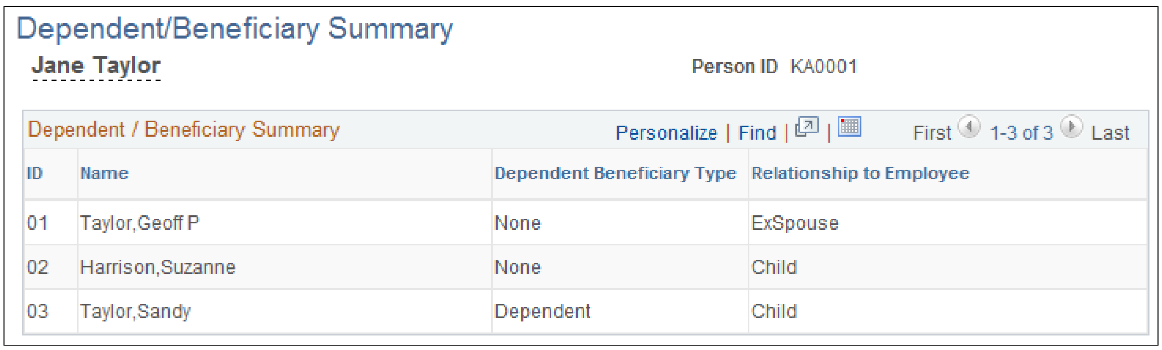
Use the Dependent/Beneficiary Summary page (DEPEND_BENEF_SUMM) to view an employee's beneficiaries and dependents.

**Navigation**

- Workforce Administration, Benefit Information NLD, Review Benefits, Dependent/Beneficiary Summary, Dependent/Beneficiary Summary
- Benefits, Employee/Dependent Information, Review Dep/Ben Summary, Dependent/Beneficiary Summary

**Image: Dependent/Beneficiary Summary page**

This example illustrates the fields and controls on the Dependent/Beneficiary Summary page. You can find definitions for the fields and controls later on this page.


Dependent/Beneficiary Summary

Jane Taylor Person ID KA0001

Dependent / Beneficiary Summary Personalize | Find | | First 1-3 of 3 Last

| ID | Name | Dependent Beneficiary Type | Relationship to Employee |
|---|---|---|---|
| 01 | Taylor,Geoff P | None | ExSpouse |
| 02 | Harrison,Suzanne | None | Child |
| 03 | Taylor,Sandy | Dependent | Child |

### Dependent/Beneficiary Summary

This group box displays a summary of all dependent and beneficiary data for an employee.

| | |
|---|---|
| **ID** | This column displays the ID of the dependent or beneficiary. |
| **Name** | This column displays the name of the dependent or beneficiary. |
| **Dependent Beneficiary Type** | Indicates whether the person is a dependent or beneficiary. |
| **Relationship to Employee** | Describes the relationship of the dependents and beneficiaries to the employee. |

---

**Note:** Over time, changes occur and you need to terminate dependent enrollments or beneficiary statuses. Remember, you enroll dependents and assign beneficiaries when you enroll employees. As with employees, to terminate a dependent enrollment or beneficiary status, you must enter a row of data with the termination date. Don't make such a change using the Dependent/Beneficiary Data page. Make the change using the benefit detail page for the benefit in question.

---

***Warning!*** If you delete dependent or beneficiary data by using the Dependent/Beneficiary Data pages, you destroy historical data. When you change enrollment data, it won't matter that the dependent or beneficiary data is available here. It must remain if your system is to provide correct historical information.

---

## Depdnt Identification Details - Depdnt Citizenship/Passport pPage

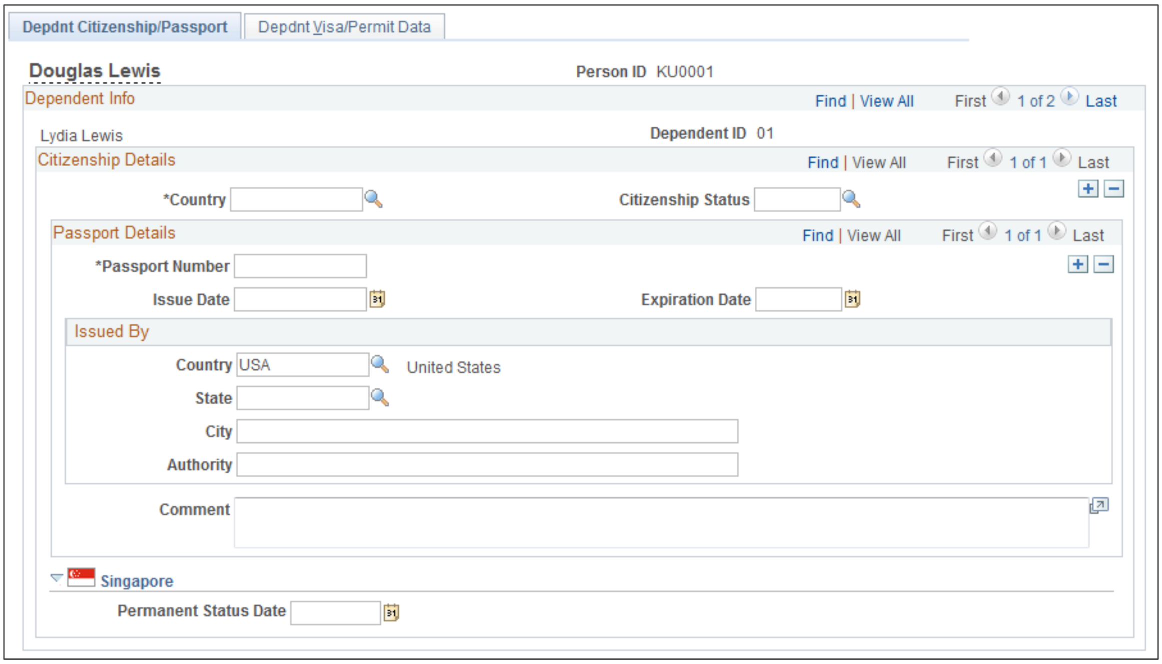
Use the Depdnt Identification Details - Depdnt Citizenship/Passport page (CITIZEN_PP_DEP) to enter or update dependent citizenship and passport data.

**Navigation**

Workforce Administration, Personal Information, Personal Relationships, Depdnt Identification Details, Depdnt Citizenship/Passport

**Image: Depdnt Identification Details - Depdnt Citizenship/Passport page**

This example illustrates the fields and controls on the Depdnt Identification Details - Depdnt Citizenship/Passport page. You can find definitions for the fields and controls later on this page.




Enter information on this page in the same manner that you enter data on the Citizenship/Passport page.

See Citizenship/Passport Page.

---

**Note:** (DEU) If you administer a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you track a German employee's OECD work permit information on the Identification, Visa/Permit table in the Track Global Assignments menu, select *DEU* as the country code from among your valid OECD permit types.

---

## Depdnt Visa/Permit Data Page

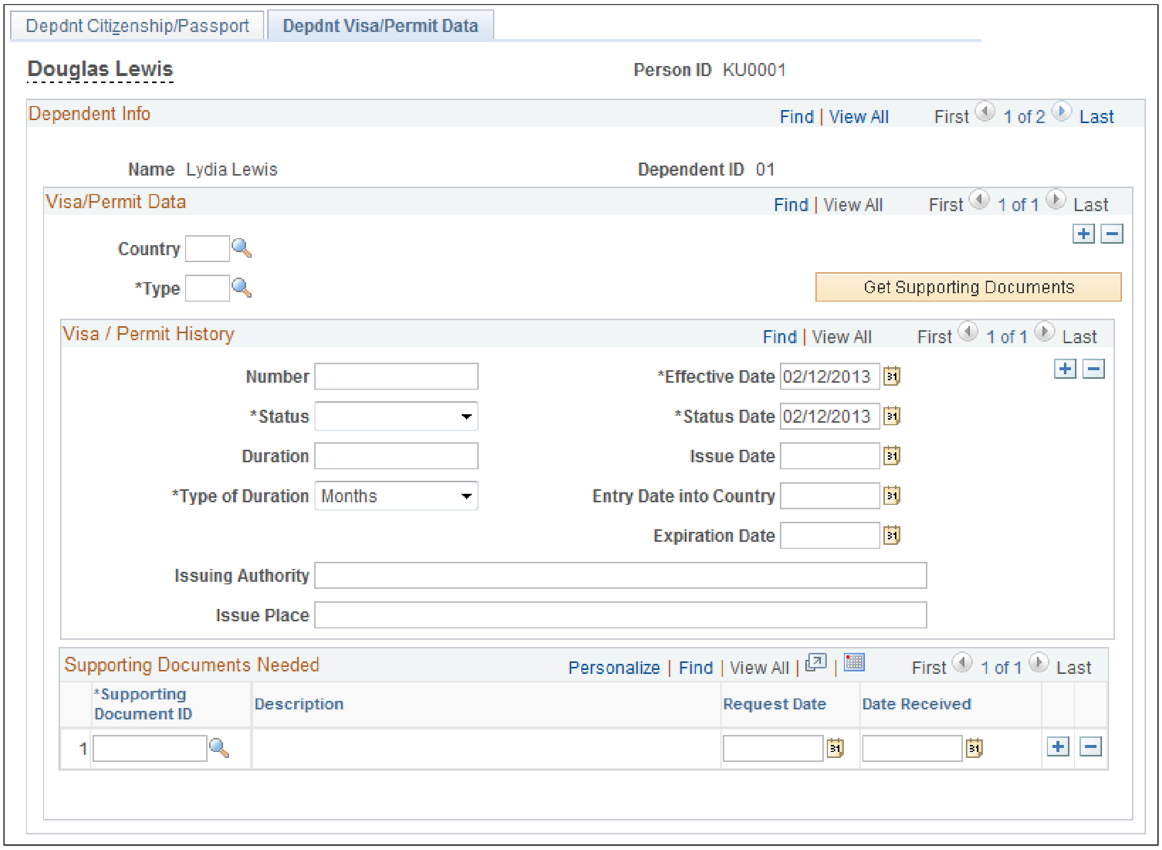
Use the Depdnt Identification Details - Depdnt Visa/Permit Data page (VISA_PERMIT_DEP) to enter or update dependent visa and permit data.

**Navigation**

Workforce Administration, Personal Information, Depdnt Identification Details, Depdnt Visa/Permit Data

**Image: Depdnt Visa/Permit Data page**

This example illustrates the fields and controls on the Depdnt Visa/Permit Data page. You can find definitions for the fields and controls later on this page.




Enter information on this page in the same manner that you enter data on the Visa/Permit Data page.

See Visa/Permit Data Page.

# Tracking Emergency Contacts

This topic discusses how to enter primary address and phone information for emergency contacts.

## Pages Used to Track Emergency Contacts

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Contact Address/Phone | EMERGENCY_CONTACT | Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Contact Address/Phone | Enter names, addresses, and primary phone information for people to contact in the event of a worker emergency. |
| Other Phone Numbers | EMERGENCY_CONTACT2 | Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Other Phone Numbers | Record additional phone numbers at which the emergency contact can be reached, such as a work or cellular phone number. |
| Emergency Contacts | PRCSRUNCNTL | Workforce Administration, Personal Information, Personal Relationships, Emergency Contacts Report | Generate the Emergency Contacts report (PER004). This report lists all contacts on the Emergency Contact table. Run the Refresh Employees Table process before running this report. |

## Emergency Contact - Contact Address/Phone Page

Use the Contact Address/Phone page (EMERGENCY_CONTACT) to enter names, addresses, and primary phone information for people to contact in the event of a worker emergency.

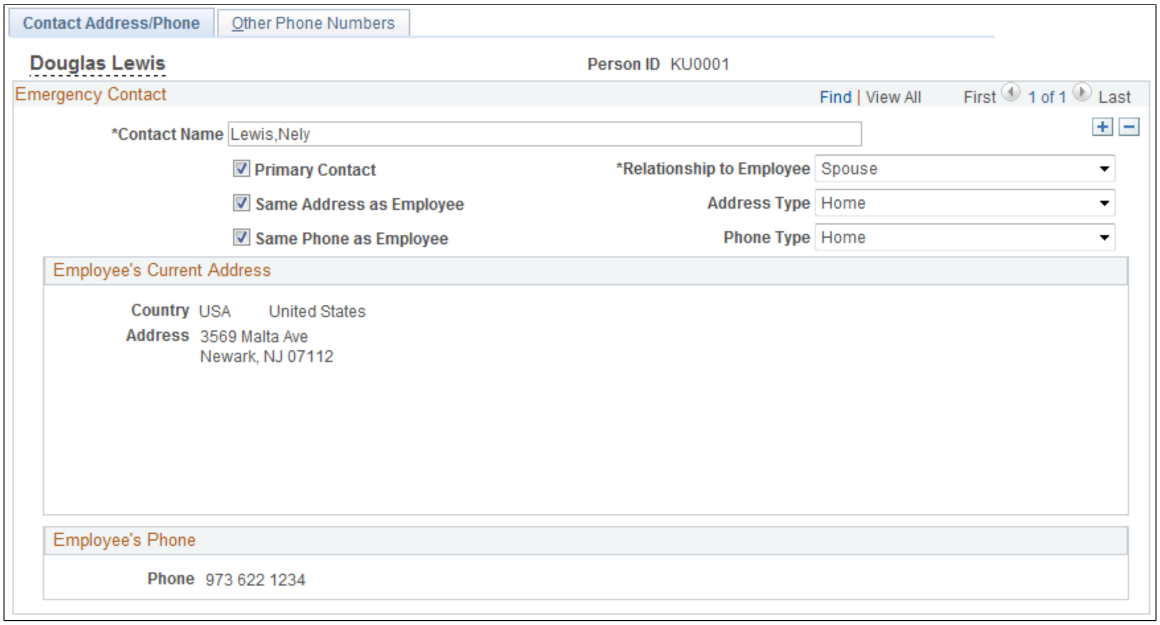
 

### Navigation

Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Contact Address/Phone

### Image: Contact Address/Phone page

This example illustrates the fields and controls on the Contact Address/Phone page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Contact Name** | Enter the name of the emergency contact person. |
| **Relationship to Employee** | Select the option that indicates the contact's relationship to the worker. |
| **Primary Contact** | Select if this is the *first* person whom you should try to contact in an emergency. Select for only one contact. |
| **Same Address as Employee and Address Type** | Select if the contact has the same address information as the worker, and then select the worker address type that is the same as this contact's. If selected, you don't need to complete any of the address fields. |
| **Same Phone as Employee and Phone Type** | Select if the contact has the same phone information as the worker, and then select the worker phone type that is the same as the contact's. If selected, you don't need to complete any of the phone fields. An emergency contact can have the same address as the worker but a different phone number. |
| **Change Country** | Click to enter or edit the contact's country. |
| **Edit Address** | Click to enter or edit the contact's address. |
| **Contact Phone** | Enter the contact's phone information. |

# Managing Citizenship and Visa or Permit Information

These topics provide a list of common elements and discuss how to:

- Track employee passport and citizenship information.
- Enter an employee's visa and permit information.

## Common Elements Used to Manage Citizenship and Visa or Permit Information

| | |
|---|---|
| **Expiration Date** | Enter the expiration date of the visa or permit. |
| **Issue Date** | Enter the date on which the visa or permit was issued. |
| **Issue Place** | Enter the location where the visa or permit was issued. |

## Pages Used to Manage Citizenship and Visa or Permit Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Citizenship/Passport | CITIZEN_PASSPORT | Workforce Administration, Personal Information, Citizenship, Identification Data, Citizenship/Passport | Track passport and citizenship information for employees. Enter multiple countries of citizenship and multiple passports for employees and their dependents. |
| Visa/Permit Data | VISA_PERMIT_DATA | Workforce Administration, Personal Information, Citizenship, Identification Data, Visa/Permit Data | Enter an employees visa or permit information. |
| Passport/Visa Expiration Audit | PRCSRUNCNTL | Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit | Generate the Passport/Visa Expiration report (PER032). This report lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Citizenship/Country/Visa Audit | PRCSRUNCNTL | Workforce Administration, Personal Information, Citizenship, Citizenship/ Country/Visa Audit | Generate the Citizenship/ Country/Visa Audit report ( PER033). This report lists discrepancies between employee citizenship country status and visa data. The report displays various discrepancies found for the employee citizenship status in the Personal Data table. |

## Citizenship/Passport Page

Use the Citizenship/Passport page (CITIZEN_PASSPORT) to track passport and citizenship information for employees.

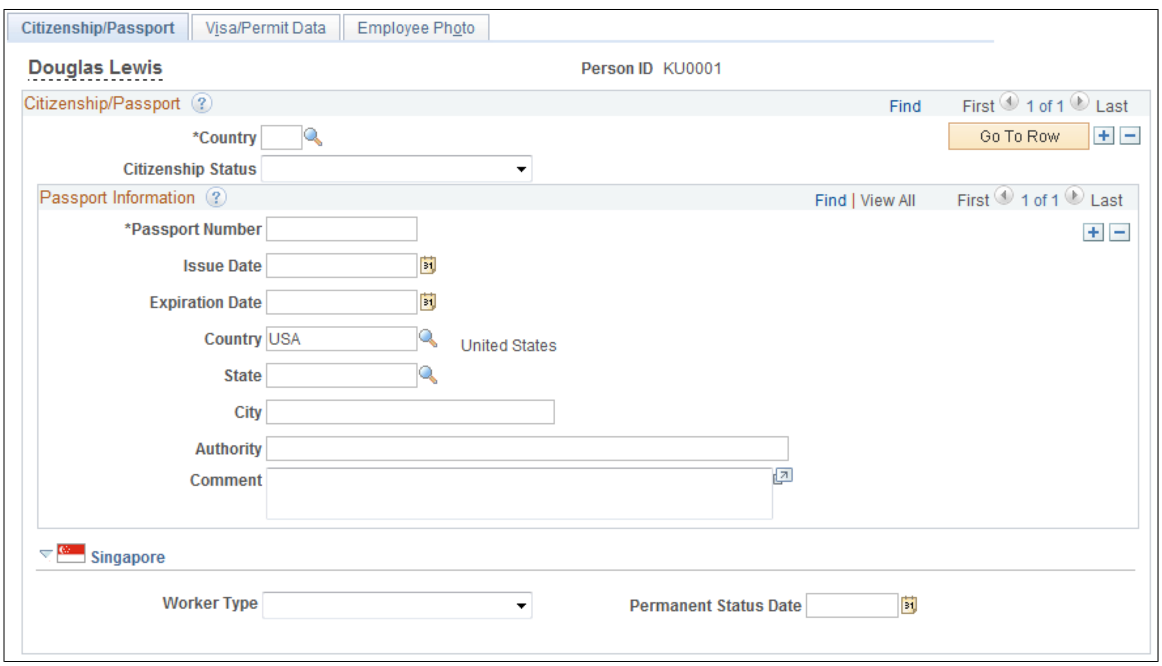
Enter multiple countries of citizenship and multiple passports for employees and their dependents.

**Navigation**

Workforce Administration, Personal Information, Citizenship, Identification Data, Citizenship/Passport

**Image: Citizenship/Passport page**

This example illustrates the fields and controls on the Citizenship/Passport page. You can find definitions for the fields and controls later on this page.




**Country** Enter the employee's country of citizenship.

**Citizenship Status** Indicate the employee's citizenship status. An employee's birth country and country of citizenship can be different. To track *birth* country information, use the Identity/Diversity page.

**Note:** (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV directive. This information is used in DEUEV processing and DEUEV reporting for German organizations or companies doing business in Germany. DEUEV processes and reporting are available only if you are using a German compliant payroll system.

### Passport Information

| | |
|---|---|
| **Passport Number** | Enter the passport number. |
| **Country** | Enter the originating country for this passport. |
| **Authority** | Enter the issuing authority, such as the U.S. Passport Agency. |

### (SGP) Singapore

| | |
|---|---|
| **Worker Type** | Select the type of worker for the employee. |
| **Permanent Status Date** | Enter the date the employee became a permanent worker for your organization. |

### Related Links

*PeopleSoft HCM 9.2: Global Payroll for Germany*

*PeopleSoft HCM 9.2: Human Resources Track Global Assignments*

## Visa/Permit Data Page

Use the Visa/Permit Data page (VISA_PERMIT_DATA) to enter an employees visa or permit information.

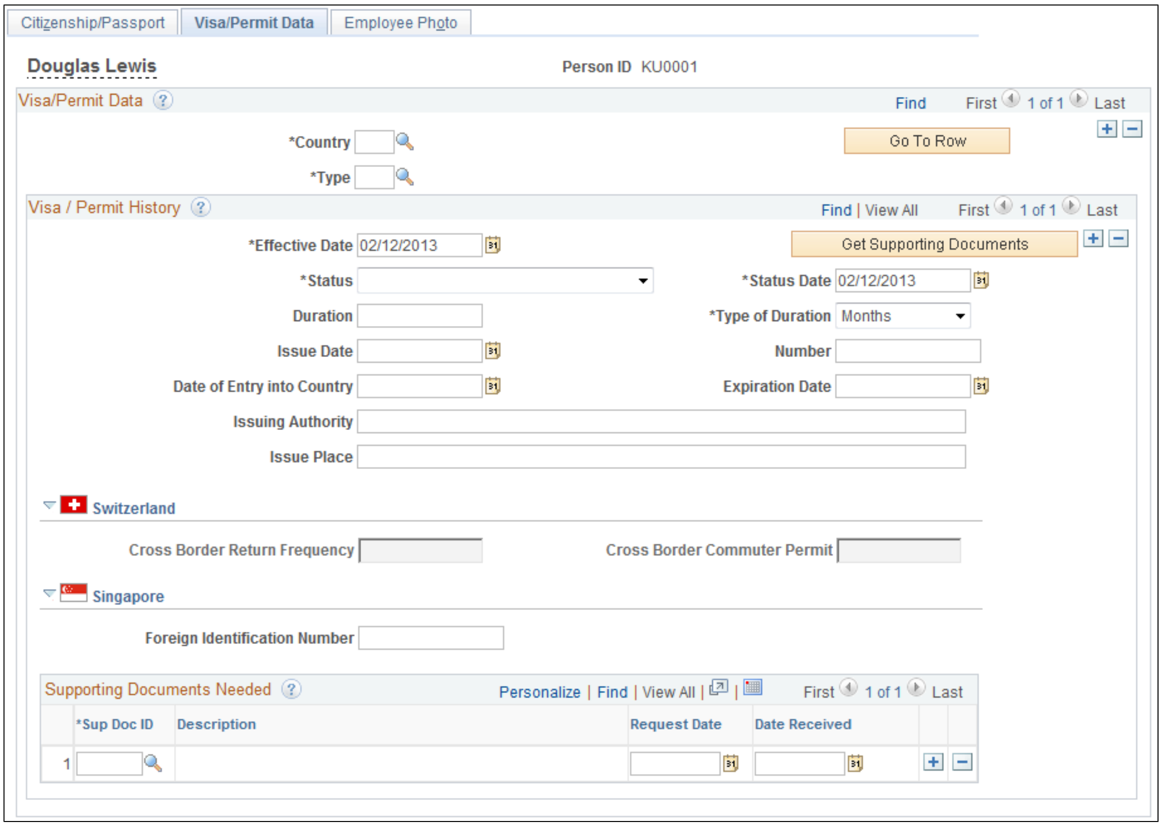
 

### Navigation

Workforce Administration, Personal Information, Citizenship, Identification Data, Visa/Permit Data

### Image: Visa/Permit Data page

This example illustrates the fields and controls on the Visa/Permit Data page. You can find definitions for the fields and controls later on this page.




**Type** — Select a type of visa or permit. The system prompts you with only types that are associated with the selected country.

**Get Supporting Documents** — Click to have the system enter a list of the appropriate supporting documents that are needed to obtain the visa or permit type that you entered.

**Number** — Enter the visa or permit number.

**Status** — Select the visa or permit status: *Applied, Granted, Renewal in Progress, Cancelled* (for people in Indonesia and Singapore only), and *Renewed.*

**Status Date** — Enter the date on which the status of the visa or permit changed.

**Duration** — Enter the number of days, months, or years that the employee stayed in the country. Select the unit of duration *(Days, Months,* or *Years)* in the adjacent field.

**Date of Entry into Country** — Enter the date on which the employee entered the country.

**Issuing Authority**

Enter the agency that issued the visa or permit, such as the U.S. Department of State or the French Consulate.

### (CHE) Switzerland

**Cross Border Return Frequency**

Enter the frequency this employee travels to their home outside of Switzerland:

*D*: daily.

*W*: weekly.

This is a required field when the type of permit is:

*G*: Cross Border Commuter.

*PG*: Border Crossing Permit.

**Cross Border Commuter Permit**

Enter the permit number for the Cross Border Commuter Permit.

---

**Note:** (DEU) If you're administering a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you're tracking a German employee's OECD work permit information on the Identification - Visa/Permit Table page in the Administer Workforce menus, select *DEU* as the country code to select from among your valid OECD permit types.

---

### Supporting Documents Needed

**Sup Doc ID (supporting document ID)**

If additional documents are required for this employee to obtain the visa or permit type, select a supporting document ID.

**Request Date**

Enter the date on which the documents were requested.

**Date Received**

Enter the date on which the documents were received.

### Related Links

Nation Duvo Page

## Managing Driver's License Information

This topic discusses how to enter license numbers and other driving record information.

## Page Used to Manage Driver's License Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Driver's License Data | DRIVERS_LIC_GBL | Workforce Administration, Personal Information, Biographical, Driver's License Data, Driver's License Data | Enter license numbers or other data from a worker's driving record. |

## Driver's License Data Page

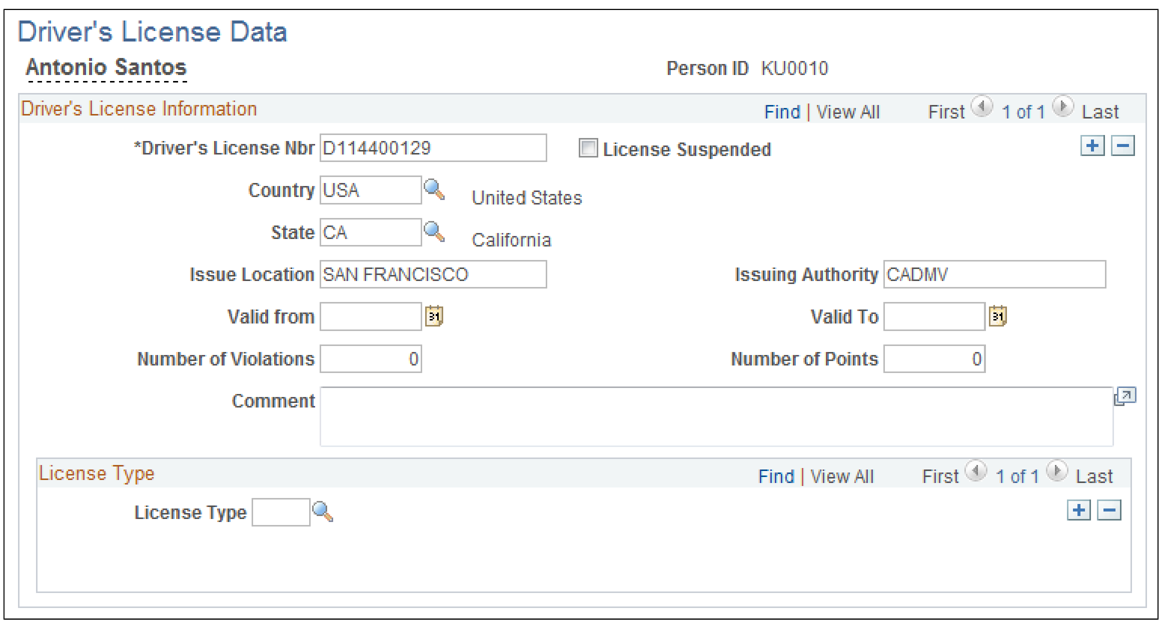
Use the Driver's License Data page (DRIVERS_LIC_GBL) to enter license numbers or other data from a worker's driving record.

**Navigation**

Workforce Administration, Personal Information, Biographical, Driver's License Data, Driver's License Data

**Image: Driver's License Data page**

This example illustrates the fields and controls on the Driver's License Data page. You can find definitions for the fields and controls later on this page.




**Driver's License Nbr (Driver's License Number)** — Enter the license number.

**License Suspended** — Select if the worker's driver's license is currently suspended.

**Issue Location** — Enter the location where the license was issued.

**Issuing Authority** — Enter the agency that issued the driver's license, such as the Department of Motor Vehicles.

**Valid from and Valid To** Enter the dates on which the driver's license remains valid. The *to* date must be in the future.

**Number of Violations** Enter the number of traffic violations cited on the worker's driving record.

**Number of Points** Enter the number of points accumulated on the worker's driving record.

**License Type** Enter the type of license held by the worker.

If you need to enter more than one driver's license for a worker, add a new data row.

# Entering Bank Account Information

These topics discuss how to:

- Record a person's bank account information.
- (GBR) Enter a worker's building society roll number and name.
- (MEX) Specify the inter-bank payment code.

## Pages Used to Enter Bank Account Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Maintain Bank Accounts | PYE_BANKACCT | • Workforce Administration, Personal Information, Biographical, Maintain Bank Accounts, Maintain Bank Accounts<br>• Global Payroll & Absence Mgmt, Payee Data, Net Pay / Recipient Elections, Maintain Bank Accounts, Maintain Bank Accounts | Enter bank account information for a payee. Use this information to track worker direct deposit information. |
| Building Society Details | PYE_BS_SP_UK | Click the Other Required Information link on the Maintain Bank Accounts page. | (GBR) For this page to appear, the country code must be *GBR* and the building society ID must have a value.<br>Enter a person's building society roll number and name. |
| Inter-bank Payment Scheme | GPMX_PYE_BANKACCT | Click the Other Required Information link on the Maintain Bank Accounts page. | (MEX) Enter the *Clave Bancaria Estandarizada* ( CLABE) number associated with the payee's bank account. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Bank Prenote Information USA | GPUS_PRENOTE | Click the Prenote Information link on the Maintain Bank Accounts page.<br><br>This link is available only if you select the Prenote Process Allowed check box on the Installation Settings USA page. | Indicate whether prenotification files ( used in Federal Schedule Reconciliation) need to be generated. |
| Specify Net Pay Elections | GP_NET_DIST | Click the Specify Net Pay Elections link on the Maintain Bank Accounts page. | Define how a person's net pay is distributed between the their bank accounts. |

# Maintain Bank Accounts Page

Use the Maintain Bank Accounts page (PYE_BANKACCT) to enter bank account information for a payee.

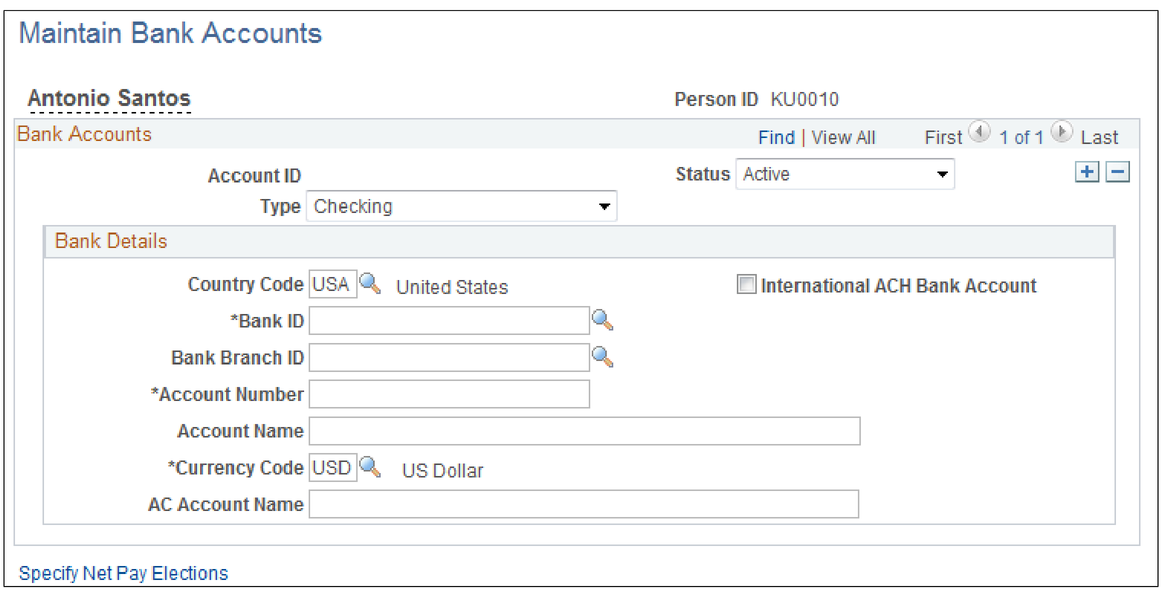
Use this information to track worker direct deposit information.

**Navigation**

- Workforce Administration, Personal Information, Biographical, Maintain Bank Accounts, Maintain Bank Accounts
- Global Payroll & Absence Mgmt, Payee Data, Net Pay / Recipient Elections, Maintain Bank Accounts, Maintain Bank Accounts

**Image: Maintain Bank Accounts page**

This example illustrates the fields and controls on the Maintain Bank Accounts page. You can find definitions for the fields and controls later on this page.



**Note:** Before you can enter a person's bank details, first set up the bank branch or building society on the Bank/Branch Table page.

**Account ID**

The system creates an account ID when you enter a new bank or building society account for a person. This field is for information only.

**Type**

Select the type of account that you are tracking. Options are *Building Society Roll Number, Checking, Current Account, Giro Account, Regular,* and *Savings.*

**International ACH Bank Account (international automatic clearing house bank)**

Select to indicate that the bank is located outside the territorial jurisdiction of the United States.

**Note:** This field appears only if you have PeopleSoft Payroll for North America or PeopleSoft Global Payroll for United States installed.

**Already have an IBAN Number**

Select to indicate that the payee has an IBAN. When you select this check box, the Bank ID, Bank Branch ID, and Account Number fields become display-only and the IBAN field and Validate button become available.

If you deselect this check box for a payee who already has an IBAN entered and validated in the IBAN field, the system alerts you that this action will result in clearing the IBAN and bank account detail fields. You can click OK to continue, or Cancel to leave the check box selected.

**Note:** This check box appears on this page only when the IBAN Enabled check box is selected and the IBAN Required check box is deselected on the IBAN Country Setup page.

**IBAN (International Bank Account Number)**

Enter the IBAN for the payee. This field is editable only if you select the Already have an IBAN Number check box or if the IBAN Required check box is selected on the IBAN Country Setup page.

**Validate**

Click to validate the number entered in the IBAN field. The validation process alerts you if there is an error in the entered IBAN. In addition, the validation process populates the Bank ID, Bank Branch ID, and Account Number fields based on the entered IBAN.

This button is available only if you select the Already have an IBAN Number check box or if the IBAN Required check box is selected on the IBAN Country Setup page.

**Bank ID, Bank Branch ID, Account Number and Check Digit**

When the Already have an IBAN Number check box is selected or if the IBAN Required check box is selected on the IBAN Country Setup page, these fields are not editable. The system populates them based on the entered IBAN when you click the Validate button.

---

**Note:** For German accounts with an IBAN, the Bank Branch ID field remains editable.

---

For accounts without an IBAN, manually enter values in the Bank ID, Bank Branch ID, and Account Number fields. The Check Digit field does not appear for these accounts.

**Building Society ID**

(GBR) If you entered *GBR* in the Country Code field, this field replaces the Bank Branch ID field. See details below.

See Maintain Bank Accounts Page.

**Account Name**

Enter the account name for the person.

**Prenote Information**

(USA) Click this link to access the Bank Prenote Information USA page.

**Currency Code**

Select the code of the currency in which the account is maintained. The code you enter in this field is for informational purposes only and is not used by the banking process.

**Prenote Information**

(USA) Click this link to access the Bank Prenote Information USA page.

This link is available only if you select the Prenote Process Allowed check box on the Installation Settings USA page.

**Other Required Information**

(MEX) Click this link to access the Inter-bank Payment Scheme page, where you can enter the Clave Bancaria Estandarizada ( CLABE) number. This link is available only for Mexican banks.

See (MEX) Inter-bank Payment Scheme Page.

(GBR) Click this link to access the Building Society Details page and enter roll information. This link is available only when *GBR* is the country code and a value is entered in the.Building Society ID field.

See (GBR) Building Society Details Page.

**AC Account Name (alternate character account name)**

Enter the alternate character account name, if applicable. Appears if you enabled alternate character (AC) functionality in the Org Defaults by Permission Lst component.

**Specify Net Pay Elections**

Click this link to access the Specify Net Pay Elections page where you can view and update net pay details for the person.

## (GBR) Entering Banking Information for UK Workers

UK customers also use this page to record workers' building society account information. When you enter *GBR* in the Country field, the Bank Branch ID field becomes the Building Society ID field.

UK customers who enter details of UK bank and building society accounts should enter the following information in the fields on the Maintain Bank Accounts page:

| ***Field*** | ***UK Bank and Building Society Information*** |
| --- | --- |
| Type | Select an account type:<br><br>*Current Account:* Select for a bank account.<br><br>*Building Society Roll Number:* Select for a building society account.<br><br>*Savings:* Not applicable to the UK.<br><br>*Checking:* Not applicable to the UK. |
| Country Code | Enter *GBR*. |
| Bank ID | If the worker has a bank account, select the bank branch from the list of branches set up in the Bank table.<br><br>If the worker has a building society account, leave this field blank. |
| Building Society ID | If the worker has a building society account, select the building society from the list of societies set up in the Branch table. When you select a building society, the system automatically completes the Bank ID field with the bank that handles clearing for the selected building society.<br><br>If the worker has a bank account, leave this field blank. |
| Account Number | Enter the worker's bank account number.<br><br>If you selected a building society in the Building Society ID field, the system automatically completes the Account Number field with the building society's account at the clearing bank and makes the field display-only.<br><br>**Note:** To enter the worker's building society account details, click Other Required Information. |
| Account Name | Enter the account name.<br><br>If you selected a building society in the Building Society ID field, the system makes this field display-only.<br><br>Click Other Required Information to display the Building Society Details page where you enter the account name. |
| Currency Code | The system provides a default value of *GBP* (Pound Sterling). Override this default if necessary. |

| ***Field*** | ***UK Bank and Building Society Information*** |
|---|---|
| Other Required Information | Click to display the Building Society Details page, where you enter the worker's building society account details.<br><br>The system does not display this link if you select a normal bank branch in the Bank ID field. |

**Note:** For more information about the account number formats for a country, see the corresponding PeopleSoft Global Payroll local country documentation.

### Related Links

"Understanding Bank and Bank Branch Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Managing the Prenotification Process *(PeopleSoft HCM 9.2: Global Payroll for United States)*"
"Understanding Banking *(PeopleSoft HCM 9.2: Global Payroll)*"

## (GBR) Building Society Details Page

Use the Building Society Details page (PYE_BS_SP_UK) to (GBR) For this page to appear, the country code must be GBR and the building society ID must have a value.

Enter a person's building society roll number and name.

**Navigation**

Click the Other Required Information link on the Maintain Bank Accounts page.

**Image: Building Society Details page**

This example illustrates the fields and controls on the Building Society Details page. You can find definitions for the fields and controls later on this page.


When you select a building society ID, the Other Required Information link appears on the page.

| | |
|---|---|
| **Roll Name** | Enter the roll name of the worker's building society account. |
| **Roll Number** | Enter the worker's building society account number. |

## (MEX) Inter-bank Payment Scheme Page

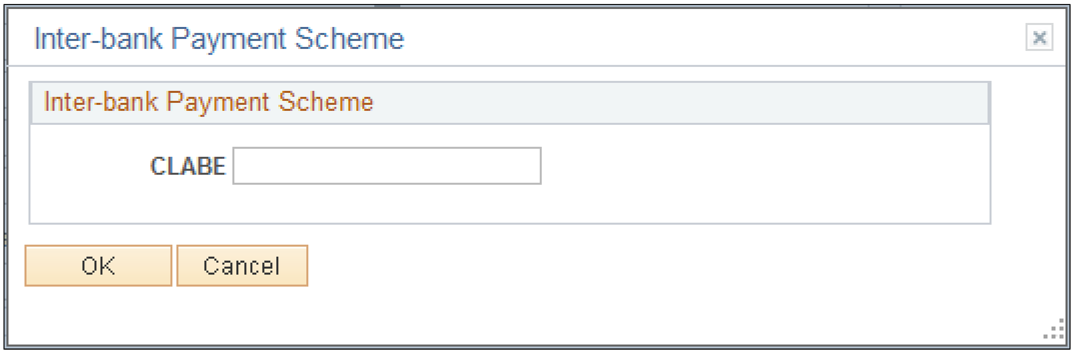
Use the Inter-bank Payment Scheme page (GPMX_PYE_BANKACCT) to (MEX) Enter the *Clave Bancaria Estandarizada* (CLABE) number associated with the payee's bank account.

**Navigation**

Click the Other Required Information link on the Maintain Bank Accounts page.

**Image: Inter-bank Payment Scheme page**

This example illustrates the fields and controls on the Inter-bank Payment Scheme page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **CLABE** | Enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account. The CLABE number is a numeric 18-digit standardized bank code for domestic Inter-bank fund transfers. |

# Tracking Volunteer Activity

This topic discusses how to enter information on worker volunteer activities.

## Page Used to Track Volunteer Activity

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Volunteer Activities | VOLUNTEER_ACTIVITY | Workforce Administration, Personal Information, Biographical, Volunteer Activities, Volunteer Activities | Enter information on worker volunteer activities. Track multiple volunteer organizations for workers and multiple start dates with the same organization. |

## Volunteer Activities Page

Use the Volunteer Activities page (VOLUNTEER_ACTIVITY) to enter information on worker volunteer activities.

Track multiple volunteer organizations for workers and multiple start dates with the same organization.

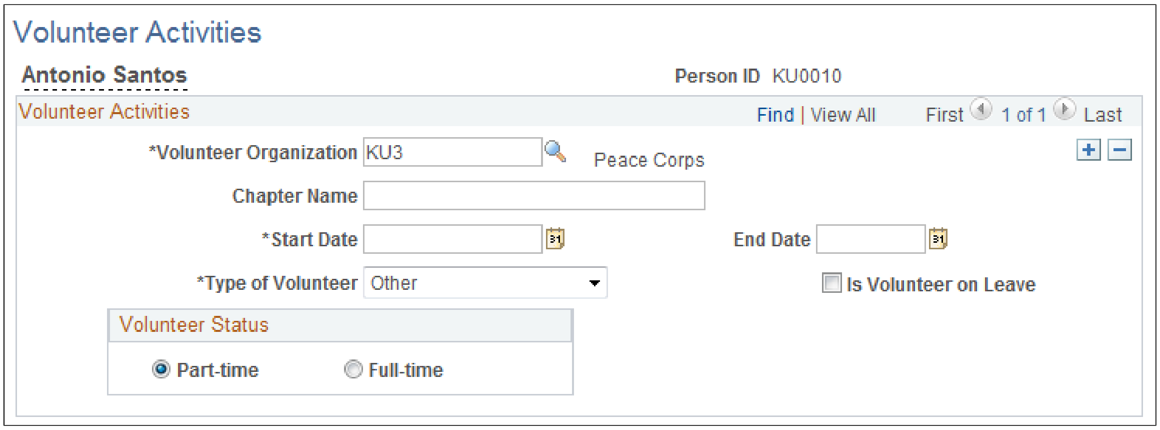
 

### Navigation

Workforce Administration, Personal Information, Biographical, Volunteer Activities, Volunteer Activities

### Image: Volunteer Activities page

This example illustrates the fields and controls on the Volunteer Activities page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Volunteer Organization** | Select a volunteer organization code. |
| **Chapter Name** | Enter the chapter name of the organizations in which the employee volunteers, if applicable. |
| **Start Date andEnd Date** | Enter the start and end date of the worker participation. |
| **Type of Volunteer** | Select the type of volunteer activity in which the worker is participating: *Administr,* *Canvasser,* *Executive,* *Fund Raise,* or *Other.* |
| **Is Volunteer on Leave** | Select if the volunteer is on leave.<br>**Note:** This check box is for informational purposes only. If you select this check box, you don't affect any Monitor Absences business process functionality. |
| **Volunteer Status** | Select either *Part Time* or *Full Time* to indicate the volunteer status. |

**Note:** This information is useful when you need to track workers' additional skills and knowledge, and when you measure the effectiveness of company-sponsored volunteer and charitable programs.

## Setting Up and Tracking Military Service Availability

To set up military service availability tracking, use the Deployment Reasons (MIL_DEPL_REASON) and Reassignment Reasons (MIL_REASSGN_RSN) components.

These topics discuss how to track military service availability.

## Pages Used to Enter and Track Military Service Availability

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Deployment Reasons | MIL_DEPL_REASON | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Deployment Reasons, Deployment Reasons | Enter reasons military members are either unavailable for deployment or are available in a limited capacity. |
| Reassignment Reasons | MIL_REASSGN_RSN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Reassignment Reasons, Reassignment Reasons | Enter reasons military members are either unavailable for reassignment or are available in a limited capacity. |
| General Availability MIL | MIL_AVAIL_DEFN | Workforce Administration, Personal Information, Biographical, General Availability MIL, General Availability MIL | Track military service availability for deployment and retirement. Use this page to also enter a compulsory retirement date, if applicable. |

## General Availability MIL Page

Use the General Availability MIL page (MIL_AVAIL_DEFN) to track military service availability for deployment and retirement.

Use this page to also enter a compulsory retirement date, if applicable.

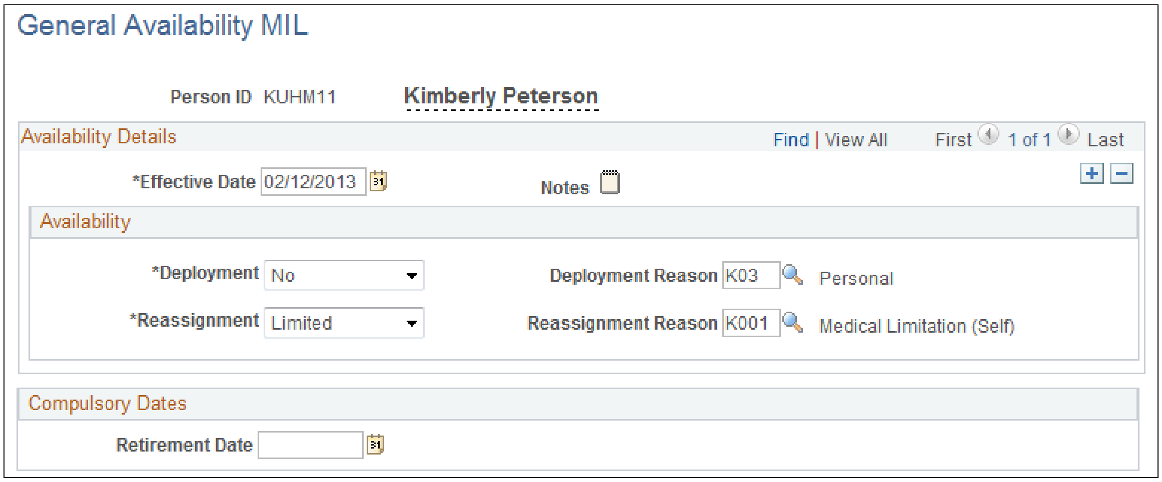
 

**Navigation**

Workforce Administration, Personal Information, Biographical, General Availability MIL, General Availability MIL

**Image: General Availability MIL page**

This example illustrates the fields and controls on the General Availability MIL page. You can find definitions for the fields and controls later on this page.




**Effective Date**

Enter the effective date of a member's deployment and reassignment availability to keep historical track of when the member's availability changes.

**Notes**

Click the Maintain/View Notes icon to enter additional notes about the person's availability. The system tracks the date you enter a comment. You can also search for comments by entering a date range and selecting them for review, deletion, or transferring the comment to another person.

**Deployment**

Identify whether this service member is ready for deployment. Valid values are defined on the Translate table as *Yes, No,* and *Limited.* When you select *No* or *Limited* to specify that the service member is not fully available for deployment, the Deployment Reason field displays.

**Deployment Reason**

Provide the reason the service member is not deployable. This field is available when you select *No* or *Limited* in the Deployment field. Valid values are defined in the Deployment Reasons table.

**Reassignment**

Identify whether this service member is available for reassignment. Valid values are defined on the Translate table as *Yes, No,* and *Limited.* When you select *No* or *Limited* to specify that the service member is not fully available for reassignment, the Reassignment Reason field displays.

**Reassignment Reason**

Select a reassignment reason to track military members who are either unavailable for reassignment or are available only in a limited capacity. This field is available when you select *No* or

| | |
|---|---|
| | *Limited* in the Reassignment field. Valid values are defined in the Reassignment Reasons table. |
| **Retirement Date** | Enter the compulsory retirement date, or absolute date, the member must retire from the military. |

# Tracking Military Discharge Dates

This topic discusses how to track military discharge dates.

## Page Used to Track Military Discharge Dates

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Maintain Military Dischrg Date (maintain military discharge date) | PERS_MILIT_USA | • Workforce Monitoring, Meet Regulatory Rqmts, Maintain Military Dischrg Date, Maintain Military Dischrg Date<br>• Workforce Administration, Personal Information, Biographical, Add a Person, Regional<br>Click the Edit Discharge Date link on the Regional page. | Enter an employee's military discharge date. |

## Maintain Military Dischrg Date Page

Use the Maintain Military Dischrg Date (maintain military discharge date) page (PERS_MILIT_USA) to enter an employee's military discharge date.

**Navigation**

- Workforce Monitoring, Meet Regulatory Rqmts, Maintain Military Dischrg Date, Maintain Military Dischrg Date
- Workforce Administration, Personal Information, Biographical, Add a Person, Regional

  Click the Edit Discharge Date link on the Regional page.

**Image: Maintain Military Dischrg Date page**

This example illustrates the fields and controls on the Maintain Military Dischrg Date page. You can find definitions for the fields and controls later on this page.


| | |
|---|---|
| **Military Discharge Date** | Enter the employee's military discharge date. This date is used by the VETS-100 report to determine which veterans qualify for the Newly Separated Veteran designation. |

# Entering and Tracking Additional Workforce Data

These topics discuss how to:

- Record badge numbers.
- Track a worker's business expenses.
- Track prior work experience.
- Enter worker images.

## Pages Used to Enter and Track Additional Workforce Data

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Badge | BADGE | Workforce Administration, Personal Information, Badge | Record badge numbers that you issue to a person, including employees, contingent workers, or persons of interest. |
| Business Expenses | BUSINESS_EXPENSES | Workforce Administration, Job Information, Business Expenses | Track a worker's business expenses, such as travel, meals, entertainment, and relocation costs. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Prior Work Experience | PRIOR_WORK_EXPER | • Workforce Administration, Personal Information, Biographical, Prior Work Experience<br>• Workforce Development, Career Planning, Manage Person Profiles, Prior Work Experience | Track prior work experience. Enter the details of a worker's previous employers and jobs. |
| Employee Photo | EMPLOYEE_PHOTO | Workforce Administration, Personal Information, Citizenship, Identification Data, Employee Photo | Enter a worker image into the system by copying and pasting images into image fields. |
| General Comments | GENL_COMMENTS | Workforce Administration, Personal Information, Biographical, General Comments | Enter a miscellaneous comment about a worker. |

## Badge Page

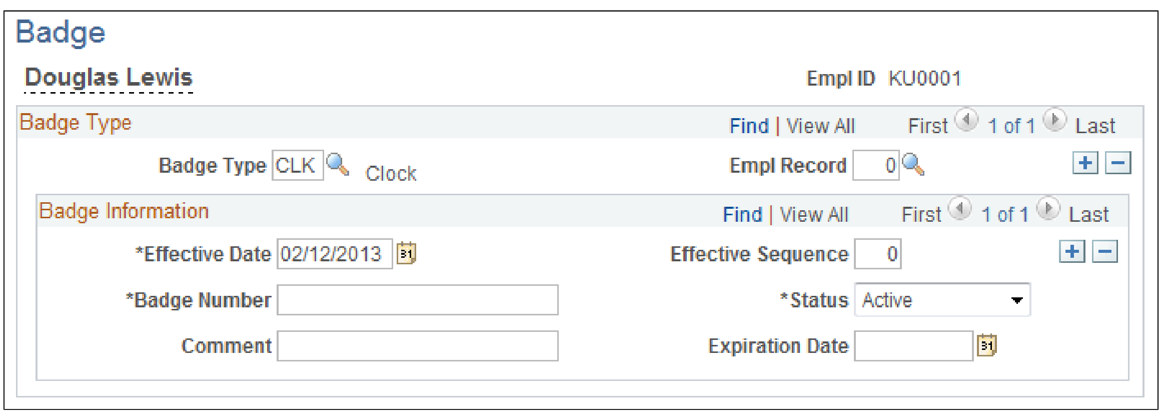
Use the Badge page (BADGE) to record badge numbers that you issue to a person, including employees, contingent workers, or persons of interest.

**Navigation**

Workforce Administration, Personal Information, Badge

**Image: Badge page**

This example illustrates the fields and controls on the Badge page. You can find definitions for the fields and controls later on this page.




You must have previously entered Badge Type data on the Translate table before using this page.

**Badge Type**

Select the type of badge number that you want to enter:

*BA* (Building Access).

*CCA* (Computer Center Access).

*CLK* (Clock).

*GB* (General Badge).

*PA* (Parking Access).

Add more values if you want or enter more than one badge type for a particular worker and employment record number.

**Badge Number**

Enter the badge number that corresponds to the badge type that you selected. The system ensures that the number that you enter isn't currently assigned to another worker. It also ensures that the number hasn't been assigned for future use by someone else.

For each badge type, only one badge number per worker and employment record number can be active at the same time. Badge numbers can be reused. If a combination of badge type and badge number was previously assigned to a worker, but is currently inactive and hasn't been assigned for future use, you can use it for a different worker and employment record number.

See Expiration Notification Page.

**Expiration Date**

Include the expiration date, if the badge expires.

## Business Expenses Page

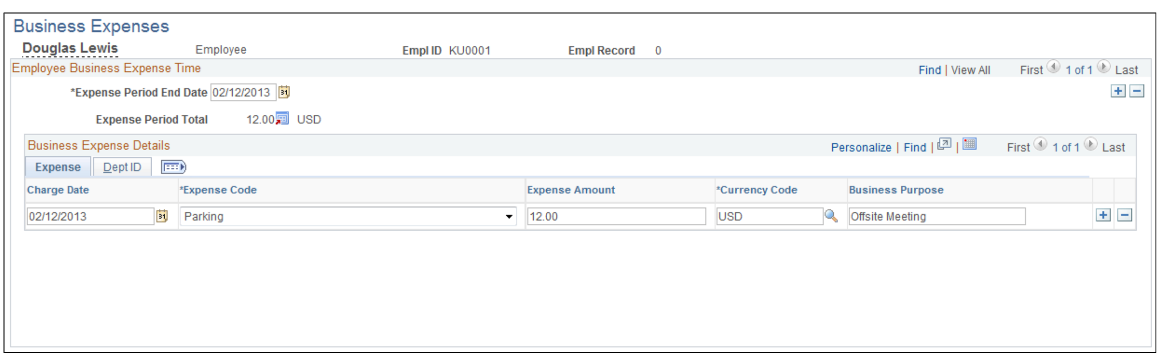
Use the Business Expenses page (BUSINESS_EXPENSES) to track a worker's business expenses, such as travel, meals, entertainment, and relocation costs.

### Navigation

Workforce Administration, Job Information, Business Expenses

### Image: Business Expenses page

This example illustrates the fields and controls on the Business Expenses page. You can find definitions for the fields and controls later on this page.




Before you can track a worker's business expenses, you must set up:

- Valid expense codes on the Translate table.
- User IDs on the Primary Permission List Preferences table.

- Currency codes on the Currency Code table.
- Departments on the Department table.

| | |
|---|---|
| **Expense Period End Date** | Enter the expense period end date for the period to which these expenses apply. |
| **Charge Date** | Enter the date of the actual expense charge. |
| **Expense Code** | Select an expense code, such as *Airfare,* for the charge. |

## Expense Tab

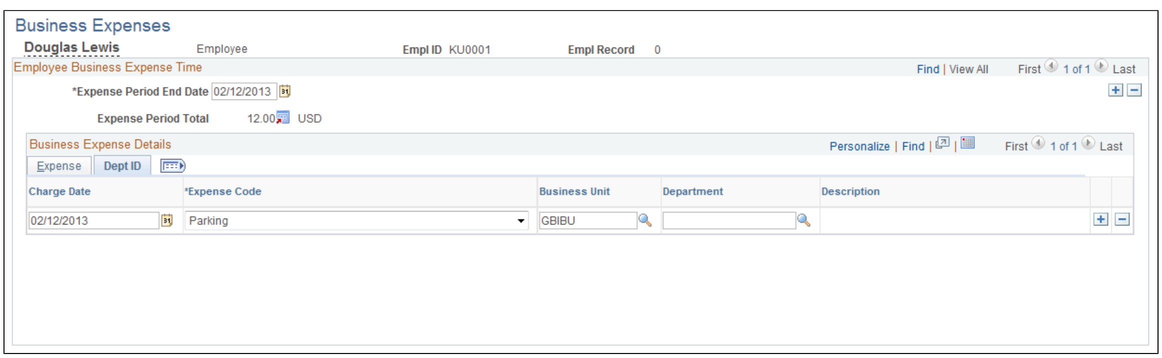
| | |
|---|---|
| **Expense Amount** | Enter the amount of the expense. |
| **Currency Code** | The currency that is specified for your user ID on the Primary Permissions List Preferences table appears by default. If there is no To Currency for your user ID, then the system uses the base currency that you specified for your implementation on the Installation table. Override the default currency if necessary by using the values in the Currency Code table. |

## Dept ID Tab

Select the Dept ID tab.

**Image: Business Expenses page: Dept ID tab**

This example illustrates the fields and controls on the Business Expenses page: Dept ID tab. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Business Unit** | Enter the business unit to which the expense should be charged. |
| **Department** | Select the specific department to which the expense should be charged. |

***Warning!*** The information that you enter here isn't related to PeopleSoft Payroll for North America processing of business expenses.

## Prior Work Experience Page

Use the Prior Work Experience page (PRIOR_WORK_EXPER) to track prior work experience.

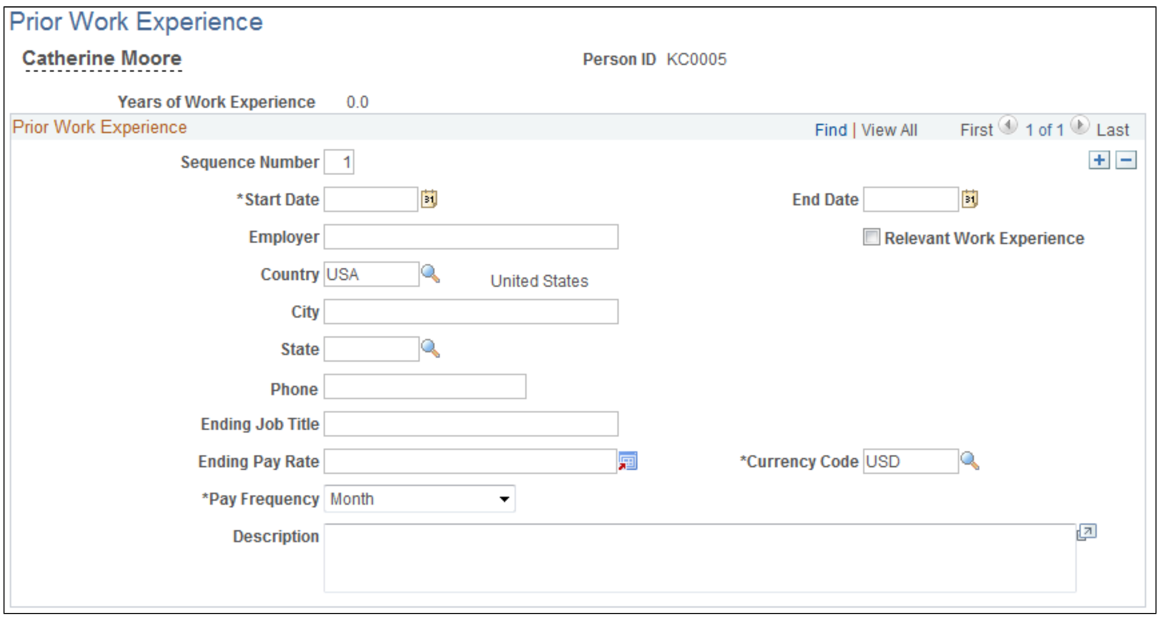
Enter the details of a worker's previous employers and jobs.

**Navigation**

- Workforce Administration, Personal Information, Biographical, Prior Work Experience
- Workforce Development, Career Planning, Manage Person Profiles, Prior Work Experience

**Image: Prior Work Experience page**

This example illustrates the fields and controls on the Prior Work Experience page. You can find definitions for the fields and controls later on this page.




If you've tracked an applicant through the Recruiting business process in PeopleSoft Human Resources, the information that you entered for an applicant becomes part of the employee record when you hire the person. For other workers, entering prior work experience information helps you establish a complete profile for reporting purposes. It's also useful for career and succession planning.

| | |
|---|---|
| **Years of Work Experience** | The system calculates this value if you select the Relevant Work Experience check box. If so, you must enter a start date and end date. |
| **Sequence Number** | Enter a sequence number for each prior work experience record. |
| **Start Date and End Date** | Enter the beginning and end of the worker's tenure with the employer. |
| **Relevant Work Experience** | Select if the experience was relevant to the worker's responsibilities with your organization. |
| **Employer** | Enter the name of the worker's previous employer. |

| | |
|---|---|
| **Ending Job Title** | Enter the title in which the worker ended employment. |
| **Ending Pay Rate** | Enter the pay rate at which the worker ended employment. |
| **Pay Frequency** | The pay Frequency field contains a default value of *Month,* which you can change if the pay amount reflects a different frequency. |

### Related Links

*PeopleSoft HCM 9.2: Human Resources Plan Careers and Successions*

"Understanding Third Party Integrations *(PeopleSoft HCM 9.2: Talent Acquisition Manager)*"

"Basic PeopleSoft HCM Reports: A to Z *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Employee Photo Page

Use the Employee Photo page (EMPLOYEE_PHOTO) to enter a worker image into the system by copying and pasting images into image fields.

**Navigation**

Workforce Administration, Personal Information, Citizenship, Identification Data, Employee Photo

Click Add Photo Button to access the File Attachment page where you can browse to and upload an image (such as an employee photograph) to the Employee Photo page.

To delete an uploaded image, click Delete Photo Button or upload another image to overwrite the existing one.

Only one image per employee is allowed.

**Note:** Full imaging capabilities may not be supported on all database platforms.

For more information, see product documentation for *PeopleTools: PeopleSoft Application Designer Developer's Guide*

# Setting Up and Tracking Security Clearance and Badge Access

These topics provide an overview of security clearance and badge access and discuss how to:

- Set up security clearance.
- Track badge history.
- Track security clearance history.
- Set up expiration notification.
- Search for pending expirations.

## Understanding Security Clearance and Badge Access

PeopleSoft provides the capability to track the security status of employees, contingent workers, and persons of interest and revoke their access levels and badges should be revoked. Using this feature, the system notifies security clearance administrators when the security status or badge clearance has expired.

## Pages Used to Track Security Clearance and Badge Access

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Security Clearance | HR_EE_SEC_CLR | Workforce Administration, Personal Information, Security Clearance | Select the security clearance type and information for a selected individual. |
| Badge History | HR_EE_BADGE_HIST | Workforce Administration, Personal Information, Badge/ Clearance Access Summary, Badge History | View the complete history of a selected individual's badges. |
| Clearance History | HR_EE_SEC_CLR_HIST | Workforce Administration, Personal Information, Badge/ Clearance Access Summary, Clearance History | View the complete history of a selected individual's security clearances. |
| Email History | HR_EE_EMAIL_HIST | Workforce Administration, Personal Information, Badge/ Clearance Access Summary, Email History | Show a selected individual's most recent email address. |
| Expiration Notification | RC_EE_EXPIR_NOTIF | Workforce Administration, Personal Information, Expiration Notification | Set up a list of people who will be notified of pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range. |
| Expiration Inquiry | HR_EE_EXPIR_INQ | Workforce Administration, Personal Information, Expiration Inquiry | Search for pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range. |

## Security Clearance Page

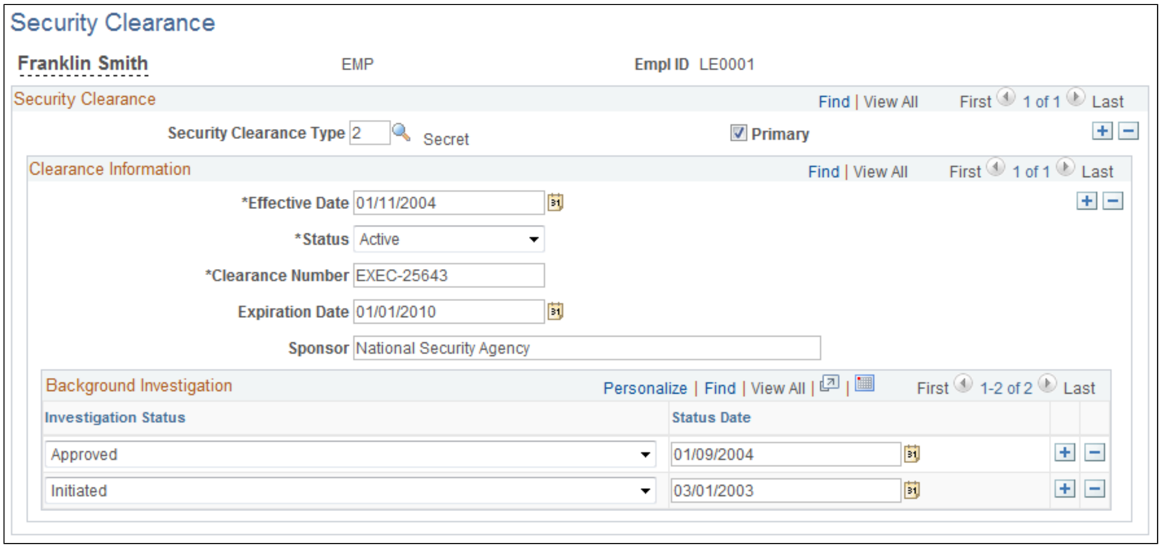
Use the Security Clearance page (HR_EE_SEC_CLR) to select the security clearance type and information for a selected individual.

**Navigation**

Workforce Administration, Personal Information, Security Clearance

**Image: Security Clearance page**

This example illustrates the fields and controls on the Security Clearance page. You can find definitions for the fields and controls later on this page.




**Security Clearance Type**

Select the security clearance type. Individuals can have more than one security clearance type.

Security clearance type values are determined on the Security Clearance Type page.

**Primary**

Select to determine the primary security clearance type if an individual has more than one security clearance type.

**Effective Date**

Displays the date the individual's security clearance was granted.

**Status**

Specify whether this security clearance is *Active* or *Inactive.*

**Clearance Number**

Enter the number associated with the clearance assignment.

**Expiration Date**

Select the expiration date of the security clearance.

**Sponsor**

Enter the sponsor who granted the security clearance. This can be the individual's current or previous agency, or an entirely separate agency. Each security clearance can have only one sponsor.

## Background Investigations

**Investigation Status**

Track the status changes in the investigation process associated with getting the security clearance. There is no default for

| | |
|---|---|
| | this field. Values include *Approved, Denied, In Progress,* or *Initiated.* |
| **Status Date** | Select the date that the investigation status changes. |

## Badge History Page

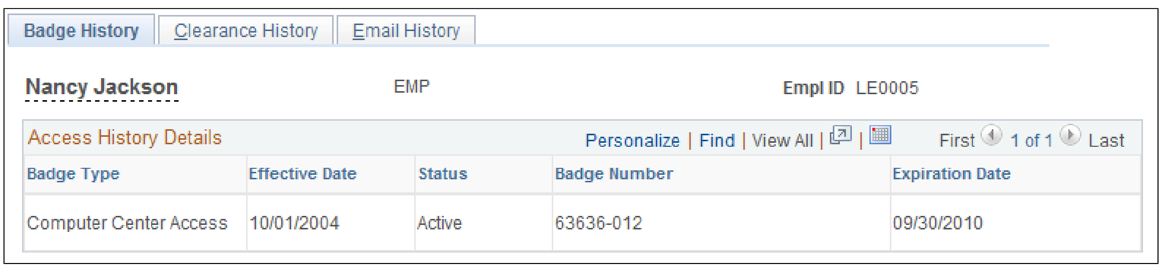
Use the Badge History page (HR_EE_BADGE_HIST) to view the complete history of a selected individual's badges.

**Navigation**

Workforce Administration, Personal Information, Badge/Clearance Access Summary, Badge History

**Image: Badge History page**

This example illustrates the fields and controls on the Badge History page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Badge Type** | Displays the badge type held by the individual.<br><br>Badge types are defined using the PeopleTools Translate Values component (PSXLATMAINT).<br><br>See *PeopleTools: PeopleSoft Application Designer.* |
| **Effective Date** | Displays the date the individual's badge was issued. |
| **Status** | Displays whether the badge is *Active* or *Inactive.* |
| **Badge Number** | Displays the badge number.<br><br>Badge numbers are determined on the Badge page. |
| **Expiration Date** | Display the badge expiration date. |

## Clearance History Page

Use the Clearance History page (HR_EE_SEC_CLR_HIST) to view the complete history of a selected individual's security clearances.

**Navigation**

Workforce Administration, Personal Information, Badge/Clearance Access Summary, Clearance History

**Image: Clearance History page**

This example illustrates the fields and controls on the Clearance History page. You can find definitions for the fields and controls later on this page.


**Clearance Type**

Displays the history of security clearance types held by the individual.

Security clearance types are determined on the Security Clearance page.

**Effective Date**

Display the grant date for the individual's security clearance.

**Status**

Displays whether the security clearance is *Active* or *Inactive.*

**Clearance Nbr**

Displays the number associated with the security clearance assignment.

**Expiration Date**

Displays the security clearance expiration date.

**Sponsor**

Identifies the sponsor who granted the security clearance.

## Expiration Notification Page

Use the Expiration Notification page (RC_EE_EXPIR_NOTIF) to set up a list of people who will be notified of pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.

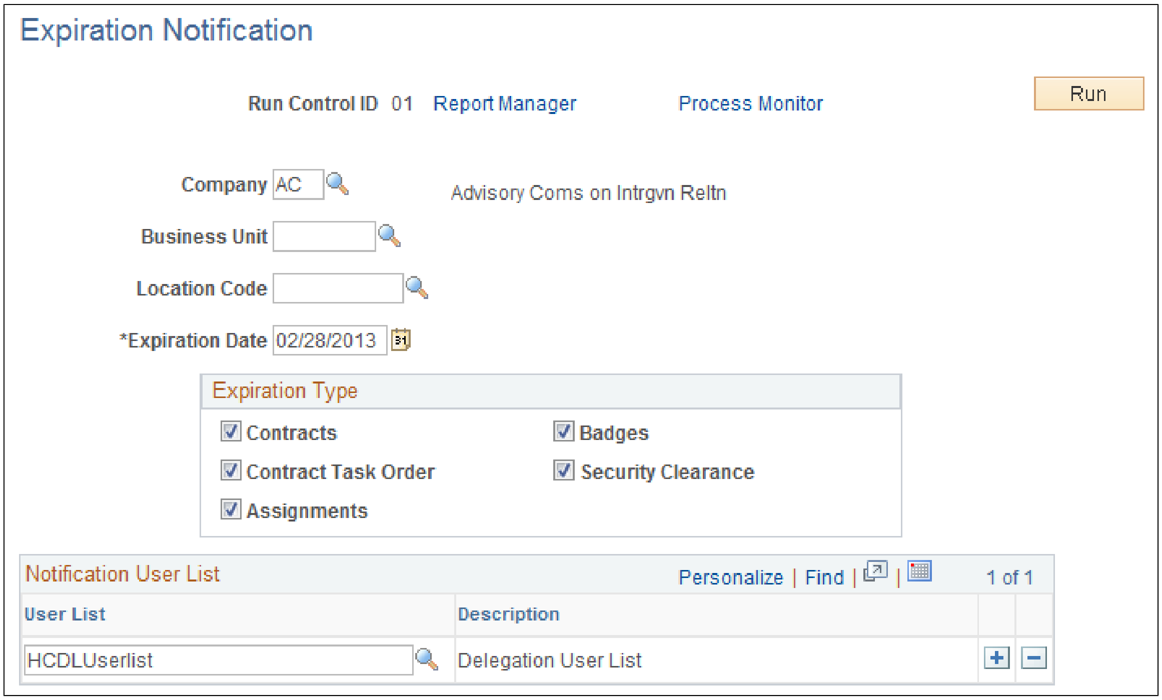
 

**Navigation**

Workforce Administration, Personal Information, Expiration Notification

**Image: Expiration Notification page**

This example illustrates the fields and controls on the Expiration Notification page. You can find definitions for the fields and controls later on this page.




**Company** Select the company for which to generate the notification.

**Expiration Date** Select the date of expiration for which your company wants to notify managers of expiration types. Any people with expiring expiration types on or before this date will be returned.

**Expiration Type** Select the type of expiration for which to generate notification.

**User List** Select the users who will be notified of impending expiration.

## Expiration Inquiry Page

Use the Expiration Inquiry page (HR_EE_EXPIR_INQ) to search for pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.

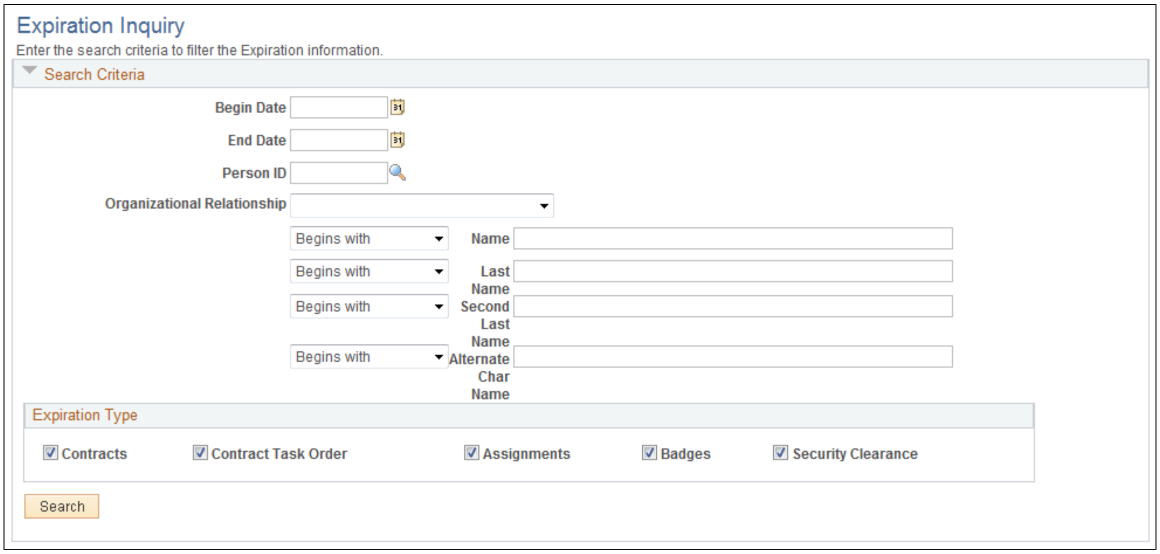
 

### Navigation

Workforce Administration, Personal Information, Expiration Inquiry

### Image: Expiration Inquiry page

This example illustrates the fields and controls on the Expiration Inquiry page. You can find definitions for the fields and controls later on this page.




**Begin Date andEnd Date**

Select the date range for which to search for pending expirations.

**Person ID**

Select a person ID to limit the search to the selected person.

**Org Relation (organizational relationship)**

Select the limit the search to a *Contingent Worker, Employee,* or *Person of Interest.*

**Name, Last Name, Second Name, and Alternate Char Name (alternate character name)**

Enter a value to search for a particular person.

**Expiration Type**

Select the type of expiration for which to search.

**Search**

Select the Search button to begin the search for pending expirations.

## Chapter 9

# (BEL) Entering Additional Data for Belgian Workers

## Tracking Claeys Formula Calculations

To track Claeys formula calculations, use the Define Contract End BEL (END_CONT_TBL_BEL), Define Contract End Reason BEL (REAS_END_TBL_BEL), Statute Table (STATUTE_TBL_BEL), Reduced Charged Table (RED_CHRG_TBL_BEL), RSZ Categories (CONTR_RSZS_BEL), Terminate Contract BEL (CONTRACT_END_BEL), and Replace Contract BEL (CONTRACT_REPL_BEL) components.

If you're administering a Belgian workforce, you need to set up codes for events or conditions that may play a role in the termination of a Belgian worker's employment contract, and for the special reasons that are associated with those conditions. You also specify employment contract statutes and substatutes, and track special jobs that allow for lower premiums than are normally required by Belgian labor regulations.

Many of the tables that you set up for these purposes contain information that you use when performing Claeys formula calculations. Employers use the Claeys formula to calculate the cost of terminating a worker's contract based on number of service years, salary, age, seniority, type of employment contract, and so on.

These topics discuss how to:

- Enter codes for events and conditions that result in terminating employment contracts.
- Define reason codes for ending employment contracts.
- Set up Belgian employment contract statutes for Claeys calculations.
- Link contract statutes to *Rijksdienst Sociale Zekerheid* (RSZ) categories.
- Record information that is necessary for terminating a Belgian worker.
- Enter a replacement worker for the employment contract.

## Pages Used to Track Claeys Formula Calculations

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Define Contract End BEL | CNT_END_TBL_BEL | • Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Contract End Types, Define Contract End BEL<br>• Workforce Administration, Job Information, Contract Administration, Define Contract End BEL | Enter or update codes for events and conditions that could result in the termination of employment contracts. |
| Define Contract End Reason BEL | CNT_ENDRSN_TBL_BEL | • Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Contract End Reasons<br>• Workforce Administration, Job Information, Contract Administration, Define Contract End Reason BEL, Define Contract End Reason BEL | Define the reasons that are associated with event codes by adding or updating employment termination reason codes.<br>First define contract termination event types. |
| Statutes | STATUTE_TBL_BEL | Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Statutes, Statutes | Set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes. |
| Reduced Charges | RED_CHRG_TBL_BEL | Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Reduced Charges, Reduced Charges | Set up the page that you use to update or add reduced charges job categories.<br>Under Belgian employment law, these are job categories that enable you to pay reduced taxes and premiums on the compensation to workers who hold those jobs. |
| RSZ Categories | CNT_RSZS_TBL_BEL | Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, RSZ Categories, RSZ Categories | Link contract statutes to *Rijksdienst Sociale Zekerheid* (RSZ) categories. |
| Terminate Contract BEL | CONTRACT_END_BEL | Workforce Administration, Job Information, Contract Administration, Terminate Contract BEL, Terminate Contract BEL | Record information that is necessary for terminating a Belgian worker. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Replace Contract BEL | CONTRACT_REPL_BEL | Workforce Administration, Job Information, Contract Administration, Replace Contract BEL, Replace Contract BEL | Enter the person who replaces the worker in the employment contract. |

## Define Contract End BEL Page

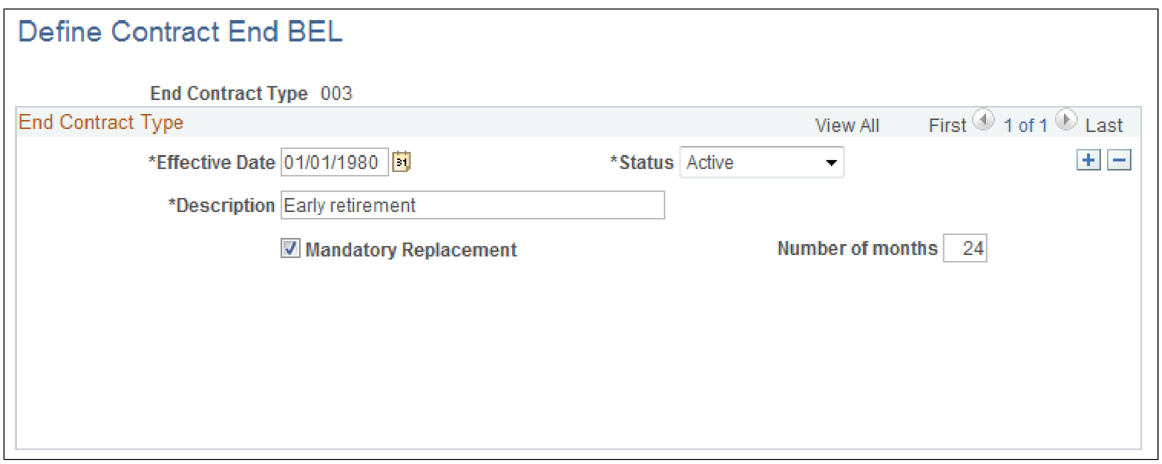
Use the Define Contract End BEL page (CNT_END_TBL_BEL) to enter or update codes for events and conditions that could result in the termination of employment contracts.

**Navigation**

- Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Contract End Types, Define Contract End BEL
- Workforce Administration, Job Information, Contract Administration, Define Contract End BEL

**Image: Define Contract End BEL page**

This example illustrates the fields and controls on the Define Contract End BEL page. You can find definitions for the fields and controls later on this page.




The end contract type codes can cover a wide range of events, including the employee's death, a voluntary or involuntary separation from your organization caused by retirement or relocation, or promotion into another job that has a different employment contract associated with it.

**Mandatory Replacement**

Select if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract.

**Number of months**

If you selected Mandatory Replacement, enter the period of time (in months) required to position the replacement.

**Note:** Belgian employment law mandates these requirements.

## Define Contract End Reason BEL Page

Use the Define Contract End Reason BEL page (CNT_ENDRSN_TBL_BEL) to define the reasons that are associated with event codes by adding or updating employment termination reason codes.

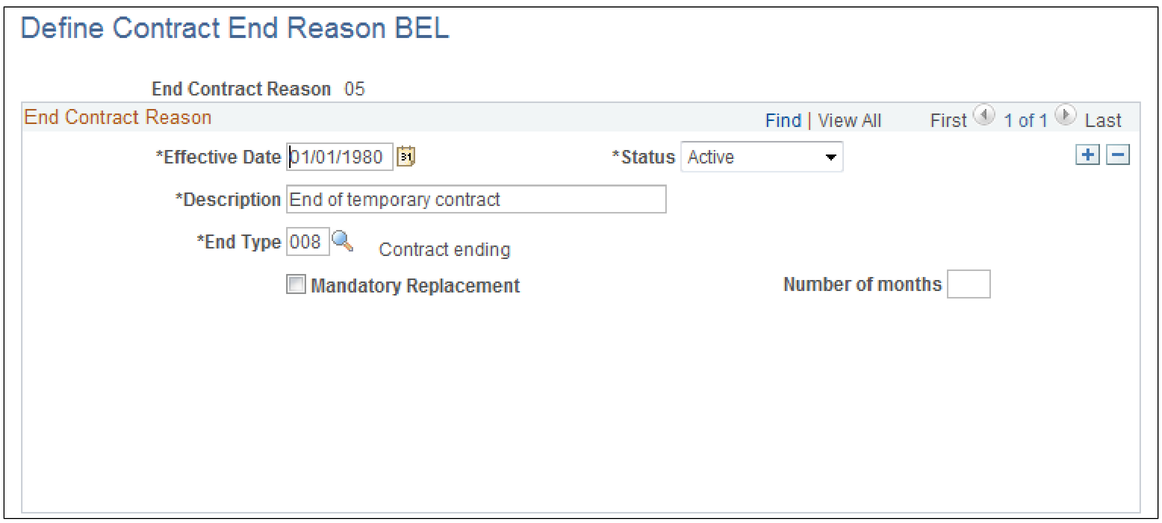
First define contract termination event types.

**Navigation**

- Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Contract End Reasons
- Workforce Administration, Job Information, Contract Administration, Define Contract End Reason BEL, Define Contract End Reason BEL

**Image: Define Contract End Reason BEL page**

This example illustrates the fields and controls on the Define Contract End Reason BEL page. You can find definitions for the fields and controls later on this page.




**End Type**

Select an end type from the list of end contract type codes that were entered on the Define Contract End BEL page.

---

**Note:** If you move out of the End Type field and then decide to change the end type code, deselect and reenter the Mandatory Replacement and Number of months fields.

---

**Mandatory Replacement and Number of months**

If you selected an end type that requires mandatory replacement, when you move out of the End Type field, the system automatically selects this check box. The system then enters the number of months that you have to replace the current employee with another employee in this contract.

If you didn't select an end type associated with mandatory replacement information, indicate if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract. Then enter the number of months that can pass before you have to find the replacement employee.

---

**Note:** Belgian employment law mandates these requirements.

---

## Statutes Page

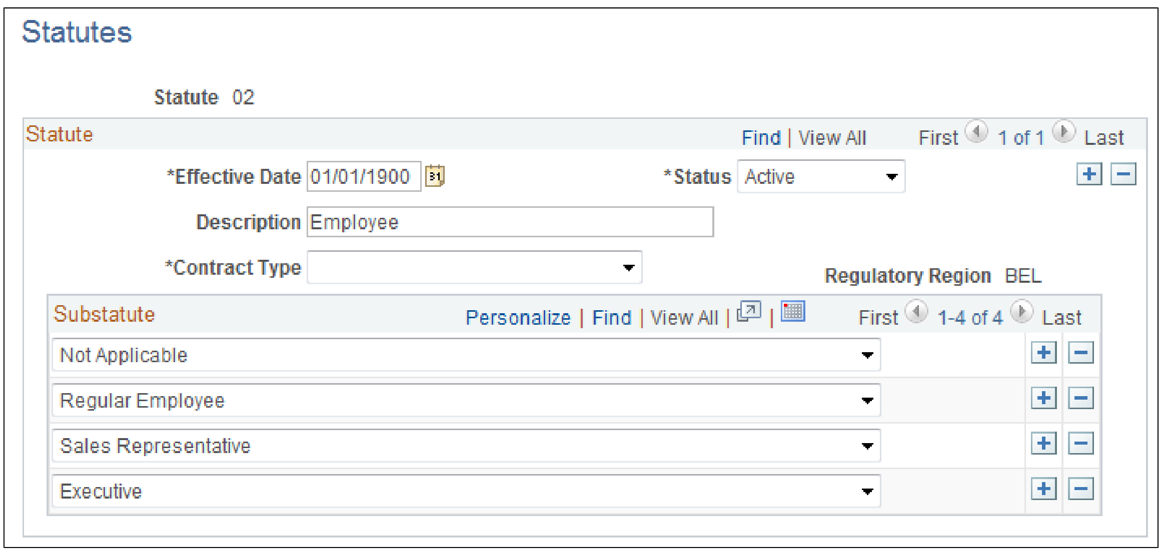
Use the Statutes page (STATUTE_TBL_BEL) to set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Statutes, Statutes

**Image: Statutes page**

This example illustrates the fields and controls on the Statutes page. You can find definitions for the fields and controls later on this page.




**Contract Type** Select a contract type for the statute. Values are *Employment, Member of the professions, Non applicable,* and *Self Employed.*

**Substatute** Select the statute code with which the system should associate this substatute code.

## RSZ Categories Page

Use the RSZ Categories page (CNT_RSZS_TBL_BEL) to link contract statutes to *Rijksdienst Sociale Zekerheid* (RSZ) categories.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, RSZ Categories, RSZ Categories

**Image: RSZ Categories page**

This example illustrates the fields and controls on the RSZ Categories page. You can find definitions for the fields and controls later on this page.


Use the government-defined RSZ categories to maintain social security records for your Belgian employees. Associate each combination of contract type, statute, and substatute with an RSZ category for Claeys formula calculations.

**RSZ-Submitted** Select to indicate that the contract is subject to RSZ. Before selecting this check box, determine whether RSZ premiums have to be paid to the Belgian social security system for the pay (wage or reimbursement) that is associated with this contract.

**RSZ-Category** Select an RSZ category from the list.

## Terminate Contract BEL Page

Use the Terminate Contract BEL page (CONTRACT_END_BEL) to record information that is necessary for terminating a Belgian worker.

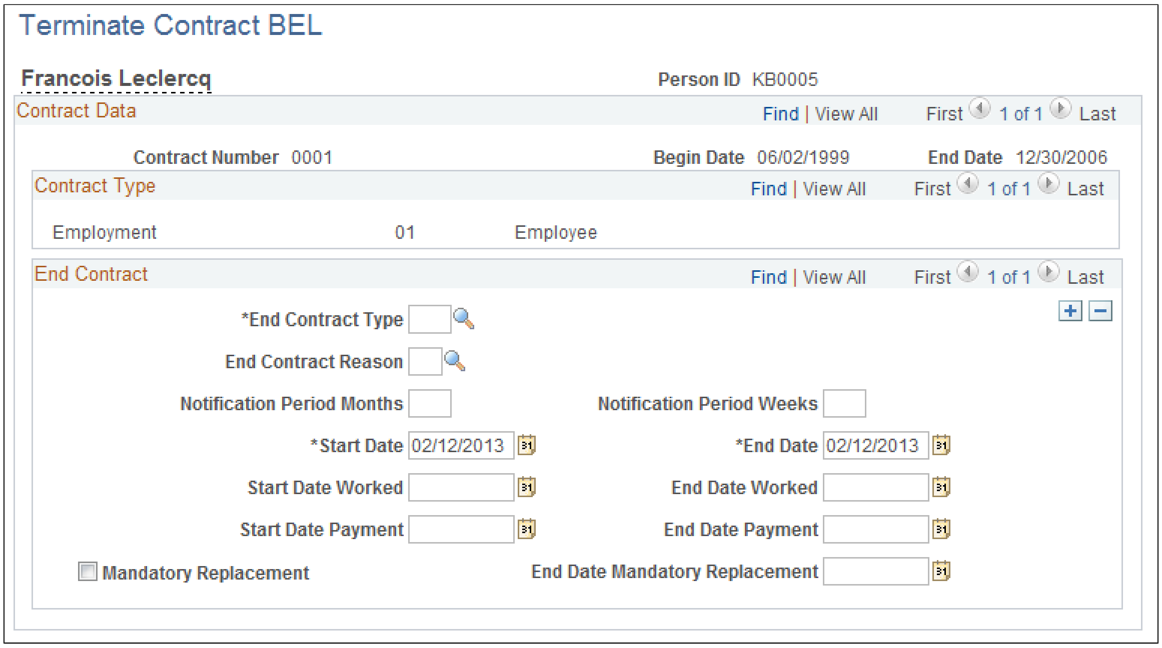
 

### Navigation

Workforce Administration, Job Information, Contract Administration, Terminate Contract BEL, Terminate Contract BEL

### Image: Terminate Contract BEL page

This example illustrates the fields and controls on the Terminate Contract BEL page. You can find definitions for the fields and controls later on this page.




Use this page to:

- Specify that the worker's employment contract has ended, and the reason that your organization has chosen to end the contract.
- Set up and track the worker's termination notification period.
- Track the worker's replacement if a replacement is mandatory based on the contract type.

**End Contract Type** — Select a valid end contract type (such as death, disability, or early retirement with mandatory replacement).

**End Contract Reason** — Select an end contract reason (such as disrupted employee relations, family reasons, a company specific program, or contract expiration).

**Notification Period Months** — Enter the number of months of notice that the employee must be given prior to the contract end date. The notification period that you enter here affects Claeys calculations in the Create Notification component. If you enter an amount here and move out of the field, the Notification Period Weeks option becomes display-only.

**Notification Period Weeks** — Enter the number of weeks of notice that the employee must be given before the contract end date. The notification period

| | |
|---|---|
| | that you enter here affects Claeys calculations in the Create Notification component.<br><br>If you enter an amount here and move out of the field, the system makes the Notification Period Months option display-only. |
| **Start Date andEnd Date** | Enter the date that the notification period begins, and the date on which the notification period ends and the employment contract terminates. |
| **Start Date Worked** | Record the employee's start date for this job contract, which should be the same as the date that you record for a job change in the worker's job record. |
| **End Date Worked** | Enter the employee's last working day on this job contract, which should be the same as the date that you record for a job change in the worker's job record—whether the worker is terminating with your company or leaving one job contract to move into another. |
| **Start Date Payment and End Date Payment** | Track the start and end payment dates, which the system stores and uses for payroll. |
| **Mandatory Replacement** | If the end contract type that you selected requires mandatory replacement, the system automatically selects this check box and makes it display-only. Specify whether an end contract type requires replacement on the Define Contract End BEL page. |
| **End Date Mandatory Replacement** | If the end contract type requires mandatory replacement, the system calculates the end date of the mandatory replacement period based on the end date on which the employee is terminated. It also calculates the number of months that you specified on the End Employment Terms table (CNT_END_TBL_BEL) as the length of the replacement period. |

### Related Links

Define Contract End Reason BEL Page

## Replace Contract BEL Page

Use the Replace Contract BEL page (CONTRACT_REPL_BEL) to enter the person who replaces the worker in the employment contract.

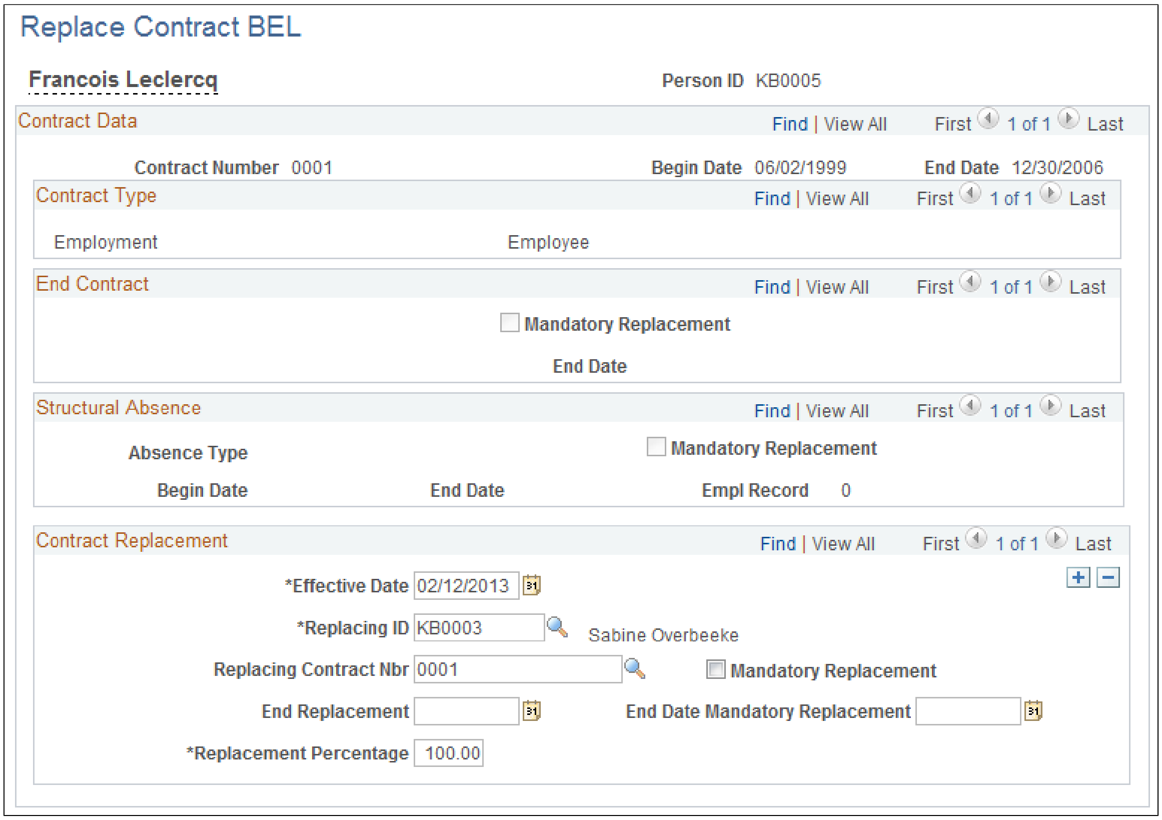
 

### Navigation

Workforce Administration, Job Information, Contract Administration, Replace Contract BEL, Replace Contract BEL

### Image: Replace Contract BEL page

This example illustrates the fields and controls on the Replace Contract BEL page. You can find definitions for the fields and controls later on this page.




**Replacing ID**

Select the ID of the employee who replaces the terminated employee in this contract. The system displays all employees who have been tagged as replacement employees for Belgian employment contracts in your human resources system. Select any applicant or employee with employment terms. If you want to start someone's employment as a replacing employee, you must create employment terms for that person first.

**Replacing Contract Nbr (replacing contract number)**

Select the number for this contract, based on the replacing employee ID that you selected.

**Mandatory Replacement**

Select to indicate that mandatory replacement is required.

**End Replacement**

If you selected Mandatory Replacement, enter the date for the end replacement. You may want to track this date if you have an earlier than expected end date for a fixed term employment contract.

**End Date Mandatory Replacement**

Enter the end date for mandatory replacement.

# Preparing for Severance Calculations

Employers in Belgium and organizations that employ a Belgian workforce are required to track worker information that is used in the Claeys formula calculation. This calculation determines the amount of severance compensation that your organization must pay a worker if you terminate employment. The formula considers factors such as the employee's seniority, age, and annual compensation (including salary, vacation pay, and so on) to determine your organization's liability to the employee.

These topics provide overviews of how Claeys calculates severance and of how to prepare for the Claeys calculation, and discuss how to:

- Track additional seniority.
- Enter protected job leave information.

## Understanding How Claeys Calculates Severance

The Claeys formula calculates months of severance salary that are owed to an employee as follows:

0.89 × (seniority) + 0.08 × (employee's age) + 0.0013 × [yearly compensation in EUR divided by 1000 × (reference index divided by actual index)] − 2 = notification period, or months of severance salary that is owed to the employee.

For example, an employee with 13 years of seniority with a company, who is 38 years of age, and who is making 82.500 EUR is entitled to 13 months of severance pay. The calculation works as follows:

0.89 × 13 = 11.57 (seniority factor)

0.08 × 38 = 3.04 (age factor)

0.0013 × (82,500 / 1000) × (125.30 / 126.00) = .1066 (compensation factor)

11.57 (seniority factor) + 3.04 (age factor) + .1066 (compensation factor) 2 = 13 months of severance

**Note:** The value for compensation is the employee's yearly compensation. This amount is based on the employee's monthly wage multiplied by the factor that is designated in the company table for your organization. The Belgian regulated factor amount is approximately 13.9.

## Understanding How to Prepare for the Claeys Calculation

Preparing for the Claeys employment compensation calculation in PeopleSoft Human Resources involves:

- Establishing default company level information that is used for Claeys formula employee compensation calculations on the Company table (COMPANY_TBL), including factoring information defaults for calculating worker seniority, age, compensation, and so on.

  You can override this data at the employee level in the Create Notification component, where you perform the Claeys calculation for a specific worker.

- Entering and maintaining information about the employee's:
  - Seniority with your organization (stored in the PER_ORG_ASGN table).

- Age (stored in the PERSON table).
- Compensation (stored in the JOB table).

- Entering and maintaining employment contract information for the employee on the Contract Data pages (stored in the CONTRACT_DATA table).
- Entering and maintaining end employment terms information about required notification periods for workers your company may terminate (stored in the CNT_END_TBL_BEL table).
- Maintaining additional information that is used to record Belgian seniority, including protected job leave information (stored in the SENIORITY_BEL table).

### Related Links

Performing the Claeys Calculation

## Pages Used to Prepare for Severance Calculations

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Identify Seniority | SENIORITY_BEL | Workforce Administration, Collective Processes, Administration BEL, Identify Seniority, Identify Seniority | Track additional seniority for an employee. Seniority affects the Claeys calculation that you perform in the Create Notification component. |
| Create Protection | PROTECT_BEL | Workforce Administration, Collective Processes, Administration BEL, Create Protection, Create Protection | Enter protected job leave information for a Belgian employee. You can assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics. |

### Related Links

Performing the Claeys Calculation

## Identify Seniority Page

Use the Identify Seniority page (SENIORITY_BEL) to track additional seniority for an employee.

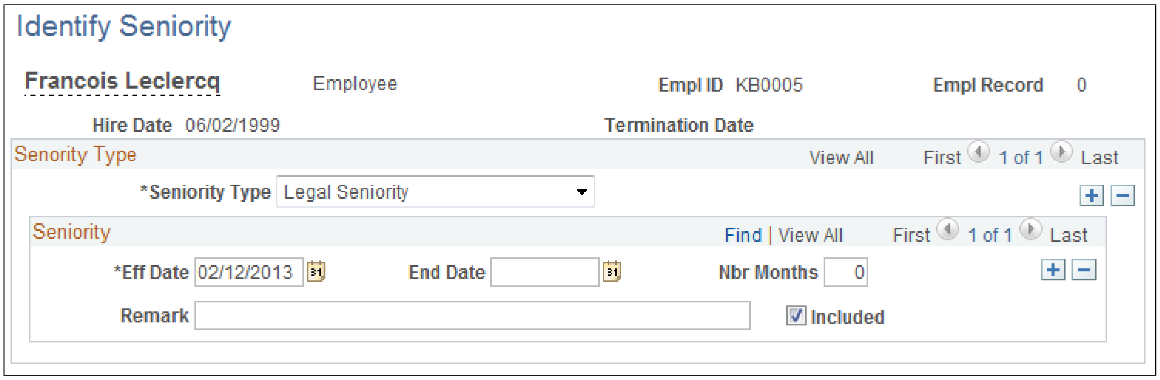
Seniority affects the Claeys calculation that you perform in the Create Notification component.

### Navigation

Workforce Administration, Collective Processes, Administration BEL, Identify Seniority, Identify Seniority

### Image: Identify Seniority page

This example illustrates the fields and controls on the Identify Seniority page. You can find definitions for the fields and controls later on this page.




The system uses the seniority information for the employee recorded on this page when performing Claeys formula processing to determine the employee's months of service. If no information about service months is available on the Seniority page for an employee, the system references the employee's service months calculation on the Job Data - Job Information page.

For example, seniority in another organization may or may not count towards an employee's company seniority, depending on your own organization's business rules, but it does count towards legal seniority, which affects the Claeys calculation. This distinction is particularly important in the case of mergers between organizations, where you decide if the seniority of employees from one organization is recognized by the other organization and, if so, to what extent. Using this page, you can specify the number of months of seniority that workers can carry over to your organization from their former companies.

**Seniority Type**

Select the seniority type method that you want to use to determine this employee's seniority in your organization. Values are:

*Company Seniority:* When figuring seniority, this method doesn't account for periods of leave time that employees may use while remaining in a job, pension calculation issues, recognized service time, and so on.

The system does *not* take into account company seniority months when performing the Claeys calculation for an employee. If you enter a period for company seniority, the Claeys calculation uses only the months of seniority based on the employee's service time on their Job Data record.

*Legal Seniority:* The system accounts for this seniority amount when calculating the Claeys formula, which is used to calculate base pay for Belgian employees.

If you enter a period for legal seniority, the Claeys calculation takes the number of service months displayed in the Nbr Months field and adds it to the months of service from the employee's Job Data record, and displays the sum of the two amounts on the Create Notification - Base page.

**Eff Date (effective date)**
Enter the effective date to record the beginning of the employee's additional seniority period. The system supplies a default date, usually today's date, which you can modify to reflect the additional seniority period.

**End Date**
Enter the end date for the seniority period.

**Nbr Months (number of months)**
When you move out of the End Date field, the system calculates the number of months of seniority. The system doesn't calculate partial months. If an employee's seniority period is 100 months and 16 days, the system calculates *100* months of seniority.

**Included**
Select to ensure that the system adds the months of seniority that you entered here to the employee's seniority based on their Job record (JOB) when it performs the Claeys calculation. If you deselect this check box and enter *Legal Seniority* months, the system *subtracts* the seniority period from the employee's seniority when it calculates the Claeys formula.

**Remark**
Enter relevant remarks about the additional seniority that you are tracking.

## Create Protection Page

Use the Create Protection page (PROTECT_BEL) to enter protected job leave information for a Belgian employee.

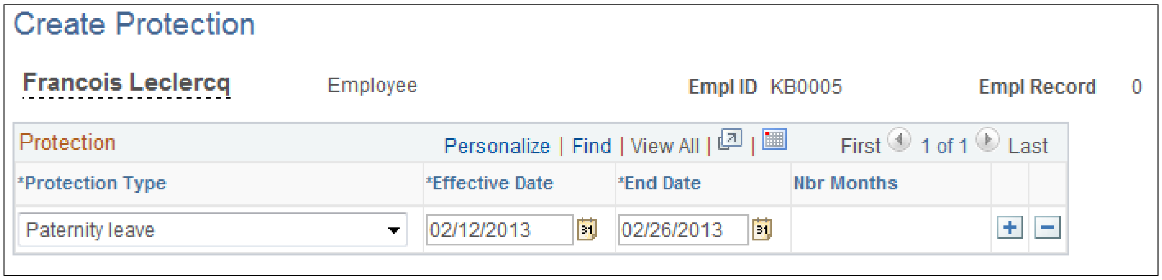
You can assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics.

**Navigation**

Workforce Administration, Collective Processes, Administration BEL, Create Protection, Create Protection

**Image: Create Protection page**

This example illustrates the fields and controls on the Create Protection page. You can find definitions for the fields and controls later on this page.




**Protection Type**

Select a protection type to indicate why this leave of absence is protected.

**Note:** Belgian employment law mandates these protection types.

**End Date**

Enter the date on which the employee will return to work.

**Nbr Months (number of months)**

When you move out of the End Date field, the system calculates the duration of the protected absence.

**Note:** The system calculates the absence period only to the nearest month and doesn't allow for partial months. If the protected leave duration period is 45 days, the system indicates that the employee's absence covers *one* month only.

**Note:** The system does *not* take into account protection months when it calculates Claeys formula seniority, in part because protection isn't limited to absences from work that might affect seniority months.

# Performing the Claeys Calculation

After you've hired a Belgian employee into your human resources system and established employment contract terms, end employment terms, seniority, and protected leave (protection) information, you can perform the Claeys calculation to determine your potential severance pay liability if you were to terminate the employee.

These topics discuss how to:

- Review Claeys calculation variables.
- Calculate the severance amount.

- Run the Notification report.

## Pages Used to Perform the Claeys Calculation

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Base | NOTIF_CALC_BEL | Workforce Administration, Collective Processes, Administration BEL, Create Notification, Base | Review and set Claeys calculation variables, including the employee's compensation, default factor information, and months of service. |
| Results | NOTIF_CALC2_BEL | Workforce Administration, Collective Processes, Administration BEL, Create Notification, Results | Calculate the severance amount. |
| Report | RUNCTL_PER066_BEL | Workforce Administration, Collective Processes, Administration BEL, Create Notification, Report | Run the Notifications report ( PER066BE). |

## Create Notification - Base Page

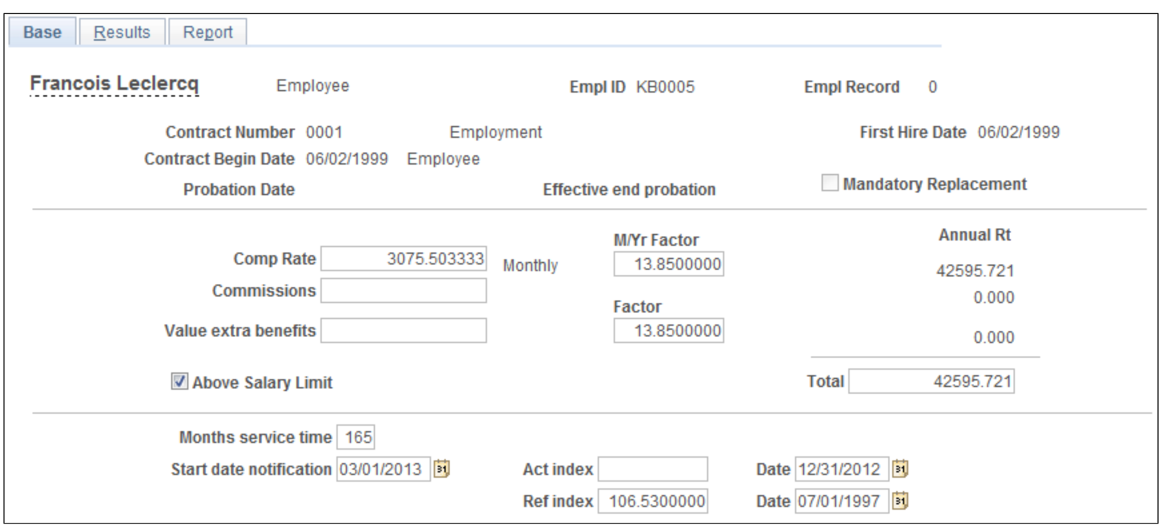
Use the Base page (NOTIF_CALC_BEL) to review and set Claeys calculation variables, including the employee's compensation, default factor information, and months of service.

**Navigation**

Workforce Administration, Collective Processes, Administration BEL, Create Notification, Base

**Image: Create Notification - Base page**

This example illustrates the fields and controls on the Create Notification - Base page. You can find definitions for the fields and controls later on this page.




The system displays the employee's name, employee ID, and the employment record number for your reference. This information comes from the person's personal data record.

The system displays employment and end employment contract terms information for the employee that you entered on the Contract Data and Terminate Contract BEL pages. The system displays the person's hire date from the Job Data record and indicates whether, according to the end employment terms for the worker, the contract requires mandatory replacement.

## Determining the Employee's Base Compensation Amount *(Jaarloon)*

| | |
|---|---|
| **Comp Rate (compensation rate)** | The system calculates the employee's monthly compensation rate based on the employee's compensation rate information on the Job Data - Compensation page and displays it here. Adjust the rate information as necessary. The system uses this amount when determining the employee's monthly pay variable for the Claeys calculation. |
| **M/Yr Factor (month/year factor)** | The system multiplies the month base amount by the month/year factor of *13.85000* to calculate a value for the employee's Annual Rt (annual rate) income amount field. The default factor displayed here comes from the default employee compensation factors that you entered on the Company table. The Belgian government determines this factor amount, but you can override the default here if the factor amount changes. |
| **Commissions** | Enter any commissions amount that the system should add to the employee's month base as part of the Claeys calculation income amount. |
| **Value extra benefits** | Add value extra benefits amounts, including other components of nonbase pay, such as any benefits that the employee receives (for example, salary, vacation pay, 13th month, meal checks, and so on). The system multiplies the value extra benefits amount by the value extra month/year factor of *13.85000* to calculate the employee's yearly extra income amount. |
| **Total** | The system displays the total compensation amount *(jaarloon)* based on the year base, the commission, and extra benefit results. Adjust the system calculated total as necessary. |

## Understanding the Above Salary Limit Setting

| | |
|---|---|
| **Above sal. limit (above salary limit)** | The system indicates if the employee's compensation total is above salary limit by accounting for the contract type. Select this check box to override the factor values on the Create Notification - Results page.<br><br>To change the salary limit setting, ensure that the notification period start date falls *after* the effective end probation date that appears with the employee's contract information at the top of the page. In this case, the system fixes the salary limit for a longer period (the system uses the factors in the Claeys Defaults group box on the Create Notification - Results page to calculate the notification period, and makes the factors available for entry). |

If the date is*before* the effective end probation date, you can't change the salary limit setting.

**Note:** The compensation currency on the Create Notification - Base and Create Notification - Results pages is the same as the employee's job currency that is set on the employee's Job record (JOB).

## Determining the Employee's Seniority

**Months service time**

The system calculates and displays the employee's number of months service time. The system determines service month information by considering both the employee's service months information on the Job Information page (JOB_DATA) and the number of months service time on the Seniority page ( SENIORITY_BEL) *if* the seniority type is set to *Legal Seniority.* The system adds the two seniority amounts and displays them as the months service time amount.

The system doesn't consider partial months in this calculation and doesn't round up. If the employee's service time is 9 months, 16 days, the system displays *9* as the employee's months service time. Adjust the months service time as necessary.

**Note:** If you enter seniority information on the Seniority page for an employee and the seniority type is set to *Company Seniority,* the system uses the months of seniority calculation on the Job Information page to set the number of months service time on the Create Notification - Base page.

**Start date notification period**

Set the start date notification period for the employee's termination notification to the first day of the *next* month if you're not performing the Claeys calculation for this employee on the first day of the *current* month. The default value is the first day of the month following the effective date that appears with the contract information at the top of the page.

For example, if you start your Claeys calculation for an employee on April 14, the system enters a start date for the notification period of May 1. Override this date as necessary.

**Note:** The start date notification period that appears on the Base page affects the way the system performs the Claeys calculation on the Results page. If the start date notification period begins before the effective end probation date on the Base page, the system uses a notification period of *Days* on the Results page when you click the Calculation button. If you enter a start date notification period that begins after the employee's effective end probation date, the system uses a notification period of *Days, Weeks,* or *Months,* depending on the statute information for that employee on the Contract Data - Contract Type/Clauses page, as follows. If the employee is classified as a *Worker* on the Employment Terms Type page, the notification period appears in *Weeks.* The classification of *Employee* results in a notification period of *Months.* The classification of *Not Applicable* results in a notification period of *Days.*

**Act. Index (actual index)**

The actual index if one is assigned for this company in the Company table. The actual index is a monthly reference number to be held against the reference index number.

The actual index is used in the Claeys calculation to calculate the notification period term that is related to the yearly base on the Create Notification - Results page:

(Yearly base salary / 1000) × (factor yearly base / actual index) × correction factor)

**Date**

The last day of the year preceding the year in which you're performing the Claeys calculation for an employee. This date is for your reference only, and isn't saved when you save the page.

**Ref. Index (reference index)**

You can also update the reference index or accept the system default that is based on the factor yearly base index that is set up on the Company Table- Default Settings, Claeys Defaults for this company. The reference index is a yearly reference amount to be compared against the actual index amount.

**Date**

The system also displays the reference index date. The system sets this date to the beginning of the last half of the year prior to the year in which you're performing the Claeys calculation. This date is for your reference only, and isn't saved when you save the page. The system doesn't use the reference index as part of the Claeys calculation.

## Create Notification - Results page

Use the Results page (NOTIF_CALC2_BEL) to calculate the severance amount.

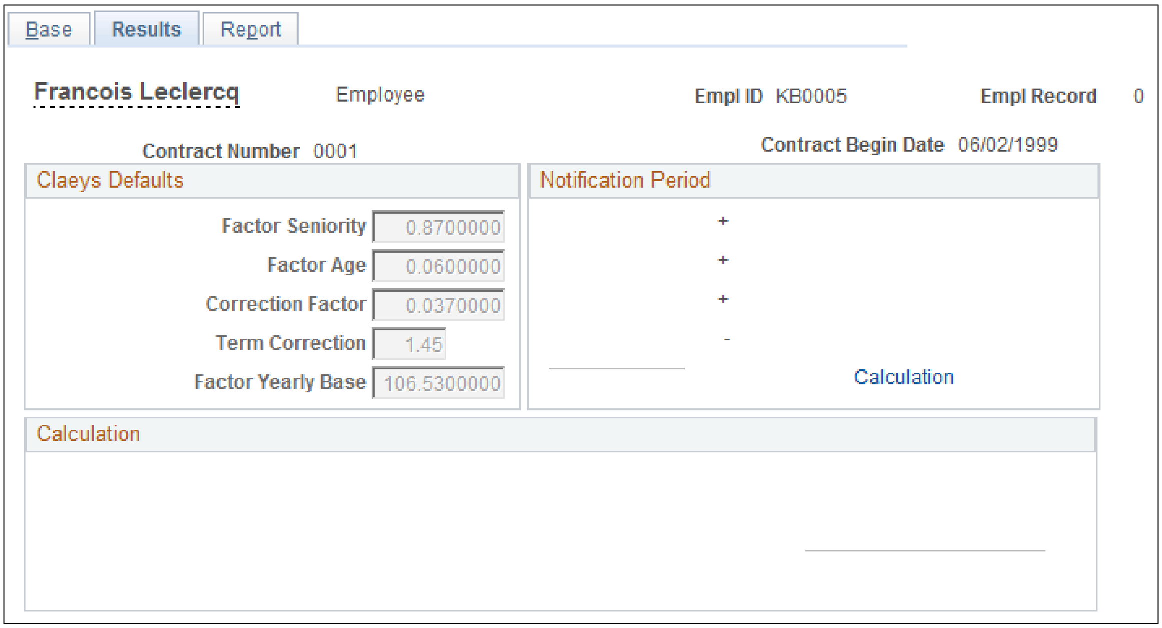
 

**Navigation**

Workforce Administration, Collective Processes, Administration BEL, Create Notification, Results

**Image: Create Notification - Results page**

This example illustrates the fields and controls on the Create Notification - Results page. You can find definitions for the fields and controls later on this page.




The system displays the Claeys defaults for Factor Seniority, Factor Age, Correction Factor, Term Correction, and Factor Yearly Base from the Company table for this employee's company. You assigned the company on the Job Data - Work Location page. Change these factors at the employee level on this page *only* if you selected the Above sal. limit check box on the Create Notification - Base page.

---

**Note:** The system uses these Claeys default factors as part of the Claeys calculation only when the Above sal. limit check box is selected on the Create Notification - Base page.

---

When you first open this page, the Notification Period and Calculation group boxes are empty. This is where the system displays the results of the Claeys calculation for this employee after you perform the calculation by selecting the Calculation link.

The system displays the calculated notification period for this employee in the Calculation group box and shows how it calculated the notification period in the Notification period group box.

## How the System Calculates the Notification Period

The system calculates the notification period in one of two ways depending on whether the employee's yearly base salary is above the salary limit:

- If the employee's yearly base salary is *above the salary limit* (Sal limit check box selected), the notification period that appears in the Calculation group box is based on the calculations that appear in the Notification Period group box.

  The system calculates the notification period based on the employee's seniority, age, and compensation:

Seniority term = (months service time / 12) × factor seniority

**Note:** For the Seniority Term amount, the system rounds the division by 12 differently for each month.

Age term = employee's age on notification start date × factor age.

Compensation term = (base total / 1000) × (factor yearly base / actual index) × correction factor.

Total notification period = seniority term + age term + compensation term - term correction.

You can tell if you're using the above salary limit method by the way the page looks when you perform the calculation. If the system used the above salary limit method to determine the notification period, it displays the notification period calculation in the Notification Period group box. The Claeys defaults that appear on the page are also available for entry, though these come from the company defaults for the employee's company and probably shouldn't be changed.

- If the employee's base isn't above the salary limit (the Above sal. limit check box is deselected), the notification period amount is based on the statute, service time, probation end date, and notification start date—without accounting for any of the Claeys defaults factors that appear on the page. In this case, the system calculates the employee's notification period as follows:

```
If the Statute is "Worker"

if Notification Start Date <= Effective Probation End Date, then Period is "0"

if the Service Time is lower than 240 Months (20 years) the Period is "4"

else the Period is "8"

If the Statute is "Employee"

if Notification Start Date <= Effective Probation End Date, then Period is "7"

else the Period is (((Service Time / 12) / 5) +1) ×3 (each division is truncat⇒
ed with zero decimals)

Else the Period is "0"
```

The unit of time for the notification period information is based on the employee's statute type that you established on the Contract Data - Contract Type/Clauses page (CONTRACT2) as defined on the Statute Table page (STATUTE_TBL_BEL). When the statute type is set to *Worker,* the period unit is in *Weeks.* When the statute is for an *Employee,* then the period unit is in *Months.* If the statute is anything other than worker or employee, the period unit is *Days.* Whenever the notification start date falls within the probation period, the unit of time is always *Days.*

## Understanding Protection Period Information

The system compares the end date for any of this employee's qualifying protection periods that you recorded on the Create Protection table (PROTECTION_BEL) to the notification start date recorded on the Belgian Notification Calculation table (NOTIF_CALC_BEL) to determine the value for the Protection period field. This method of comparison ensures that the employer respects the employee's protection rights.

**Note:** The protection period isn't included in the Claeys calculation process.

The system also displays the Protection End Date field, which is the *actual* end date of the protection period if any protected leave time is entered for this employee on the Create Protection page. This is the date that you set as the end date for any qualifying protection period that you specified on the Create Protection page.

### Working with the End Compensation Amount

The End compensation field displays the resulting Claeys calculation amount that you owe this employee as severance pay, as calculated by the system.

Depending on the notification period unit of time, the system calculates the end compensation by dividing the yearly base total (displayed on the Create Notification, Base page) by 12 if the notification period is months, 52 if weeks, or 365 if days. The result is then multiplied by the notification period amount to arrive at the end compensation amount. For example, the end compensation amount calculation for Guido Peeters is:

(31576.25 / 12) * 11 = 28944.89

Any amount that you enter in the Revenue compensation field is added to the total severance amount for the employee.

If you need to change the notification data and rerun the calculation, make your changes and click the Calculation link again. The system deselects the old results and calculates the Claeys amount based on your changes.

---

***Warning!*** The system does not save this data. You must run the Notification report to maintain records for each calculation.

---

## Create Notification - Report Page

Use the Report page (RUNCTL_PER066_BEL) to run the Notifications report (PER066BE).

**Navigation**

Workforce Administration, Collective Processes, Administration BEL, Create Notification, Report

After completing the Claeys calculation, run the termination notification report. The report page displays the employee's ID and record number together with the notification period that is calculated by the Claeys formula.

### Related Links

"(BEL) Claeys Defaults Page *(PeopleSoft HCM 9.2: Application Fundamentals)*"

# Setting Up and Generating DIMONA Notifications

To set up DIMONA Notification data, use the Online Processing Setup BEL (HR_PRCS_SETUP_BEL), DIMONA Sender Setup BEL (HR_DI_SENDER_BEL), and DIMONA Event Type BEL (HR_DI_EVT_TYP_BEL) components.

These topics provide an overview of DIMONA notifications and discuss how to:

- Set up properties for HR Belgium processes.
- Identify sender IDs and addresses for the DIMONA declaration process.
- Define event types for DIMONA declarations.
- Create new DIMONA notifications as XML files.
- Review new DIMONA results.
- View DIMONA result details.
- Load DIMONA notifications.
- View loading errors.

## Understanding DIMONA Notifications

The Belgian E-government Social Security plan requires companies to report social insurance data for workers employed under Belgium regulations. DIMONA notifications contain the required data.

The DIMONA Declaration process (HR_DI_BEL) creates the mandatory xml format file and is initiated from the New DIMONA Notification page. The PeopleSoft system supports employee start and end of employment DIMONA notifications, which are based on the actions and action reasons selected in the setup, including corresponding updates and cancellations. You can also create you own DIMONA notifications based off of the actions or action reasons selected in the setup. You can generate notifications for a single employee, for a company, or for a business unit.

**Note:** A previous version of the DIMONA notification generation, the Create DIMONA Notification process (HRBEL_DIM_AE), generates DIMONA notifications as flat files and uses hardcoded actions.

After you have generated files containing the notifications, you can transfer the files to the National Office for Social Security (NOSS), known as RSZ or ONSS in Belgium, using the NOSS file transfer protocol server. After you transfer data to the NOSS, you can consult and update employee data by using the NOSS database system.

## Pages Used to Generate DIMONA Notifications

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Online Processing Setup | HR_PRCS_SETUP_BEL | Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Online Processing Setup, Online Processing Setup | Set up properties for HR Belgium processes. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| HR Belgium Process Setup | HR_PROP_LONG_BEL | Click the Details link on the Online Processing Setup page. | Create, modify, or view long property values. This page enables you to give an explanation of the property or assign a long value as property to a process parameter, like a URL for example. |
| DIMONA Sender Setup | HR_DI_SENDER_BEL | Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, DIMONA Sender Setup, DIMONA Sender Setup | Identify sender IDs and addresses for the DIMONA declaration process. |
| DIMONA Event Type BEL | HR_DI_EVT_TYP_BEL | Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, DIMONA Event Type BEL, DIMONA Event Type BEL | Define event types for the HR Belgium DIMONA declaration. |
| Create DIMONA Notification | HR_DIMONA_CNTL_BEL | Workforce Administration, Collective Processes, Administration BEL, Create DIMONA Notification, Create DIMONA Notification | Create DIMONA notifications as a flat file. This is an older version of the notification process. |
| Review DIMONA Notification | HR_DIMONA_RVW_BEL | Workforce Administration, Collective Processes, Administration BEL, Review DIMONA Notification, Review DIMONA Notification | Review DIMONA notifications that were created as a flat file using the older Create DIMONA Notifications process. This is an older version of the DIMONA notification review. |
| New DIMONA Notification | HR_DI_RUNCTL_BEL | Workforce Administration, Collective Processes, Administration BEL, New DIMONA Notification, New DIMONA Notification | Create new DIMONA XML notifications. |
| DIMONA Result | HR_DI_RVW1_BEL | Workforce Administration, Collective Processes, Administration BEL, Review New DIMONA Results, Review New DIMONA Results | Review new DIMONA results. |
| DIMONA Result Details | HR_DI_RSLT_SEC_BEL | Click the Details button on the DIMONA Result page. | View additional data regarding the DIMONA process. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Load DIMONA Notification | HR_DI_LOAD_BEL | Workforce Administration, Collective Processes, Administration BEL, Load DIMONA Notification, Load DIMONA Notification | Load DIMONA notification. |
| DIMONA Error Details | HR_DI_LOAD_SEC_BEL | Click the Details link on the Load DIMONA Notification page. | View error details from the DIMONA load process. |

## Online Processing Setup BEL - Online Processing Setup Page

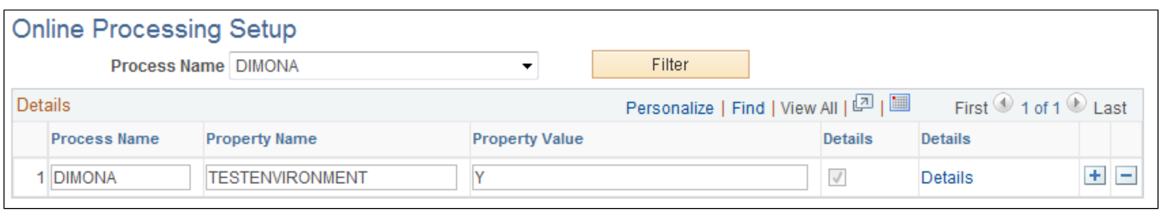
Use the Online Processing Setup page (HR_PRCS_SETUP_BEL) to set up properties for HR Belgium processes.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, Online Processing Setup, Online Processing Setup

**Image: Online Processing Setup page**

This example illustrates the fields and controls on the Online Processing Setup page. You can find definitions for the fields and controls later on this page.




Add, modify, or view variables for DIMONA or other Belgium processes.

The PeopleSoft HR application delivers the *DIMONA* process name to set your system as a test environment. This enables you to set the system environment to be in test or final production mode while running DIMONA notifications.

| | |
|---|---|
| **Property Value** | Enter values pertaining to the process.<br><br>For the *DIMONA* process, specify whether your environment is in test or final production mode. Valid values are *Y* (Test mode) and *N* (Production mode). Test environments set as *N* are for final generation and will be sent to social security.<br><br>The DIMONA Declaration process will place either a *T* = Test (data) or an *R* = Real (data) in position 31 of the DIMONA filename based on the production mode.<br><br>See New DIMONA Notification Page. |
| **Details** | This check box displays whether there is additional information regarding this process name. |

Click the Details link to open the HR Belgium Process Setup page and manage long property value information.

## DIMONA Sender Setup Page

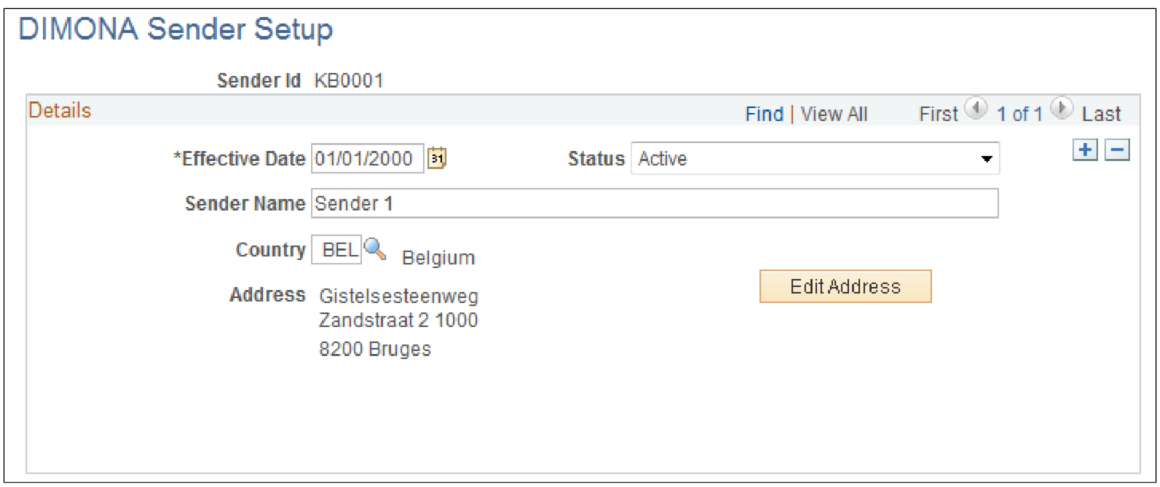
Use the DIMONA Sender Setup page (HR_DI_SENDER_BEL) to identify sender IDs and addresses for the DIMONA declaration process.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, DIMONA Sender Setup, DIMONA Sender Setup

**Image: DIMONA Sender Setup page**

This example illustrates the fields and controls on the DIMONA Sender Setup page. You can find definitions for the fields and controls later on this page.




Use this page to maintain sender address information. When an user enters a sender number on the New DIMONA Notification run control page the page will display the associated address for this sender.

## DIMONA Event Type Page

Use the DIMONA Event Type page (HR_DI_EVT_TYP_BEL) to define event types for the HR Belgium DIMONA declaration.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data BEL, DIMONA Event Type BEL, DIMONA Event Type BEL

**Image: DIMONA Event Type page**

This example illustrates the fields and controls on the DIMONA Event Type page. You can find definitions for the fields and controls later on this page.


Use this page to define and maintain HR actions and reasons that the New DIMONA Notification process should select from HR Job Data. For example, if you indicate a *Hire* Action value with the Reason Code value of *First Job,* the process will select only employee job data that have an action of *Hire* and a reason of *First Job.* If the Reason Code field is left blank, the process will select all employee job data with the action *Hire,* regardless of the reason code.

The PeopleSoft HR system delivers this event types:

| ***Event Type*** | ***Action*** | ***Reason Code*** | ***HR Status*** |
|---|---|---|---|
| *Start* (start of employment) | *Hire* (HIR) | N/A | *Active* |
| *Start* | *Rehire* (REH) | N/A | *Active* |
| *End* (end of employment) | *Termination* (TER) | N/A | *Inactive* |
| *End* | *Terminated with Benefits* ( TWB) | N/A | *Inactive* |
| *End* | *Terminated with Pay* (TWP) | N/A | *Inactive* |

**Note:** N/A indicates that there is now action reason associated with the action.

See Review New DIMONA Results Page.

## New DIMONA Notification Page

Use the New DIMONA Notification page (HR_DI_RUNCTL_BEL) to create new DIMONA XML notifications.

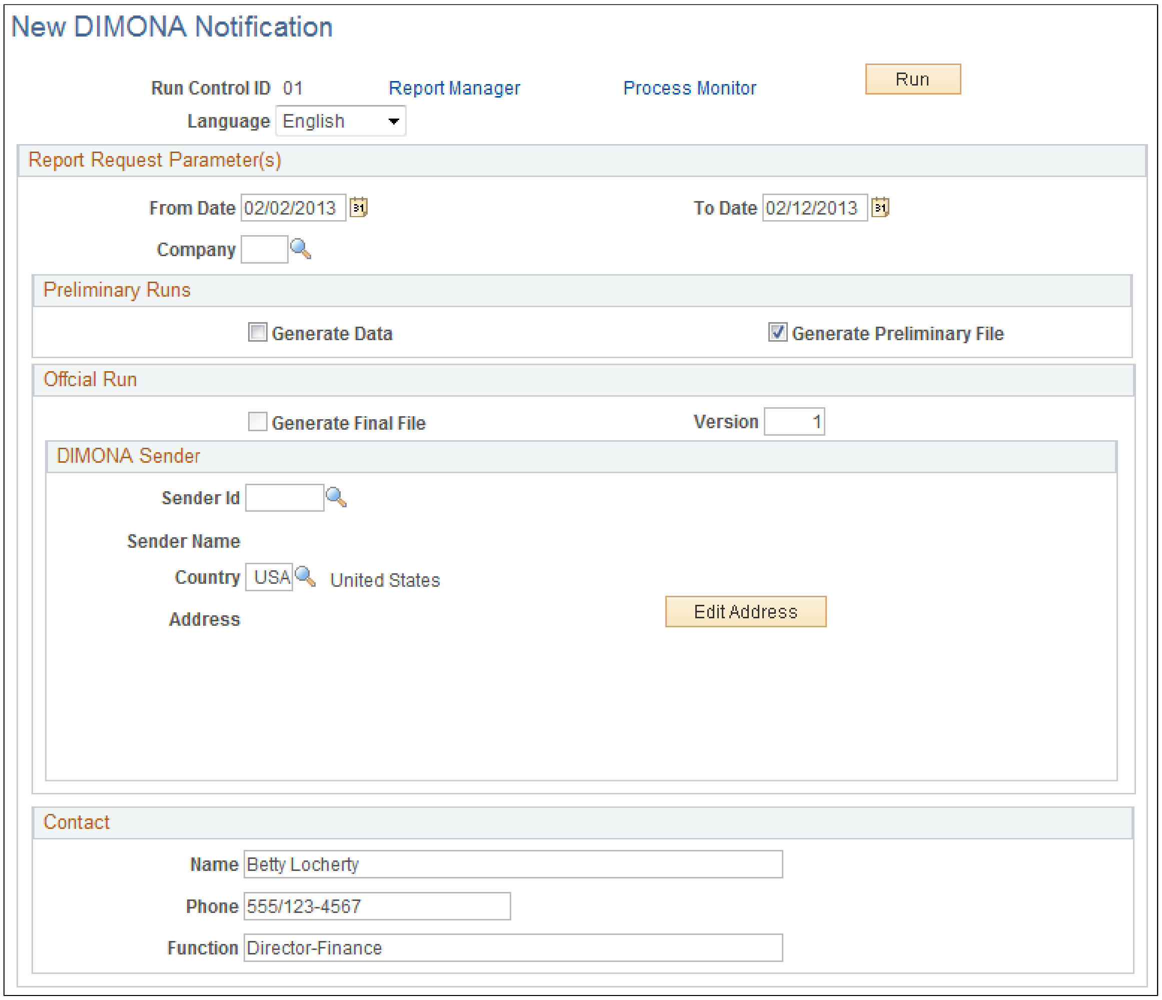
 

**Navigation**

Workforce Administration, Collective Processes, Administration BEL, New DIMONA Notification, New DIMONA Notification

**Image: New DIMONA Notification page**

This example illustrates the fields and controls on the New DIMONA Notification page. You can find definitions for the fields and controls later on this page.




## Report Request Parameter(s)

**From Date and To Date**

Enter a date range for the period you want to include in the DIMONA notification. The process will select the data between these dates.

The From Date field displays by default a date 10 days prior to the system's date. The To Date field displays by default the system date.

**Company**

Enter the company or business unit for which to create a DIMONA notification. Only companies with the *BEL* regulatory region are available for selection. If you leave this field blank, the process will select all companies which have a regulatory region of *BEL* (Belgium).

## Preliminary Runs

Use this section to execute preliminary runs. The system selects and stores the data in the DIMONA result table and a test file. You can then review the data online before creating the official file or review and validate the xml file using xml schema validator software.

**Generate Data**

Select this check box to have the process select data from Job and insert it into the DIMONA result table.

Do not select this check box if you have performed changes since the last run, otherwise the changes will be overwritten by the process.

---

**Note:** Any existing data that has not yet been reported will be overwritten. If you have performed manual changes, such as set an action to update or cancel, these changes will be overwritten as well.

---

**Generate Preliminary File**

Select this check box to have the system create a temporary file that you can review. The file name will have a *T* in position 31.

## Official Run

Use this section after you have reviewed the data online or through the temporary file, performed any necessary manual changes, and consider the file ready to be sent to the social security office.

**Generate Final File**

Select this check box to have the system create a final file to be sent to the social security office. The file name will have an *R* in position 31.

This check box is available in production mode only. In test mode, the check box is unavailable. The mode is determined on the Online Processing Setup page for process name *DIMONA. - TESTENVIRONMENT* The system uses the following Property Value field values to determine the mode:

- *Y* - test mode.
- *N* - production mode.

See Online Processing Setup BEL - Online Processing Setup Page.

**Version**

Enter the DIMONA version (from the first page of the Glossarium) used when creating the DIMONA file.

The system provides by default the last version number + 1 of the file sent by this sender. This value can be overwritten. The first time this DIMONA process is run, the user should set the version to *1*.

### DIMONA Sender

Enter information about the person who is sending the notification.

**Sender Nr (sender number), Sender Name, Country, and Address**

Enter the number that the NOSS assigned to the person who is sending the notification. After you enter the sender number, the page displays the address information defined on the DIMONA Sender Setup page.

See DIMONA Sender Setup Page.

**Country Code**

Enter the sender's country code.

**Edit Address**

Click this button to access the Edit Address page and update the address, if necessary.

### Contact

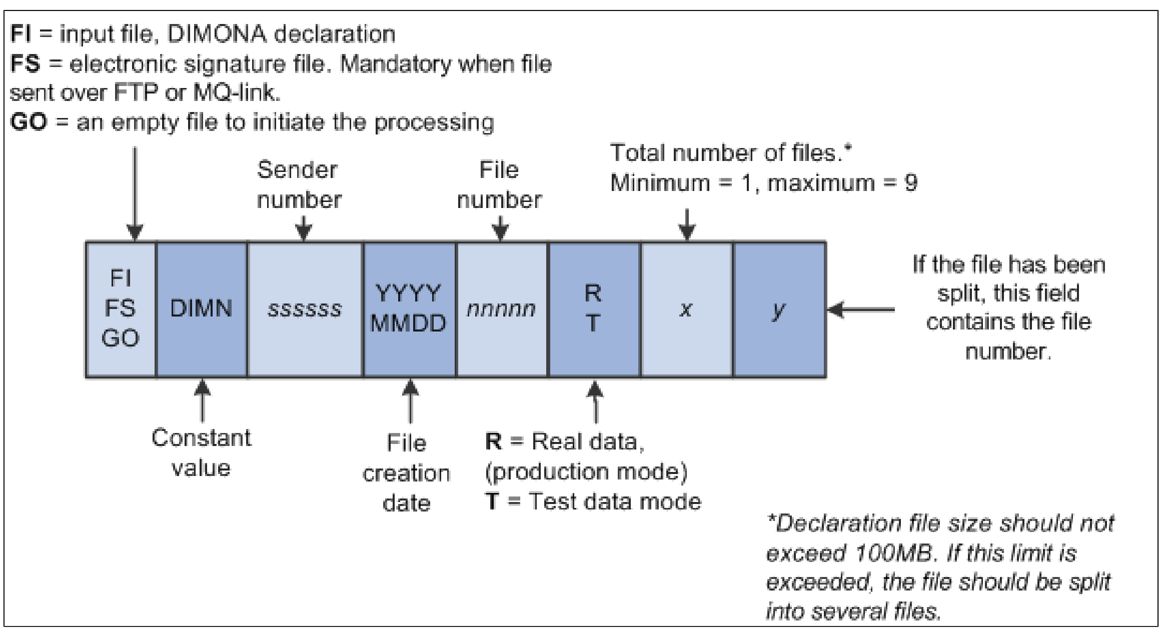
**Name, Phone, and Function**

Enter the name, telephone number, and function of the person whom the NOSS can contact in case a problem occurs with the file.

### Understanding the XML DIMONA File Naming Convention

**Image: DIMONA file naming convention**

When running the DIMONA Declaration process (HR_DI_BEL) using the New DIMONA Notification page, the system will create an eight segment file name, 33 to 35 characters, using the following format:



An example of a DIMONA declaration input file created on July 16, 2011 in final mode might have the following file name:

`FI.DIMN.998033.20110716.00044.R.2.1`

The sender ID is 998033 and this would be the first of 2 files.

---

**Note:** The New DIMONA Notification process creates files starting with *FI* only

---

## Review New DIMONA Results Page

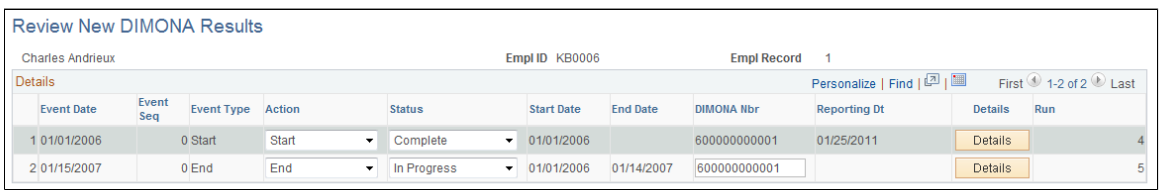
Use the Review New DIMONA Results page (HR_DI_RVW1_BEL) to review new DIMONA results.

**Navigation**

Workforce Administration, Collective Processes, Administration BEL, Review New DIMONA Results, Review New DIMONA Results

**Image: Review New DIMONA Results page**

This example illustrates the fields and controls on the Review New DIMONA Results page. You can find definitions for the fields and controls later on this page.




**Event Date**

Displays the date of the DIMONA event from Job Data, such as a start or end of employment.

**Event Sequence**

Displays the effective sequence of the Job Data transaction associated with the DIMONA event. The sequence number tracks the order of multiple administrative actions that occur on the same day.

**Event Type**

Displays the type of DIMONA event *Start* or *End,* as determined by the process.

See DIMONA Event Type Page.

**Action**

View or select the notification action. Valid values are:

- *Start* - The process provides this value by default when associated with a starting job action, such as a hire or rehire.
- *End* - The process provides this value by default when associated with an ending job action, such as a termination.
- *Cancel* - The process provides this value by default to indicate that the event no longer exists in Job Data.
- *Update* - Select this value to indicate that you have updated the event.

- *None* - Select this value to indicate that there is no event to report.

**Status**

View or select the status of the notification. Valid values are:

- *Cancel* - Select this value to indicate that you have canceled the event.
- *Complete* - The process provides this value by default when the Generate Final File check box is selected on the New DIMONA Notification page.
- *Error* - Select this value to indicate that this event was created in error.
- *In Progress* - The process provides this value by default when the Generate Preliminary File check box is selected on the New DIMONA Notification page.
- *Rejected* - Indicates that it was rejected by the social security. The load notification process selects this value if the notification was sent back by the social security due to error.

**Start Date**

Displays the event start date from Job Data.

**End Date**

Displays the event end date from Job Data.

**DIMONA Nbr (DIMONA number)**

The DIMONA Nbr is provided by the social security and loaded in the system with the load notification process.

**Reporting Dt (reporting date)**

Displays the date the process was finalized.

**Details**

Click this button to open the DIMONA Result Details page to view additional information about the notification.

**Run**

Increments by one each time the process is run.

## DIMONA Result Details Page

Use the DIMONA Result Details page (HR_DI_RSLT_SEC_BEL) to view additional data regarding the DIMONA process.

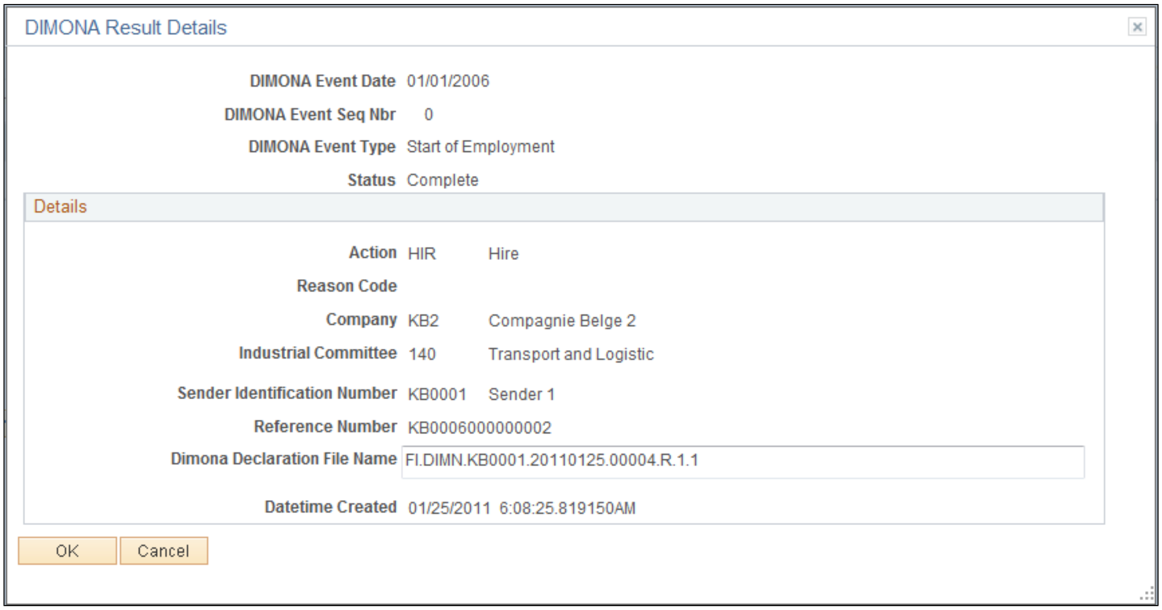
 

**Navigation**

Click the Details button on the DIMONA Result page.

**Image: DIMONA Result Details page**

This example illustrates the fields and controls on the DIMONA Result Details page. You can find definitions for the fields and controls later on this page.




Displays additional information about the DIMONA notification.

**Reference Number**

Displays the number that the social security will reference when sending back the notification. It is the link between the employee data (in the xml) and the handling result in the notification.

**Note:** The reference number is generated by the process: EmplID followed by a sequence number

**Dimona Declaration File Name**

Displays the DIMONA file name the process created in final production mode.

## Load DIMONA Notification Page

Use the Load DIMONA Notification page (HR_DI_LOAD_BEL) to load DIMONA notification.

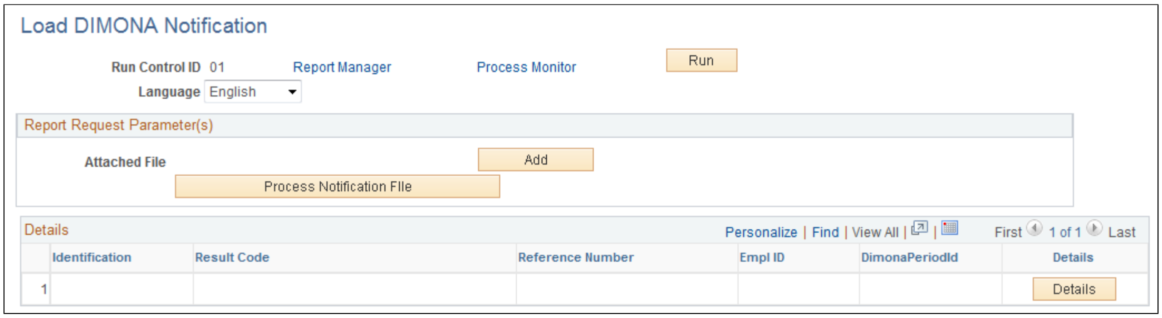
 

**Navigation**

Workforce Administration, Collective Processes, Administration BEL, Load DIMONA Notification, Load DIMONA Notification

**Image: Load DIMONA Notification page**

This example illustrates the fields and controls on the Load DIMONA Notification page. You can find definitions for the fields and controls later on this page.




In case of a successful submission of a new hire, or start of employment, a return file will be provided with the newly assigned DIMONA number, which will be stored in the tables for future reference. In cases of an unsuccessful submission, the error(s) will be uploaded and viewable in the next transaction.

| | |
|---|---|
| **Details** | Click this button to open the DIMONA Error Details page and view error details. |

## DIMONA Error Details Page

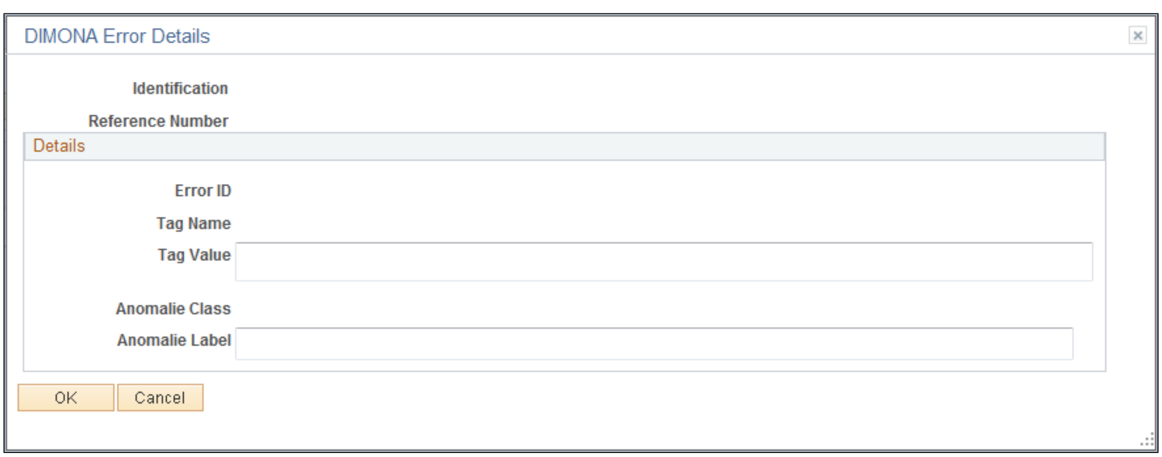
Use the DIMONA Error Details page (HR_DI_LOAD_SEC_BEL) to view error details from the DIMONA load process.

**Navigation**

Click the Details link on the Load DIMONA Notification page.

**Image: DIMONA Error Details page**

This example illustrates the fields and controls on the DIMONA Error Details page. You can find definitions for the fields and controls later on this page.



# Running the Social Report

This topic lists the page used to run the Belgian Social report.

## Page Used to Run the Social Report

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Social Report BEL | RUNCTL_PER067_BEL | Workforce Administration, Workforce Reports, Social Report BEL, Social Report BEL | Run the Social Report ( PER067BEL), which reports a variety of employer and employee information that is required by the government. |

## Chapter 10

# Managing Country-Specific Workforce Data

## (ARG) Providing Additional Information for Argentinean Employees

These topics discuss how to:

- Enter Early Registration code information.
- Declare health provider data.
- Manage Integral Retirement and Pension System data.

### Pages Used to Provide Additional Information for Argentinean Employees

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Additional Information ARG | ADDL_INFO_ARG | Workforce Administration, Job Information, Additional Information ARG, Additional Information ARG | Enter additional employee information. |
| Health Benefits | ADDL_HB_ARG | Workforce Administration, Job Information, Additional Information ARG, Health Benefits | Declare the Social Security Plan and health provider data for each employee. |
| SICOSS | ADDL_SIJP_ARG | Workforce Administration, Job Information, Additional Information ARG, SICOSS | Manage the Integral Retirement and Pension System data required by the government of Argentina. |

### Additional Information ARG Page

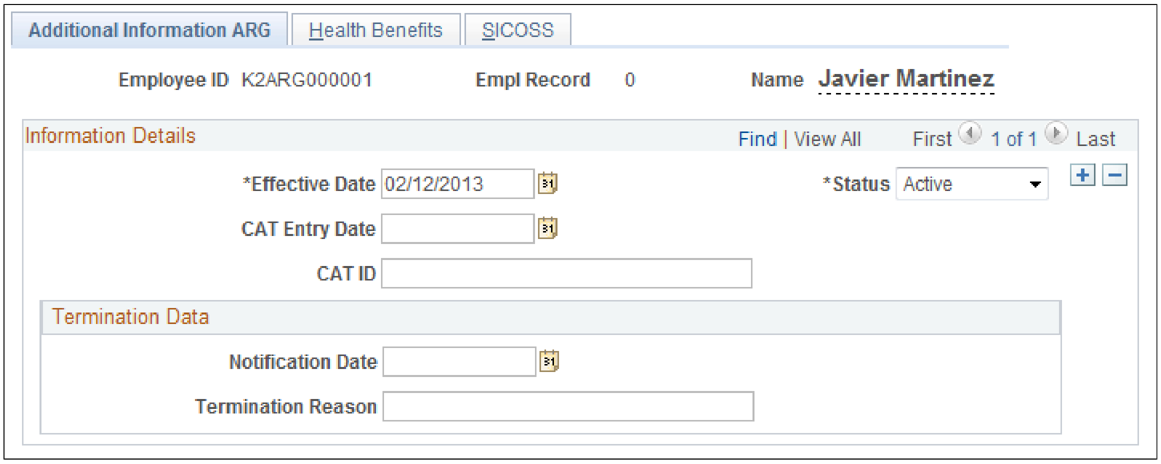
Use the Additional Information ARG page (ADDL_INFO_ARG) to enter additional employee information.

### Navigation

Workforce Administration, Job Information, Additional Information ARG, Additional Information ARG

**Image: Additional Information ARG page**

This example illustrates the fields and controls on the Additional Information ARG page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **CAT Entry Date (Clave Alta Temprana Entry Date)** | Enter the date that the early registration code was assigned to the employee. |
| **CAT ID (Clave Alta Temprana ID)** | Enter the early registration code requested by the employer. |

## Health Benefits Page

Use the Health Benefits page (ADDL_HB_ARG) to declare the Social Security Plan and health provider data for each employee.

**Navigation**

Workforce Administration, Job Information, Additional Information ARG, Health Benefits

**Image: Health Benefits page**

This example illustrates the fields and controls on the Health Benefits page. You can find definitions for the fields and controls later on this page.


## Social Security Plan

| | |
|---|---|
| **Social Security Code** | Select the code for the employee's Social Security entity. |
| **Social Security Plan Code** | Select the plan code for the employee's Social Security entity. |
| **SS Affiliate Number (Social Security Affiliate Number)** | Enter the employee's identification number for the Social Security entity. |
| **SS Card Expiration Date (Social Security Card Expiration Date)** | Enter the expiration date of the employee's Social Security card. |

## Health Provider Plan

| | |
|---|---|
| **Health Provider Code** | Select the code for the employee's health provider entity. |
| **Health Provider Plan Code** | Select the code for the employee's health provider plan. |
| **HP Affiliate Number (Health Provider Affiliate Number)** | Enter the employee's identification number for the health provider entity. |
| **HP Card Expiration Date (Health Provider Card Expiration Date)** | Enter the expiration date for the employee's health provider card. |

## SICOSS Page

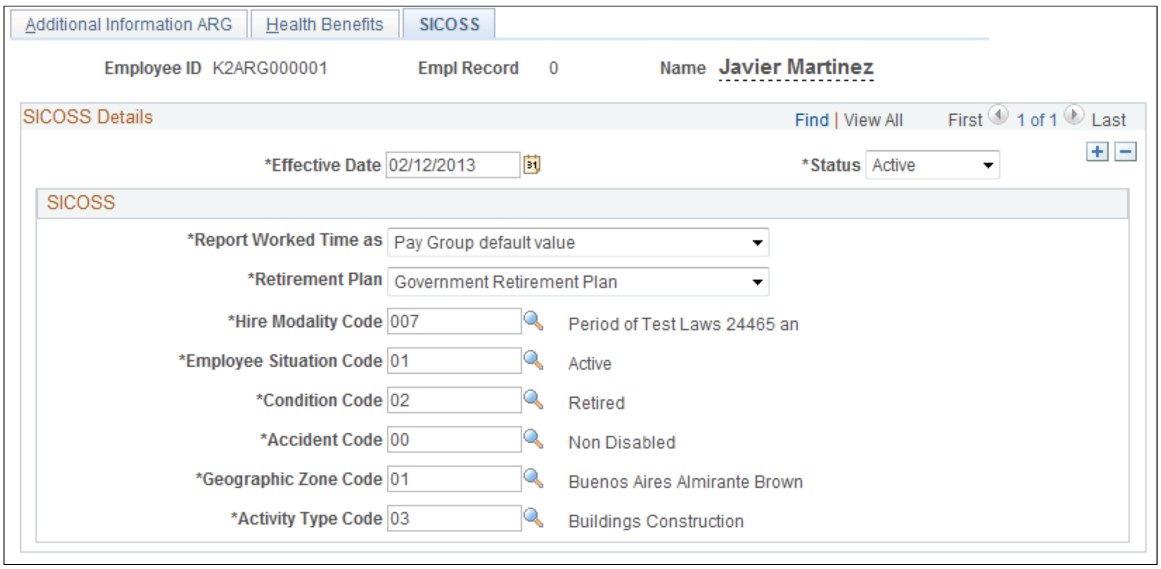
Use the SICOSS page (ADDL_SIJP_ARG) to manage the Integral Retirement and Pension System data required by the government of Argentina.

**Navigation**

Workforce Administration, Job Information, Additional Information ARG, SICOSS

**Image: SICOSS page**

This example illustrates the fields and controls on the SICOSS page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Report Worked Time as** | Select how to report worked time. The default value, *Pay Group default value,* reports worked time based on the pay group. You can override the value set by the pay group for this employee. Select *Days* to report the amount of worked days in the month, or select *Hours* to report the amount of hours worked in the month. |
| **Retirement Plan** | Select the employee's retirement plan. The default value is *Government Retirement Plan.*<br><br>*Corporate Retirement Plan* is available for selection only when the effective date is before January 1, 2009. |
| **AFJP Code (*Administratoras de Fondos de Jubilaciones y Pensiones* Code)** | Select the employee's AFJP code. This field is displayed only when the value in the Retirement Plan field is *Corporate Retirement Plan.* This is possible only when the effective date is before January 2, 2009. |
| **Hire Modality Code** | Select the employee's Hire Modality Code value. |
| **Employee Situation Code** | Select the employee's Employee Situation Code value. |
| **Condition Code** | Select the employee's Condition Code value. |

| | |
|---|---|
| **Accident Code** | Select the Accident Code value. |
| **Geographic Zone Code** | Select the Geographic Zone Code. |
| **Activity Type Code** | Select the corresponding Activity Type Code. |

# (BRA) Providing Additional Information for Brazilian Employees

These topics discuss how to:

- Enter additional SEFIP data for Brazilian employees.
- Manage national ID history for Brazilian employees.
- Specify contract periods for Brazilian employees.

## Pages Used to Enter Additional Data for Brazilian Employees

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Personal Information BRA | PERSONAL_INFO_BRA | Workforce Administration, Personal Information, Biographical, Personal Information BRA, Personal Information BRA | Enter additional information about a person for Brazil, such a parental information and RG and CTPS expiration dates. |
| Additional Information BRA | ADDL_INFO_BRA | Workforce Administration, Job Information, Additional Information BRA, Additional Information BRA, Additional Information BRA | Enter additional worker information. |
| National ID History | PERS_NID_HI_BRA | Workforce Administration, Job Information, Additional Information BRA, National ID History | Enter the effective dated national ID. This information is used in SEFIP reporting. |
| Additional Contract Data | CONTRCT_DTA_BRA | Workforce Administration, Job Information, Additional Information BRA, Additional Contract Data | Specify the first and second contract periods for the employee who has an active contract. |

## Additional Information BRA Page

Use the Additional Information BRA page (ADDL_INFO_BRA) to enter additional worker information.

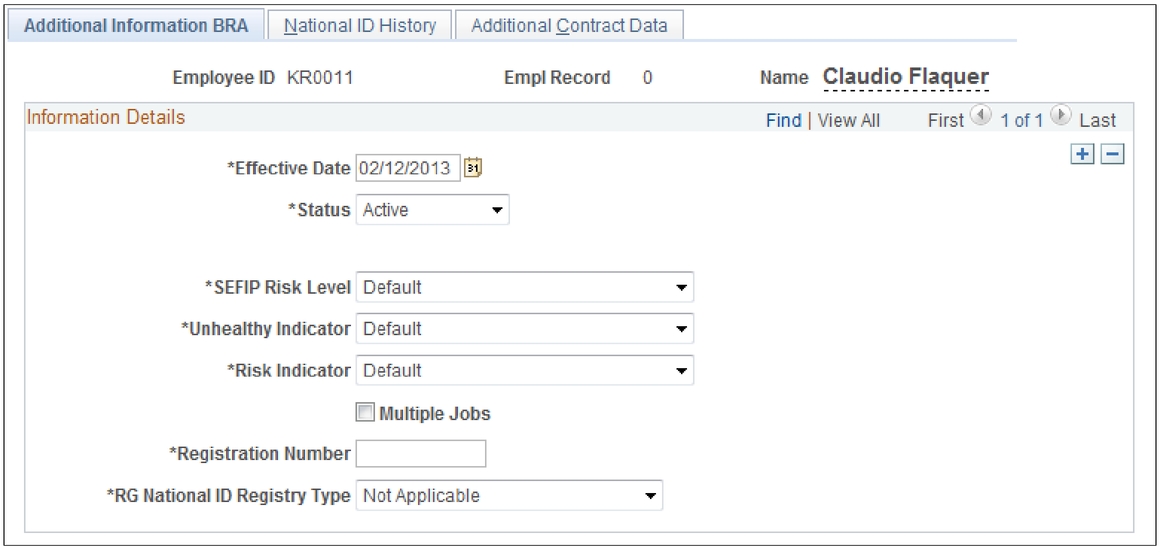
 

### Navigation

Workforce Administration, Job Information, Additional Information BRA, Additional Information BRA, Additional Information BRA

### Image: Additional Information BRA page

This example illustrates the fields and controls on the Additional Information BRA page. You can find definitions for the fields and controls later on this page.




---

**Note:** If you have Global Payroll for Brazil installed, you can override the values on this page using the Payee Parameters page.

---

See "Setting Up Payee Data *(PeopleSoft HCM 9.2: Global Payroll for Brazil)*".

**SEFIP Risk Level**

Select the appropriate risk level for the employee's activities. The system uses this information to generate the SEFIP report and to determine the employee's retirement deduction.

**Unhealthy Indicator**

Select the appropriate health risk level for the employee's activities. The system uses this indicator to calculate an earning that compensates for this health risk factor.

Values are *Default, Maximum Grade, Middle Grade, Minimum Grade,* and *Not Applicable.*

**Risk Indicator**

Select the appropriate hazard level for the employee's activities. The system uses this indicator to calculate an earning that compensates for this hazardous factor.

Values are *Applicable, Default,* and *Not Applicable.*

**Multiple Jobs**

Select to specify whether this person has one or more jobs outside of this company.

**Registration Number**

Enter the employee's registration number. This number acts as an alternate employee ID.

When an employee is hired, transferred, or rehired through the Job Data component, the system updates this field with the last registration number listed on the Additional Info - Brazil page of the establishment that is associated with the employee. If an employee was terminated and later rehired with the same establishment, the same registration number is used.

## (BRA) National ID History Page

Use the National ID History page (PERS_NID_HI_BRA) to enter the effective dated national ID.

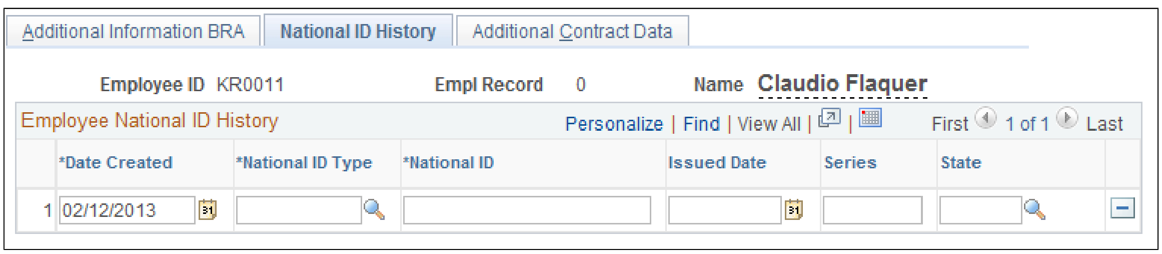
This information is used in SEFIP reporting.

**Navigation**

Workforce Administration, Job Information, Additional Information BRA, National ID History

**Image: National ID History page**

This example illustrates the fields and controls on the National ID History page. You can find definitions for the fields and controls later on this page.




Enter a Brazilian employee's PIS and CTPS (work card) national IDs and supporting data on the Biographical Details and Regional pages of personal data. When one of these national IDs is updated in personal data, a new history record, containing the national ID as well as the additional related data found on Regional page, are entered on the National ID History page. These values can be modified or deleted on this page.

**Date Created**

Displays the date the national ID was entered in the system. This date is used in SEFIP reporting.

**National ID Type**

The national ID comes from the Biographical Details page of personal data. The national ID history only allows the *CTPS* ( work card) and *PIS* values.

**National ID**

Displays the historical national ID number.

**Issued Date**

Specifies the date this ID was issued. This information comes from the Regional page of personal data. Data entered in the CTPS group box of the Regional page displays for the CTPS ( work card) national ID type. The issue date for the PIS national ID type comes from the date entered in the Inscription Date field on the Regional page of personal data.

**Series** Enter the work card number. This value comes from the Regional page of personal data in the CTPS group box.

**State** Enter the political subdivision of the CTPS issuing agency. This value comes from the Regional page of personal data in the CTPS group box. This information is required if a CTPS number is provided.

## (BRA) Additional Contract Data Page

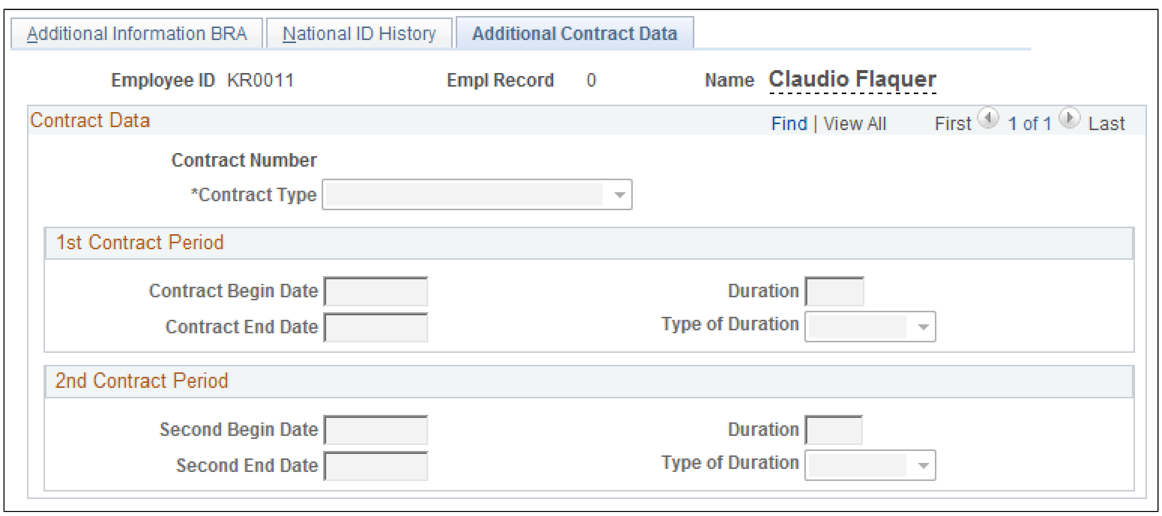
Use the Additional Contract Data page (CONTRCT_DTA_BRA) to specify the first and second contract periods for the employee who has an active contract.

**Navigation**

Workforce Administration, Job Information, Additional Information BRA, Additional Contract Data

**Image: Additional Contract Data page**

This example illustrates the fields and controls on the Additional Contract Data page. You can find definitions for the fields and controls later on this page.




### 1st Contract Period

Specify the first contract period by either entering the contract begin and end dates, or entering the contract begin date and the duration of the contract (for example, 2 months, 30 days, and so on). If the latter method is used, the system calculates and populates the contract end date in this section automatically.

---

**Note:** When either the contract begin date or the duration is updated, the contract end date is recalculated accordingly.

---

An error is displayed if the begin date entered is greater than the end date.

### 2nd Contract Period

The system populates the second begin date value by adding 1 day to the current contract end date. When the duration is specified, the system calculates and populates the second end date automatically.

---

**Note:** If the contract end date is recalculated due to a change in the contract begin date or duration, and the newly adjusted second begin date value is not equal to the current second begin date, the system populates the newly adjusted second begin date and clears the second end date and duration values in this section.

---

An error is displayed if the begin date entered is greater than the end date, or if the contract end date is removed manually when the second begin date value is present.

# (CHN) Providing Personal File Information for Chinese Employees

This topic discusses how to define personal file information.

## Page Used to Provide Personal File Information for Chinese Employees

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Personal Information CHN | GPCN_FILE_INFO | Workforce Administration, Personal Information, Biographical, Personal Information CHN, Personal Information CHN | Define personal file information. |

## Personal Information CHN Page

Use the Personal Information CHN page (GPCN_FILE_INFO) to define personal file information.

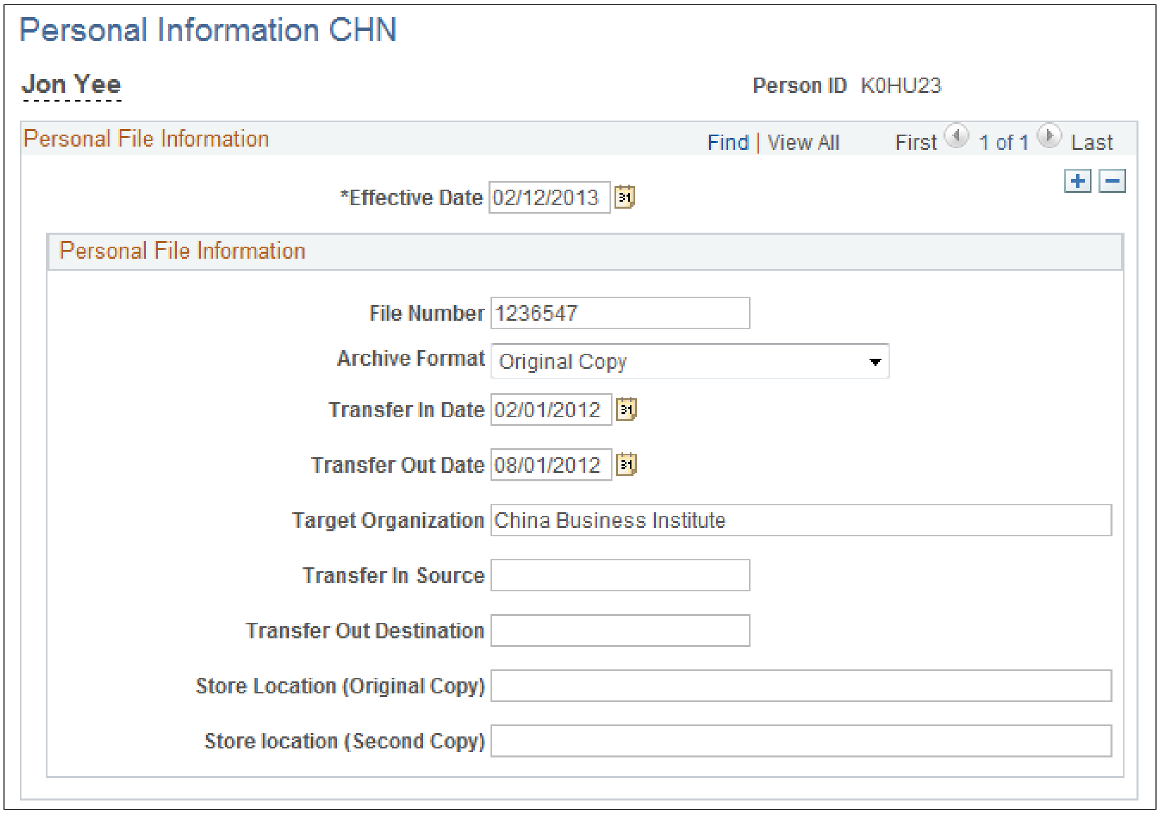
 

**Navigation**

Workforce Administration, Personal Information, Biographical, Personal Information CHN, Personal Information CHN

**Image: Personal Information CHN page**

This example illustrates the fields and controls on the Personal Information CHN page. You can find definitions for the fields and controls later on this page.




**File Number** Enter the employee's personal file number.

**Archive Format** Specify the format of the employee's archived file information. Valid values are:

- *Film*
- *No File Existing*
- *Original Copy*
- *Original Copy and Film*
- *Original Copy, Secondary Copy*
- *Original, Secondary Copy & File*
- *Other*
- *Secondary Copy*

- *Secondary Copy and Film*

**Transfer In Date and Transfer Out Date** — Enter the dates on which the file was transferred in and transferred out.

**Target Organization** — Enter the organization to which the file was transferred.

**Transfer In Source** — Enter the source of the file that was originally transferred in.

**Transfer Out Destination** — Enter the destination to which the file was transferred out.

**Store Location (Original Copy)** — Enter the location in which the original copy of the file is stored.

**Store Location (Second Copy)** — Enter the location in which the secondary copy of the file is stored.

# (CAN) Providing Additional Information for Canadian Employees

There are a few issues that are unique to a Canadian workforce.

**Note:** While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, the PeopleSoft system continues to offer Ontario Employment Equity (OEE) reporting functionality.

These topics discuss how to:

- Enter OEEC workforce survey responses.
- Record employee-level information about official language use.

## Pages Used to Provide Additional Information for Canadian Employees

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Workforce Survey Result | CAN_OEE_SURVEY | Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Result, Workforce Survey Result | Enter OEEC workforce survey responses. |
| Official Languages | PERS_OFFLNG_CAN | Workforce Administration, Personal Information, OEE Workforce Survey CAN, Official Languages, Official Languages | Record employee-level information about the use of official languages. The information stored in this page is used for the Official Languages reports that you submit to the Canadian government, in accordance with the Official Languages Act. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Groups by OCC Group Report | RUNCTL_FTCANAC | Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report, Groups by OCC Group Report | Generate the OEE Groups by OCC Group report ( PER103CN). The report lists the totals of active employees, within the defined area codes, employed within the date range. |
| Groups by Emplymt Type Rpt | RUNCTL_FTCANAC | Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Emplymt Type Rpt, Groups by Emplymt Type Rpt | Generate the OEE Groups by Employment Type report ( PER104CN). |
| Groups / Jobs Filled/Vacated | RUNCTL_FTCANAC | Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups / Jobs Filled/Vacated, Groups / Jobs Filled/Vacated | Generate the OEE Groups by Jobs Filled/Vacatd report ( PER106CN), which lists the totals of active employees, within the defined area codes, employed within the date range. |
| Workforce Survey Stats | RUNCTL_PER105CN | Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats, Workforce Survey Stats | Run the OEE Work Force Survey Stats report ( PER105CN). The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed. |

## Workforce Survey Result Page

Use the Workforce Survey Result page (CAN_OEE_SURVEY) to enter OEEC workforce survey responses.

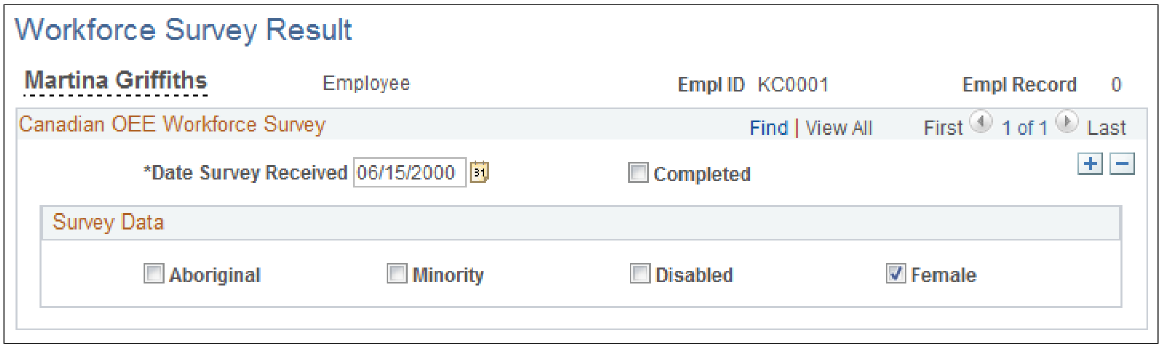
 

**Navigation**

Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Result, Workforce Survey Result

**Image: Workforce Survey Result page**

This example illustrates the fields and controls on the Workforce Survey Result page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Date Survey Received** | Enter the date on which the survey was received. The default is the system date, which is usually today's date. Change this date if necessary. |
| **Completed** | Select to indicate that the survey was completed. |
| **Survey Data** | Indicate whether the survey respondent is *Aboriginal, Minority, Disabled,* or *Female.* |

## Official Languages Page

Use the Official Languages page (PERS_OFFLNG_CAN) to record employee-level information about the use of official languages.

The information stored in this page is used for the Official Languages reports that you submit to the Canadian government, in accordance with the Official Languages Act.

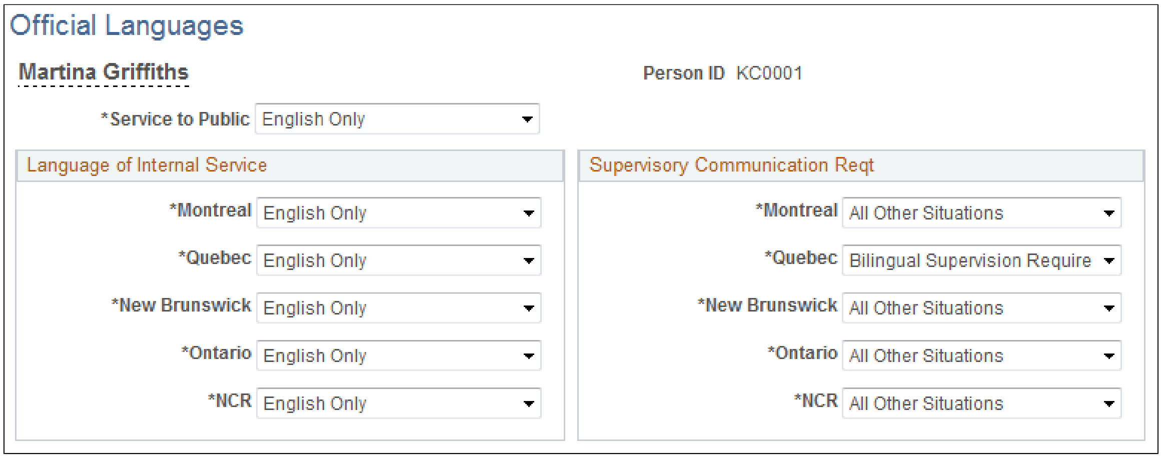
 

**Navigation**

Workforce Administration, Personal Information, OEE Workforce Survey CAN, Official Languages, Official Languages

**Image: Official Languages page**

This example illustrates the fields and controls on the Official Languages page. You can find definitions for the fields and controls later on this page.




**Service to Public**: Indicate which languages the employee uses to provide service to the public.

## Language of Internal Service

**Montreal, Quebec, New Brunswick, Ontario, and NCR (National Capital Region)**: For the locations listed in this group box, indicate which languages the employee uses to communicate internally. Select *N/A (not applicable)* for those locations that don't apply.

## Supervisory Communication Reqt (Supervisory Communication Required)

**Montreal, Quebec, New Brunswick, Ontario, and NCR (National Capital Region)**: For the locations listed in this group box, indicate which languages the employee requires for supervisory communication. Select *N/A (not applicable)* for those locations that don't apply.

## Related Links

"Running Official Languages Reports *(PeopleSoft HCM 9.2: Human Resources Meet Regulatory Requirements)*"

# (CHE) Running the Company Statistics Report

The Swiss Federal Department of Statistics requires all Swiss companies to create this report every 10 years.

## Page Used to Run the Company Statistics Report

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Company Statistics CHE | RUNCTL_PER001_CHE | Workforce Monitoring, Company Statistics CHE, Company Statistics CHE | Run the Company Statistics report (PER001CH). This report provides information on employee wages, occupations, and other data necessary for the Company Statistics report *(Betriebszaehlung)*.<br><br>If GP Switzerland is installed, the payroll offers two statistic reports that replace this one —the BESTA Statistics (GPCHST01.SQR) and Salary Structure Analysis ( GPCHST02.SQR) reports. |

# (FRA) Providing Additional Information for French Workers

These topics discuss how to:

- Track mandate information.
- Enter worker military service information.

## Pages Used to Provide Additional Information for French Workers

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Mandates FRA | MANDATES_FRA | Workforce Administration, Job Information, Mandates FRA, Mandates FRA | Track mandate information for French workers. |
| Military Situation FRA | MILIT_SITUATN_FRA | Workforce Administration, Personal Information, Biographical, Military Situation FRA, Military Situation FRA | Enter worker military service information, including the branch of the armed forces in which the worker served, and the worker's ID number, grade, and reserve status. |

## Mandates FRA Page

Use the Mandates FRA page (MANDATES_FRA) to track mandate information for French workers.

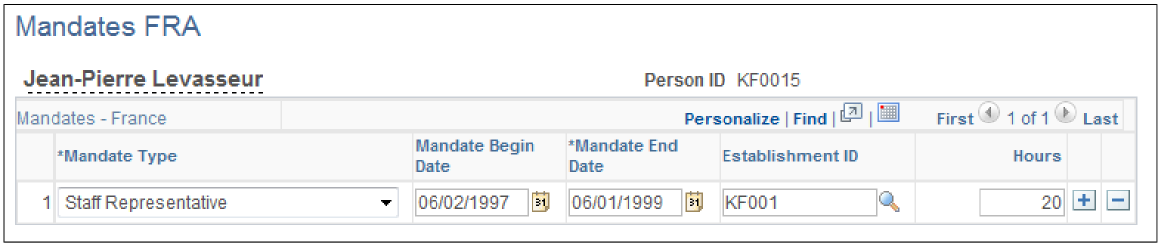
 

**Navigation**

Workforce Administration, Job Information, Mandates FRA, Mandates FRA

**Image: Mandates FRA page**

This example illustrates the fields and controls on the Mandates FRA page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Mandate Type** | Select a mandate type. |
| **Mandate Begin Date and Mandate End Date** | Enter the mandate begin and end dates during which the worker was associated with the mandate type. |
| **Establishment ID** | Select an establishment ID. |
| **Hours** | Indicate the number of hours for the mandate, if appropriate. |

## Military Situation FRA Page

Use the Military Situation FRA page (MILIT_SITUATN_FRA) to enter worker military service information, including the branch of the armed forces in which the worker served, and the worker's ID number, grade, and reserve status.

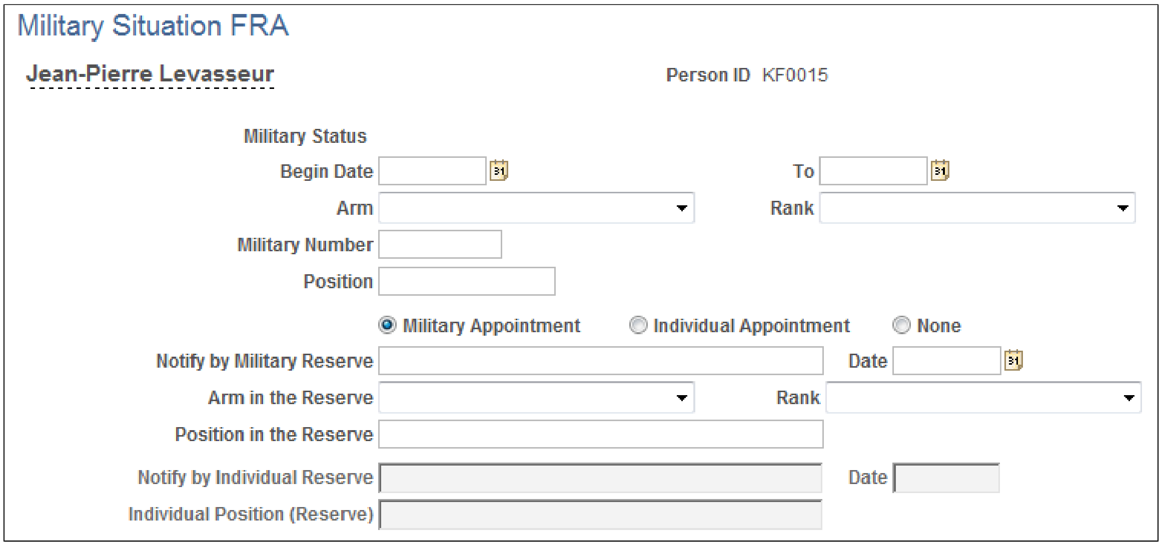
 

**Navigation**

Workforce Administration, Personal Information, Biographical, Military Situation FRA, Military Situation FRA

**Image: Military Situation FRA page**

This example illustrates the fields and controls on the Military Situation FRA page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Begin Date andTo Date** | Indicate the begin and end date for the worker's military service. |
| **Arm** | Select the arm of the military in which the worker served. |
| **Rank, Military Number, and Position** | Indicate the worker's rank, military number, and position if known. |
| **Military Appointment, Individual Appointment, and None** | Indicate if the service was the result of a military appointment, an individual appointment, or none (to indicate that the worker wasn't appointed to the position). |

If the worker had a military appointment, enter additional reserve information.

| | |
|---|---|
| **Notify by Military Reserve** | Enter the appropriate Notify by Military Reserve information. |
| **Date** | Enter the date of notification. |
| **Arm in the Reserve** | Enter the worker's arm in the reserve. |
| **Rank** | Enter the worker's rank. |

If the worker has an individual appointment, enter additional information.

| | |
|---|---|
| **Notify by Individual Reserve** | Enter the appropriate Notify by Individual Reserve information. |
| **Date** | Enter the date of notification. |
| **Individual Position (Reserve)** | Enter the worker's individual position in the reserve. |

# (NLD) Recording and Reporting Diversity Information for Dutch Workers

These topics provide an overview of the diversity reporting and discuss how to:

- Establish a worker's ethnic status.
- Running the Diversity Report NLD report.

**Note:** Since December 31, 2003, the SAMEN law is now longer a legislative requirement. However, PeopleSoft application maintains the functionality to allow you to track diversity in your company.

## Understanding Diversity Reporting

If you have a Dutch workforce, you may need to track information on the national origin of an employee's birth parents. This information establishes the ethnic status of workers and provides for diversity reporting in the Netherlands.

Diversity reporting provides for equal employment opportunities for immigrant workers or their children or both. The birth country of either the employee or one of the employee's parents can be recorded for reporting to the Dutch government.

When you select a birth country for the employee's parents, you can choose only from among those countries stored in the Country Table - HR (HR_COUNTRY_DEFN) table. The system indicates if the birth country is one of the target countries stored in the Country Table - HR table. When the selected country is *IDN* (Indonesia), an additional category appears, which indicates an additional choice to record diversity information.

## Pages Used to Record and Report Diversity Information for Dutch Workers

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Diversity Registration | SAMEN_NLD | Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Registration, Diversity Registration | Establish worker ethnic status to comply with diversity laws for a qualifying Dutch worker. |
| Diversity Reporting | RUNCTL_PER038_NL | Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Reporting, Diversity Reporting | Run the *Diversiteit Rapport* ( Diversity Report NLD) report (PER038NL). |

## Diversity Registration Page

Use the Diversity Registration page (SAMEN_NLD) to establish worker ethnic status to comply with diversity laws for a qualifying Dutch worker.

**Navigation**

Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Registration, Diversity Registration

**Image: Diversity Registration page**

This example illustrates the fields and controls on the Diversity Registration page. You can find definitions for the fields and controls later on this page.


**Objection Registration**

Select if the employee objects to being included in the diversity reporting to the Dutch government. If selected, the system won't include the employee when you generate the diversity report.

**Included in Target Group**

Select to include the employee in the diversity reporting to the Dutch government. This field is available for entry only when one parent comes from a target group.

## Target Group - Diversity Mgmt

**Birth Country**

Displays the employee's birth country.

**Note:** The system always displays the employee's birth country and indicates if it is one of the target countries stored in the Country Table - HR table.

**Father's Birth Country and Mother's Birth Country**

Select the birth country of the employee's father and mother.

**Category**

This field appears if a birth country is *IDN* (Indonesia). Select one of these values to fulfill diversity requirements:

- *Former Netherlands East Indies:* (born in Indonesia before December 27, 1949).
- *Incl. Law Rietkerk-uitkering:* (in Register 1b, *Rietkerk-uitkering* law).

- *Indonesia (after 27-12-1949):* (born in Indonesia after December 27, 1949).

**In Target Group**

The system automatically selects this check box if the birth country for the employee, employee's father, or employee's mother is one of the countries stored in the Country Table - HR table.

## Diversity Reporting Page

Use the Diversity Reporting page (RUNCTL_PER038_NL) to run the Diversiteit Rapport (Diversity Report NLD) report (PER038NL).

**Navigation**

Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Reporting, Diversity Reporting

The *Diversiteit Rapport* (Diversity Report NLD - PER038NL) produces the required diversity statistics information. The reports lists the number of people in the workforce who were born in a target country, or one of whose parents was born in one.

**Note:** This report is only available in Dutch.

# (ITA) Recording Additional Hiring Data for Italian Workers

This topic discusses how to run the Matricula Book Calculation process.

## Pages Used to Record Additional Hiring Data for Italian Workers

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Employment Categorization IT - Documents | EMPL_DOC_ITA | Workforce Administration, Job Information, Employment Categorization ITA, Documents, Documents | Record an employee's workbook code and employment eligibility, or C1 declaration code and release date. |
| Employment Categorization ITA - Job Letters | EMPL_JOBLTR_ITA | Workforce Administration, Job Information, Employment Categorization ITA, Job Letters, ITA Employee Job Letter | Use the Employment Categorization ITA - Job Letters page to print the hiring letter to be signed by both employee and employer on or before the first day of employment. The page displays company, labor agreement, and employee category information. Select the Print Letter check box and enter the date. Select Save to print the letter. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Employment Categorization ITA - Company Codes | EMPL_COMP_CD_ITA | Workforce Administration, Job Information, Employment Categorization ITA, Company Codes, Company Codes | Use the Employment Categorization ITA - Company Codes page to link employees with company INAIL, INPS, PREV, INPDAI, and CIA codes. |
| Matricula Book - Personal/Job Data | EMPL_MATR_BOOK_ITA | Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book, Personal/Job Data | View or update data to be included in the Matricula book. |
| Matricula Book - Address Data | EMPL_MTRBKADDR_ITA | Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book, Address Data | View or update Matricula book address data. |
| Matricula Calculation | RUNCTL_MATRBK_ITA | Workforce Administration, Job Information, Employment Categorization ITA, Matricula Calculation, Matricula Calculation | Run the Matricula Book Calc process to update the Matricula table. |

## Matricula Calculation Page

Use the Matricula Calculation page (RUNCTL_MATRBK_ITA) to run the Matricula Book Calc process to update the Matricula table.

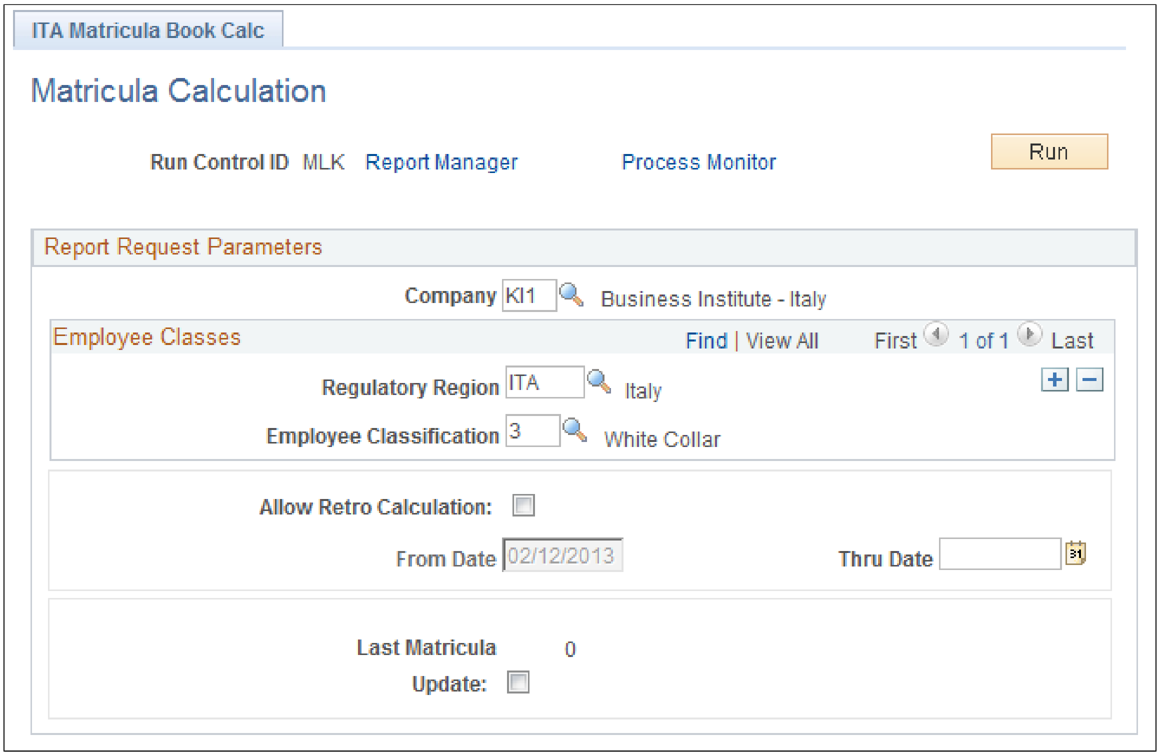
 

**Navigation**

Workforce Administration, Job Information, Employment Categorization ITA, Matricula Calculation, Matricula Calculation

**Image: Matricula Calculation page**

This example illustrates the fields and controls on the Matricula Calculation page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Employee Classification** | Select the employee classification for this book. |
| **Allow Retro Calculation** | Select to enable retroactive calculations to capture previously lost or missed matricula data. |
| **Last Matricula and Update** | Select if you want the process to check for new matricula data only. |

## (ITA) Recording End of Employment Information for Italian Workers

This topic discusses how to record employee resignation dates and normal notice periods.

## Page Used to Record End of Employment Information for Italian Workers

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Terms | EMPL_TERMS_ITA | Workforce Administration, Job Information, Employee Categorization ITA, Terms, Terms | Record the date on which an employee resigns from your company, and the normal notice period as required by the employee's contract. |

## Terms Page

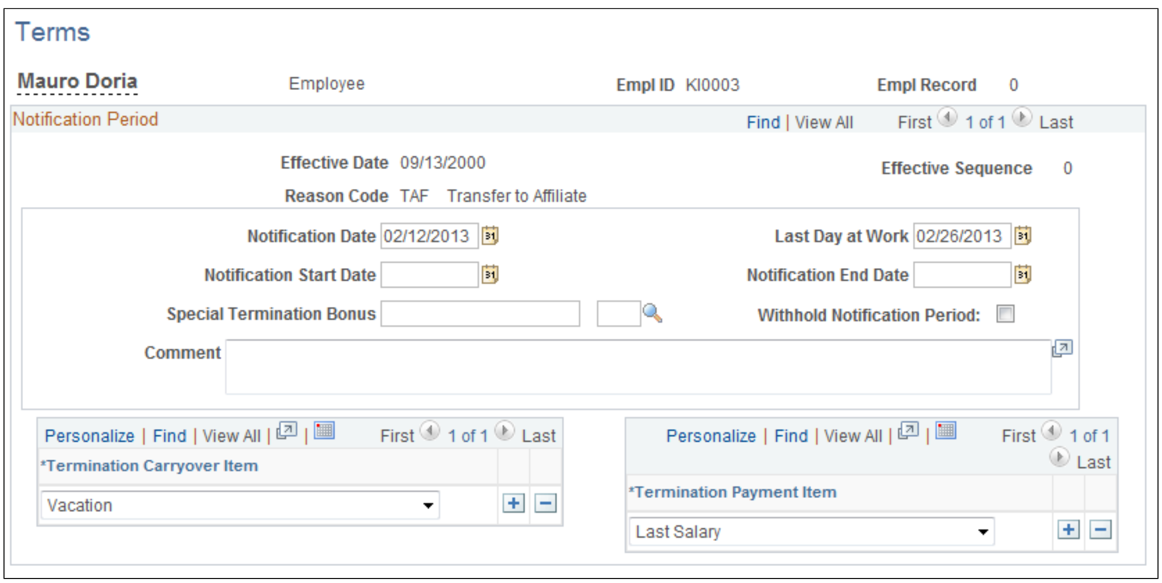
Use the Terms page (EMPL_TERMS_ITA) to record the date on which an employee resigns from your company, and the normal notice period as required by the employee's contract.

**Navigation**

Workforce Administration, Job Information, Employee Categorization ITA, Terms, Terms

**Image: Terms page**

This example illustrates the fields and controls on the Terms page. You can find definitions for the fields and controls later on this page.




**Notification Date** Enter the date on which the employee gave notice of intent to end the contract.

**Last Day at Work** Enter the last day the employee will be at work.

**Notification Start Date and Notification End Date** Enter the start and end dates of the notification *(preavviso)* period, that is, the period for which the employer still pays contributions after termination. If the employment is terminated by the payee and notification is to be withheld, this is the period for which the amount should be withheld.

**Special Termination Bonus** Enter any bonus incentive owed to the employee.

| | |
|---|---|
| **Withhold Notification Period** | Indicates whether the employee's salary is to be withheld during the period between the notification start and end dates. This is an information-only field. |
| **Termination Carryover Item** | Enter items that the employee can carry over for a termination. For example, during terminations such as a term for transfer to an affiliate, the employee and the employer can decide to "freeze" some items that can be transferred to the same employee for the new hiring process in the new affiliate company. |
| **Termination Payment Item** | Enter items that should be paid after termination. |

# (ITA) Running the Equal Opportunities Report

This topic discusses how to run the Equal Opportunities report.

## Page Used to Run the Equal Opportunities Report

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Equal Opportunities ITA | RUNCTL_PER053 | Workforce Administration, Labor Administration, Reports, Equal Opportunities ITA, Equal Opportunities ITA | Run the ITA Equal Opportunities report ( PER053). This report is submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report. |

## Equal Opportunities ITA Page

Use the Equal Opportunities ITA page (RUNCTL_PER053) to run the ITA Equal Opportunities report (PER053).

This report is submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.

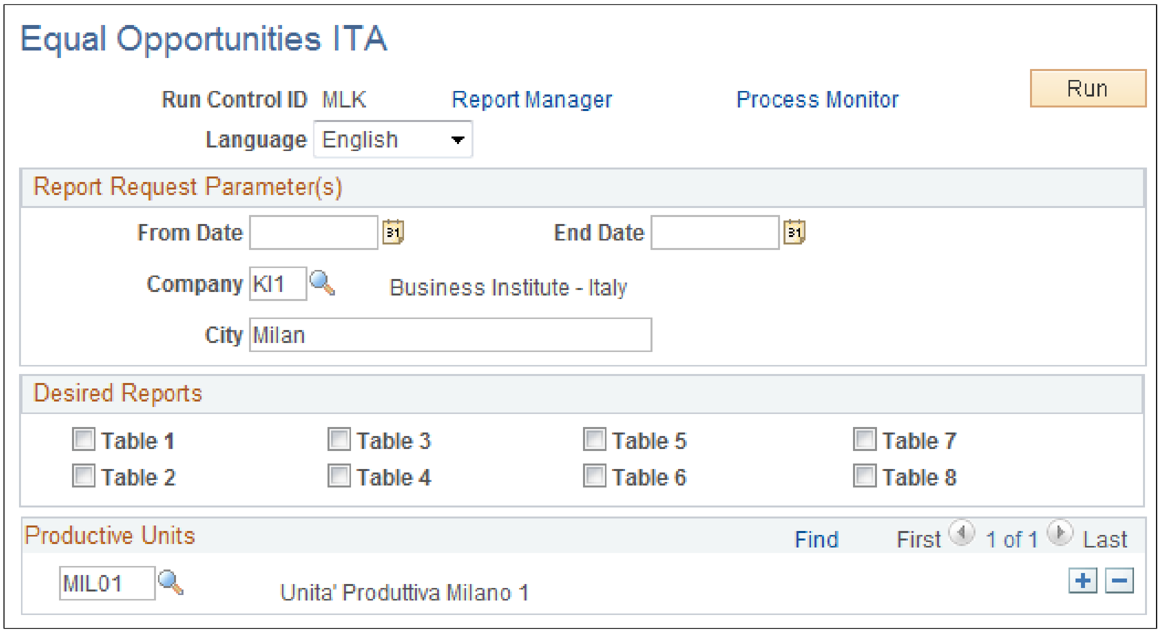
 

**Navigation**

Workforce Administration, Labor Administration, Reports, Equal Opportunities ITA, Equal Opportunities ITA

**Image: Equal Opportunities ITA page**

This example illustrates the fields and controls on the Equal Opportunities ITA page. You can find definitions for the fields and controls later on this page.




## Desired Reports

Select the Equal Opportunities report tables that you want to populate.

**Table 1 *(Informazioni Generali Sull'azienda)***

This table contains:

- Company and location information.
- Total number of employees as of December 31st of the second year of the reported period.
- Economic activity, including IVA organization codes.
- All CCNL information that applies.

**Table 2 *(Informazioni generali sulle unitá nell'ambito comunale)***

This table contains:

- Location address.
- Total number of employees at that location as of the reporting date.
- Number of employees as of December 31st of the second year of the reported period.

| | |
|---|---|
| **Table 3** ***(Entrate e uscite nel biennio)*** | This table contains:<br>• Number of employees as of December 31st of the first year of the reported period.<br>• The number of starts as of December 31st of the first year of the reported period.<br>• The number of end of employments as of December 31st of the first year of the reported period.<br>• Number of employees as of December 31st of the second year of the reported period. |
| **Table 4** ***(Occupati al 31.12 del secondo anno del biennio e promozioni e assunzioni nell'anno)*** | Lists the number of employees in each of the following categories: *dirigenti, quadri, impiegati,* and *operai.* Within each category, the report lists the number of employees per category level. |
| **Table 5** ***(Occupati al 31.12 del secondo anno del biennio per tipo contratto. CIG e aspettativa)*** | Lists, per contract type, the number of employees in each of the following categories: *dirigenti, quadri, impiegati,* and *operai.* |
| **Table 6** ***(Elenco delle entrate, uscite e trasformazioni contratto (secondo anno del biennio))*** | This table contains the following information listed by category *(dirigenti, quadri, impiegati,* and *operai):*<br>• Hires, including employees transferred from another location of the company, employees changed from another category, and new hires.<br>• Terminations, including employees transferred to another location of the company or transferred to another category, and termination of the labor relation (pension, resignation, contract expiration, individual or collective dismissal, death, and disability).<br>• Contract changes, including from *Determine Period* to *Undetermined,* from part-time to full-time, and vice versa. |
| **Table 7** ***(Formazione del personale svolta nel corso del secondo anno del biennio)*** | This table contains the following information listed by category *(dirigenti, quadri, impiegati,* and *operai):*<br>• Number of training participants.<br>• Total hours of training participation per category. |
| **Table 8** ***(Retribuzione annua (secondo anno del biennio) per livello e categoria professionale)*** | This table contains the annual gross salary amount subdivided by category *(dirigenti, quadri, impiegati,* and *operai)* and contractual level. |

## Productive Units

Select the productive units of the employees on whom you're reporting.

# (USA) Managing I-9 Information

These topics provide an overview of managing I-9 information and discuss how to:

- Complete and submit Section 1 of the I-9 form. (This section is completed by the employee.)
- Complete the Preparer/Translator Certification. (Applicable only in specific situations.)
- Complete Sections 2 and 3 of the I-9 form. (These sections are completed by the employer.)
- Update or request a new I-9 form.
- Print I-9 forms.
- Run the I-9 Receipt/Expiration report.
- Archive I-9 data.

## Understanding I-9 Information Management

The Immigration and Nationality Act requires United States employers to complete and store I-9 forms. The law was modified in 2005 to allow employers to manage I-9 forms electronically. Employers may continue to process paper I-9 forms and store them in electronically or complete and retain the I-9 forms solely in electronic format.

PeopleSoft Human Resources enables you to collect, store, and manage all I-9 information in compliance with the Immigration and Nationality Act. This includes employee self service functions to complete and submit the employee I-9 information, and functionality for the employer to complete the required employer sections of the I-9 form. The application provides components to report and process I-9 information, including notification of expiration dates, storing, printing, and archiving.

## Pages Used to Manage I-9 Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| I-9 Form - Employee Information and Verification | HR_I9_EE | Self Service, Personal Information, Complete and Submit I-9 Form, Employee Information and Verification | Enter employee information for the I-9 form. |
| I-9 Form - Preparer Notification | HR_I9_PREP_NOTE | Select one or more check boxes on the I-9 Form - Employee Information and Verification page and click the Accept button. | Notify employee that the Preparer/Translator Certification page must be completed. |
| I-9 Form - Preparer/Translator Certification | HR_I9_PREPARER | Click the OK button on the I–9 Form - Preparer Notification page. | This page is completed by the person who assisted the employee in the completion of the I-9 Form page. This page is displayed only if you selected one or more check boxes in the employee section of the I-9 Form page. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| I-9 Form - Submit Confirmation | EO_SUBMIT_CONFIRM | This page appears after the employee and preparer or translator successfully complete required information and submit the self service I-9 form. | Notification that you have successfully submitted the employee portion of the I-9 form. |
| I-9 Form - Employer Review and Verification | HR_I9_ADMIN_SEC2 | Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Employer Review and Verification | Complete sections 2 and 3 of the I-9 form. These sections are completed by the employer. |
| I-9 Form - Updating and Reverification | HR_I9_ADMIN_SEC3 | Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Updating and Reverification | Update a completed I-9 form or request that the employee submit a new form. |
| Print I-9 Forms | HR_RUNCTL_I9_FORM | Workforce Administration, Personal Information, I-9 Forms, Print I-9 Forms, Print I-9 Forms | Generate the I-9 forms in PDF format. |
| I-9 Receipt/Expiration Report | HR_RUNCTL_I9_VERFY | Workforce Administration, Personal Information, I-9 Forms, I-9 Receipt/ Expiration Report, I-9 Receipt/Expiration Report | Identify I-9 forms that require re-verification and notify administrators. |

## I-9 Form - Employee Information and Verification Page

Use the I-9 Form - Employee Information and Verification page (HR_I9_EE) to enter employee information for the I-9 form.

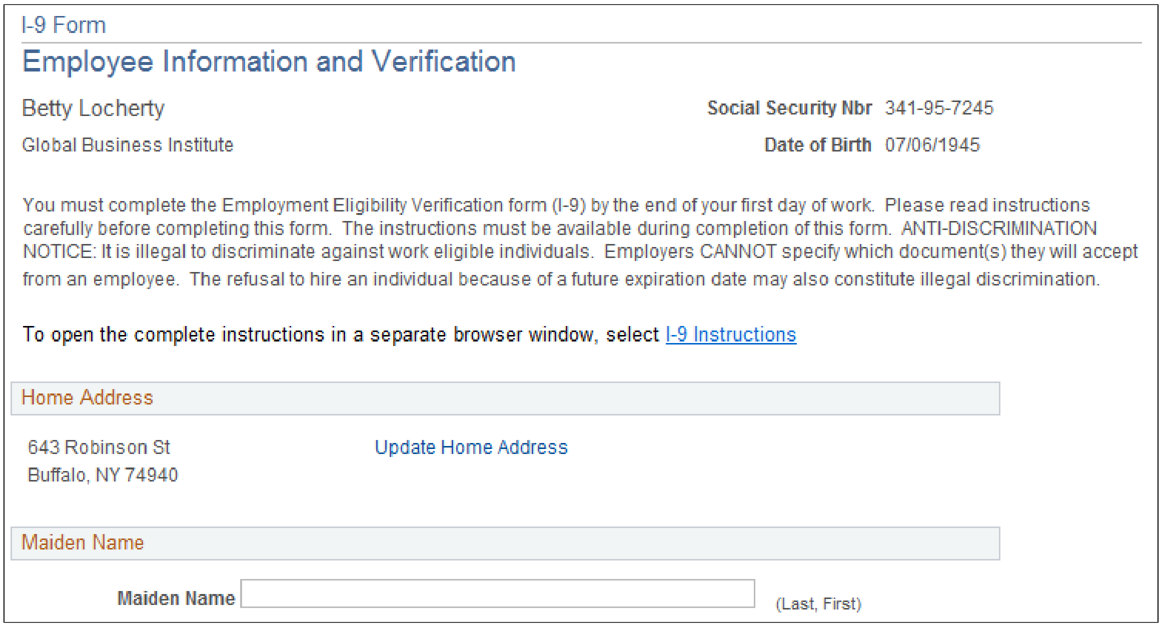
 

### Navigation

Self Service, Personal Information, Complete and Submit I-9 Form, Employee Information and Verification

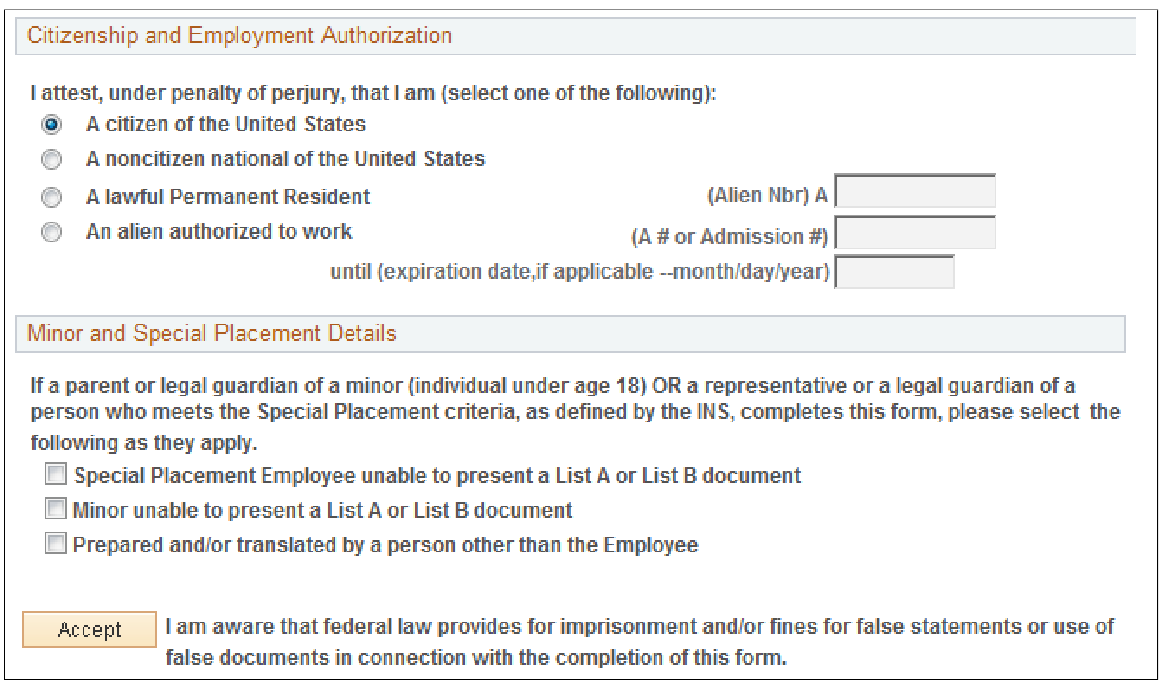
### Image: I-9 Form - Employee Information and Verification page, Section 1 (1 of 2)

This example illustrates the fields and controls on the I-9 Form - Employee Information and Verification page, Section 1 (1 of 2). You can find definitions for the fields and controls later on this page.




### Image: I-9 Form - Employee Information and Verification page, Section 1 (2 of 2)

This example illustrates the fields and controls on the I-9 Form - Employee Information and Verification page, Section 1 (2 of 2). You can find definitions for the fields and controls later on this page.



Employees use this page to complete and submit Section 1 of their I-9 forms. Employees can complete and submit more than one I-9 form. Employees cannot modify I-9 forms after submission and can view only the most recent submission.

| | |
|---|---|
| **I-9 Instructions** | Click this link to open a new browser window with the I-9 form in PDF format that has instructions for completing the form. |
| **Home Address** | This information is loaded from the employee's address record. |
| **Update Home Address** | If the address information is not current, click this link to open the Home and Mailing Address page in employee self service. Edit address information and return to the employee I–9 form. |
| **Maiden Name** | This is an optional field that stores maiden name, if applicable. The field is automatically populated by the employee's name record, if available. |

### Citizen and Employment Authorization

Select the option for your eligibility type. You must select one of the options and provide any additional data that is associated with the selected option.

| | |
|---|---|
| **(Alien Nbr) A (alien number)** | Enter your lawful Permanent Resident alien number. This field is mandatory if you select the option stating that you are A lawful Permanent Resident. |
| **(A # or Admission #) (alien number or admission number)** | Enter your assigned number. This field is mandatory if you select the option stating that you are an alien authorized to work. |
| **until (expiration date, if applicable – month/day/year)** | Enter the date until which you are authorized to work. This field is mandatory if you select the option stating that you are an alien authorized to work. |

### Minor and Special Placement Details

Select the appropriate check boxes. You can select more than one check box, if applicable. If you select any check box in this section, the preparer or translator must complete the Preparer/Translator page before submitting the form.

### Submitting the Form

| | |
|---|---|
| **Accept** | Click this button to save and submit this form, trigger appropriate workflow notifications to the administrator, and generate the confirmation page. |

## I-9 Form - Preparer/Translator Certification Page

Use the I-9 Form - Preparer/Translator Certification page (HR_I9_PREPARER) to this page is completed by the person who assisted the employee in the completion of the I-9 Form page.

This page is displayed only if you selected one or more check boxes in the employee section of the I-9 Form page.

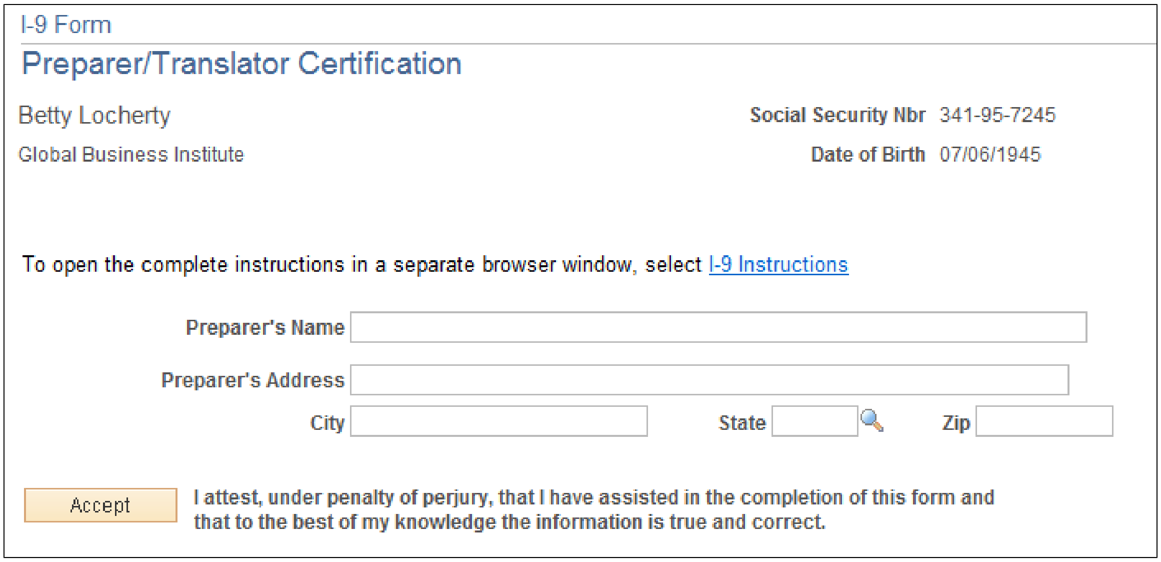
 

**Navigation**

Click the OK button on the I–9 Form - Preparer Notification page.

**Image: I-9 Form - Preparer/Translator Certification page, Section 1**

This example illustrates the fields and controls on the I-9 Form - Preparer/Translator Certification page, Section 1. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Preparer's Name** | Enter the preparer's name in this field. This field is required. |
| **Preparer's Address, City, Stateand Zip** | Enter the preparer's address in these fields. These fields are required. |

**Image: I-9 Form - Submit Confirmation page, Section 1I-9 Form - Submit Confirmation page**

This example illustrates the fields and controls on the I-9 Form - Submit Confirmation page, Section 1I-9 Form - Submit Confirmation page. You can find definitions for the fields and controls later on this page.


This message appears after you complete and successfully submit all of the required I-9 Form information.

## I-9 Form - Employer Review and Verification Page

Use the I-9 Form - Employer Review and Verification page (HR_I9_ADMIN_SEC2) to complete sections 2 and 3 of the I-9 form.

After the employee has completed and submitted the I-9 form, the employer completes the remaining sections. These sections are completed by the employer.

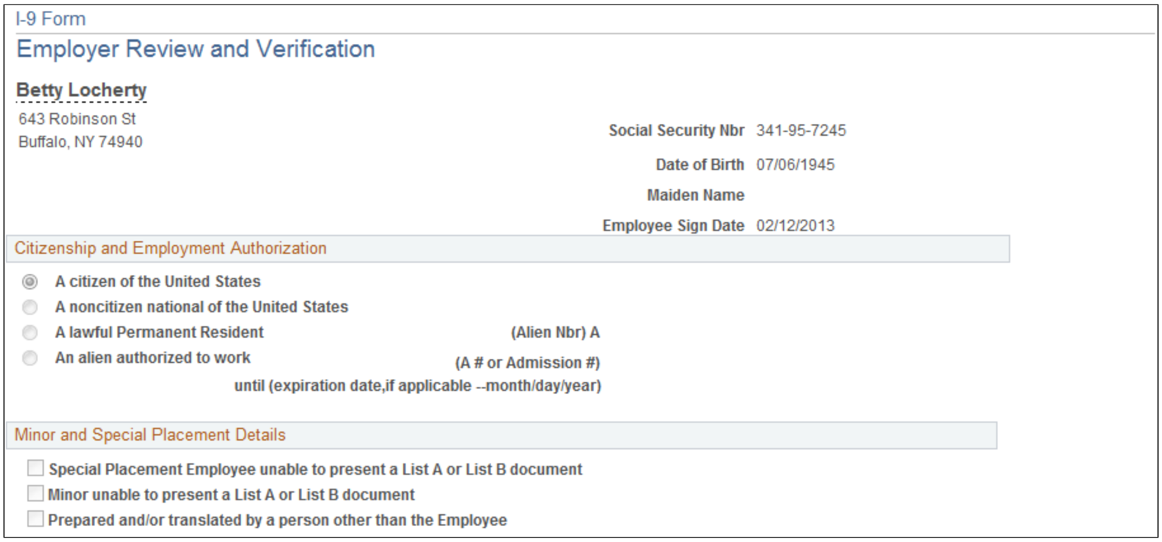
 

### Navigation

Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Employer Review and Verification

### Image: I-9 Form – Employer Review and Verification page 1 of 4

This example illustrates the fields and controls on the I-9 Form – Employer Review and Verification page 1 of 4. You can find definitions for the fields and controls later on this page.




### Image: I-9 Form – Employer Review and Verification page 2 of 4

This example illustrates the fields and controls on the I-9 Form – Employer Review and Verification page 2 of 4. You can find definitions for the fields and controls later on this page.

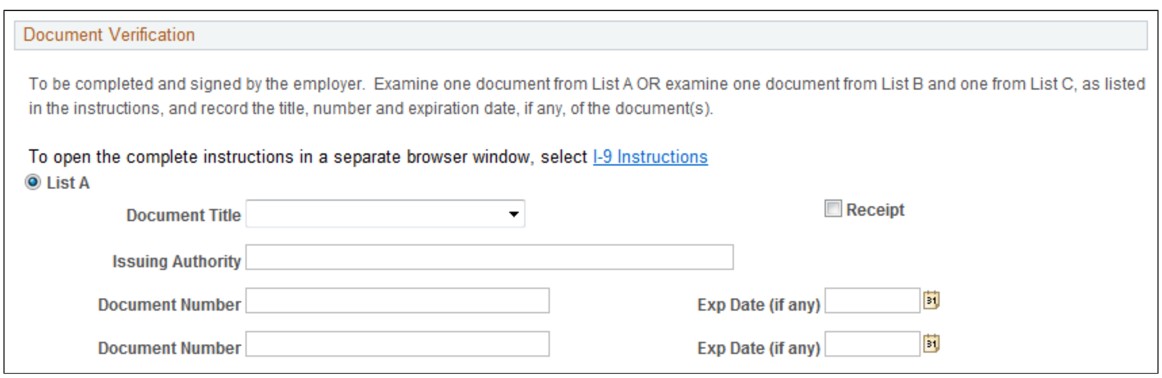


**Image: I-9 Form – Employer Review and Verification page 3 of 4**

This example illustrates the fields and controls on the I-9 Form – Employer Review and Verification page 3 of 4. You can find definitions for the fields and controls later on this page.

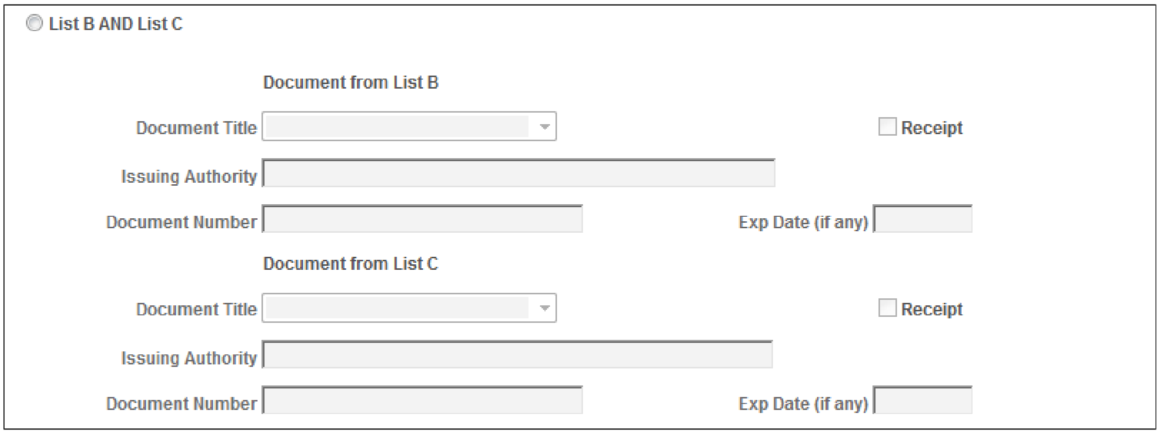
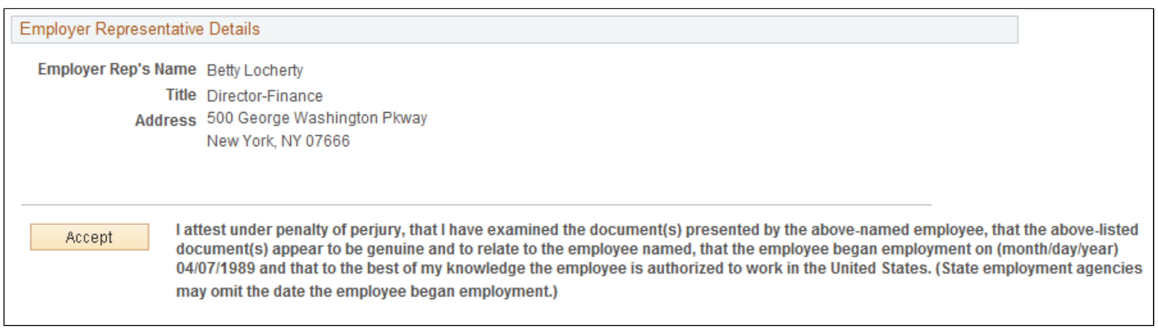



**Image: I-9 Form – Employer Review and Verification page 4 of 4**

This example illustrates the fields and controls on the I-9 Form – Employer Review and Verification page 4 of 4. You can find definitions for the fields and controls later on this page.




This page is automatically configured depending on employee entries on the form:

- If the employee selected the Special Placement option, then the List B AND List C option is selected by default and the text *Special Placement* appears in the Document Number field.
- If the employee selected the Minor check box, then the List B AND List C option is selected by default and the text *Individual under age 18* appears in the Document Number field.
- If the employee selected both the Special Placement and the Minor check boxes, then the List B AND List C option is selected by default and both the *Special Placement* and *Individual under age 18* text entries appear in the Document Number field.

## Document Verification

**I-9 Instructions**

Click this link to open a new browser window that contains the I-9 form with instructions in PDF format.

**List A orList B AND List C**

Select the option that corresponds to the type of citizenship document provided by the employee. You must select either List A or List B AND List C and enter the information. If List A is chosen, at least one of the two document number fields is

| | |
|---|---|
| | required. These options are mutually exclusive; after you select one, the fields associated with the other are grayed out. |
| **Document Title** | Record the type of documentation provided by the employee. There are separate fields for each document type (A, B and C). |
| **Issuing Authority** | Enter the name of the agency that issued the document. |
| **Receipt** | Select this check box to indicate that the employee has applied for the document. The default setting is deselected, which hides the Receipt Document Number field and corresponding Expiration Date field. When the Receipt check box is selected, the Receipt Document Number and Exp Date (if any) fields are visible. After you save this page you cannot deselect this check box. |
| **Receipt Doc Nbr (receipt document number)** | Enter the receipt number of the documentation application. The receipt document number may be different from the actual document number.<br><br>This field appears only if the Receipt check box is selected. |
| **Exp Date (if any)** | Optional field to record the expiration date, if any, of the receipt document entered. |
| **Document Number** | Enter the number of the actual document. |
| **Exp Date (if any)** | Optional field to record the expiration date, if any, of the document entered. |

### Employer Representative Details

| | |
|---|---|
| **Employer Rep's Name (employer representative's name)** | This field is populated with the name of the administrator who is submitting the data. |
| **Title** | This field is populated with the job title of the administrator who is submitting the data. |
| **Address** | These fields are populated with the current company address. |
| **Accept** | Click this button to save the information you entered. |

## I-9 Form - Updating and Reverification Page

Use the I-9 Form - Updating and Reverification page (HR_I9_ADMIN_SEC3) to update a completed I-9 form or request that the employee submit a new form.

### Navigation

Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, Updating and Reverification

### Image: I-9 Form - Updating and Reverification page (1 of 3)

This example illustrates the fields and controls on the I-9 Form - Updating and Reverification page (1 of 3). You can find definitions for the fields and controls later on this page.

**Image: I-9 Form - Updating and Reverification page (2 of 3)**

This example illustrates the fields and controls on the I-9 Form - Updating and Reverification page (2 of 3). You can find definitions for the fields and controls later on this page.

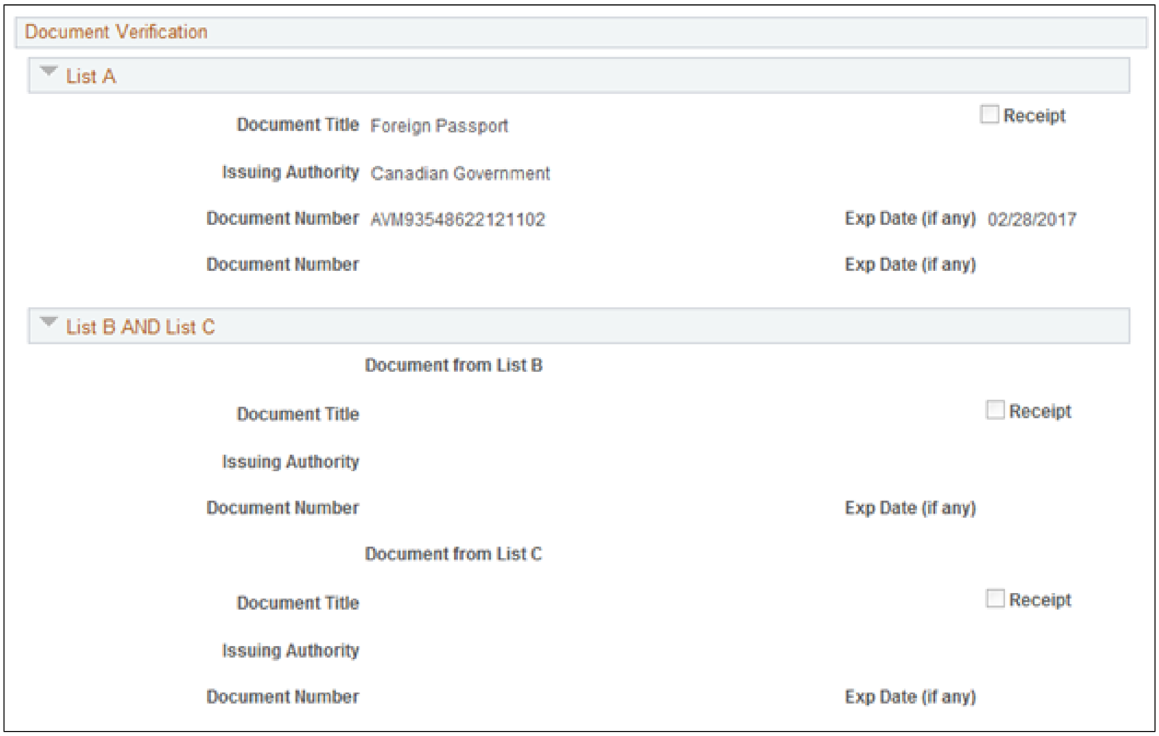
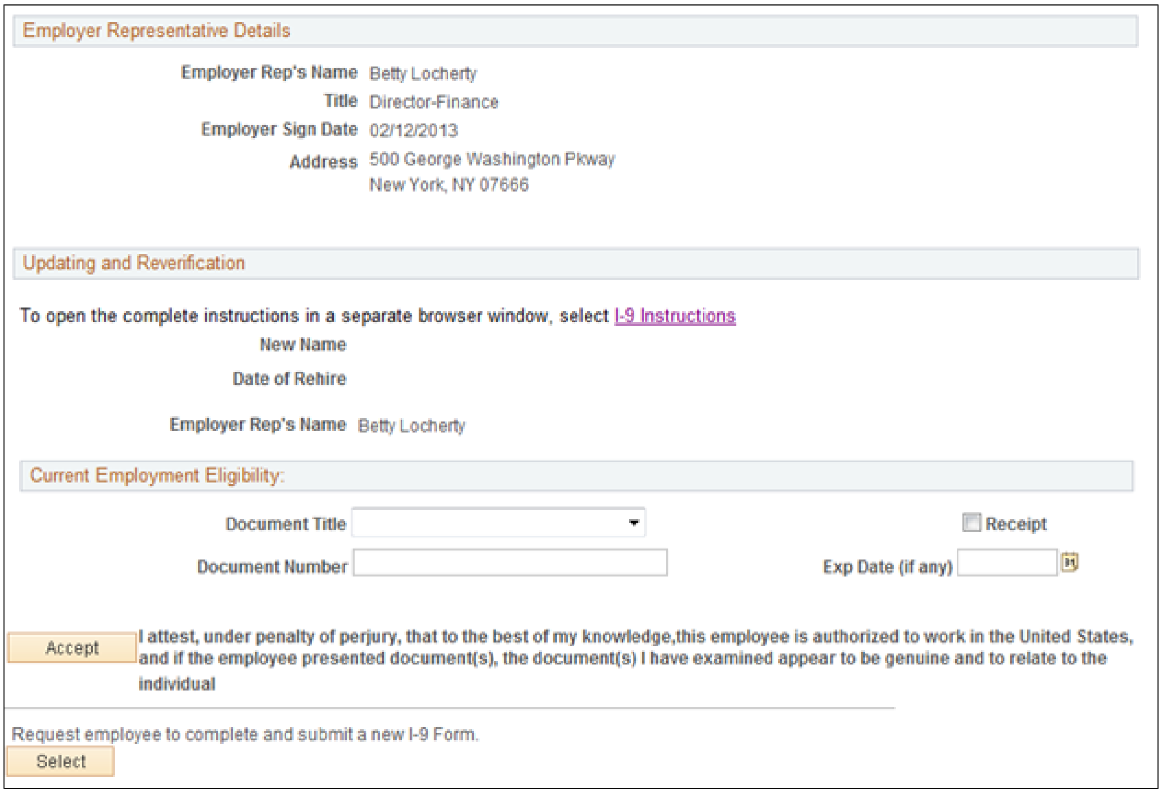


**Image: I-9 Form - Updating and Reverification page (3 of 3)**

This example illustrates the fields and controls on the I-9 Form - Updating and Reverification page (3 of 3). You can find definitions for the fields and controls later on this page.




HR Administrators use this page to view completed I-9 documentation and enter additional information, if applicable. If an employee is rehired within three years of termination, or if the original document has expired, employers may reverify or update the original I-9 after it is submitted. An I-9 form can only be updated or reverified one time (including receipt and actual documentation).

If new information needs to be entered and actual documentation information already exists, all fields will be display only and the employee and employer must complete a new I-9 form. The administrator can send an email notification to the employee requesting a new I-9 form from this page. The administrator is able to view all forms completed by employees, including history.

The employer is not allowed to make any changes to the form after it is saved unless the Receipt check box is selected. In this case, you can enter the actual information for the specific document that was flagged as Receipt, but only the Document Number and Expiration Date fields. The entry in the Document Title field cannot be changed. After the additional field entries are completed and the form is saved, the Receipt check box and Receipt Document Number field are grayed out and cannot be edited.

## Updating and Reverification

**I-9 Instructions** — Click this link to open an I-9 form in PDF format that includes instructions for completion.

**New Name** — This field is automatically populated by the employee's current name if it is different from the name initially saved on the form.

**Date of Rehire**

The most current rehire date appears by default in this field if it exists.

### Current Employment Eligibility

**Document Title**

Enter the type of documentation being reverified or updated.

**Receipt**

Select this check box to indicate that the employee has applied for the reverified or updated document. The default setting is deselected, which hides the Receipt Document Number field and corresponding Expiration Date field. When the Receipt check box is selected, the Receipt Document Number and Expiration Date fields are visible. After you save this page you cannot deselect this check box.

**Receipt Document Number**

Enter the receipt number for the document application receipt.

**Document Number**

Enter the actual document number.

**Exp. Date (if any)**

Use this optional field to record the expiration date, if any, of the document entered.

**Accept**

Click this button to save the form.

**Select**

Click this button to send an email notification to the employee requesting a new I-9 form.

## Print I-9 Forms Page

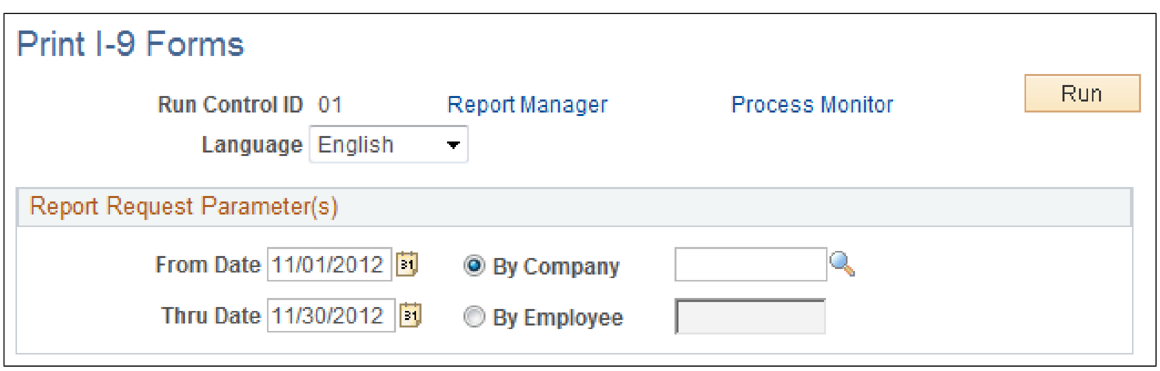
Use the Print I-9 Forms page (HR_RUNCTL_I9_FORM) to generate the I-9 forms in PDF format.

**Navigation**

Workforce Administration, Personal Information, I-9 Forms, Print I-9 Forms, Print I-9 Forms

**Image: Print I-9 Forms page**

This example illustrates the fields and controls on the Print I-9 Forms page. You can find definitions for the fields and controls later on this page.



**From Date and Thru Date**

Use these fields to determine effective dates to extract when running the report. Both fields are required.

**By Company or By Employee**

Run the report using one of these options. Use the lookup icon to enter a company code or an employee ID.

## I-9 Receipt/Expiration Report Page

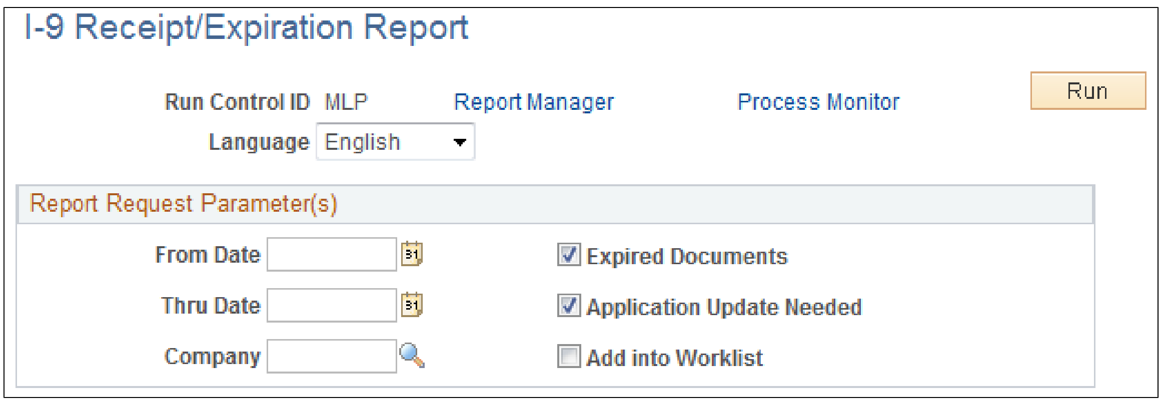
Use the I-9 Receipt/Expiration Report page (HR_RUNCTL_I9_VERFY) to identify I-9 forms that require re-verification and notify administrators.

**Navigation**

Workforce Administration, Personal Information, I-9 Forms, I-9 Receipt/Expiration Report, I-9 Receipt/Expiration Report

**Image: I-9 Receipt/Expiration Report page**

This example illustrates the fields and controls on the I-9 Receipt/Expiration Report page. You can find definitions for the fields and controls later on this page.




**From Date and Thru Date**

Use these fields to define the effective dates for the report. Both fields are required.

**Company**

This is an optional field. Entering a value will limit the report output to employees for a specific company as of the date that the employee submitted the I-9 form.

**Expired Documents**

Select this check box to have the report list I-9 forms with expiration dates within the specified date range.

**Application Update Needed**

If selected, the process will find all documents that have a Receipt check box selected and that do not have corresponding actual data saved. The process compares the I-9 submission date with the date range and includes all employees whose I-9 date plus 90 days is within the date range.

---

**Note:** You must select either the Expired Documents or the Application Update Needed check box to run the report.

---

| | |
|---|---|
| **Add into Worklist** | Select this check box to have the administrator receive a worklist entry for each employee form listed in the report. |

## Archiving I-9 Data

See *PeopleTools: Data Management, "Using PeopleSoft Data Archive Manager."*

# (USA) Determining U.S. Residency Status for Foreign Nationals

This topic discusses how to run the Substantial Presence test.

## Page Used to Determine U.S. Residency Status for Foreign Nationals

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Employee Presence Test USA | PRESENCE_TEST | Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA, Employee Presence Test USA | Run the Substantial Presence test to determine if alien employees are considered U. S. residents for tax purposes for a particular calendar year. |

## Employee Presence Test USA Page

Use the Employee Presence Test USA page (PRESENCE_TEST) to run the Substantial Presence test to determine if alien employees are considered U.S. residents for tax purposes for a particular calendar year.

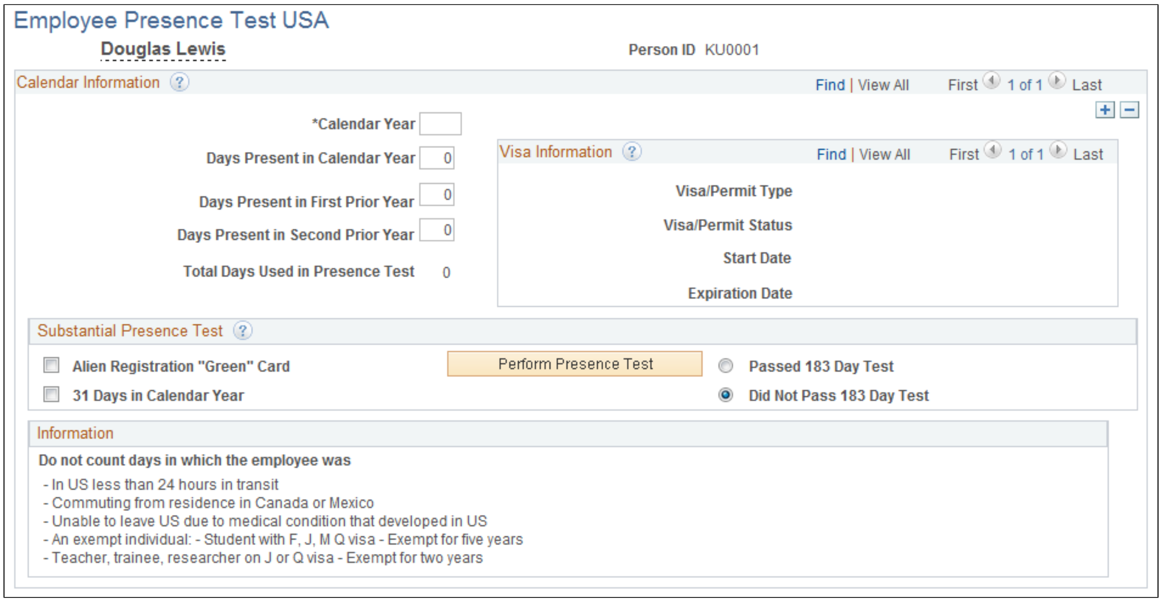
 

**Navigation**

Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA, Employee Presence Test USA

**Image: Employee Presence Test USA page**

This example illustrates the fields and controls on the Employee Presence Test USA page. You can find definitions for the fields and controls later on this page.




Under this test, a foreign national is considered a resident for tax purposes if the person is present in the U.S. at least 31 days in the current year and 183 days during the current year and the two preceding years, as determined under a weighted formula.

Nonresident aliens may make a special election to be treated as residents for the first year in which they are present in the U.S. This election is subject to several restrictions, one of which is that the nonresident alien must satisfy the Substantial Presence test in the year following the election.

Rules that govern which days don't count towards an employee's Substantial Presence test appear in the Do not count days in which the employee was group box. This test is only valid for current or previous years.

## Calendar Information

| | |
|---|---|
| **Calendar Year** | Enter the appropriate calendar year. |
| **Days Present in Calendar Year, Days Present in First Prior Year, and Days Present in Second Prior Year** | Enter the number of days present in the current year, the previous year, and the year previous to that.<br><br>The actual days present in the first prior year equal 1/3 of 365 minus the value in the Days Present in First Prior Year field. The actual days present in the second prior year equal 1/6 of 365 minus the value in the Days Present in Second Prior Year field.<br><br>For example, enter the number of days present in 1998, followed by the number of days present in 1997, followed by the number of days present in 1996. |

The Total Days Used in Presence Test field automatically displays the total number of days after all of the previous fields are completed.

**Note:** If you are entering Substantial Presence test information for multiple years, the First Prior Year and Second Prior Year fields are based on the prior year information.

### Visa Information

If the employee has a visa or permit, this group box provides information about the visa or permit.

### Substantial Presence Test

**Alien Registration "Green" Card**

Select if the employee has been issued an alien registration card, or green card. If you select this check box, the Substantial Presence test isn't necessary; the employee is considered a U.S. resident for tax purposes.

**31 Days in Calendar Year**

This check box is automatically selected if the employee has been present 31 days in a calendar year.

**Perform Presence Test**

Click to see if the employee passed the Substantial Presence test. The system calculates the total number of days present and selects either the Passed 183 Day Test or Did Not Pass 183 Day Test option.

In the 183 Day Test calculation, the system uses 100 percent of the days present in the calendar year.

## Chapter 11

# (ESP) Managing Spanish Reporting

## Setting Up XML Files

These topics provide an overview of XML file setup and discuss how to:

- Set up XML code tables.
- Define XML sets.
- Set up XML node tables.
- Set up node mapping.
- Define XML templates.
- Map contracts to XML nodes.

## Understanding XML File Setup

This overview discusses the XML file setup necessary to generate XML files. The system uses the XML file setup for Delta (Sistema Delt@) reporting, Contrata (Sistema Contrat@) reporting, contract printing, and Tripartite Foundation reporting.

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**Note:** Tripartite Foundation reporting is documented in the *PeopleSoft HCM 9.2: Human Resources Administer Training*PeopleSoft HR Administer Training documentation.

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See "Understanding Tripartite Foundation Communications Management *(PeopleSoft HCM 9.2: Human Resources Administer Training)*".

### General XML Setup Steps

Before you can generate XML files for reporting, you must set up the components for XML file creation.

To set up XML files:

1. Set up XML code tables.
2. Define XML sets.
3. Set up XML node tables and node mapping.
4. Define XML templates.
5. Perform the steps to generate the XML file.

The XML generation process uses this dynamic setup data to create the XML files based on the specific needs of the report you are generating.

## XML Code Tables

XML code tables are tables that list the valid values of an XML node. Code tables enable you to compile setup data through a single menu entry point. Use the XML Code Table (XML_CODE_TBL) component to define the auxiliary XML code tables and the valid values that your company uses. Once you define the XML code tables, you can use them to:

- Map system values to XML code table values for a node.
- Serve as validation tables for the values of a node.

You can perform both of these options when defining XML nodes through the XML Node Table component. Later in the business process, when you are completing a person's node data for an XML file during XML file generation, the system prompts you to select from the valid values that you have defined in the code table for the node.

## XML Sets

An XML set is a group XML files. You can associate XML sets with functional areas. Human Resources for Spain delivers an XML set for the Contrata, Delta, Contract Printing, and Tripartite Foundation functional areas. Use the XML Set Table component to define XML set definitions for XML files. You associate XML sets with XML nodes and XML templates. Assign XML sets to XML nodes through the XML Node Table component and to XML templates through the XML Template Table component.

## XML Node Tables

XML nodes are the core of the XML file setup. XML nodes are sets of tags within an XML file that determine the hierarchical structure of the file. They represent the XML tags that are mapped to Human Resources data. All tags between the open tag and closed tag of a node comprise the node. Use the XML Node Table component to define XML nodes and create the relationships between the nodes. The nodes that you create and relate to each other define the XML file structure. Through the XML generation process the system can retrieve data that is already stored in the Human Resources database and write the data into the appropriate XML nodes.

You can define complex nodes or simple nodes. Complex nodes are composed of other simple or complex nodes. Complex nodes can be root nodes or children nodes. There can only be one root node per XML template that you define. A root node defines a specific XML file layout. For further embedding of XML tags, children nodes can also contain their own children nodes. Simple nodes are associated with values. To derive the values of simple nodes, you can use as source data manual values that you enter or system values.

Sometimes the data with the system as the source from which you are deriving the values of the nodes does not match the data that you need for the XML file. In cases such as these, you can also use the XML Node Table component to map the system data values to alternate values that fit your reporting needs. For example, PeopleSoft system data uses as gender values M (male) and F (female). However, I.N.E.M. uses H (*hombre*/male) and M (*mujer*/female). You can use the XML Node Table component to map these PeopleSoft system values to the corresponding I.N.E.M. values.

## XML Templates

XML templates define the type of communications within each functional area, identifying the complete XML structure of the XML file that you generate for each communication. An XML template holds the keys and root node for runtime data retrieval for the XML generation process. When defining each template, you assign a root node. The root node thus contains the whole information for all of the nodes in the template thereby defining the XML file structure. At runtime the system uses these keys to retrieve the correct values for the fields as part of the SQL Select statement when retrieving the data for the children nodes of the root node that you associate with the XML template in its definition.

## Pages Used to Set Up XML Files

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| XML Code Tables | XML_CODE_TBL | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Code Tables, XML Code Table | Define the auxiliary XML code tables and the valid values that your company uses for XML nodes. |
| XML Set Table | XML_SET_TBL | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Set Table, XML Set Table | Maintain XML set definitions. |
| XML Template | XML_TEMPLATE | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Template Table, XML Template | Define templates for use during XML file generation. |
| Node Table | XML_NODE_TBL1 | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Table | Define the nodes that comprise the XML file structure for Delta and Contrata reporting, or for contract printing of specific contract types. |
| Node Mapping | XML_NODE_TBL2 | Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Mapping | Map existing system values for nodes to alternate values that the XML file requires. |

## XML Code Tables Page

Use the XML Code Tables page (XML_CODE_TBL) to define the auxiliary XML code tables and the valid values that your company uses for XML nodes.

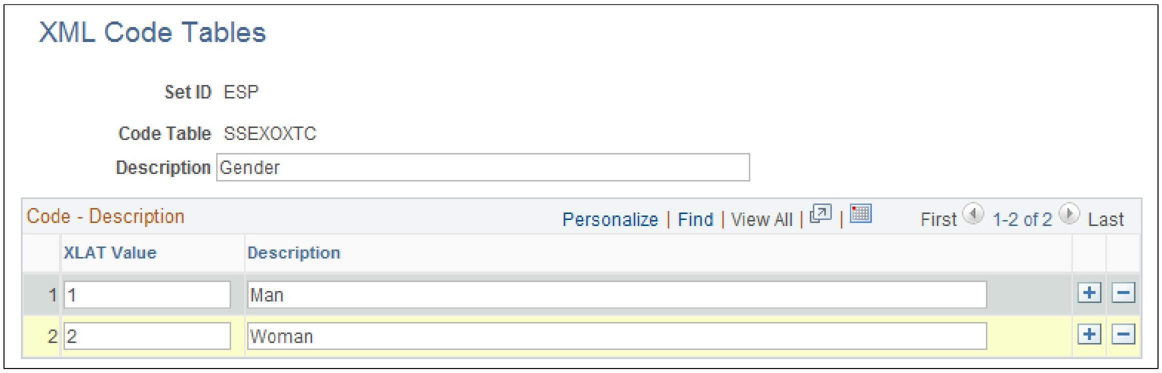
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Code Tables, XML Code Table

**Image: XML Code Tables page**

This example illustrates the fields and controls on the XML Code Tables page. You can find definitions for the fields and controls later on this page.




**Code Table** The name of the code table.

**Description** Enter the description of the code table.

### Code - Description

**XLAT Value** Enter the translate value for the code table.

**Description** Enter the description of the translate value.

## XML Set Table Page

Use the XML Set Table page (XML_SET_TBL) to maintain XML set definitions.

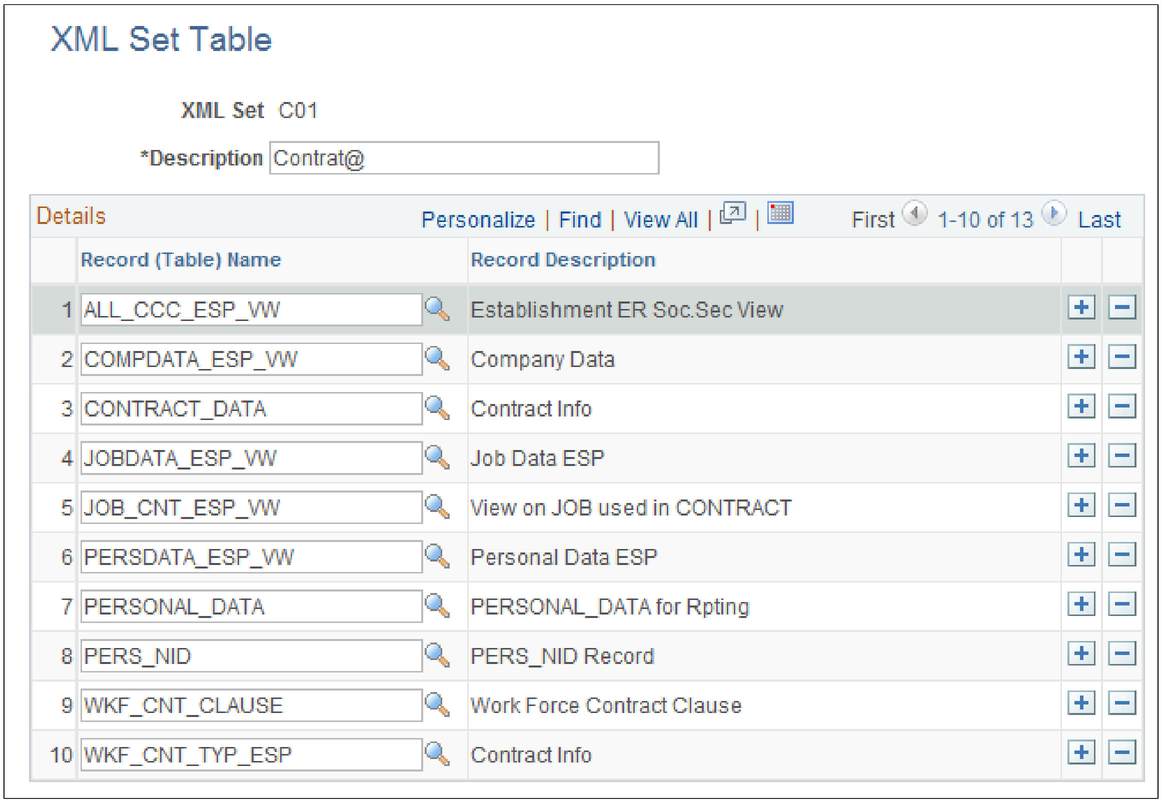
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Set Table, XML Set Table

**Image: XML Set Table page**

This example illustrates the fields and controls on the XML Set Table page. You can find definitions for the fields and controls later on this page.




Human Resources for Spain provides XML sets for both Delta and Contrata reporting. Human Resources for Spain also delivers the XML set P01 for use with all contract printing.

## (ESP) Node Table Page

Use the Node Table page (XML_NODE_TBL1) to define the nodes that comprise the XML file structure for Delta and Contrata reporting, or for contract printing of specific contract types.

## Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Table

## Image: Node Table page (complex node type)

This example illustrates the fields and controls on the Node Table page (complex node type). You can find definitions for the fields and controls later on this page.

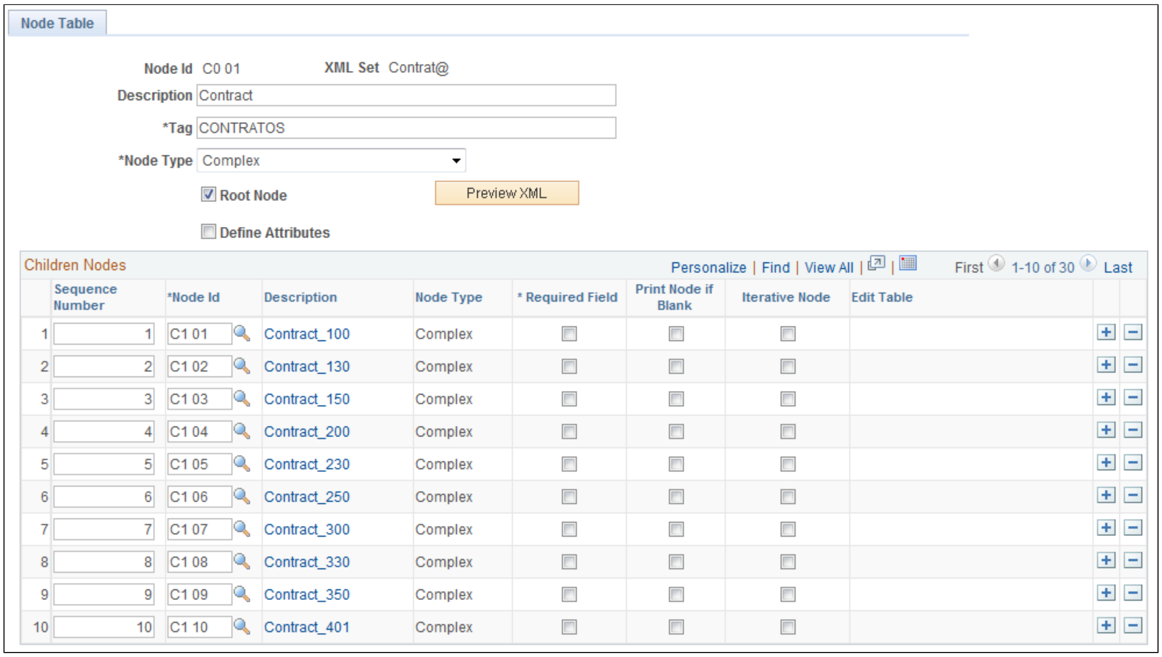
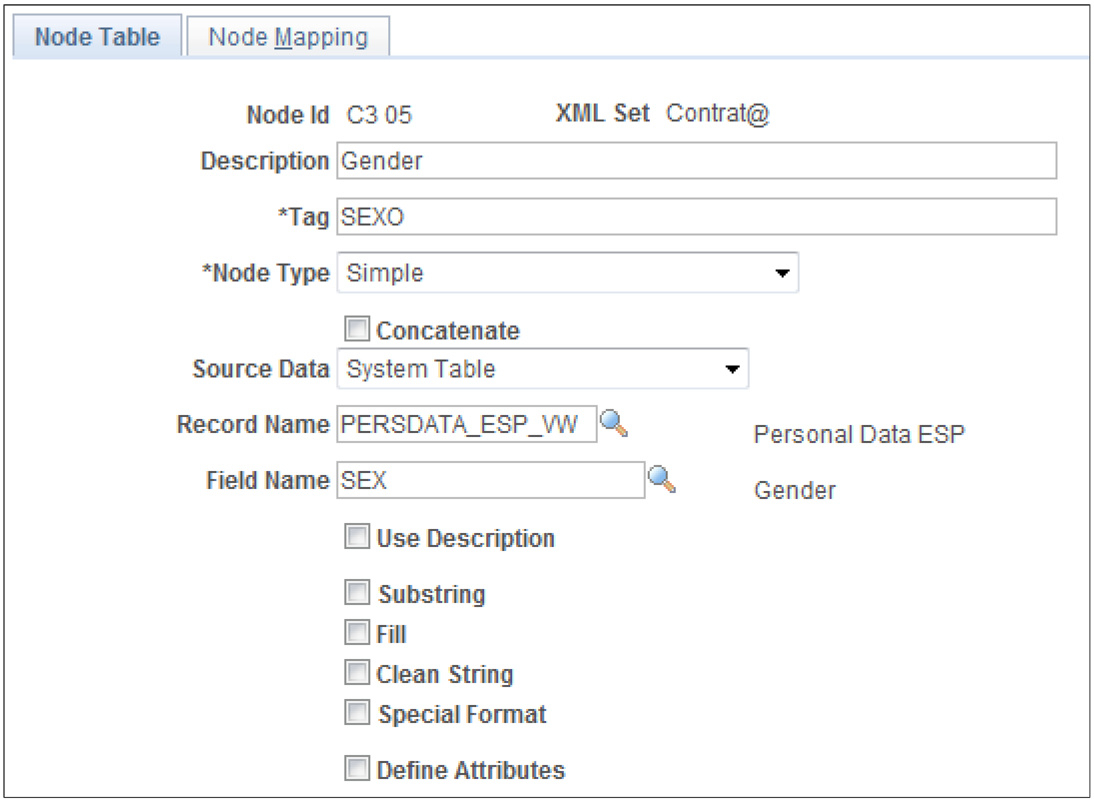


**Image: Node Table page (simple node type)**

This example illustrates the fields and controls on the Node Table page (simple node type). You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Node Id** | When creating a new node, enter a code to identify the node. |
| **XML Set** | Select the XML set to specify the functional area for which you are defining this node. |
| **Description** | Enter a description of the node. |
| **Tag** | Enter the name of the XML tag for the node. |
| **Node Type** | Select whether the node is *Simple* or *Complex.* Simple nodes are associated with values, whereas complex nodes are composed of other simple or complex nodes. |
| **Root Node** | Select this check box to indicate that this complex node is a root node, meaning that it is the node from which all other nodes in the XML file structure are derived.<br><br>This field appears only when the node type is *Complex.* |
| **Preview XML** | Click this button to access the XML Preview ESP page, where you can preview the XML file structure for the complex node. You can only preview XML files structure for complex node types.<br><br>This button appears only when the node type is *Complex.* |

**Concatenate**

Select this check box if the data in this node is the concatenation of two or more fields in the database. The system displays the Node ID field for you to select the concatenated node.

This check box becomes available for edit only for simple nodes.

**Node Id**

Select the concatenated node.

This field becomes available only if you select the Concatenate check box.

**Source Data**

Select how you want to define the source data for the node. During XML file generation, the system uses the option that you select to retrieve and validate node values in the XML file.

This field becomes available for edit only for simple nodes.

Valid values are:

- *Manual:* Select this option for those nodes for which the data is not stored in the HR system, so the system will request its value to be entered manually when generating the file. Selecting this option enables you to validate a node value against the specific XML code table, translate field, or date format that you specify. Or you can specify that there be no validation, enabling the user to enter any node value into an open entry field.
- *System:* Select this option to indicate that the valid values for the node already exist in the application as part of a special view designed specifically for XML files. After selecting this option, you then need to specify which record (view) and field contains the valid values for the node. The Record Name field, Field Name field, and Node Mapping page become available for edit. You must select this option if you need to map a system value to an alternate value.

**Record Name and Field Name**

The system displays these fields when you select system data as the as source data of a simple node. If you select the *System* value in the Source Data field, you then need to specify which record and field contain the valid values for the XML node. To specify a record and field, first select a record from the list of valid views. Then select a field from the list of available fields in the view. The system uses your selection to validate data when generating XML files.

When selecting a valid record and field, you cannot use any record. You must use special views built for this purpose. The delivered special views and any that you create must meet the following two conditions:

1. Name.Record name must start with XML_ and end with _ VW.2.

2. Keys.Record keys must be defined using only the fields defined in the template.

**Validation Type**

Manually select the type of data validation that you want to occur when the system validates the node values that users enter for a person in an XML file.

This field becomes available only when the Source Data field value is manual.

Valid values are:

- *Code Table:* Select this option if you want the node value to come from a table of values as defined on the XML Code Table page. The system displays the Code Table field for you to select the specific table.
- *Date:* Select this option if you want the node value to be a date. The system displays the Formatted field for you to select the date format.
- *None:* Select this option if you do not need validation of the node value. The system displays the Node Value field as an open entry field on the Details page of the XML file generation pages. Users can enter any value for the node because the field that has no edits for validation.
- *Xlat Field* (translate field): Select this option if you want node value to come from a translate table for a specific field. The system displays the Field Name field for you to select the field from which the system prompts users with translate values.

**Default Value**

For a simple node where the source is manual you can set up a default value.

**Reg Region (regulatory region)**

Select the regulatory region to use to filter possible code tables to a specific setID. Code tables contain a setID. By selecting the regulatory region, the system enables you to select only the code tables with the same setID as the regulatory region.

This field is available only for simple node types that use code tables.

**Code Table**

If you select a validation type of code table, select the table from which you want the system to prompt users with values to select for a node.

This field is available only for simple node types that use code tables.

**Formatted**

Select how you want the date field to be formatted.

| | |
|---|---|
| | This field is available only if you select a validation type of *Date.* |
| **Field Name** | Select the field from which the system prompts users with translate values.<br><br>This field is available only if you select a validation type of *Xlat Field.* |

### Children Nodes

Use this group box to define the children node members of a complex node. All children nodes that you define for a given node appear at the same level in an XML file structure. If children nodes are complex nodes that require their own children nodes, you must define members for these nodes in their own node definition.

This group box appears only when the node type is *Complex.*

| | |
|---|---|
| **Sequence Number** | Enter the sequence in which you want the children nodes to appear in the file structure within the parent node. The system arranges the children nodes in order from lowest to highest. |
| **Node ID** | Select the child node. Define child nodes using this same component. |
| **Description** | The system displays the description of the child node. |
| **Node Type** | The system displays the node type of the child node, either simple or complex. |
| **Required Field** | Select this check box to make this node a required field in the XML file. When you validate the XML file through the appropriate reporting component, the system requires that the user enter a value for this field before generating the XML file. |
| **Iterative Node** | Select this check box to indicate that you can repeat this node inside the XML file. |
| **Print if Blank** | Select this check box if you want an XML file to contain a specific node even if the value is null. |

## Node Mapping Page

Use the Node Mapping page (XML_NODE_TBL2) to map existing system values for nodes to alternate values that the XML file requires.

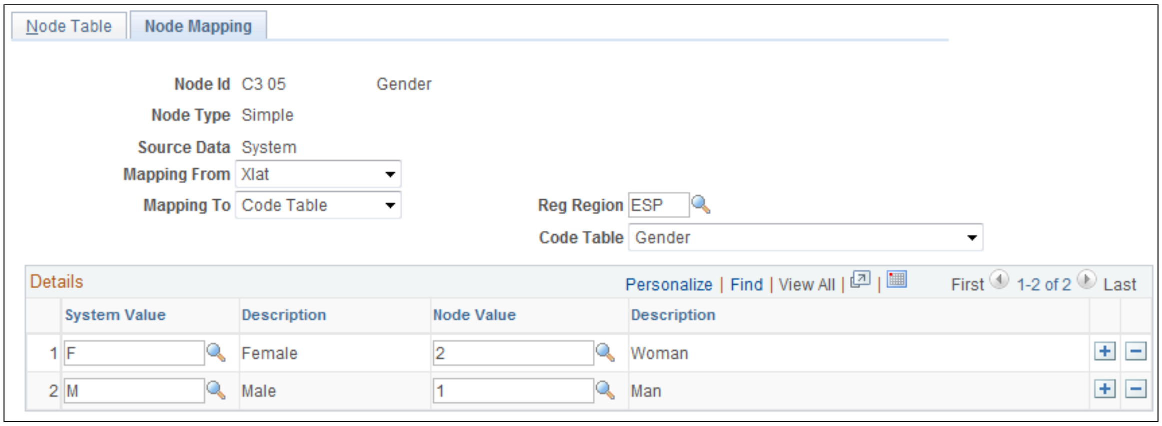
 

### Navigation

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Mapping

### Image: Node Mapping page

This example illustrates the fields and controls on the Node Mapping page. You can find definitions for the fields and controls later on this page.




---

**Note:** This page becomes available only when you define the Node Type as Simple and the Source Data as System on the Node Table page.

---

Use this page is cases where the values for the node exists in the application but the system values do not match the values that the XML file requires. Through this page you can map the existing system values to other, more appropriate values that you must use for the XML file.

**Mapping From**

For the field that you are mapping from, select how the field derives its valid values. After you make a selection, use the System Value field in the grid below to specify the system field values from which you want to map to alternate values. Your choices are:

- *Manual:* Select this option if the system values are derived manually through user entry and you want to map these values to other values. Fields such as these are defined as having no edit, thus enabling manual entry. The System Values field in the grid prompts you to manually enter each system value that you want to map to another value.
- *None:* Select this option if there is no need to map system values for the field that you specify in the Field Name field on the Node Table page to another value.
- *Record:* Select this option if the system values are derived from a prompt table and you want to map values in the prompt table to other values. Then use the Edit Table field, which becomes available, to specify the prompt table from which the field derives its valid values. The System Values

field in the grid prompts you to select each prompt table value that you want to map to another value.

- *Xlat* (translate): Select this option if the system values are derived from a translate table and you want to map these translate values to other values. The System Values field in the grid prompts you to select each translate value that you want to map to another value.

---

**Note:** To successfully map system values to an alternate value, you must know the type of table edit that is associated with the field that you are mapping. In this way you preserve data integrity so that the system is able to accurately remap values during data validation of an XML file. You select the field on the Node Table page in the Field Name field.

---

**Edit Table**

If you select to map field values from a record, select the prompt table from which the field derives its valid values.

**Mapping To**

Select how you want to define the new valid field values that you are mapping to. After you make a selection, use the Node Value field in the grid below to specify the new value to replace the system value. Your choices are:

- *Code Table:* Select this option to map values to a value that exists on an XML code table. The Code Table field becomes available for edit.
- *Manual:* Select this option to map system values to a value that you manually define.
- *None:* Select this option there is no need to map system values to another value.

**Reg Region (regulatory region)**

Select the regulatory region to use to filter possible code tables to a specific setID. Code tables contain a setID. By selecting the regulatory region, the system enables you to select only the code tables with the same setID as the regulatory region.

**Code Table**

If you select to map new field values to values from an XML code table, select the code table. Define XML code tables on the XML Code Table page.

**System Value andDescription**

Specify the system field value from which you are mapping to another more appropriate value for the XML file. If you are mapping from a field where the valid values are derived from translate tables or prompt tables, select the value that you want to change. If you are mapping from fields where the valid values are derived by manual entry into the system, enter the value that you want to change. The value that you enter manually must be identical to the value defined through user entry.

For translate values and table record values, the system displays the description of your selection.

**Node Value andDescription**

Select or enter the node value to which you are mapping the system value. If you have selected to map to a code table in the Mapping To field, the system prompts against the values in the XML code table that you specify. For XML code table values, the system displays the description of your selection.

## XML Template Page

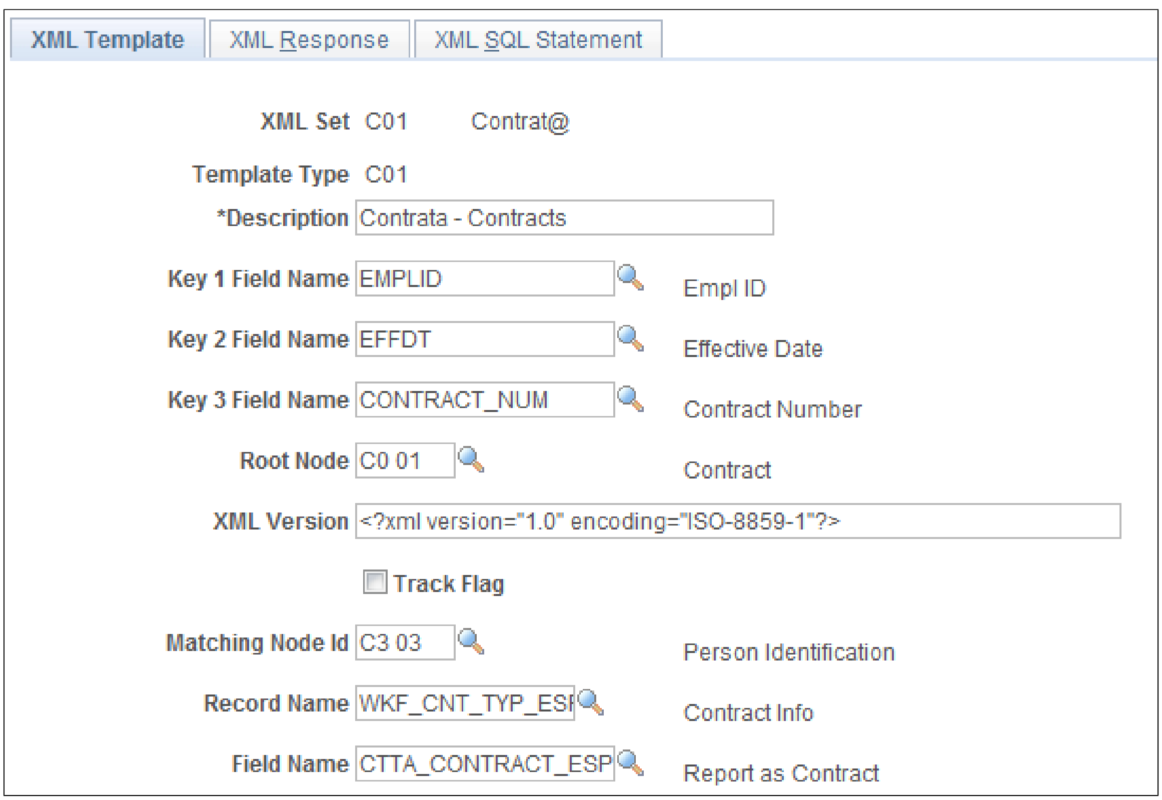
Use the XML Template page (XML_TEMPLATE) to define templates for use during XML file generation.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data ESP, XML Template Table, XML Template

**Image: XML Template page**

This example illustrates the fields and controls on the XML Template page. You can find definitions for the fields and controls later on this page.




**XML Set**

When defining new XML Templates, select the XML set to which the template belongs.

**Template Type**

The identifying code of the template.

| | |
|---|---|
| **Description** | Enter a description of the XML template. |
| **Key 1 Field Name, Key 2 Field Name and Key 3 Field Name** | Specify the fields that you want to use as keys for the different levels of data that you are reporting with the XML template. These fields indicate the key structure of the table from which the system retrieves data for reporting through XML files.<br><br>For example, with Contrata reporting you define EmplID and EFFDT as the key fields to indicate that you are reporting employee information based on the effective date of the contracts. With Delta reporting, you define three levels—company, employee, and effective date (or the incident) — to deliver XML files that include information keyed at the company level, employee level, and incident level.<br><br>When you map a node to a record and field that exist in the database through the XML Node Table component, the record that you select must have at least one of these keys as a record key because the Where clause is built dynamically to use these fields.<br><br>The system also uses the key fields that you define here as filter criteria when you confirm or unconfirm the sending of XML files that are based on this XML template. Confirm XML files through the XML File Confirmation ESP component. |
| **Root Node** | Select the root node for the XML template. By identifying the root node for the XML template you are setting the whole structure of the XML file because the root node contains in a recursive mode the whole structure. The root node is the starting point of the XML structure. Define root nodes on the XML Node Table page. |
| **XML Version** | Specify the version of the XML files that are based on this template. Each XML file needs to include a first line that states the version. |

# Managing Contrata Communications

These topics provide an overview of Contrata (Sistema Contrat@) communication management, list steps to manage Contrata XML file generation, list prerequisites, and discuss how to:

- Generate the Contrata XML file.
- Preview generated XML.

## Understanding Contrata Communication Management

*Contrata* is a web service of the Public Service of Employment (SEPE.) that enables companies to file new employees' employment contracts, change an employee's situation from temporary to permanent, notify SEPE. of extensions to contracts, and carry out other legally required processes. When companies submit the communication online to SEPE. they receive an immediate response notifying them of errors. Companies can then correct the errors before confirming the communication. It is mandatory that companies communicate contract data to SEPE.

Human Resources for Spain provides *Contrata* communication functionality that enables you to track multiple persons' labor contract data and to generate an XML flat file to send to SEPE. This feature combined with the *Contrata* web service eliminates the paper communication between companies and SEPE. and enables companies to communicate data for multiple persons at once, thus reducing time and costs.

Contrata XML files contain all of the data related to the hiring of employees between two dates for a specific type of contract communication. Human Resources for Spain delivers the templates to create XML files to use for Contrata communications of labor contracts, basic copy, and extensions. The XML file generation process obtains data from the HCM database and from data that you enter when generating the XML file. Once you generate the XML file you can then upload the file through the *Contrata* web service.

To use the *Contrata* communication management functionality you must first review the delivered XML file setup data during implementation to ensure that it complies with your company's requirements. This setup includes defining the XML sets, code tables, nodes, and templates necessary for the XML generation process to gather data and generate the XML file. Human Resources for Spain delivers a large percentage of this setup data to facilitate implementation.

## Delivered XML Codes for *Contrata* Reporting

The Spanish social security administration (SEPE.) delivers tables with a simple structure of code equals value, with each of these tables containing numerous values. Human Resources for Spain delivers the social security tables as XML code tables for *Contrata* reporting, providing many of the table values as sample data. During implementation, you must review the setup data to ensure that it complies with your company's requirements.

The following table describes the data tables within the XML Code Tables component that relate to the Contrata communication functionality:

| ***XML Code Table*** | ***Description*** | ***Used By*** |
|---|---|---|
| TELCOLBO | Bonification Groups | Contrata |
| TEKLEYBO | Bonification Law | Contrata |
| TDPMUNIC | City Codes | Contrata |
| TERFIRCB | Clause Signature | Contrata |
| TEHTPCTO | Contract Codes | Contrata |
| TERRORES | Contrata Errors | Contrata |
| TEVACTCL | Council Activity | Contrata |
| TEUECCLL | Council Codes | Contrata |

| ***XML Code Table*** | ***Description*** | ***Used By*** |
|---|---|---|
| SPAISXTC | Country | Contrata |
| STIACATC | Degree | Contrata |
| THITIACA | Degree (SISPE) | Contrata |
| TEJINDIS | Disability Types | Contrata |
| TESCETCO | ET / CO / TE Contracts | Contrata |
| TBONVFOR | Education Level | Contrata |
| TETPGMEM | Employment Program | Contrata |
| SSEXOXTC | Gender | Contrata |
| SACECOTC | Industrial Activity | Contrata |
| TEIINTER | Interim Reasons | Contrata |
| STDIDETC | NID Type | Contrata |
| TAICLAOC | Official Occupation Codes CNO-4 | Contrata |
| SOCUPATC | Official Occupation Codes CNO-8 | Contrata |
| TEQPTIEM | Period | Contrata |
| TAUCOMAU | Region | Contrata |
| THYDISLE | Regulations | Contrata |
| TEYTRELE | Relieve Employee | Contrata |
| TEXTINVE | Research Employee | Contrata |
| TEWEINVE | Research Employer | Contrata |
| TFGGRCOT | SS Work Groups | Contrata |
| SREGCOTC | Scheme | Contrata |
| SPROVITC | States | Contrata |
| THPCOLFO | Training Contract Groups | Contrata |
| TENLEYDE | Unlimited Contract Regulation | Contrata |

| XML Code Table | Description | Used By |
|---|---|---|
| TEOCOLDE | Unlimited Contract Regulation Groups | Contrata |
| ONE_TWO | Yes/No Table (1/2) | Contrata and Delta |
| YESNO | Yes/No Table (S/N) | Contrata and Delta |

### Delivered XML Nodes for Contrata Reporting

Human Resources for Spain delivers XML file structures for Contrata communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

### Delivered XML Templates for Contrata Reporting

Human Resources for Spain delivers five different types of communications for Contrata reporting. Use the XML Template Table component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers as system data the following XML templates:

| XML Template | Description |
|---|---|
| Contrat@ - Contracts | Used to communicate new contracts. |
| Contrat@ - Extensions | Used to communicate extension of a contract. |
| Contrat@ - Basic Copy | Used to communicate the clauses of a contract. |
| Contrat@ - Callings | Used to communicate to the employment agency. |
| Contrat@ - Transformations | Used to communicate the transformation of a contract. |

## Steps to Manage Contrata XML File Generation

Once you have entered all of the data necessary for Contrata reporting, you can use the Print Contrata XML File ESP component to create the Contrata report in XML file format for reporting to SEPE.

To complete the Contrata XML file generation process:

1. Select the template (type of communication) to use for the XML file on the Print Contrata XML File ESP page.
2. Specify report parameter and search for persons to include in the report using the Print Contrata XML File ESP page.
3. Select from the search results, the persons to include in the report.
4. Run the load process.

5. Send the XML file to SEPE through the Contrata web service.

## Prerequisites

Before you can use the *Contrata* communications functionality you must first define Spanish workforce data related to Contrata XML files in the appropriate setup pages. This Spanish workforce data includes XML templates, codes, and nodes.

### Related Links

Setting Up XML Files

## Pages Used to Manage Contrata XML File Generation

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Print Contrata XML File ESP | XML_RC_ESP | Workforce Administration, Workforce Reports, Print Contrata XML File ESP, Print Contrata XML File ESP | Specify the template type and XML file ID, and run the process to generate the XML file to send to SEPE. |
| Read External XML File ESP | XML_RC_READING | Workforce Administration, Workforce Reports, Read External XML File ESP | View and manage SEPE. responses to the Contrata XML files that you submit. |

## Print Contrata XML File ESP Page

Use the Print Contrata XML File ESP page (XML_RC_ESP) to run the process to generate the XML file to send to SEPE.

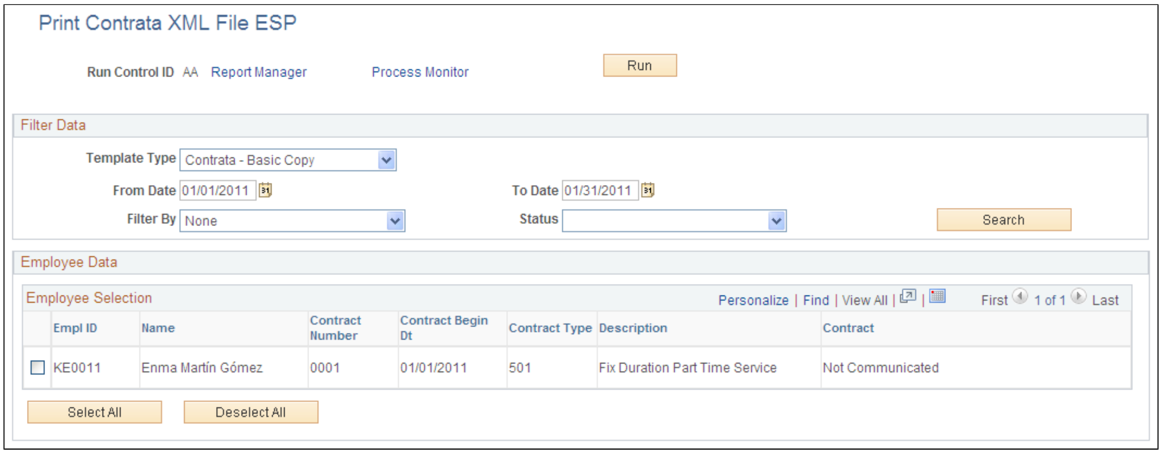
 

### Navigation

Workforce Administration, Workforce Reports, Print Contrata XML File ESP, Print Contrata XML File ESP

### Image: Print Contrata XML File ESP page

This example illustrates the fields and controls on the Print Contrata XML File ESP page. You can find definitions for the fields and controls later on this page.




**Template Type**

Select the XML template that you want to use for Contrata communication. The values available are: *Contrat@ - Contracts*, *Contrat@ - Extensions*, *Contrat@ - Basic Copy*, *Contrat@ - Callings* and *Contrat@ - Transformations*

**From Date and To Date**

Select the date range for which you want to generate the XML file.

**Filter By**

Select a filter condition to narrow down your search results.. If you select one of these filter options, the system displays a Filter List grid for you to enter the additional search criteria. The value available are:

- *Company*
- *Employee*
- *None*
- *SS Contribution Center*

**Status**

Select the status of the Contrata communication in this field. The values available are:

- *Not Communicated*: The Contrata communication has not been sent yet.
- *XML Generated*: The XML file has been generated, but not communicated yet..

| | |
|---|---|
| | • *XML Sent/Confirmated*: The XML file has been generated, and communicated to SEPE. |
| **Search** | Click the button to search for records that match the filter conditions. |

Based on the filter options you select in the Filter By field, a Filter List grid appears on the page. The fields on the Filter List grid are listed below:

| | |
|---|---|
| **Company and Description** | If you select *Company* in the Filter By field, then select the company for which you want to generate the Contrata communication. The Description field automatically displays the company name. |
| **Empl ID and Name** | If you select *Employee* in the Filter By field, then select the employee for whom you want to generate the Contrata communication. The Name field automatically displays the employee name. |
| **Company, Description and Social Security Number** | If you select *SS Contribution Center* in the Filter By field, then select the company and the social security number for which you want to generate the Contrata communication. The Descriptionfield automatically displays the company name. |

## Previewing Generated XML

After you run the process from the Print Contrata XML File ESP page to create the Contrata.xml file, you can go to Process Scheduler and click Details, View Log/Trace to view the XML that was generated for the selected person. Use the template ID that you selected on the page.

Note that to generate the XML file with the correct template, you must select the correct template type and use the appropriate XML file ID.

## Read External XML File ESP Page

Use the Read External XML File ESP page (XML_RC_READING) to view and manage the SEPE. responses to the XML files that you submit.

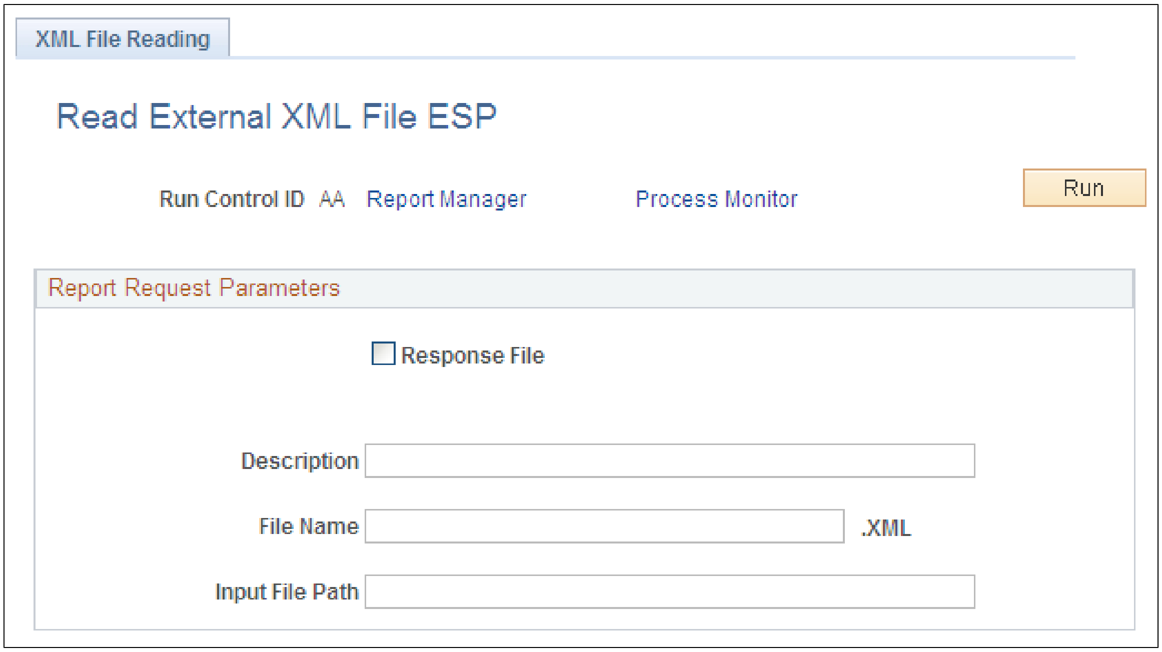
 

**Navigation**

Workforce Administration, Workforce Reports, Read External XML File ESP

**Image: Read External XML File ESP page**

This example illustrates the fields and controls on the Read External XML File ESP page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Response File** | Select this check box if the XML file is a response file. In case of other files, you need to clear the check box. |
| **Description** | Enter a description for the SEPE response file. |
| **File Name** | Enter the name of the SEPE. response file that you want to retrieve. Note that the .XML extension is already provided, and hence do not enter the extension in the field. |
| **Input File Path** | Enter the path to the destination where you want the system to place the uploaded SEPE. response file. |
| **XML Set** | Select the XML set that you want to run. The values available are:<br>• *C01 - Contrat@*<br>• *D01 - Delt@ XML Set*<br>• *G01 - Certific@2*<br>• *P01 - Contract Printing*<br>• *T01 - Tripartite Foundation* |

**Note:** This field is available only if you select the Response File check box.

**Template Type**

Select the type of template to be used for the response file communication. The values available vary based on the type of communication you selected in the XML Set field. For example, if you select *C01 - Contrat@* in the XML Set field, the following contrata templates are available:

- *Contrata - Basic Copy*
- *Contrata - Callings*
- *Contrata - Contracts,*
- *Contrata - Extensions*
- *Contrata - Transformations*

**Note:** This field is available only if you select the Response File check box.

# Managing Delta Communications

These topics provide an overview Delta (Sistema Delt@) communication management, list the steps to manage industrial accident information, list prerequisites, and discuss how to generate the Delta XML file.

## Understanding Delta Communication Management

Every company must report to the Work Minister, external insurance companies, and other management entities the details of industrial accidents that occur to employees. Regulations require that companies report these industrial accidents through Delta reports within a given timeframe.

There are three types of Delta accident reports:

- Industrial accident report where the company must send a report that lists all employees with absences due to an industrial accident (PAT).
- Industrial accident report where the company must send a report that lists employees involved in an industrial accident resulting in no absence (RATSB).
- Report that lists employees who have finished the industrial accident absence because of medical discharge or death (RAF).

Human Resources for Spain provides Delta communication functionality that enables you to efficiently communicate to management entities the information about industrial accidents. This functionality helps speed the distribution of information, reduce costs, and simplify communications while guaranteeing the confidentiality of the content of documents.

The basic flow of industrial accident data is as follows:

1. The accident takes place and the person informs the company with or without a sick note.
2. The company records all incident and injury details about the industrial accident in the system.
3. The company generates the appropriate XML file and sends it to the management entities.
4. If errors exist the management entities return their copies to the company.
5. The company corrects the errors and resends copies to the management entities.

Using Human Resources for Spain, you record all data necessary for the Delta accident reports through components in the Human Resources Health and Safety business process. The Health and Safety business process enables you to create and track incidents related to health and safety for employees and non-employees. It also enables you to associate multiple individuals with a single incident. Specifically, use the Incident Details component and the Injury Details component to enter the necessary data for XML file generation. Through the Incident Details component you can enter or update industrial accident data. Through the Injury Details component you can enter the necessary data about people involved in an industrial accident.

Once you have entered all of the data necessary for Delta reporting, you can use the Print Delta XML File Id ESP component for Delta reporting. Within this component, you can search for employees and incident types matching your filter criteria, select the employees for whom you want to send data to the insurance company, and generate the XML files. Human Resources for Spain provides a unique XML file template for each of the Delta accident reports. The template provides the file structure in XML format.

If you make changes to the report data or the management entities find errors in the report and return the XML file, you can use these same components to correct the errors and resend the XML file.

The Delta communication functionality is integrated with other PeopleSoft applications for integral management of data. In addition, both the Delta communication functionality and the Contrata functionality share components related to data setup, XML file setup, and XML file generation. The Contrata documentation provides further details about these topics.

## Delivered XML Codes for Delta Reporting

The Spanish social security administration delivers tables with a simple structure of code equals value, with each of these tables containing numerous values. Human Resources for Spain delivers the social security tables as XML code tables for Delta reporting, providing many of the table values as sample data. During implementation, you must review the setup data to ensure that it complies with your company's requirements.

The following table describes the data tables within the XML Code Tables component that relate to the Delta communication functionality:

| ***XML Code Table*** | ***Description*** | ***Used By*** |
|---|---|---|
| DIG | Body Part | Delta |
| CNT | Contact Types | Delta |
| INJ | Injury Description | Delta |
| DEV | Irregular Activity | Delta |

| ***XML Code Table*** | ***Description*** | ***Used By*** |
|---|---|---|
| TOL | Material Agent | Delta |
| CNO | Official Occupation Codes CNO-2 | Delta |
| TSK | Physical Activity | Delta |
| PLC | Place Type | Delta |
| WRK | Work Type | Delta |
| ONE_TWO | Yes/No Table (1/2) | Contrata and Delta |
| YESNO | Yes/No Table (S/N) | Contrata and Delta |

### Delivered XML Nodes for Delta Reporting

Human Resources for Spain delivers XML file structures for Delta communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

### Delivered XML Templates for Delta Reporting

Human Resources for Spain delivers three different types of communications for Delta reporting. Use the XML Template Table component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers as system data the following XML templates:

| ***XML Template*** | ***Description*** |
|---|---|
| DELT@ PAT | Used for communication of industrial accident with sick note. |
| DELT@ RATSB | Used for communication of industrial accident without sick note. |
| DELT@ RAF | Used for communication of discharge or death. |

### Related Links

Managing Contrata Communications

## Steps to Manage Industrial Accident Information

This topic describes the steps necessary to enter industrial accident data and generate the related XML files for reporting.

To manage industrial accident information:

1. Complete the prerequisite setup for the Delta communication functionality.

2. Set the Delta data Preventive option for a company on the Company Setup page.
3. Enter the insurance company code on the Establishment Address page.
4. Use the Incident Details component to complete these steps:
    a. Enter the incident number of the accident, incident date, and incident time, and select whether the incident is a recurrence on the Incident Details - Incident page.
    b. Enter a long description of the incident in the Description text box on the Incident Details - Description page.
    c. On the Incident Details - Location page enter the location, address, and establishment information where the accident occurred, and, if applicable, select the Car Incident check box to indicate that the incident is a car accident.
    d. Enter any other data related to the incident on the remaining pages of the component.
5. For an PAT incident, use the Injury Details - Injury component to:
    a. Access the Injury Details - Injury page and specify for each accident the employee or non-employee involved, the date reported, and the time reported.
    b. Select the PAT value in the Incident Type Esp field.
    c. Specify the absence begin date, working hours, and whether the incident is a relapse occurrence.
    d. Click the Accident with sick note link to access the Detailed PAT Data page, where you must specify PAT data details about the employee, employer, and place of incident.
    e. Enter an end date on the Injury Details - Injury page so that the PAT becomes a RAF only if the PAT results in a medical discharge or death.
    f. Click the Medical Discharge or Death link to access the Detailed RAF Data page, where you must define the reason for discharge, the injury grade, and the diagnosis code.
    g. Move to the Injury Details - Details page and click the Accident with sick note link to access the Detailed Pat Data page, where you can specify further details of the PAT incident.
    h. Move to the Injury Details - Diagnosis page and click the Accident with sick note link to access the Detailed PAT Data page, where you can specify medical assistance and economic data for the PAT incident.
    i. Enter any other data related to the injury in the remaining pages of the component.
6. For an RATSB incident, use the Injury Details - Injury component to:
    a. Access the Injury Details - Injury page and specify for each accident the employee or non-employee involved, the date reported, and the time reported.
    b. Select the RATSB value in the Incident Type Esp field.
    c. Move to the Injury Details - Details page and click the Accident without sick note link to access the Detailed RATSB Data page, where you can specify further details of the RATSB incident.

d. Enter any other data related to the injury in the remaining pages of the component.

7. If you make changes or corrections to an XML file that requires you to resend the Delta communication report, use the Print Delta XML File Id ESP component to regenerate the modified XML file.

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**Note:** For the system to include a person in XML file reports that the Delta service generates, the person must work for a company where you have specified the Delta data option on the Company Setup page.

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### Related Links

(ESP) Setting Up Spanish Workforce Tables

"Defining Establishments *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Entering Health and Safety Incident Details *(PeopleSoft HCM 9.2: Human Resources Monitor Health and Safety)*"

"Entering Injury Details *(PeopleSoft HCM 9.2: Human Resources Monitor Health and Safety)*"

## Prerequisites

Before you can use the Delta communications functionality first you must define Spanish workforce data related to Delta accident report XML files in the appropriate setup pages. This Spanish workforce data includes XML templates, codes, and nodes.

### Related Links

Setting Up XML Files

## Pages Used to Manage Delta Communications

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Company Setup | SOCS_SETUP_ESP | Set up HCM, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Company Setup | Enter specific company information, including data needed for social security purposes. |
| Establishment Address | ESTAB_TBL1_GBL | Set Up HCM, Foundation Tables, Organization, Establishment, Establishment Address | Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address. |
| Incident Details - Incident | HS_INCIDENT | Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Incident | Add a new incident or update an existing incident. Be sure to enter the incident number of the accident, incident date, and incident time, and select whether the incident is a recurrence. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Incident Details - Description | HS_INC_DESCRIPTION | Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Description | Describe the health and safety incident and record related data. Be sure to enter a long description of the incident. |
| Incident Details - Location | HS_INC_LOCATION | Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Location | Identify the location where the incident occurred and specify whether the incident was a car accident. |
| Injury Details - Injury | HS_INJ_NOTIFY | Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Injury | Enter information about employees and non-employees who have work-related injuries or illnesses. |
| Detailed PAT Data | HS_PAT1_ESP_SEC | Click the Accident with sick note link on the Injury Details - Injury page. | Enter details about the employee, employer, and place of accident for the PAT incident. |
| Detailed RAF Data | HS_RAF1_ESP_SEC | Click the Medical Discharge or Death link on the Injury Details - Injury page. | Enter the reason for discharge, the injury grade, and the diagnosis code for the RAF incident. |
| Injury Details - Details | HS_INJ_DETAIL | Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Details | Provide details of the injury or illness that is suffered by each person who is involved in the incident. |
| Detailed PAT Data | HS_PAT2_ESP_SEC | Click the Accident with sick note link on the Injury Details - Details page. | Enter detailed information about the accident that caused the injury for PAT reporting. |
| Detailed RATSB Data | HS_RATSB_ESP_SEC | Click the Accident without sick note link on the Injury Details - Details page. | Enter detailed data for RATSB reporting. |
| Injury Details - Diagnoses | HS_INJ_DIAGNOSIS | Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Diagnoses | Record details about the physician, hospital or clinic, and the medical diagnoses that are involved with the injured and ill employees. |
| Detailed PAT Data | HS_PAT3_ESP_SEC | Click the Accident with sick note link on the Injury Details - Diagnoses page. | Specify medical assistance and economic data for PAT incidents. |
| Print Delta XML File ESP | XML_RC_ESP | Workforce Monitoring, Health and Safety, Reports, Print Delta XML File ESP, Print Delta XML File ESP | Specify the template type and XML file ID, and run the process to generate the XML file to send to the insurance companies. |

## Print Delta XML File ESP Page

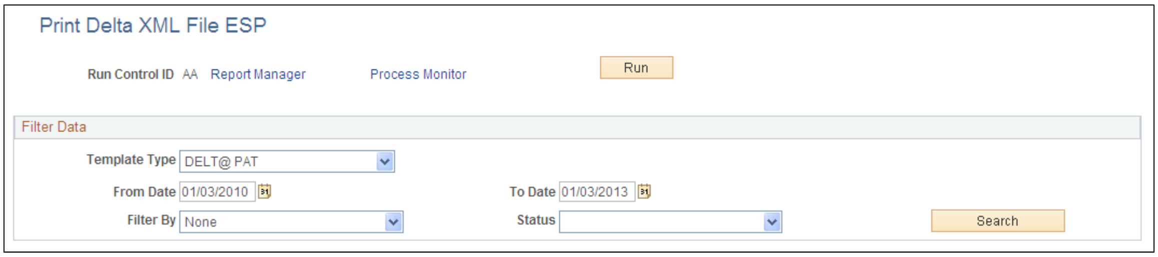
Use the Print Delta XML File ESP page (XML_RC_ESP) to specify the template type and XML file ID, and run the process to generate the XML file to send to the insurance companies.

**Navigation**

Workforce Monitoring, Health and Safety, Reports, Print Delta XML File ESP, Print Delta XML File ESP

**Image: Print Delta XML File ESP page**

This example illustrates the fields and controls on the Print Delta XML File ESP page. You can find definitions for the fields and controls later on this page.




**Template Type**

Select the type of template you want to use for Delta communication. The values available are: *DELT@ PAT*, *DELT@ RATSB* and *DELT@ RAF*

**From Date and To Date**

Select the date range for which you want to generate the Delta communication.

**Filter By**

Select a filter condition to narrow down your search results.. If you select one of these filter options, the system displays a Filter List grid for you to enter the additional search criteria. The value available are:

- *Company*
- *Employee*
- *None*
- *SS Contribution Center*

**Status**

Select the status of Delta communication in this field. The values available are:

- *Not Communicated*: The Delta communication has not been sent yet.
- *XML Generated*: The XML file has been generated, but not communicated yet..
- *XML Sent/Confirmated*: The XML file has been generated, and communicated to the agencies.

| | |
|---|---|
| **Search** | Click the button to search for records that match the filter conditions. |

Based on the filter options you selected in the Filter By field, a Filter List grid is visible on the page. The fields on the Filter List grid are listed below:

| | |
|---|---|
| **Company and Description** | If you select *Company*as the filter option, then select the company for which you want to generate the Delta communication. The Description field automatically displays the company name. |
| **Empl Id and Name** | If you select *Employee* as the filter option, then select the employee for whom you want to generate the Delta communication. The Name field automatically displays the employee name. |
| **Company, Description and Social Security Number** | If you select *SS Contribution Center*as the filter option, then select the company and the social security number for which you want to generate the Delta communication. The Description field automatically displays the company name. |

## Previewing Generated XML

After you run the process from the Print Delta XML File ESP page to create the Delta.xml file, you can go to Process Scheduler and click Details, View Log/Trace to find the file and preview the XML that was generated for the selected person. Use the template ID that you selected on the Definition page of this component.

# Printing Contracts

Printing contract functionality enables generating PDF reports corresponding to the contracts between the company and the employee.

Utilizing the flexible setup delivered to generate XML files to define the data structure of the PDF reports, the system uses the same pages to define the data of these reports by defining specific nodes.

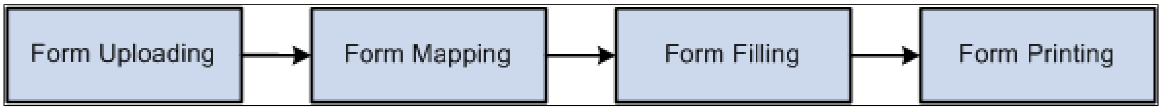
## Understanding Contract Printing

The Spanish government delivers a complete set of contract forms in PDF format that employers can download from the government website. The employer must complete the appropriate forms for new hires and submit them to the government after the newly hired employees sign the forms. To assist employers in the completion of these contract forms, Human Resources for Spain provides Contract Printing functionality to print the contracts.

Employers can then have employees sign the printed forms and return them to the human resources administrator, who can then submit the completed forms to the government.

**Image: Four tasks for contract printing**

The following diagram shows the four basic tasks involved in Contract Printing functionality:




System administrators must perform form uploading and form mapping tasks whenever there are new contract types that require contract-printing capability. Human Resources administrators perform the form filling and form printing tasks as necessary.

To set up the system for the printing of new contracts, system administrators can define the XML nodes that relate to the contract form, including the node values and whether the nodes are mandatory, through the XML Node Table component. They can also create empty nodes to enable Human Resources administrators to edit the node data online before printing.

To generate and print contracts, Human Resources administrators can print a batch of forms for a selected group of employees through the Print Contracts ESP component. They can then give the printed form to the employee for signature.

## Understanding Contract Printing XML Setup

Human Resources for Spain uses the XML generation process to retrieve the Human Resources data needed for completing the forms to print contracts, delivering all of the setup necessary to print contracts for unlimited contract types. System administrators can define additional data for the perform contract printing for other contract types.

### Contract Printing XML Setup Structure

The setup for contract printing is based on:

- An XML set.

  Human Resources for Spain delivers the XML set *P01* for use with all contract printing.

  To maintain XML set definitions, use the XML Set Table component.

- XML nodes.

  XML nodes for contract printing are always keyed by the XML set for contract printing. Human Resources for Spain delivers the XML nodes for printing unlimited contracts.

  Specifically, Human Resources for Spain delivers the *PE-170* XML node for printing unlimited contracts and unlimited full-time contracts and the *PE-172* XML node for printing transformation to unlimited contracts. These nodes contain children nodes that correspond to each of the fields on the contract, and themselves are children nodes to the *P0 01* contract-printing root node.

  Human Resources for Spain also delivers the children nodes for PE-170 and PE-172 contracts.

System administrators can maintain the delivered nodes and also define additional nodes for other contract types. To define nodes that comprise the XML file structure for contract printing of specific contract types, use the XML Node Table component.

- An XML template.

  The XML template for contract printing is keyed by the XML set for contract printing. Human Resources for Spain delivers the XML template for use with all contract printing. Human Resources for Spain delivers the XML template *P01* for use with all contract printing.

  To define templates for use during XML file generation, use the XML Template Table component.

### Related Links

Setting Up XML Files

## Understanding Contract Generation

Human Resources administrators can use the Contract Printing ESP component to generate, review, edit, and validate contract data.

To create contracts:

**Note:** To print contracts in groups, use the Print Contracts ESP component.

### Related Links

Print Contracts ESP Page

## Pages Used To Print Contracts

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Print Contracts ESP | CTPR_RC_ESP | Workforce Administration, Workforce Reports, Print Contracts ESP, Print Contracts ESP | Print contracts in batch for employees that are grouped within a specified Contract Printing Run ID. |

## Print Contracts ESP Page

Use the Print Contracts ESP page (CTPR_RC_ESP) to print contracts based on some filter conditions.

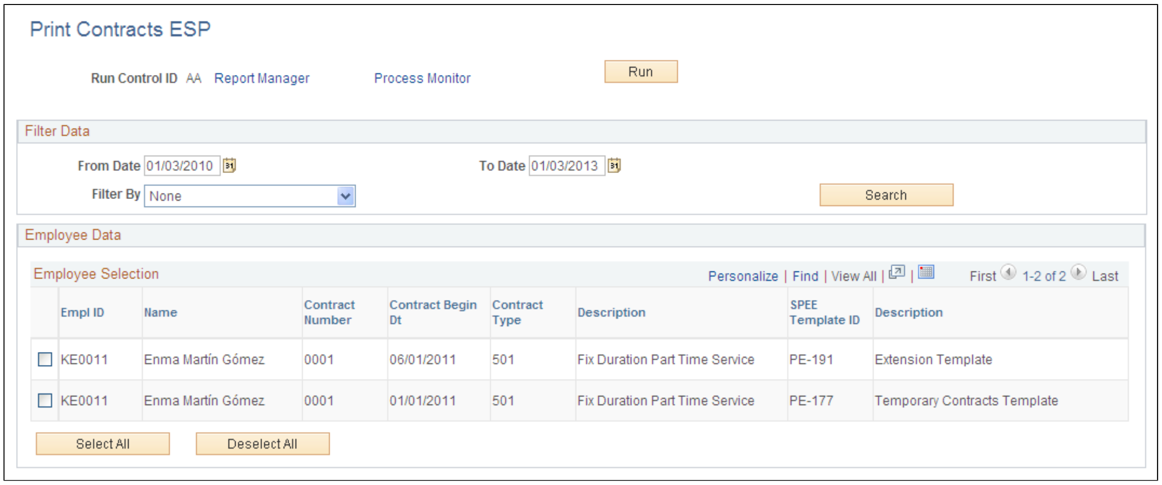
 

### Navigation

Workforce Administration, Workforce Reports, Print Contracts ESP, Print Contracts ESP

### Image: Print Contracts ESP page

This example illustrates the fields and controls on the Print Contracts ESP page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **From Date and To Date** | Select the date range for which you want to print the contracts. |
| **Filter By** | Select a filter condition to narrow down your search results.. If you select one of these filter options, the system displays a Filter List grid for you to enter the additional search criteria. The value available are:<br>• *Company*<br>• *Employee*<br>• *None*<br>• *SS Contribution Center* |
| **Search** | Click this button to search for records that match the selected filter conditions. |

Based on the filter options you selected in the Filter By field, a Filter List grid is visible on the page. The fields on the Filter List grid are listed below:

## Filter Grid

| | |
|---|---|
| **Company and Description** | If you select *Company* in the Filter By field, then select the company for which you want to print the contracts. The Description field automatically displays the company name. |
| **Empl ID and Name** | If you select *Employee* in the Filter By field, then select the employee for whom you want to print the contracts. The Namefield automatically displays the employee name |

**Company, Description, and Social Security Number**

If you select *SS Contribution Center* in the Filter By field, then select the company and the social security number for which you want to print the contracts. The Description field automatically displays the company name.

# Generating AFI Flat Files

## Understanding the AFI Process

For Spanish employers, PeopleSoft Human Resources includes an AFI process (SOCS_AFI_ESP) for reporting workforce changes to the Social Security General Treasury. The PeopleSoft process simplifies submissions by automatically creating a flat file in the format that is required by the Spanish authorities.

Every time you add, delete, or update an effective-dated row to the JOB_DATA record, the system verifies whether the action is a termination. If so, the system adds, deletes, or updates the corresponding effective-dated row in the WKF_CNT_TYP record via PeopleTools Integration Broker. The system uses the ESPAFIData_Sync message subscription within the WORKFORCE_SYNC message to perform the synchronization.

When ready you can run the AFI process through the Create AFI Report ESP component. The AFI process generates a flat file that lists changes in workforce such as hiring, terminations, personal changes, or job data changes for a particular period. The system ensures that employees for whom you have already generated the report are not included in subsequent file generations.

In addition to workforce changes, you can use the AFI process to send information requests to the Social Security General Treasury. Employers use these requests to obtain information about their employees' or companies' social security contributions.

When you generate an AFI report through the AFI file generation process, the system assigns an AFI file name to each row of employee AFI data that it includes in the file. The assignment of this value prevents repeat communication of the data in subsequent AFI files. The system also assigns to the communicated row of data a node status value of *Included in AFI* and a time stamp value that specifies the date and time of the processing.

**Note:** To use AFI reporting functionality you must configure PeopleTools Integration Broker to support Integration Broker.

## Pages Used to Generate AFI Flat Files

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
| --- | --- | --- | --- |
| Create AFI File ESP - Employees | AFI_RC_1_ESP | Workforce Administration, Workforce Reports, Create AFI File ESP, Employees | Search for employees for which you need to communicate AFI data to social security, and then generate the AFI flat file for selected employees. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Create AFI File ESP - Employee Inqueries | AFI_RC_2_ESP | Workforce Administration, Workforce Reports, Create AFI File ESP, Employee Inqueries | Create inquiries to submit to the Social Security General Treasury about selected employees. The AFI report process includes these inquiries in the AFI flat file that it generates. |
| Create AFI File ESP - Company Inqueries | AFI_RC_3_ESP | Workforce Administration, Workforce Reports, Create AFI File ESP, Company Inqueries | Create inquiries to submit to the Social Security General Treasury about selected companies. The AFI report process includes these inquiries in the AFI flat file that it generates. |
| Create AFI File ESP - Non Employee Inqueries | AFI_RC_4_ESP | Workforce Administration, Workforce Reports, Create AFI File ESP, Non Employee Inqueries | Create inquiries to submit to the Social Security General Treasury about selected non-employees. The AFI report process includes these inquiries in the AFI flat file that it generates. |

## Create AFI File ESP - Employees Page

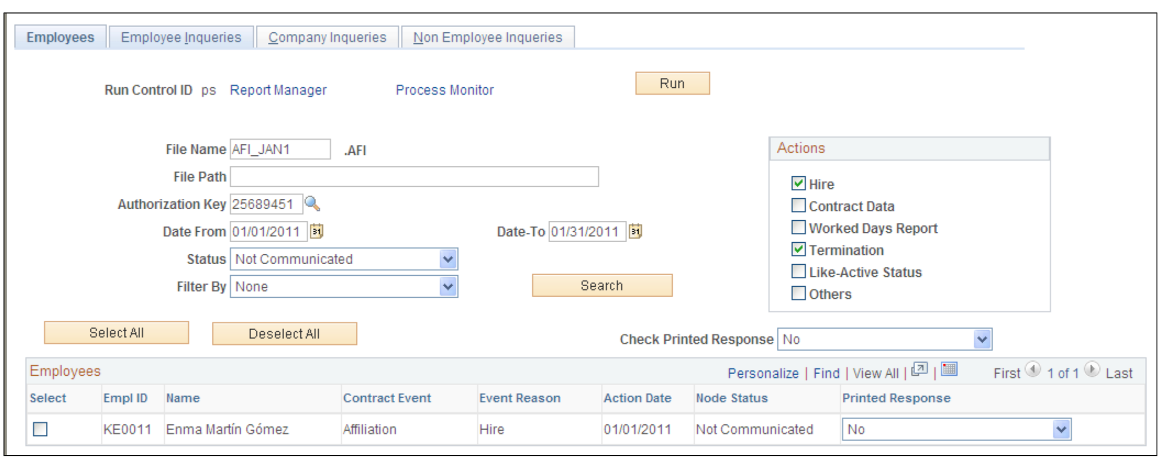
Use the Create AFI File ESP - Employees page (AFI_RC_1_ESP) to search for employees for which you need to communicate AFI data to social security, and then generate the AFI flat file for selected employees.

**Navigation**

Workforce Administration, Workforce Reports, Create AFI File ESP, Employees

**Image: Create AFI File ESP - Employees page**

This example illustrates the fields and controls on the Create AFI File ESP - Employees page. You can find definitions for the fields and controls later on this page.



**File Name**

Enter the name of the file that you want the process to use for the report. The system stores the data in an AFI file.

**File Path**

Enter the path where you want the process to store the report file.

**Authorization Key**

Select to narrow search results to employees working for companies with this authorization key. Social Security General Treasury provides companies with authorization codes to access Winsuite.

**Date From and Date-To**

Enter a date range to find all employees with a change in social security status between these dates.

**Filter By**

Select a filter to narrow search results further. When you select a filter, the Filter Data Grid becomes available to specify filter details. Available filters are:

- *SS Contribution Center:* Select to run the process for a selected company and a social security number. The system displays the Filter Data Grid for you to select the company and social security number.
- *Company:* Select to run the process for selected companies. The system displays the Filter Data Grid for you to select the companies.
- *Department:* Select to run the process for selected departments. The system displays the Filter Data Grid for you to select the setID and departments.
- *Employee:* Select to run the process for selected employees. The system displays the Filter Data Grid for you to select the employee IDs.
- *None:* Select to search without a filter.

**Search**

Click to retrieve results based on your search criteria.

## Filter Data Grid

**Company**

Select the company for which to report data.

**Social Security Number**

Select the employer's social security number for which to report data. If you leave this field blank, the extract file contains data for all of the employer's social security numbers.

**SetID**

Select the department setID for which to report data.

**Department**

Select the department for which to report data.

**EmplID (employee ID)**

Select the specific employee ID for which to report data.

### Actions

**Hire** — Select to include employees who were hired.

**Termination** — Select to include employees who were terminated.

**Contract Data** — Select to include employees whose contracts changed.

**Like-Active Status** — Select to include employees with like-active situations.

**Worked Days Report** — Select to include part-time employees whose worked days need to be reported.

**Others** — Select to include employees with other type of actions.

### Employees

The system displays employees that meet your search criteria and have AFI data that you still need to report to social security. The system displays only employees with social security actions that you have not yet communicated to social security in an AFI report. Select the check box next to the employee AFI data row to include the information in the AFI flat file.

**Select All** — Click this button to select all employees in the search results grid.

**Deselect All** — Click this button to deselect the check box for all employees in the search results grid.

**Printed Response** — Select whether you want a printed response from the Social Security General Treasury for the employee's AFI information. Values are:

- *No:* Indicates that you do not want a printed response to the communication that you are sending.
- *Print Resolution:* Indicates that you do want a printed response to the communication that you are sending.
- *Contribution Data Report (IDC):* Indicates that you do not want a printed response to the communication that you are sending, but would like to receive information on the contribution data for the employee.
- *Print Resolution + IDC:* Indicates that you want both a printed response to the communication that you are sending and information on the contribution data for the employee.

## Create AFI File ESP - Employee Inqueries Page

Use the Create AFI File ESP - Employee Inqueries page (AFI_RC_2_ESP) to create inquiries to submit to the Social Security General Treasury about selected employees.

The AFI report process includes these inquiries in the AFI flat file that it generates.

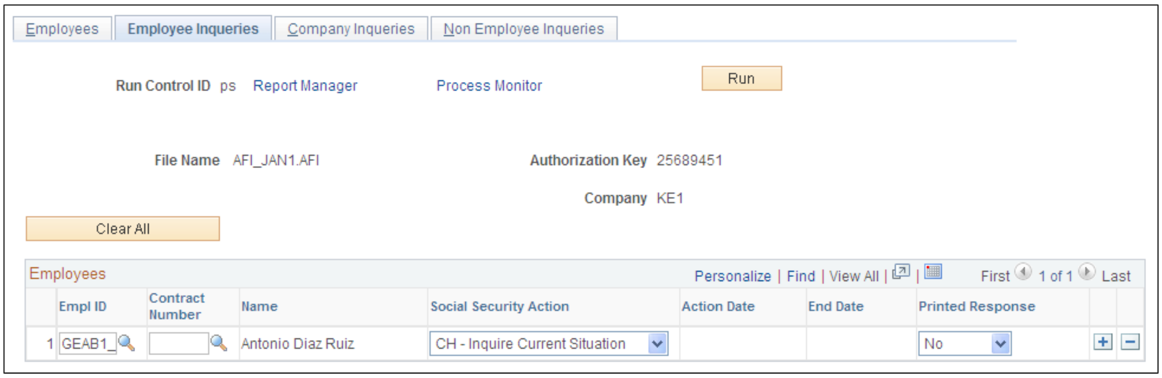
 

### Navigation

Workforce Administration, Workforce Reports, Create AFI File ESP, Employee Inqueries

### Image: Create AFI File ESP - Employee Inqueries page

This example illustrates the fields and controls on the Create AFI File ESP - Employee Inqueries page. You can find definitions for the fields and controls later on this page.




**Clear All**

Click this button to deselect all rows in the Employees grid on this page.

**Empl ID andContract Number**

Select the employee and the specific contract for which you want to submit an inquiry to social security.

**Social Security Action**

Select the inquiry that you want to submit to the Social Security General Treasury regarding the selected employee. Possible inquires are:

- *CH - Inquire Current Situation:* Select to request the information that the Social Security General Treasury has about the employee.
- *CE - Inquire IT Per Ill:* Select to request information about a temporary disability situation.
- *CP - Inquire Previous Movements:* Select to request the information that the Social Security General Treasury has about previous movement in the CCC.
- *CD - Inquire TA2 Copy:* Select to request a copy of a specific TA2 report. The system displays the Action Date field.
- *IDC - Inquire Contribution Data:* Select to request information on the contribution data for the employee in the period selected by the user.
- *PLT - Contribution/Period. Employee:* Select to request information on the contribution data for the employee for Settlement Period.

**Action Date** If you select to inquire about a duplicate TA2 copy, the system prompts you to enter the action date of the original TA2.

## Create AFI File ESP - Company Inqueries Page

Use the Create AFI File ESP - Company Inqueries page (AFI_RC_3_ESP) to create inquiries to submit to the Social Security General Treasury about selected companies.

The AFI report process includes these inquiries in the AFI flat file that it generates.

**Navigation**

Workforce Administration, Workforce Reports, Create AFI File ESP, Company Inqueries

**Image: Create AFI File ESP - Company Inqueries page**

This example illustrates the fields and controls on the Create AFI File ESP - Company Inqueries page. You can find definitions for the fields and controls later on this page.


**Clear All** Click this button to deselect all rows in the Companies grid on this page.

**Company** Select the company for which you want to submit an inquiry to social security.

**Social Security Number** Select the employer's social security number for which to submit an inquiry.

**Social Security Action** Select the inquiry that you want to submit to social security regarding the selected company. Possible inquires are:

- *AAC - Certificated Authorization:* Select to request the Certificated Authorization to inquire other company data. The system asks for the Customer CCC in the Additional Data tab.
- *CL - Inquire Labor Life in CCC:* Select to request the information that the Social Security General Treasury has about labor life in the CCC.

- *CS - Inquire CCC Situation:* Select to request the information that the Social Security General Treasury has about the company.
- *CT - Inquire Current CCC Workers:* Select to request the information that the Social Security General Treasury has about current workers in the CCC.
- *CTA - ITA by Authorization Key:* Select to request the ITA ( Affiliated Workers Report) by Authorization Key.
- *CTP - ITA by Main CCC:* Select to request the ITA ( Affiliated Workers Report) by Main Employer Social Security Number(CCC).
- *CU - Inquire Previous CCC Movement:* Select to request the information that the Social Security General Treasury has about previous movement in the CCC.
- *PLC - Contribution/Period Company:* Select to request information on the contribution data for company employees for Settlement Period.
- *PMT - Average Company Staff:* Select to request information on average company staff.

**Action Date**

System prompts you to enter the start date of the period you are asking for information about. This is applicable for actions: *AAC, CL, PLC,* and *PMT.*

**End Date**

System prompts you to enter the end date of the period you are asking for information about. This is applicable for actions: *AAC, CL,* and *PMT.*

**Customer CCC**

Enter the complete Employer SSN (CCC) including the scheme for customer to request the authorization. This is applicable for the action: *AAC.*

**Note:** Click the Additional Data tab to view this field.

## Create AFI File ESP - Non Employee Inqueries Page

Use the Create AFI File ESP - Employee Inqueries page (AFI_RC_4_ESP) to create inquiries to submit to the Social Security General Treasury about selected employees.

The AFI report process includes these inquiries in the AFI flat file that it generates.

### Navigation

Workforce Administration, Workforce Reports, Create AFI File ESP, Non Employee Inqueries

### Image: Create AFI File ESP - Non Employee Inqueries page

This example illustrates the fields and controls on the Create AFI File ESP - Non Employee Inqueries page. You can find definitions for the fields and controls later on this page.


**Clear All**

Click this button to deselect all rows in the Non Employees grid on this page.

**Empl ID and Name**

Select the non employee for whom you want to submit an inquiry to the social security. On selecting the ID, the Name field populates the person's name.

**Empl Record**

If the person has more than one employee record linked to the employee ID, search and select the record against which you want to submit an enquiry.

**Social Security Action**

Select the inquiry that you want to submit to social security regarding the selected person. The value available in the list is *CTO - Contractor Inquire*.

**Action Date**

Enter the date for which you want to submit an enquiry.

**Printed Response**

Select whether you want a printed response from the Social Security General Treasury for the person's AFI information. The values are:

- *Contribution Data Report (IDC)*: Indicates that you do not want a printed response for your inquiry, but would like to receive information on the contribution data for the person.
- *No*: Indicates that you do not want a printed response for your inquiry.
- *Print Resolution*: Indicates that you do want a printed response for your inquiry.

- *Print Resolution + IDC*: Indicates that you want both a printed response for your inquiry, and information on the contribution data for the person.

Chapter 12

# (ESP) Managing the Spanish Redundancy Procedure (ERE)

## Understanding ERE

ERE is the administrative procedure under Spanish legislation that companies must follow when requesting a temporary suspension of labor contracts or a collective dismissal because of economic, technological, organizational, or productive reasons, or due to force majeure. Such action requires the agreement of the workers' representatives or, failing this, prior official authorization from the administrative authorities. The administrative authority would be either the Ministry of Employment and Immigration or the Regional Employment Ministry depending on the location of the affected employees.

When a company is forced to perform a massive reduction in force, ERE grants Social Security benefits if the company chooses not to terminate their employees, but rather suspend them temporarily. In addition, ERE provides financial support to employees who are terminated.

Oracle provides all the tools you need to manage the ERE procedure enabling you to enter required data, adjust reductions in contribution and compensation, and generate the reports to communicate required data to legal entities (Social Security and SPEE).

### Types of ERE Actions

For a given ERE event, a company can take the following actions for its employees:

- Permanent termination: Employees who are terminated permanently are provided an indemnity payment from the company. In addition, terminated employees are eligible to receive unemployment benefits paid by the *Servicio Público de Empleo Estatal* (SPEE).
- Suspension: This action results in the temporary suspension of employees. During this suspension, employees don't work at all and receive a monthly benefit paid by SPEE. At the end of the suspension, employees return to their jobs and receive their normal monthly wage.
- Work Schedule Reduction: This action results in a reduced work schedule for affected employees. Their work schedule is reduced either by the number of days worked per month, or the hours worked per day. During the work schedule reduction, employees receive a portion of their wages from their company based on the hours or days worked. In addition, they receive some unemployment benefits from SPEE to make up for wages lost due to their reduced work schedule.

## Defining an ERE Event

The first step in the ERE procedure is to define an ERE event. The ERE Data ESP (ERE_DATA_ESP) component enables you to define an ERE event at a collective level. The system uses the data defined for the event for reporting and payroll purposes.

These topics discuss how to:

- Create an ERE data definition.
- Set up ERE payroll data.
- Define ERE statuses and documentation.

## Pages Used to Define an ERE Event

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| ERE Data ESP - Definition | ERE_DATA_ESP | Workforce Administration, ERE Procedure ESP, ERE Data ESP | Create an ERE data definition. |
| ERE Data ESP - Payroll | ERE_DTA_BNF_ESP | Workforce Administration, ERE Procedure ESP, ERE Data ESP, Payroll | Set up ERE payroll data. |
| ERE Data ESP - Status/ Documents | ERE_DTA_DOC_ESP | Workforce Administration, ERE Procedure ESP, ERE Data ESP, Status/Documents | Define ERE statuses and documentation. |

## ERE Data ESP - Definition Page

Use the ERE Data ESP - Definition page (ERE_DATA_ESP) to create an ERE data definition.

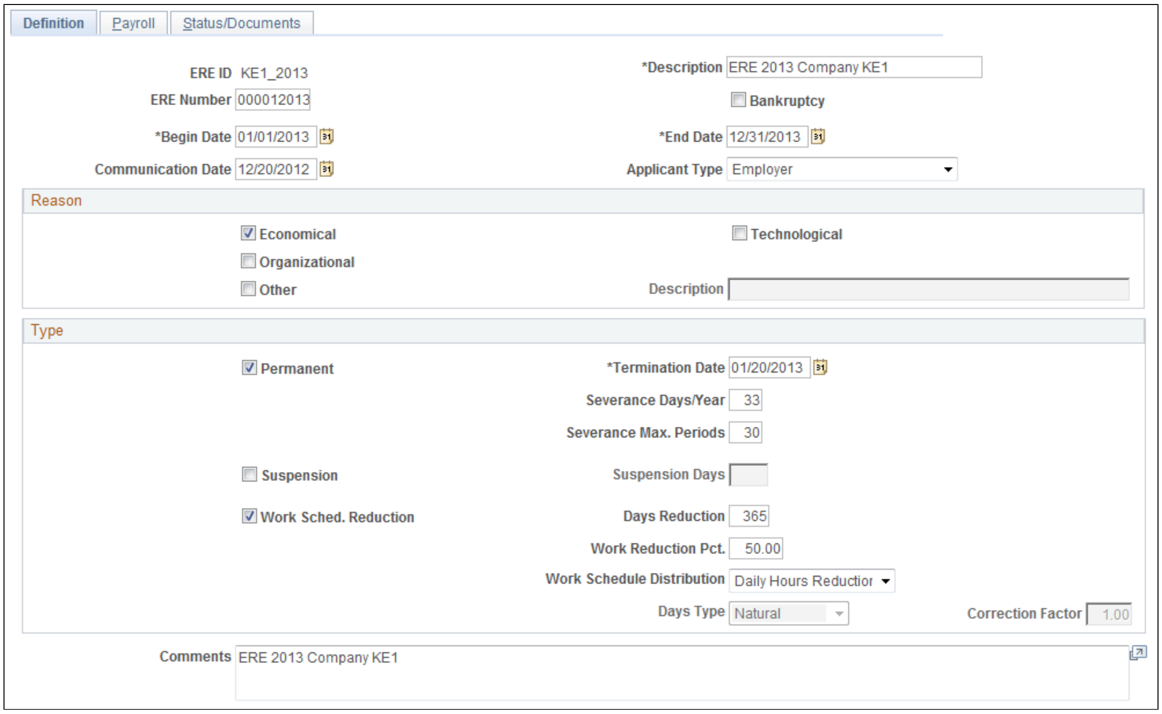
 

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Data ESP

**Image: ERE Data ESP - Definition page**

This example illustrates the fields and controls on the ERE Data ESP - Definition page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **ERE Number** | Enter the unique ERE number that is provided by the labor authority that is administrating the ERE event. |
| **Bankruptcy** | Select to indicate that the ERE event is associated with a bankruptcy. |
| **Begin Date and End Date** | Enter the date range for the ERE event. |
| **Communication Date** | Enter the date on which the ERE event is communicated to the affected employees and their representatives. |
| **Applicant Type** | Select the entity who is applying for the ERE event. Valid values are: Employee’s Representative, Employees, and Employer. |

## Reason

Select all reasons that apply to the ERE event. You can select Economical, Technological, Organizational, and Other. If you select the Other check box, enter a description of the reason in the Description field.

## Type

**Permanent**

Select to indicate that permanent terminations are included in the ERE event. When you select this check box, the Termination Date, Days/Years, and Max Period fields become available.

**Note:** If you select this check box, the Permanent ERE (ERE_PERM_EE_ESP) page appears in the ERE Employee Data ESP (ERE_EMPL_DTA_ESP) component for this ERE ID.

**Termination Date**

Enter the date on which the terminations associated with the ERE event take effect.

**Days/Years**

Enter the number of days by year of service that the payroll process uses when calculating severance pay amounts for employees affected by permanent ERE.

**Max Periods (maximum period)**

Enter the maximum number of periods that the payroll process uses when calculating the severance pay amounts for employees affected by permanent ERE.

**Suspension**

Select to indicate that suspensions are included in the ERE event. When you select this check box, the Suspension Days field becomes available.

**Note:** If you select this check box, the Suspension ERE (ERE_SUSP_EE_ESP) page appears in the ERE Employee Data ESP (ERE_EMPL_DTA_ESP) component for this ERE ID.

**Suspension Days**

Enter the length of the suspension in days.

**Work Sched. Reduction (work schedule reduction)**

Select to indicate that work schedule reductions are included in the ERE event. When you select this check box, the Days Reduction, Work Reduction Pct., and Work Schedule Distribution fields become active.

**Note:** If you select this check box, the Work Reduction ERE (ERE_WSRD_EE_ESP) page appears in the ERE Employee Data ESP (ERE_EMPL_DTA_ESP) component for this ERE ID.

**Days Reduction**

Enter the number of days by which the ERE event reduces the work schedule of employees affected by work schedule reduction ERE.

**Work Reduction Pct. (work reduction percentage)**

Enter the percentage by which the ERE event reduces the work schedule of employees affected by work schedule reduction ERE.

**Work Schedule Distribution**

Select whether the work schedule reduction is a *Daily Hours Reduction* or a *Work Day Reduction*. If you select the *Work Day Reduction* value, the Days Type field becomes available.

**Days Type**

Select whether the work day reduction is for *Natural* days or *Working* days. If you select the *Working* value, the Correction Factor field becomes available.

**Correction Factor**

Enter the correction coefficient that the payroll process uses when calculating ERE days to account for holidays and weekends. This factor applies to work schedule reductions comprising work days with days not worked.

### Comments

Enter any additional comments for the ERE event.

## ERE Data ESP - Payroll Page

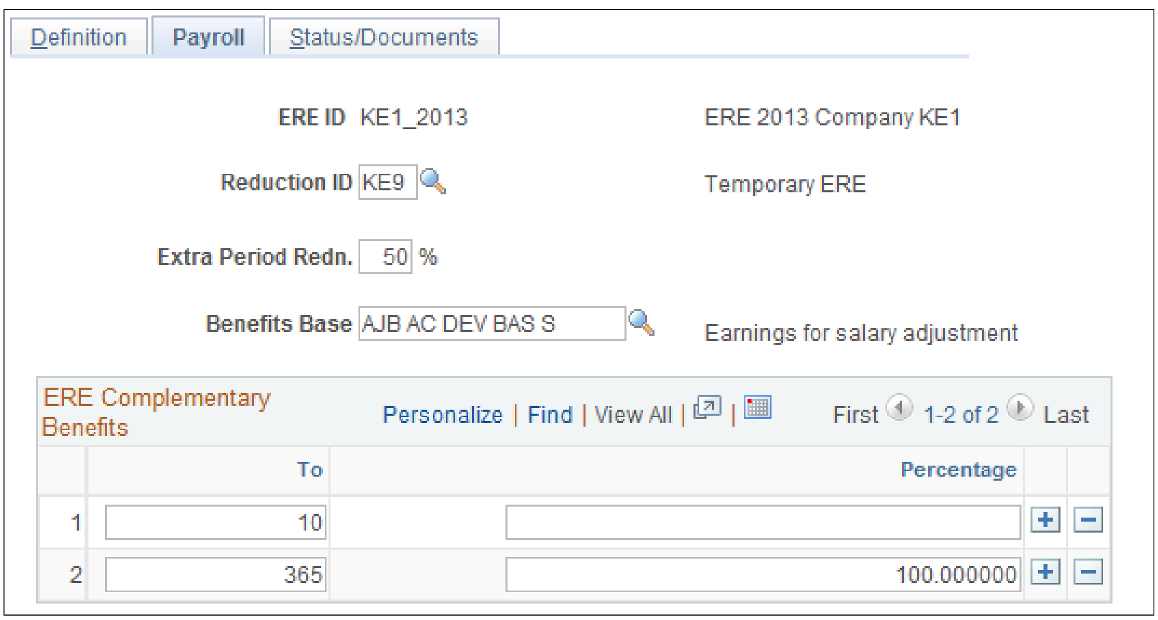
Use the ERE Data ESP - Payroll page (ERE_DTA_BNF_ESP) to set up ERE payroll data.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Data ESP, Payroll

**Image: ERE Data ESP - Payroll page**

This example illustrates the fields and controls on the ERE Data ESP - Payroll page. You can find definitions for the fields and controls later on this page.




Use this page to define how the system updates payroll data for employees affected by the two types of temporary ERE: suspensions and work schedule reductions.

**Reduction ID**

Enter the Social Security reduction ID for the ERE event. You define reduction IDs on the Reduction page.

**Extra Period Redn. (extra period reduction)**

Enter the percentage by which the system reduces extra period days for employees affected by temporary ERE.

**Benefits Base** — Enter the accumulator that the system uses as the basis for calculating the ERE complementary benefits of employees affected by temporary ERE. These are the complementary benefits paid by the company in addition to the subsidy paid by SPEE.

### ERE Complementary Benefits

Use this group box to define complementary benefits received due to the ERE event.

**To** — Define the period for the benefit (usually the number of days up to a certain day). For example, if you enter 4 in the first row, then from days 1–4 (up to day 4) of absence due to ERE, the employee receives a specified percentage. If you enter 5 in the second row, then for day 5, the employee receives another specified percentage. If you enter 10 in the third row, then from days 6–10, the employee receives another specified percentage.

**Percentage** — Define the percentage of the benefit base that an employee receives in ERE complementary benefits. For example, if you enter 100, employees receive 100 percent of the benefit base during the specified period.

### Related Links

"Viewing and Defining Social Security Ceilings, Rates, and Bases *(PeopleSoft HCM 9.2: Global Payroll for Spain)*"

## ERE Data ESP - Status/Documents Page

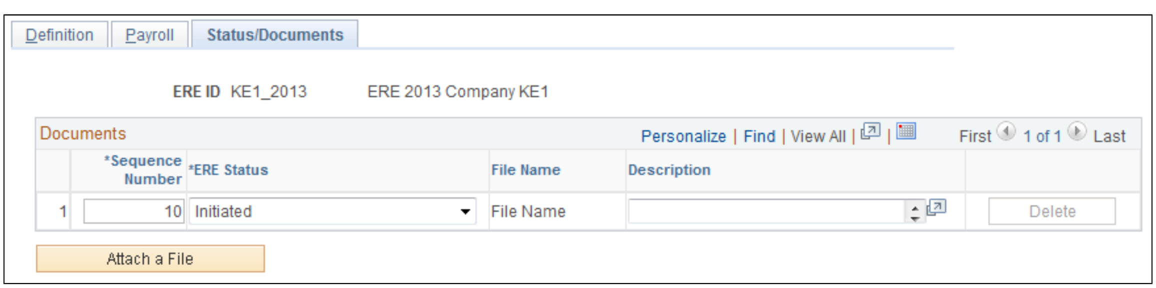
Use the ERE Data ESP - Status/Documents page (ERE_DTA_DOC_ESP) to define ERE statuses and documentation.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Data ESP, Status/Documents

**Image: ERE Data ESP - Status/Documents page**

This example illustrates the fields and controls on the ERE Data ESP - Status/Documents page. You can find definitions for the fields and controls later on this page.




Use this page to enter a status for each step in the ERE procedure. Along with each step in the procedure, you can attach any associated documentation.

**Sequence Number**

Enter the sequence number for the step in the ERE procedure. By default, the system separates each step by 10.

**ERE Status**

Enter the status for each step in the procedure. Valid values are:

- Initiated
- Requested
- Rejected
- Consultation Period
- Accepted w/Agreement (accepted with agreement)
- Accepted wo/Agreement (accepted without agreement)
- Approved
- Appealed

You can use a given status more than once. For example, you might have two or more steps with a status of Consultation Period because each step in the consultation period is associated with a different document.

**File Name**

Displays a link to the attached file associated with the step in the ERE procedure. Click the link to open the file in a new browser window.

**Description**

Enter a description of the attached file.

**Delete**

Click to delete an attached file from the page. Once you delete the file, the step becomes unavailable to edit.

**Attach a File**

Click to attach a file to a new step in the ERE procedure.

## Defining Company-Specific Details for an ERE Event

Once you have defined the collective ERE event, you must define the details for the one or more companies associated with the ERE event. These topics discuss how to:

- Define ERE company data.
- Define ERE representatives.
- View ERE distribution information.

## Pages Used to Define Company-Specific Details for an ERE Event

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Company Data | ERE_CMP_DTA_ESP | Workforce Administration, ERE Procedure ESP, ERE Company Data ESP | Define ERE company data. |
| Representatives | ERE_REPREST_ESP | Workforce Administration, ERE Procedure ESP, ERE Company Data ESP, Representatives | Define ERE representatives. |
| Distribution | ERE_CMP_DST_ESP | Workforce Administration, ERE Procedure ESP, ERE Company Data ESP, Distribution | View ERE distribution information. |

## ERE Company Data ESP - Company Data Page

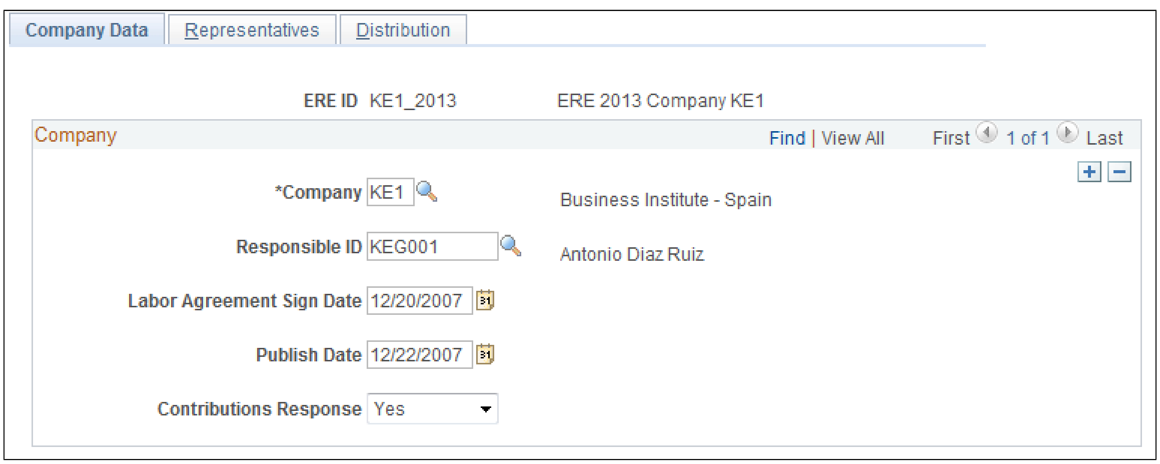
Use the Company Data page (ERE_CMP_DTA_ESP) to define ERE company data.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Company Data ESP

**Image: Company Data page**

This example illustrates the fields and controls on the Company Data page. You can find definitions for the fields and controls later on this page.




Use this page to define basic ERE information for the companies associated with an ERE event.

**Company** Enter the ID of the company associated with the ERE event.

**Responsible ID** Enter the ID of the person responsible for managing the ERE event for the company.

**Labor Agreement Sign Date** Enter the date on which the company's labor agreement was originally signed.

**Publish Date**

Enter the official publication date of the company's labor agreement.

**Contributions Response**

Indicate whether the company wants to receive a reply from SPEE regarding the contributions in the XML file for employees affected by ERE. The company must have received permission from employees to request a response.

## Representatives Page

Use the Representatives page (ERE_REPREST_ESP) to define ERE representatives.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Company Data ESP, Representatives

**Image: Representatives page**

This example illustrates the fields and controls on the Representatives page. You can find definitions for the fields and controls later on this page.


Use this page to identify the company and employee representatives for a company associated with an ERE event.

### Company

Use this group box to define the representatives for the employees who work for the company undergoing the ERE event.

**Main Contact**

Select to indicate the main contact for the employees. Only one employee representative can be designated as the main contact.

**Representative ID**

Enter the ID of the employee representative.

**Name, Contact Phone, and Email ID**

These fields display any name, telephone, or email information defined for the representative.

### Employees

**Main Contact**

Select to indicate the main contact for the employees. Only one employee representative can be designated as the main contact.

**Representative ID** Enter the ID of the employee representative.

**Name, Contact Phone, and Email ID** These fields display any name, telephone, or email information defined for the representative.

**Included in ERE** Select to indicate that the representative's employment is affected by the ERE event.

## Distribution Page

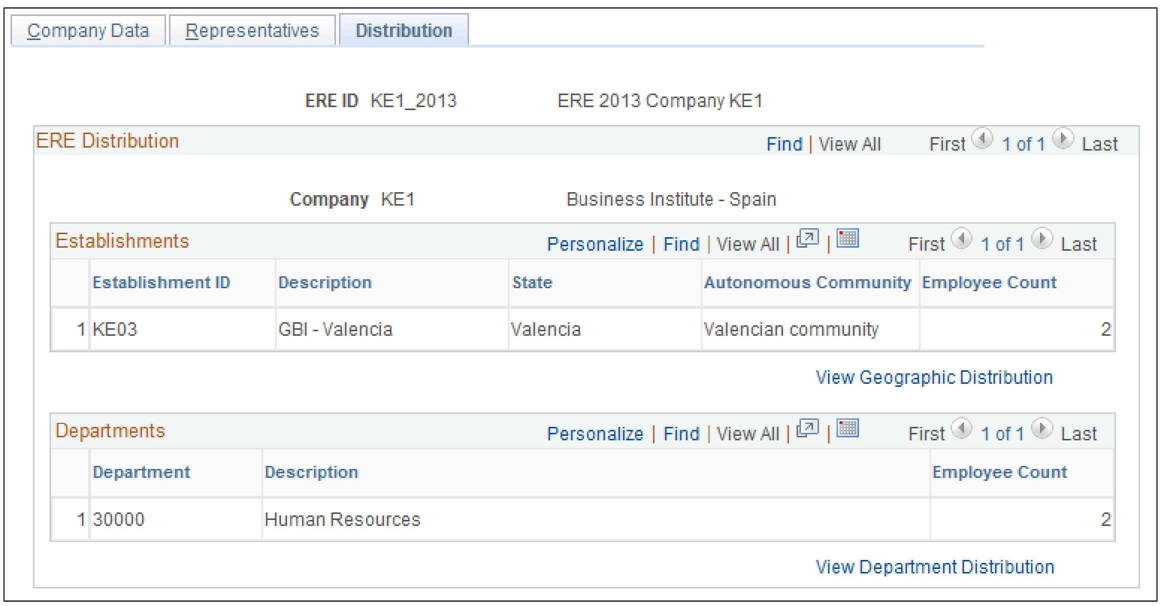
Use the Distribution page (ERE_CMP_DST_ESP) to view ERE distribution information.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Company Data ESP, Distribution

**Image: Distribution page**

This example illustrates the fields and controls on the Distribution page. You can find definitions for the fields and controls later on this page.




This page lists the establishments and departments of the companies affected by the ERE event along with the count of affected employees. The data that is displayed on this page depends on the employees that you select on the pages of the ERE Employee Data ERE (ERE_EMPL_DTA_ESP) component for the ERE event.

**View Geographic Distribution** Click to view a pie chart that illustrates the geographic distribution of the establishments within the company undergoing the ERE event.

**View Department Distribution** Click to view a pie chart that illustrates the distribution of departments within the company undergoing the ERE event.

# Defining Employees Affected by an ERE Event

The pages of the ERE Employee Data ESP (ERE_EMPL_DTA_ESP) component enable you to determine which employees affected by permanent, suspension, and work schedule reduction ERE.

These topics discuss how to:

- Select employees affected by permanent ERE.
- Enter additional details for employees affected by permanent ERE.
- Select employees affected by suspension ERE.
- Enter additional details for employees affected by temporary ERE.
- Select employees affected by work schedule reduction ERE.
- Enter additional details for employees affected by work schedule reduction ERE.

## Pages Used to Define Employees Affected by an ERE Event

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Permanent ERE | ERE_PERM_EE_ESP | Workforce Administration, ERE Procedure ESP, ERE Employee Data ESP | Select employees affected by permanent ERE. |
| Permanent ERE Employee Data | ERE_PERM_EE_X_ESP | Click the Details icon for an employee on the Permanent ERE page. | Enter additional details for employees affected by permanent ERE. |
| Suspension ERE | ERE_SUSP_EE_ESP | Workforce Administration, ERE Procedure ESP, ERE Employee Data ESP, Suspension ERE | Select employees affected by suspension ERE. |
| Suspension ERE Employee Data | ERE_SUSP_EE_X_ESP | Click the Details icon for an employee on the Suspension ERE page. | Enter additional details for employees affected by suspension ERE. |
| Work Reduction ERE | ERE_WSRD_EE_ESP | Workforce Administration, ERE Procedure ESP, ERE Employee Data ESP, Work Reduction ERE | Select employee affected by work schedule reduction ERE. |
| Work Reduction Employee Data | ERE_WSRD_EE_X_ESP | Click the Details icon for an employee on the Work Redn. ERE page. | Enter additional details for employees affected by work schedule reduction ERE. |

## ERE Employee Data ESP - Permanent ERE page

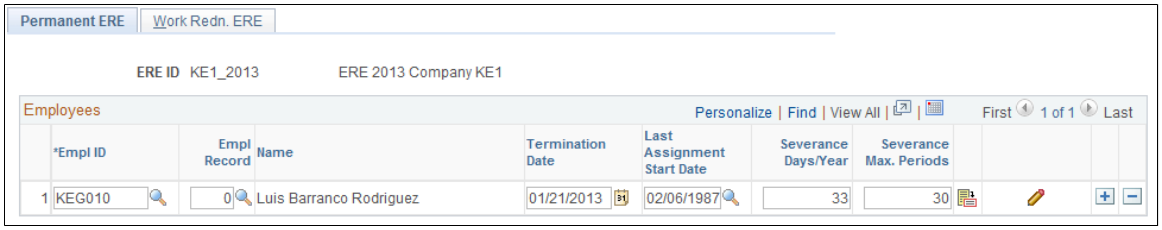
Use the Permanent ERE page (ERE_PERM_EE_ESP) to select employees affected by permanent ERE.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Employee Data ESP

**Image: Permanent ERE page**

This example illustrates the fields and controls on the Permanent ERE page. You can find definitions for the fields and controls later on this page.




Use this page to select the employees who will be permanently terminated as part of the ERE event. This page appears for this component only if you select the Permanent check box on the ERE Data ESP - Definition page for the ERE event.

---

**Note:** Once you run the Process ERE Data (ERE_UDTA_ESP) process, the fields on this page become unavailable to edit.

---

**Empl ID (employee ID)**

Enter the ID of the employee you want to terminate through permanent ERE.

**Empl Record (employment record)**

If the employee has multiple employment records, enter the employment record you want to add to the permanent ERE.

**Termination Date**

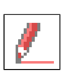
Enter the date on which the terminations associated with the ERE event take effect. By default, the system populates this field with the value you entered on the ERE Data ESP - Definition page for the ERE event.

**Severance Days/Year**

Enter the maximum number of periods that the payroll process uses when calculating the severance pay amounts for employees affected by permanent ERE.

If you entered a value in the Max Periods field on the ERE Data ESP - Definition page for the ERE event, that value appears in this field by default.

Click the details icon to access the Permanent ERE Employee Data page.



Click the Correction icon to update field values for an employee after you have run the Process ERE Data (ERE_UDTA_ESP) process.

---

**Note:** The Process ERE Data (ERE_UDTA_ESP) process updates the employee data in multiple components. You have to manually undo all the data changes it makes.

---

### Related Links

Updating Affected Employee Job and Payroll Data

## Permanent ERE Employee Data Page

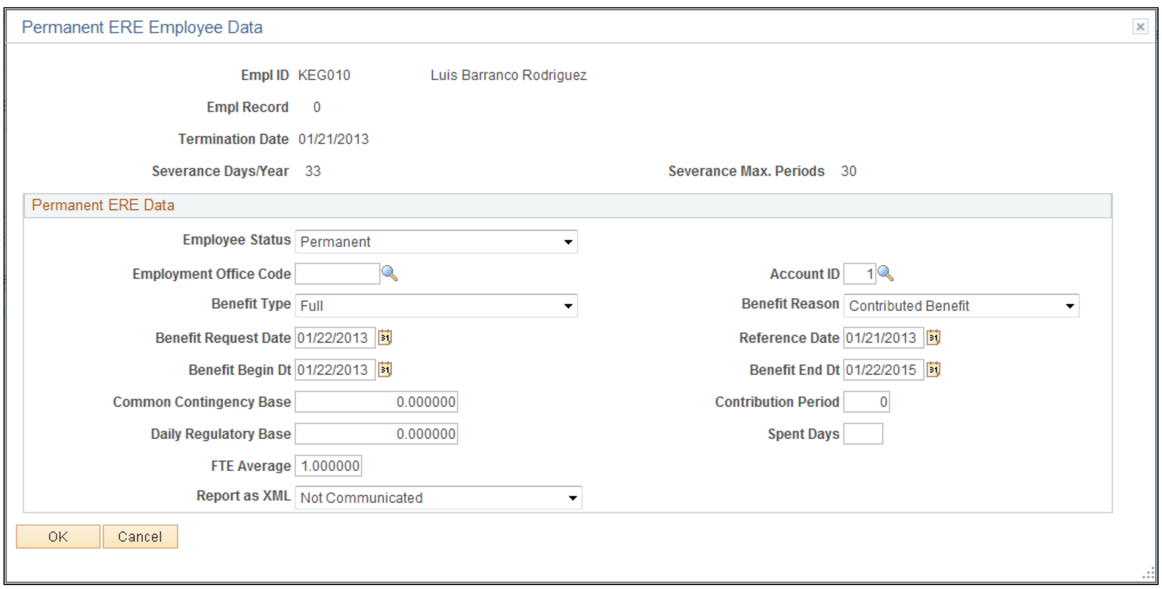
Use the Permanent ERE Employee Data page (ERE_PERM_EE_X_ESP) to enter additional details for employees affected by permanent ERE.

**Navigation**

Click the Details icon for an employee on the Permanent ERE page.

**Image: Permanent ERE Employee Data page**

This example illustrates the fields and controls on the Permanent ERE Employee Data page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Employee Status** | Select the employment status for the employee. |
| **Job Code CNO** | Enter the official occupation code for the employee. |
| **Employment Office** | Enter the unemployment office that manages the subsidy for the employee. |
| **Account ID** | Enter the employee's bank account ID. |
| **Benefit Type** | Select whether the employee has Full or Partial benefits. |
| **Benefit Reason** | Select whether the reason for the benefit. Values are Contributed Benefit and Replenish Benefit Entitlement. |
| **Benefit Request Date** | Enter the date on which the benefit is requested. |
| **Reference Date** | Enter the date that the system uses to calculate the maximum and minimum ceilings for the contributive unemployment benefit. |

| | |
|---|---|
| **Benefit Begin Date and Benefit End Date** | Enter a date range for the benefit. |
| **Common Contingency Base** | Displays the sum of common contingencies bases for the last 180 contribution days.<br><br>For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process. |
| **Contribution Days** | Displays the contribution days used to calculate the daily regulatory base.<br><br>For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process. |
| **Daily Contributing Base** | Displays the Daily Regulatory Base that is derived from the Professional Contingencies bases (without overtime) for the last 180 contribution days.<br><br>For customers who have PeopleSoft Global Payroll installed, the system calculates and populates the value for this field when you run the Process ERE Data (ERE_UDTA_ESP) process. |
| **Spent Days** | Enter the number of unemployment days that the employee has used as part of a prior ERE event.<br><br>The Process ERE Data (ERE_UDTA_ESP) process updates the Decimal 4 field on the Absence Event Input Detail page to account for these days during the payroll process. |
| **Report as XML** | Select the status of the employee's XML ERE report. Valid values are:<br><br>• Not Communicated<br><br>• XML Generated<br><br>• XML Sent/Confirmated |

## Suspension ERE Page

Use the Suspension ERE page (ERE_SUSP_EE_ESP) to select employees affected by suspension ERE.

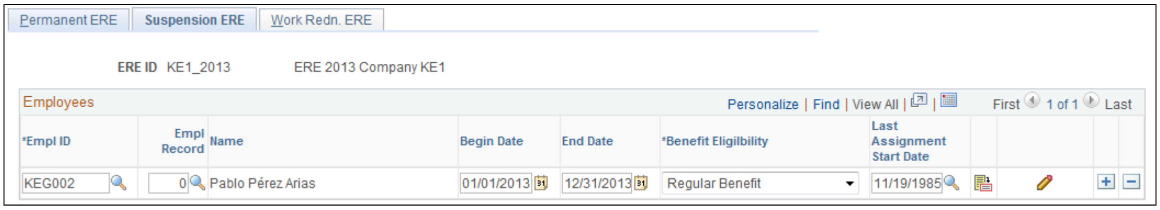
 

### Navigation

Workforce Administration, ERE Procedure ESP, ERE Employee Data ESP, Suspension ERE

### Image: Suspension ERE page

This example illustrates the fields and controls on the Suspension ERE page. You can find definitions for the fields and controls later on this page.




Use this page to select the employees who will be suspended as part of the ERE event. This page appears for this component only if you select the Suspension check box on the ERE Data ESP - Definition page for the ERE event.

---

**Note:** Once you run the Process ERE Data (ERE_UDTA_ESP) process, the fields on this page become unavailable to edit.

---

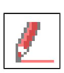
**Empl ID (employee ID)**
Enter the ID of the employee you want to suspend.

**Empl Record (employment record)**
If the employee has multiple employment records, enter the employment record you want to add to the suspension ERE.

**Begin Date and End Date**
Enter the date range of the employee's suspension. By default, the system populates these fields using the values of the Begin Date and End Date fields on the ERE Data ESP - Definition page.

**Benefit Eligibility**
Select the employee's benefit eligibility. Values are: *No Benefit*, *Regular Benefit*, and *Special Subsidy*. By default, this field has a value of *Regular Benefit*.


Click the details icon to access the Suspension ERE Employee Data page.


Click the Correction icon to update field values for an employee after you have run the Process ERE Data (ERE_UDTA_ESP) process.

---

**Note:** The Process ERE Data (ERE_UDTA_ESP) process updates the employee data in multiple components. You have to manually undo all the data changes it makes.

---

## Related Links

Updating Affected Employee Job and Payroll Data

## Suspension ERE Employee Data Page

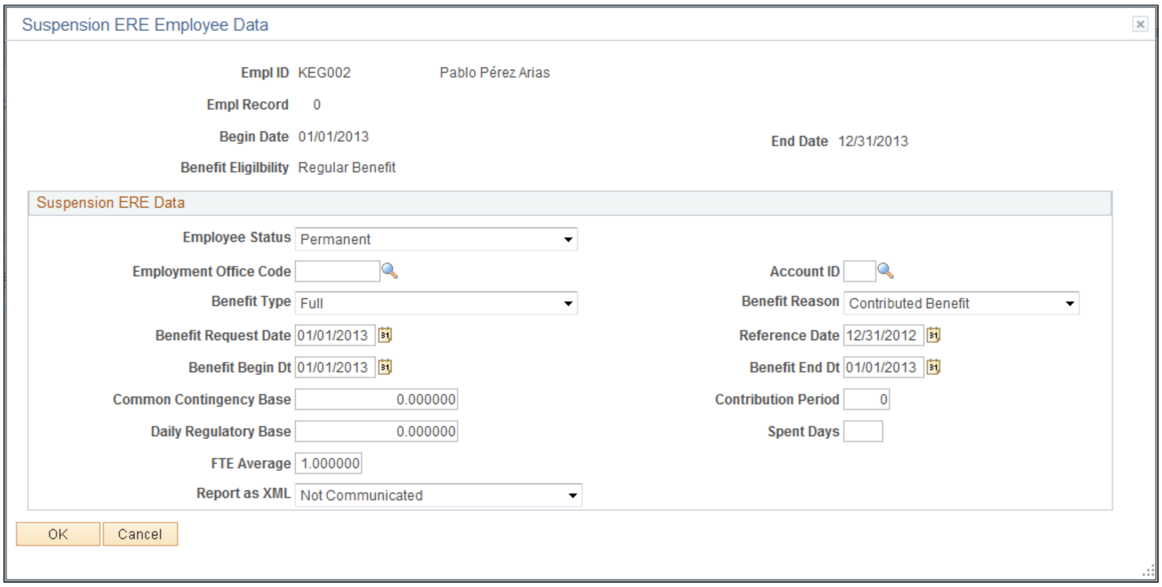
Use the Suspension ERE Employee Data page (ERE_SUSP_EE_X_ESP) to enter additional details for employees affected by suspension ERE.

**Navigation**

Click the Details icon for an employee on the Suspension ERE page.

**Image: Suspension ERE Employee Data page**

This example illustrates the fields and controls on the Suspension ERE Employee Data page. You can find definitions for the fields and controls later on this page.




The fields on this page are identical to those on the Permanent ERE Employee Data page.

## Work Redn. ERE Page

Use the Work Redn. ERE page (ERE_WSRD_EE_ESP) to select employee affected by work schedule reduction ERE.

### Navigation

Workforce Administration, ERE Procedure ESP, ERE Employee Data ESP, Work Reduction ERE

**Image: Work Redn. ERE page (1 of 2)**

This example illustrates the fields and controls on the Work Redn. ERE page (1 of 2). You can find definitions for the fields and controls later on this page.

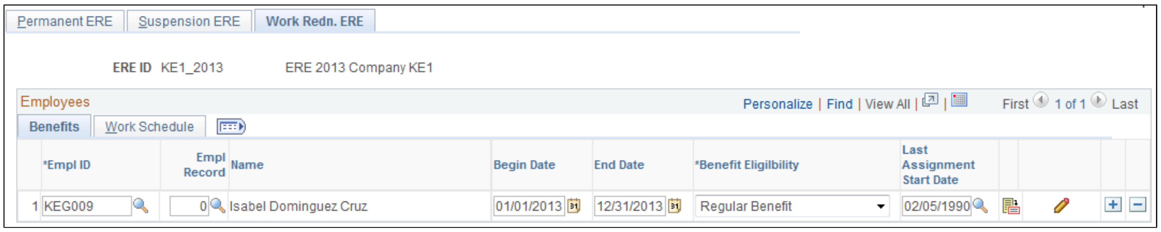
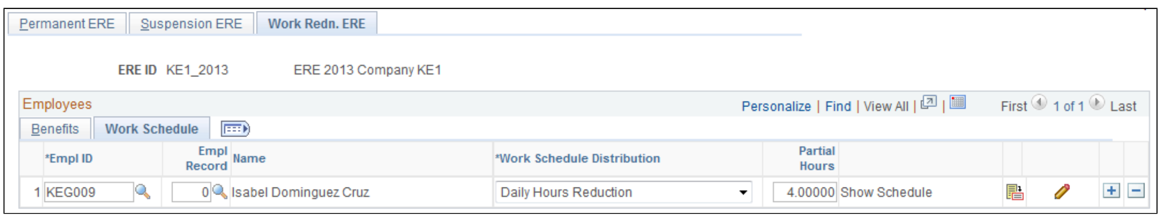



**Image: Work Redn. ERE page (2 of 2)**

This example illustrates the fields and controls on the Work Redn. ERE page (2 of 2). You can find definitions for the fields and controls later on this page.




Use this page to select the employees who will be suspended as part of the ERE event. This page appears for this component only if you select the Suspension check box on the ERE Data ESP - Definition page for the ERE event.

---

**Note:** Once you run the Process ERE Data (ERE_UDTA_ESP) process, the fields on this page become unavailable to edit.

---

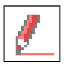
| | |
|---|---|
| **Empl ID (employee ID)** | Enter the ID of the employee whose work schedule you are reducing. |
| **Empl Record (employment record)** | If the employee has multiple employment records, enter the employment record you want to add to the suspension ERE. |
| **Begin Date and End Date** | Enter the date range of the employee's work schedule reduction. By default, the system populates these fields using the values of the Begin Date and End Date fields on the ERE Data ESP - Definition page. |
| **Benefit Eligibility** | Select the employee's benefit eligibility. Values are: *No Benefit*, *Regular Benefit*, and *Special Subsidy*. By default, this field has a value of Regular Benefit. |
| **Work Schedule Distribution** | Select whether the work schedule reduction is a Daily Hours Reduction or a Work Day Reduction. If you select the Daily Hours Reduction value, the Partial Hours field becomes available. If you select the Work Day Reduction value, the Show Schedule link becomes available. |

By default, the value of this field matches the value you selected in the Work Schedule Distribution field on the ERE Data ESP - Definition page.

**Partial Hours** — Enter any partial hours associated with the employee's reduction in daily hours.

**Show Schedule** — Click to access the Assign Work Schedule page and enter an alternative work schedule that specifies the working days during the period affected by ERE.

Click the details icon to access the Work Reduction Employee Data page.



Click the Correction icon to update field values for an employee after you have run the Process ERE Data (ERE_UDTA_ESP) process.

---

**Note:** The Process ERE Data (ERE_UDTA_ESP) process updates the employee data in multiple components. You have to manually undo all the data changes it makes.

---

### Related Links

Updating Affected Employee Job and Payroll Data

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

## Work Reduction Employee Data Page

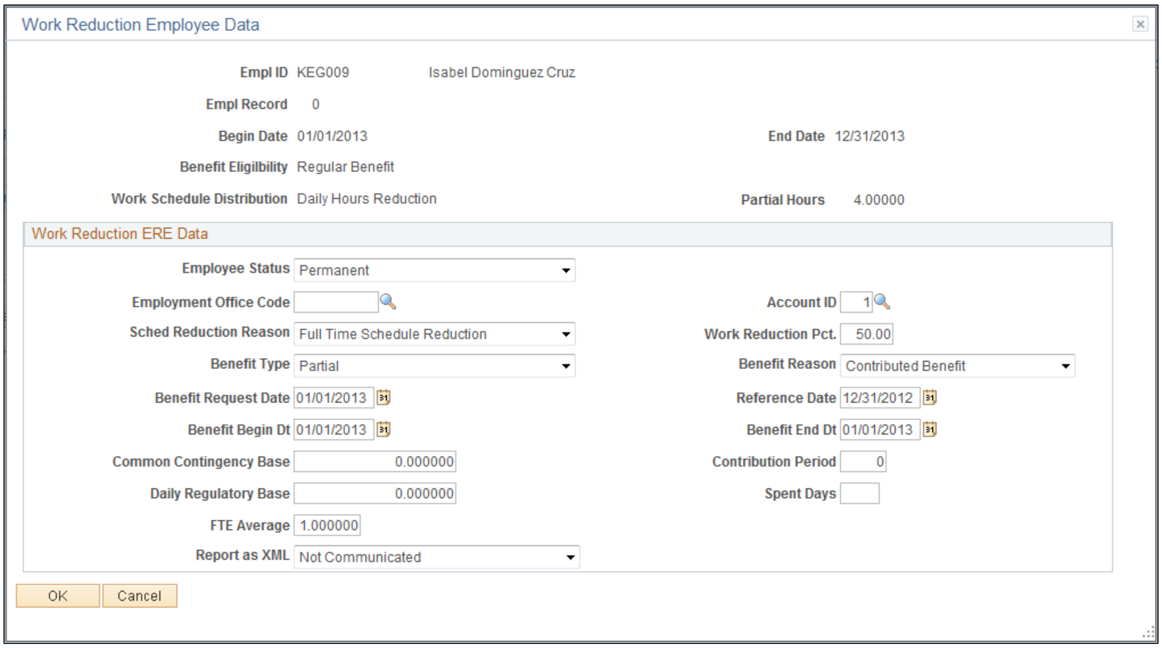
Use the Work Reduction Employee Data page (ERE_WSRD_EE_X_ESP) to enter additional details for employees affected by work schedule reduction ERE.

**Navigation**

Click the Details icon for an employee on the Work Redn. ERE page.

**Image: Work Reduction Employee Data page**

This example illustrates the fields and controls on the Work Reduction Employee Data page. You can find definitions for the fields and controls later on this page.




The fields on this page are identical to those on the Permanent ERE Employee Data page.

# Updating Affected Employee Job and Payroll Data

Properly adjusting the job and payroll data for all employees affected by an ERE event requires updating up to five separate components in PeopleSoft HCM and PeopleSoft Global Payroll for Spain. Oracle provides a batch process that enables you to perform all of these updates automatically. The process makes updates based on the types of ERE you are processing and the data actions that you define on the Process ERE data actions ESP page.

## Permanent ERE

For employees affected by permanent ERE, the Process ERE Data (ERE_UDTA_ESP) process makes the following changes:

- Creates a new row on the Work Location page of the Job Data component with the Action and Reason you specify for permanent ERE on the Process ERE data actions ESP page. This action has an effective date equal to one day after the termination date defined for the ERE event.
- Creates a new record on the Contract Status/Content page of the Update Contracts component with a Contract End Date equal to the termination date defined for the ERE event.
- Creates a new record on the Manage Terminations ESP page with the Termination Reason that you specify for Permanent ERE on the Process ERE data actions ESP page. The effective date of the

record is equal to the termination date defined for the ERE event. In addition, the system uses the statutory values for Days/Year and Max Periods to calculate severance pay.

- For customers who have Global Payroll installed, calculates the following values and enters them on the Permanent ERE Employee Data page:
    - Common Contingency Base
    - Contribution Days
    - Daily Contributing Base

## Suspension ERE

For employees affected by suspension ERE, the Process ERE Data (ERE_UDTA_ESP) process makes the following changes:

- Creates a new row on the Work Location page of the Job Data component with the Action and Reason you specify for suspension ERE on the Process ERE data actions ESP page. This action has an effective date equal to the begin date defined for the ERE event.
- For the existing record on the Contract Status/Content page of the Update Contracts component, adds a reduction using the reduction ID defined for the ERE event on the ERE Data ESP - Payroll page. The effective date of the reduction is equal to the begin date defined for the ERE event.
- Creates a row on the Absence Event Entry page of the Absence Event ESP page using the Absence Take Element you specify for suspension ERE on the Process ERE data actions ESP page. The begin and end dates of the absence event are equal to the begin and end dates defined for the ERE event.
- For customers who have Global Payroll installed, calculates the following values and enters them on the Suspension ERE Employee Data page:
    - Common Contingency Base
    - Contribution Days
    - Daily Contributing Base

## Daily Hours Reduction ERE

For employees affected by daily hours reduction ERE, the Process ERE Data (ERE_UDTA_ESP) process makes the following changes:

- Creates a new row on the Work Location page of the Job Data component with the Action and Reason you specify for daily hours reduction ERE on the Process ERE data actions ESP page. This action has an effective date equal to the begin date defined for the ERE event.
- For the existing record on the Contract Status/Content page of the Update Contracts component, adds a reduction using the reduction ID defined for the ERE event on the ERE Data ESP - Payroll page. The effective date of the reduction is equal to the begin date defined for the ERE event.
- Creates a row on the Absence Event Entry page of the Absence Event ESP component using the Absence Take Element you specify for daily hours reduction ERE on the Process ERE data actions ESP page. The begin and end dates of the absence event are equal to the begin and end dates defined

for the ERE event. In addition, the system enters partial hours for the absence event if you entered a value in the Partial Hours field on the Work Redn. ERE page.

- For customers who have Global Payroll installed, calculates the following values and enters them on the Work Reduction Employee Data page:
    - Common Contingency Base
    - Contribution Days
    - Daily Contributing Base

### Work Day Reduction ERE

For employees affected by work day reduction ERE, the Process ERE Data (ERE_UDTA_ESP) process makes the following changes:

- Creates a new row on the Work Location page of the Job Data component with the Action and Reason you specify for work day reduction ERE on the Process ERE data actions ESP page. This action has an effective date equal to the begin date defined for the ERE event.
- For the existing record on the Contract Status/Content page of the Update Contracts component, adds a reduction using the reduction ID defined for the ERE event on the ERE Data ESP - Payroll page. The effective date of the reduction is equal to the begin date defined for the ERE event.
- Creates a row on the Absence Event Entry page of the Absence Event ESP component using the Absence Take Element you specify for work day reduction ERE on the Process ERE data actions ESP page. The begin and end dates of the absence event are equal to the begin and end dates defined for the ERE event
- For customers who have Global Payroll installed, calculates the following values and enters them on the Work Reduction Employee Data page:
    - Common Contingency Base
    - Contribution Days
    - Daily Contributing Base

## Pages Used to Update Affected Employee Job and Payroll Data

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Process ERE data actions ESP | ERE_UDTA_ACTN_ESP | Set Up HCM, Install, Country Specific, Process ERE data actions ESP | Define ERE data actions. |
| Process ERE Data ESP | ERE_RC_UPD_DTA_ESP | Workforce Administration, ERE Procedure ESP, Process ERE Data ESP | Process ERE data. |

### Related Links

Work Location Page

Contract Status/Content Page

"Manage Terminations ESP Page *(PeopleSoft HCM 9.2: Global Payroll for Spain)*"

"Entering Absence Events *(PeopleSoft HCM 9.2: Global Payroll for Spain)*"

## Process ERE data actions ESP Page

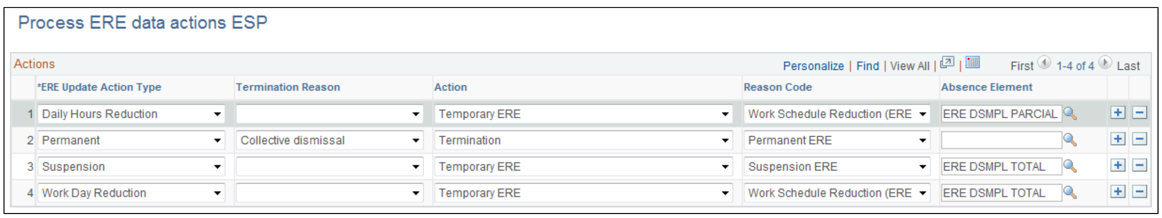
Use the Process ERE data actions ESP page (ERE_UDTA_ACTN_ESP) to define ERE data actions.

**Navigation**

Set Up HCM, Install, Country Specific, Process ERE data actions ESP

**Image: Process ERE data actions ESP page**

This example illustrates the fields and controls on the Process ERE data actions ESP page. You can find definitions for the fields and controls later on this page.




Use this page to determine how the system updates job and payroll data for employees for each of the different types of ERE actions.

**ERE Update Action Type**

Select the ERE update action type you are defining. Valid values are: *Daily Hours Reduction*, *Permanent*, *Suspension*, and *Work Day Reduction*.

**Termination Reason**

Select the termination reason that the system uses when updating the Manage Terminations ESP page when you run the Process ERE Data (ERE_UDTA_ESP) process. Typically you select a value in this field only for the *Permanent* ERE update action type.

**Action**

Select the action that the system uses when updating the Work Location page of the Job Data component when you run the Process ERE Data (ERE_UDTA_ESP) process.

**Reason Code**

Select the reason that the system uses when updating the Work Location page when you run the Process ERE Data (ERE_UDTA_ESP) process.

**Absence Element**

Enter the absence take element that the system uses to update the Absence Event Entry page when you run the Process ERE Data (ERE_UDTA_ESP) process.

Oracle delivers the following ERE absence takes:

- *ERE DSMPL PARCIAL:* This should be mapped to the daily hours reduction ERE action type.
- *ERE DSMPL TOTAL:* This should be mapped to the suspension and work day reduction ERE action types.

## Process ERE Data ESP Page

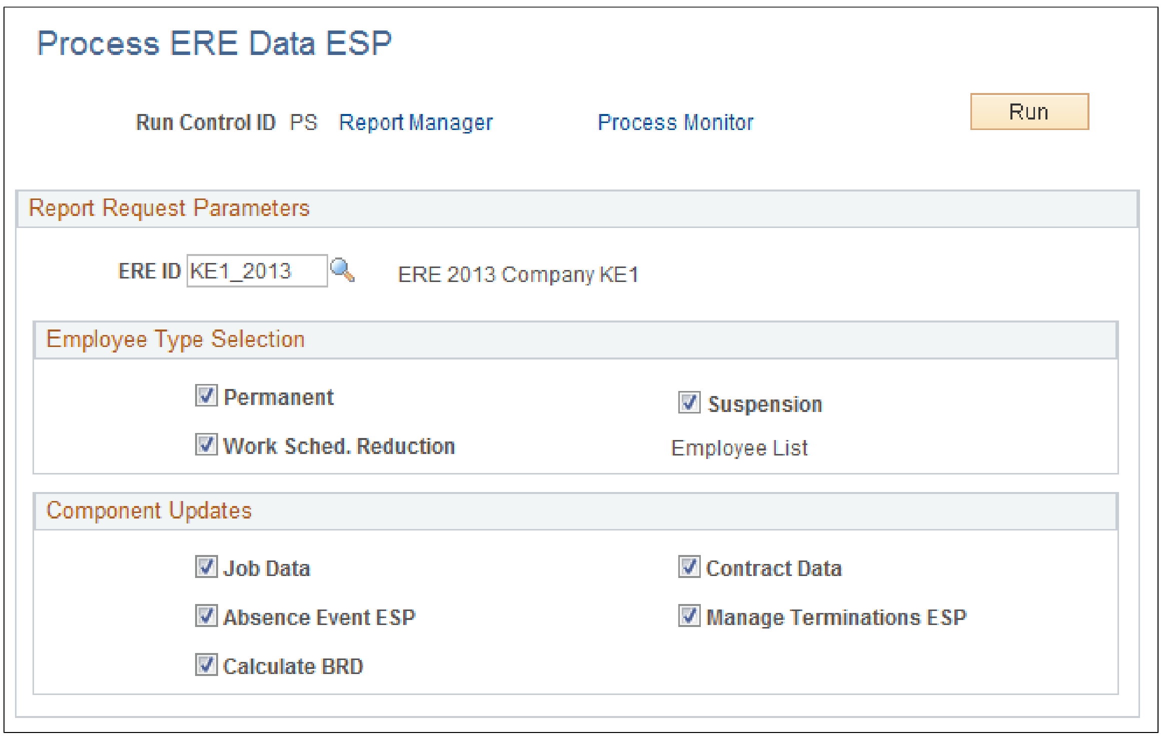
Use the Process ERE Data ESP page (ERE_RC_UPD_DTA_ESP) to process ERE data.

**Navigation**

Workforce Administration, ERE Procedure ESP, Process ERE Data ESP

**Image: Process ERE Data ESP page**

This example illustrates the fields and controls on the Process ERE Data ESP page. You can find definitions for the fields and controls later on this page.




Use this page to run the Process ERE Data (ERE_UDTA_ESP) process.

| | |
|---|---|
| **ERE ID** | Select the ERE event for which you want to run the process. |

### Employee Type Selection

Select the types of ERE for which you are running the process.

| | |
|---|---|
| **Permanent** | Select to update the job and payroll data for employees affected by permanent ERE. |

| | |
|---|---|
| **Suspension** | Select to update the job and payroll data for employees affected by suspension ERE. |
| **Work Sched. Reduction (work schedule reduction)** | Select to update the job and payroll data for employees affected by work schedule reduction ERE. |

### Component Updates

Select the components you want the process to update for employees affected by ERE.

| | |
|---|---|
| **Job Data** | Select to update the Work Location page. |
| **Contract Data** | Select to update the Contract Status/Content page. |
| **Absence Event ESP** | Select to update the Absence Event Entry page. |
| **Manage Terminations ESP** | Select to update the Manage Terminations ESP page. |
| **Calculate BRD** | Select to update the following fields on the Permanent ERE Employee Data, Suspension ERE Employee Data, and Work Reduction Employee Data pages:<br>• Common Contingency Base<br>• Contribution Days<br>• Daily Contributing Base |

# Generating ERE Reports

These topics provide an overview of ERE reports and discuss how to:

- View delivered autonomous communities.
- Generate an ERE request.
- Load activity periods data.
- Modify activity periods data.
- Generate ERE XML files.

## Understanding ERE Reports

Oracle enables you to generate three ERE-specific reports:

- Free format ERE request.
- Benefit registration XML report
- Activity periods XML report.

### Free Format ERE Request

You generate this report for both permanent and temporary ERE to generate an official request for the ERE event that you defined.

### Benefit Registration XML Report

You generate this report for employees affected by both permanent and temporary ERE to register them with the SPEE as eligible to receive unemployment benefits.

### Activity Periods XML Report

You generate this report on a monthly basis to communicate to the SPEE the activity periods for employees affected by temporary ERE. SPEE uses this information to determine the employees' monthly unemployment benefit. Generating this report is a three-step process:

1. Load activity periods data for a given month and year using the Process ERE Activity Data (ERE_SCHD_ESP) process.
2. Make any necessary modifications to the loaded activity periods data using the ERE Activity Periods ESP page.
3. Generate the Activity Periods Report using the ERE SPEE Communications ESP page.

## Pages Used to Generate ERE Reports

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Autonomous Community ESP | AUTON_REG_S_ESP | Set Up HCM, Install, Country Specific, Autonomous Community ESP | View autonomous communities. |
| ERE Data Report | ERE_RC_DTA1_ESP | Workforce Administration, ERE Procedure ESP, ERE Data Report ESP | Generate an ERE request. |
| Process ERE Activity Data ESP | ERE_RC_XML2 | Workforce Administration, ERE Procedure ESP, Process ERE Activity Data ESP | Load activity periods data. |
| ERE Activity Periods ESP | ACTIVT_PERIOD_ESP | Workforce Administration, ERE Procedure ESP, ERE Activity Periods ESP | Modify activity periods data. |
| ERE SPEE Communications ESP | ERE_RC_XML | Workforce Administration, ERE Procedure ESP, ERE SPEE Communications ESP | Generate ERE XML files. |

## Autonomous Community ESP Page

Use the Autonomous Community ESP page (AUTON_REG_S_ESP) to view autonomous communities.

**Navigation**

Set Up HCM, Install, Country Specific, Autonomous Community ESP

**Image: Autonomous Community ESP page**

This example illustrates the fields and controls on the Autonomous Community ESP page. You can find definitions for the fields and controls later on this page.


Some data related to ERE are linked to the autonomous community in which the ERE is requested. It is also possible for one ERE event to impact more than one autonomous community. The Autonomous Community ESP page enables you to view the delivered autonomous communities and the states with which they are associated.

## ERE Data Report ESP Page

Use the ERE Data Report page (ERE_RC_DTA1_ESP) to generate an ERE request.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Data Report ESP

**Image: ERE Data Report ESP page**

This example illustrates the fields and controls on the ERE Data Report ESP page. You can find definitions for the fields and controls later on this page.


| | |
|---|---|
| **ERE ID** | Enter the ID of the ERE event for which you are generating a request. |

**Company**

Enter the ID of the company associated with the ERE request. If you leave this field blank, the system generates the report for all companies affected by the ERE event.

**Autonomous Community**

Enter the autonomous community associated with the ERE request. If you leave this field blank, the system generates the report for all autonomous communities affected by the ERE event.

**As Of Date**

Enter the date for which you are generating the ERE request. By default, the system populates this field with the begin date defined for the selected ERE ID.

## Process ERE Activity Data ESP Page

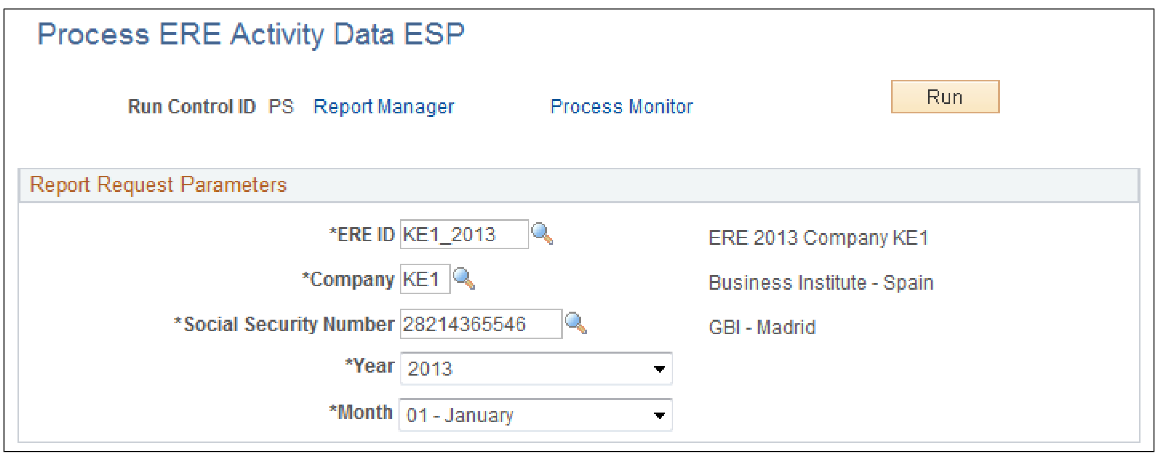
Use the Process ERE Activity Data ESP page (ERE_RC_XML2) to load activity periods data.

**Navigation**

Workforce Administration, ERE Procedure ESP, Process ERE Activity Data ESP

**Image: Process ERE Activity Data ESP page**

This example illustrates the fields and controls on the Process ERE Activity Data ESP page. You can find definitions for the fields and controls later on this page.




**ERE ID**

Enter the ID of the ERE event for which you want to load activity periods data.

**Company**

Enter the ID of the company for which you want to load activity periods data.

**Social Security Number**

Enter the social security number of the employer for which you want to load activity periods data.

**Year and Month**

Select the year and month for which you want to load activity periods data.

## ERE Activity Periods ESP Page

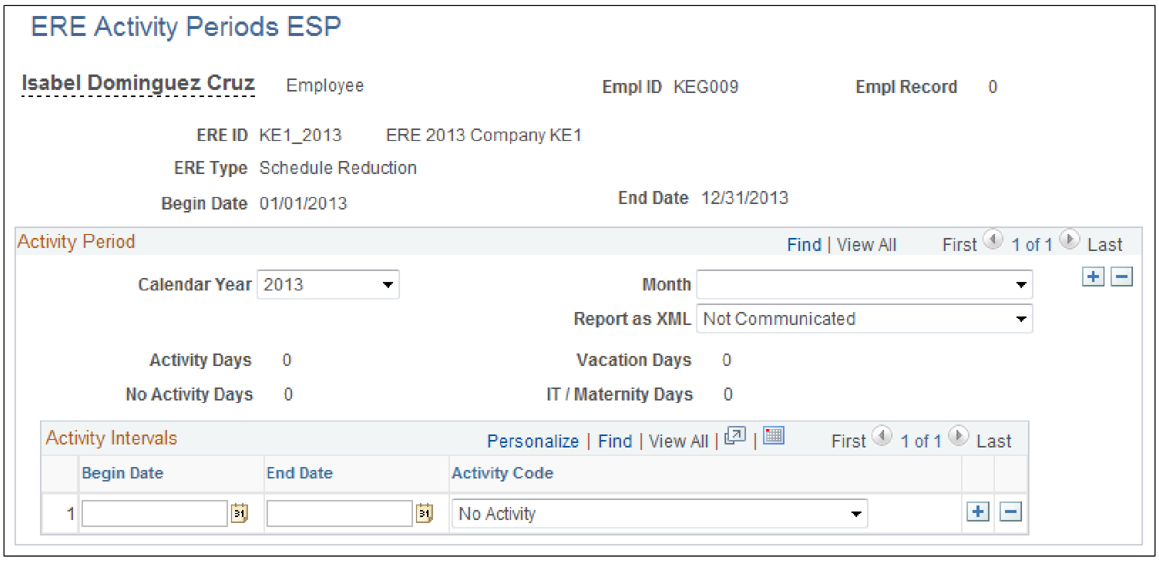
Use the ERE Activity Periods ESP page (ACTIVT_PERIOD_ESP) to modify activity periods data.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE Activity Periods ESP

**Image: ERE Activity Periods ESP page**

This example illustrates the fields and controls on the ERE Activity Periods ESP page. You can find definitions for the fields and controls later on this page.




Use this page to make modifications to the activity periods data loaded by the Process ERE Activity Data (ERE_SCHD_ESP) process.

### Activity Period

| | |
|---|---|
| **Calendar Year and Month** | Select the year and month for the activity periods data you want to modify. |
| **Activity Coefficient** | Select the coefficient for the activity period. |
| **Report as XML** | Indicate whether the activity periods data XML file has been generated and communicated. Valid values are: *Not Communicated, XML Generated,* and *XML Sent/Confirmated.* |
| **Activity Days, Vacation Days, No Activity Days, and IT/Maternity Days** | Display the number of days for each type of activity for the selected month and year. |

### Activity Intervals

Use this group box to enter activity codes for the periods within the selected month and year.

| | |
|---|---|
| **Begin Date and End Date** | Enter a date range for a given activity code. |

**Activity Code** Enter the activity code for the period. Valid values are: *Activity, Maternity/IT, No Activity, No Activity due Push Back Call,* and *Vacations/Weekends.*

## ERE SPEE Communications ESP Page

Use the ERE SPEE Communications ESP page (ERE_RC_XML) to generate ERE XML files.

**Navigation**

Workforce Administration, ERE Procedure ESP, ERE SPEE Communications ESP

**Image: ERE SPEE Communications ESP page (Benefit Registration template)**

This example illustrates the fields and controls on the ERE SPEE Communications ESP page (Benefit Registration template). You can find definitions for the fields and controls later on this page.

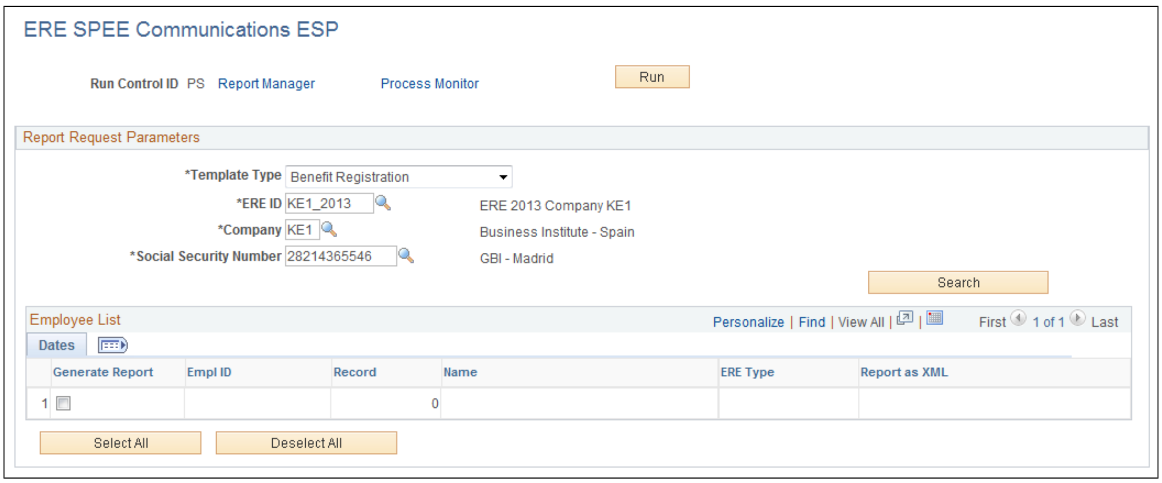
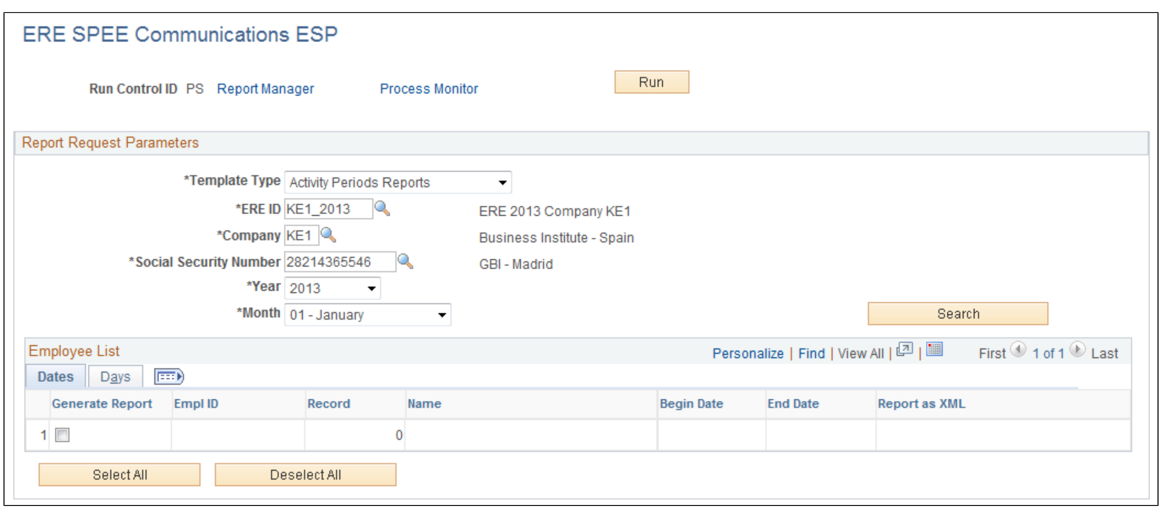



**Image: ERE SPEE Communications ESP page (Activity Periods Reports template)**

This example illustrates the fields and controls on the ERE SPEE Communications ESP page (Activity Periods Reports template). You can find definitions for the fields and controls later on this page.




You can use this page to generate two different XML reports: the Benefits Registration Report and the Activity Periods Report.

### Report Request Parameters

| | |
|---|---|
| **Template Type** | Select whether you want to generate an XML file for *Benefits Registration* or *Activity Periods Reports*. The fields displayed in the Employee List group box change depending on your selection. |
| **ERE ID** | Enter the ID of the ERE event for which you are generating an XML file. |
| **Company** | Enter the ID of the company for which you are generating an XML file. |
| **Year and Month** | Enter the year and month for which you are generating an XML file. These fields appear only if you select *Activity Periods Reports* on in the Template Type field. |
| **Social Security Number** | Enter the social security number of the employer for which you are generating an XML file. |
| **Search** | Click to populate the Employee List group box with employees that meet the criteria you specify in the Report Request Parameters group box. |

### Employee List

When you click the Search button, this group box displays the employees that meet your search criteria. The fields that appear in this group box depend on which value you select in the Template Type field. Select the Generate Report check box next to the employees for which you want to generate an XML file.

## Completing the ERE Procedure

After you have defined and processed your ERE data and generated the required reports, there are some additional steps you must take to complete the ERE procedure.

### Permanent ERE

To complete the ERE procedure for employees affected by permanent ERE:

1. Create a record on the Employee AFI Data ESP page for each affected employee with an effective date equal to the termination date defined for the ERE event. Use *Termination* as the value for the Social Security Action field and *Non Voluntary Termination* as the value for the Social Security Reason field.

   On the AFI Data Details page, enter a Vacation Not Taken End Date. This date varies for each employee based on the number of pending vacation days that the employee has at the time of termination.

2. Using the Create AFI File ESP component, run the Create AFI File ESP (SOCS_AFI_ESP) process to generate an AFI flat file for the terminated employees.

3. Using the Calculate Absence and Payroll page, run the payroll process for the terminated employees and confirm that they received the correct amount for the INDMNCN earning on the Earnings and Deductions page.
4. Generate the Company Certificate Report using the Company Certificate Report ESP page. To create the employee list for the report, filter for Terminated employees and use the Not in Absence search criterion.
5. Use the Create Fan File ESP page to generate a fan file for each company associated with the ERE event.

## Suspension ERE

To complete the ERE procedure for employees affected by suspension ERE:

1. Create a record on the Employee AFI Data ESP page for each affected employee with an effective date equal to the begin date defined for the ERE event. Use *Like-Active Communication* as the value for the Social Security Action.

   On the AFI Data Details page, enter a value of *Temporary ERE reduction* in the Like-Active Status Type field and enter the appropriate ERE reduction percentage. Enter period begin and end dates equal to the begin and end dates of the ERE event.
2. Using the Create AFI File ESP component, run the Create AFI File ESP (SOCS_AFI_ESP) process to generate an AFI flat file for the employees affected by suspension ERE.
3. Using the Calculate Absence and Payroll page, run the payroll process for the suspended. On the Earnings and Deductions page, confirm that they received the correct amounts for their regular compensation based on their worked time. In addition, confirm that they received the correct amounts for the unemployment benefit (BNF DESEMPL E) and company complementary benefit (PRST CMP ERE) earnings based on their non-worked time.
4. Generate the Company Certificate Report using the Company Certificate Report ESP page. To create the employee list for the report, filter for Active employees and use the ERE search criterion.
5. Use the Create Fan File ESP page to generate a fan file for each company associated with the ERE event.

## Work Schedule Reduction ERE

To complete the ERE procedure for employees affected by work schedule reduction ERE:

1. Create a record on the Employee AFI Data ESP page for each affected employee with an effective date equal to the begin date defined for the ERE event. Use *Like-Active Communication* as the value for the Social Security Action.

   On the AFI Data Details page, enter a value of *Temporary ERE reduction* in the Like-Active Status Type field and enter the appropriate ERE reduction percentage. Enter period begin and end dates equal to the begin and end dates of the ERE event.
2. Using the Create AFI File ESP component, run the Create AFI File ESP (SOCS_AFI_ESP) process to generate an AFI flat file for the employees affected by work schedule reduction ERE.
3. Using the Calculate Absence and Payroll page, run the payroll process for the employees with reduced work schedules. On the Earnings and Deductions page, confirm that they received the correct

amounts for their regular compensation based on their worked time. In addition, confirm that they received the correct amounts for the unemployment benefit (BNF DESEMPL E) and company complementary benefit (PRST CMP ERE) earnings based on their non-worked time.

4. Generate the Company Certificate Report using the Company Certificate Report ESP page. To create the employee list for the report, filter for Active employees and use the ERE search criterion.
5. Use the Create Fan File ESP page to generate a fan file for each company associated with the ERE event.

Chapter 13

# (JPN) Tracking Additional Appointments (Kenmu)

## Understanding Additional Appointments

You track additional appointments as additional jobs (employment record numbers) in the Job record. You can track multiple additional appointment rows for each main appointment row of the Job record using the Additional Appointment JPN page. The Cost Rate JPN page enables you to track cost rate distribution among a main appointment and its additional appointments.

The system automatically increments employment record numbers, including additional appointments. The total number of additional appointments appears with main appointment data on the employee's Job Summary JPN page.

When additional appointments exist in conjunction with intercompany transfers, for example when you serve as a hosting company, you can store information about additional appointments that your transferee may have in the home company, as well as any additional appointment information within your company as host.

On the Employee Assignment List report, you can view employees by department, including an employee's additional appointments.

When you terminate a main appointment, the system automatically terminates all additional appointments associated with it.

### Related Links

(JPN) Understanding Reporting Appointments for Job Data Changes

## Internal and External Companies

Some of the pages used for tracking additional appointments distinguish between internal and external company appointments. Here are the definitions of internal and external companies:

| | |
|---|---|
| **Internal Companies** | Companies that are internal to your organization's database. Data for these companies is already set up on the Company table and Department table. |
| **External Companies** | Companies that are external to your organization's database. You must set up data for these companies on the Intercompany Transfer Company/Department table. |

# Setting Up Codes for Tracking Additional Appointments

To set up the codes for tracking additional appointments, use the IC Trans External Company/Dept (INTCPX_CPY_JPN), IC Trans External Superv Lvl (INTCPX_SPV_JPN), Additional Appointment Setup for Existing Business Units (RC_AA_JOBCODE_JPN), and Additional Appointment Setup (AA_SETUP_JPN) components.

These topics provide overviews of dummy codes and setup steps for additional appointments, list prerequisites, and discuss how to:

- Set up a dummy business unit, company, department, and location.
- Designate Job record codes for additional appointments.

## Understanding Dummy Codes

Setup for additional appointment tracking requires the use of dummy codes.

### Dummy Job Code

The PeopleSoft system provides a dummy job code for use with all additional appointments. The dummy job code is needed because additional appointment data is held on the Job record, which requires a job code. Because job codes are not tracked as part of additional appointment data, the dummy code is required to save the Job record with additional appointment information. The dummy job code is only used in background processing for saving, and is never visible on any page except the Additional Appointment Setup and Job Code Table pages.

The delivered dummy job code is *AADUMY.* The system automatically creates this job code for each new business unit that you define. If you have already created business units, the system provides an application engine process that creates the dummy job code for each existing business unit. You only have to run the application engine one time. Subsequently, the system automatically creates the dummy job code when you define a new business unit.

### Dummy Business Unit, Company, Department, and Location Codes

When the additional appointment is in an external company, the business unit, company, department, and location codes setup for the external company are on the IC Transfer setup tables only, which are not values used in the Job record. Therefore, you must define one dummy code for each of these required fields so that you can save Job record information for additional appointments to external companies. Set up and use the same codes for all additional appointments to external companies. The PeopleSoft system does not deliver these dummy codes.

The dummy codes are only used in background processing for saving and are never visible on any page except the Additional Appointment Setup page.

---

***Warning!*** The department code can impact security, so it is important to create a new department code for which no one has security access. Anyone who can access the dummy department through security will be granted access to all main appointments that have an external assignment.

---

### Related Links

Setting Up a Dummy Business Unit, Company, Department, and Location

Additional Appointment Setup Page

## Understanding Setup Steps for Additional Appointments

The setup steps for additional appointment tracking vary slightly depending upon whether you:

- Initially implement PeopleSoft Human Resources with additional appointment tracking before you set up business units.
- Add additional appointment tracking after you have already set up business units, such as during an upgrade.

Both situations require that you create dummy codes and assign them on the Additional Appointment Setup page. The details of how to do this are presented in subsequent topics.

### Business Units Are Not Defined

Here are the steps for setting up additional appointment tracking when you have not yet defined business units:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table - Country Specific page.
2. Set up your organization's business units on the Business Unit page.

   The system automatically creates the dummy job code *AADUMY* for each business unit that you define.
3. Create a dummy business unit, company, department, and location for use with additional appointments to external companies.
4. Assign the dummy codes on the Additional Appointment Setup page.
5. (Optional) Set up additional appointment security.

### Business Units Are Defined

If you are setting up additional appointment tracking when you have already defined business units, such as when upgrading, the steps are the same as listed in the previous topic with the exception of step 2:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table - Country Specific page.
2. Run the AA_JOBCODE_JPN Application Engine process to create the dummy job code *AADUMY* for each business unit in your system.

   You only have to run the application engine process one time. Subsequently, the system automatically creates the dummy job code for each business unit that you define.
3. Create a dummy business unit, company, department, and location for use with additional appointments in external companies.
4. Enter the dummy codes on the Additional Appointment Setup page.
5. (Optional) Set up additional appointment security.

### Related Links

Setting Up Security for Tracking Additional Appointments
"Setting Up Implementation Defaults *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Defining Business Units *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Prerequisites

If you plan to track additional appointments in external companies, you must set up the following information for the external companies:

- Company and department IDs for external company appointments on the IC Trans External Company/ Dept page.

  See (JPN) Setting Up Intercompany Transfer Company Data.

- Supervisor levels for external company appointments on the IC Trans External Superv Lvl page.

These codes provide the prompt values on the Edit Additional Appointment Information page and are visible on pages that display employee additional appointment data.

## Setting Up a Dummy Business Unit, Company, Department, and Location

Set up one dummy code to be used with all additional appointments for each of the following:

- Business unit

  See "Defining Business Units *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- Company

  See "Entering Company Information *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- Department

  See "Maintaining Departments *(PeopleSoft HCM 9.2: Application Fundamentals)*".

- Location

  See "Establishing Locations *(PeopleSoft HCM 9.2: Application Fundamentals)*".

### Additional Setup Instructions

The following are important points to keep in mind when setting up these dummy codes for use with additional appointments to external companies:

- We recommend that they not be real business unit, company, department, and location codes because of the possible effect on security and reporting.

- You may use a real, existing setID to define the dummy codes.

- The dummy department must be excluded from the department tree.

  Otherwise, anyone who has access to the dummy department has access to *all* main appointments of employees who have an additional appointment in an external company.

## Pages Used to Set Up Codes for Managing Additional Appointments

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| IC Trans External Company/ Dept | INTCPX_CPY_JPN | Set Up HCM, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept, IC Trans External Company/Dept | Set up company and department codes for intercompany transfers to and additional appointments in external companies. |
| IC Trans External Superv Lvl | INTCPX_SPV_JPN | Set Up HCM, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl, IC Trans External Superv Lvl | Set up supervisor level codes for intercompany transfers to and additional appointments in external companies. |
| AA Setup for Existing BUs JPN (Additional Appointment Setup for Existing Business Units JPN) | RC_AA_JOBCODE_JPN | Set Up HCM, Install, Country Specific, AA Setup for Existing BUs JPN, AA Setup for Existing BUs JPN | Run the AA_JOBCODE _JPN Application Engine process to create the dummy *AADUMY* job code for each existing business unit. Run this process only if business units already exist at the time of implementing additional appointment tracking. You only run this process one time. |
| Additional Appointment Setup | AA_SETUP_JPN | Set Up HCM, Product Related, Workforce Administration, Workforce Data JPN, Additional Appointment Setup, Additional Appointment Setup | Enter the dummy business unit, company, department, location, and job codes to populate required entry fields on the Job record for additional appointments. |

## Additional Appointment Setup Page

Use the Additional Appointment Setup page (AA_SETUP_JPN) to enter the dummy business unit, company, department, location, and job codes to populate required entry fields on the Job record for additional appointments.

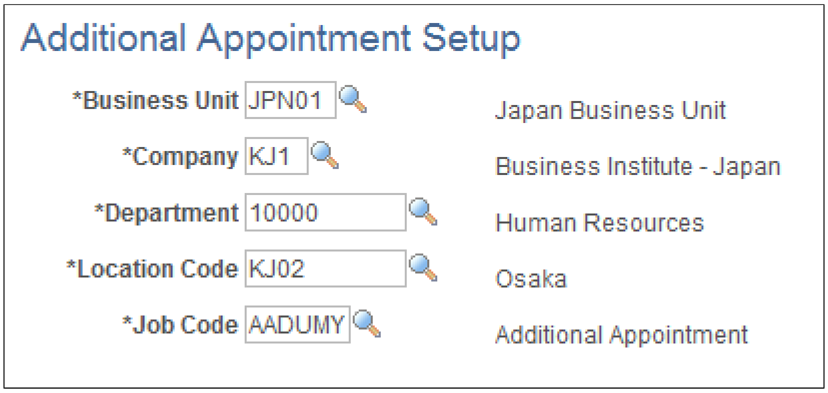
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data JPN, Additional Appointment Setup, Additional Appointment Setup

**Image: Additional Appointment Setup page**

This example illustrates the fields and controls on the Additional Appointment Setup page. You can find definitions for the fields and controls later on this page.




The prompt values for the Business Unit, Company, Department, and Location Code fields are the valid codes set up in the respective setup tables for your PeopleSoft database. In each field, select the single dummy code that you defined for use with additional appointments.

| | |
|---|---|
| **Job Code** | *AADUMY* is the default value. |

The system uses the values on this page to populate the Job record so that it can be saved.

## Setting Up Security for Tracking Additional Appointments

To set up the security for tracking additional appointments, use the Security Install Settings (SCRTY_INSTALL), Security Type Table (SCRTY_TYPE2_TBL), and Addl Appt SQR Security JPN (ADDAPPT_SEC_JPN) components.

These topics provide an overview of security for additional appointments and discuss how to:

- Set up the security basis for additional appointments.
- Select reports that use additional appointment security.

### Understanding Security for Additional Appointments

The PeopleSoft system provides two security options for accessing additional appointment data: departmental security and security for additional appointments. If you choose to use the default option, departmental security, additional appointments do not provide any additional security access. The user must have access to the department in which the main appointment resides to access an employee's data. If you set up security for additional appointments, then additional appointments do provide additional security access. A user can view the main appointment if the main appointment or any of its additional appointments resides in a department to which the user has access.

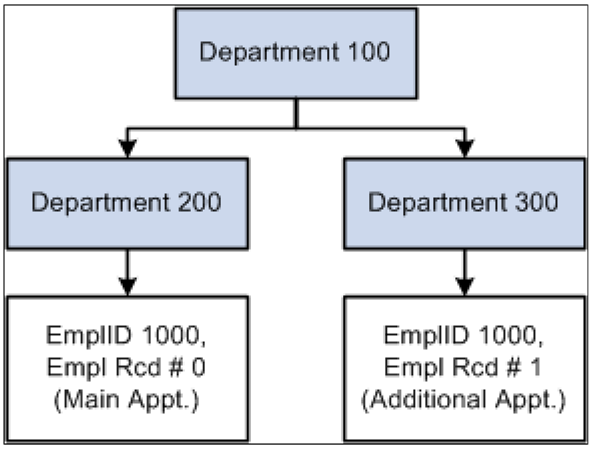
 

### Example of Security Access

**Image: Sample department security tree**

To illustrate how the security options work, consider a department security tree where department 100 is hierarchically above departments 200 and 300. Employee 1000 is in both department: ERN #0, the main appointment, is in department 200, and ERN #1, the additional appointment, is in department 300.

The following diagram illustrates this department structure:




Here is how security works for the two security options:

- If you choose to use the default, departmental security:
  - If the user has access to department 200, then the user has access to the data for employee ID 1000.
  - Even if the user has access to department 300, the user does not have any access to the data for employee ID 1000.
- If you choose to set up security for additional appointments:
  - If the user has access to department 200, then the user has access to the data for employee ID 1000.
  - If the user has access to department 300 only, then the user can access the data for employee ID 1000 because the employee has an additional appointment in department 300.

---

**Note:** Security access is dependent on the system date being earlier than the effective date of the release of the additional appointment. Security access to the data row ceases with the effective date of the additional appointment release.

---

## Setting Up Additional Appointment Security

To set up security for additional appointments:

1. Select *JPN Appointment* on the Security Install Settings page.
2. Select *JPN Additional Appointment* on the Security Type Table page for the PPLJOB security set.

3. Refresh the security join tables using the Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC).

### Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Pages Used to Set Up Security for Additional Appointments

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Security Installation Settings | SCRTY_INSTALL | Set Up HCM, Security, Core Row Level Security, Security Installation Settings, Security Installation Settings | Choose the HCM security settings for your installation. |
| Security Type Table | SCRTY_TYPE2_TBL | Set Up HCM, Security, Core Row Level Security, Security Access Type, Security Type Table | Use to enable existing security access types or create new ones. |
| Addl Appt SQR Security JPN | AA_SECURITY_JPN | Set Up HCM, Security, Core Row Level Security, Addl Appt SQR Security JPN, Addl Appt SQR Security JPN | Select the reports that use additional appointment security. |

## Addl Appt SQR Security JPN Page

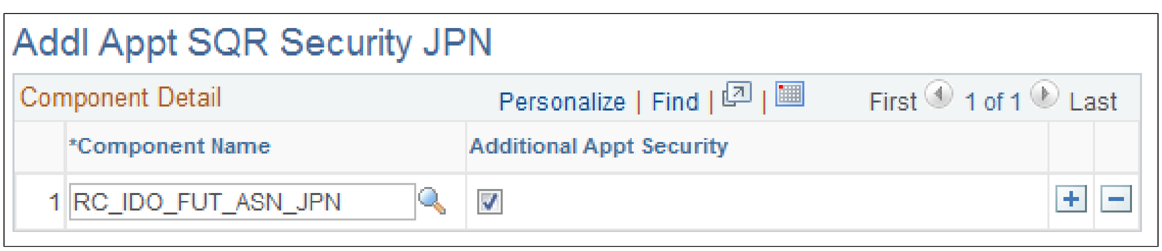
Use the Addl Appt SQR Security JPN page (AA_SECURITY_JPN) to select the reports that use additional appointment security.

**Navigation**

Set Up HCM, Security, Core Row Level Security, Addl Appt SQR Security JPN, Addl Appt SQR Security JPN

**Image: Addl Appt SQR Security JPN page**

This example illustrates the fields and controls on the Addl Appt SQR Security JPN page. You can find definitions for the fields and controls later on this page.




The following table lists the only reports that can be enabled for additional appointment security and the component name to select on the report page:

| ***Report ID*** | ***Report Name*** | ***Component Name*** |
|---|---|---|
| PER062JP | Grade Advance Candidate List | RUNCTL_PER062_JPN |

| ***Report ID*** | ***Report Name*** | ***Component Name*** |
|---|---|---|
| PER063JP | Appointment Notification JPN | RUNCTL_NTF_JPN |
| PER064JP | Appointment List JPN | RUNCTL_NTF2_JPN |
| PER065JP | Completion of IC Transfer JPN | RUNCTL_PER065_JPN |
| PER066JP | Employee Assignment List JPN | EMP_ASN_LST_JPN |
| PER072JP | Future Employee Assignment List | RC_IDO_FUT_ASN_JPN |
| PER074JP | Ido Candidate Listing | RC_IDO_EE_LIST_JPN |

For other reports, the only way to access information on the main appointment is to have access to the department on which the main appointment resides. The department of the additional appointment does not provide any additional access for any reports other than the five reports listed here, even when additional appointment security is activated.

The purpose of activating additional appointment security for these reports is to display the main appointments when there is security access to the additional appointment. Activating additional appointment security does not display additional appointments on PER062JP, PER063JP, PER064JP, and PER065JP. PER066JP, PER072JP, and PER074JP display additional appointments.

When additional appointment security is activated for these five reports, the system evaluates only current job information. The system ignores future-dated job rows, such as future-dated hires or terminations. Regardless of the security option selected, the system uses only the current row to determine security access.

### Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Setting Up to Handle Additional Appointment Terminations

When you terminate a main appointment, the system employs a message subscription that uses a component interface to automatically terminate all additional appointments that are associated with the main appointment.

The message subscription is delivered inactive; you must activate it if you use additional appointment functionality. Following are the details you need to activate the subscription:

| | |
|---|---|
| **Message subscription** | Termination_Add_Appt |
| **Message name** | WORKFORCE_SYNC |
| **Channel** | PERSON_DATA |
| **Tables written to** | JOB |

Termination rows are inserted for all active additional appointments associated with the terminated main appointment.

For more information, see the product documentation for *PeopleTools: PeopleSoft Component Interfaces*

# Recording and Viewing Employee Additional Appointments Data

These topics discuss how to:

- Add, change, or release additional appointments.
- Record additional appointment details.
- Distribute cost.

**Note:** To access additional appointment data, you must first access the associated main appointment in the search page.

## Pages Used to Record and View Employee Additional Appointments Data

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Additional Appointment JPN | AA_MGMT_JPN | Workforce Administration, Job Information, Additional Appointment JPN, Additional Appointment JPN | Add, change, or release additional appointments. |
| Edit Additional Appointment Information | AA_MGMT_JPN_SEC | Click the Add or Edit button on the Additional Appointment JPN page. | Record details of additional appointments. |
| Cost Rate JPN | AA_MGMT2_JPN | Workforce Administration, Job Information, Cost Rate JPN, Cost Rate JPN | Distribute the cost of a main appointment among its additional appointments. |
| Job Summary JPN | JOB_SUMMARY_JPN | Workforce Administration, Job Information, Review Job Information, Job Summary JPN, Job Summary JPN | View an employee's job history, including additional appointment total. Access details of additional appointments. |
| Additional Appointment Data | ADD_APPT_SUMM_SEC | Click the View link for an additional appointment on the Job Summary JPN, Work Location page. | View details of additional appointments. |

## Additional Appointment JPN Page

Use the Additional Appointment JPN page (AA_MGMT_JPN) to add, change, or release additional appointments.

**Navigation**

Workforce Administration, Job Information, Additional Appointment JPN, Additional Appointment JPN

**Image: Additional Appointment JPN page**

This example illustrates the fields and controls on the Additional Appointment JPN page. You can find definitions for the fields and controls later on this page.


## Additional Appointments

This section of the page displays information about existing additional appointments.

**Empl Record (employment record)** The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

**Effective Date** The effective date of the latest data row for the employment record number. This date might be later than the system date if additional appointment information was entered with an effective date in the future.

**Status as of** The status of the appointment as of the date in the Effective Date field for this employment record number. Values are *Active* and *Inactive.*

**Edit** Click this button to access the Edit Additional Appointment Information page, where you can change or release the selected additional appointment.

**Add** Click this button to add an additional appointment. The system displays the Edit Additional Appointment Information page, where you record the details of the new appointment.

# Edit Additional Appointment Information Page

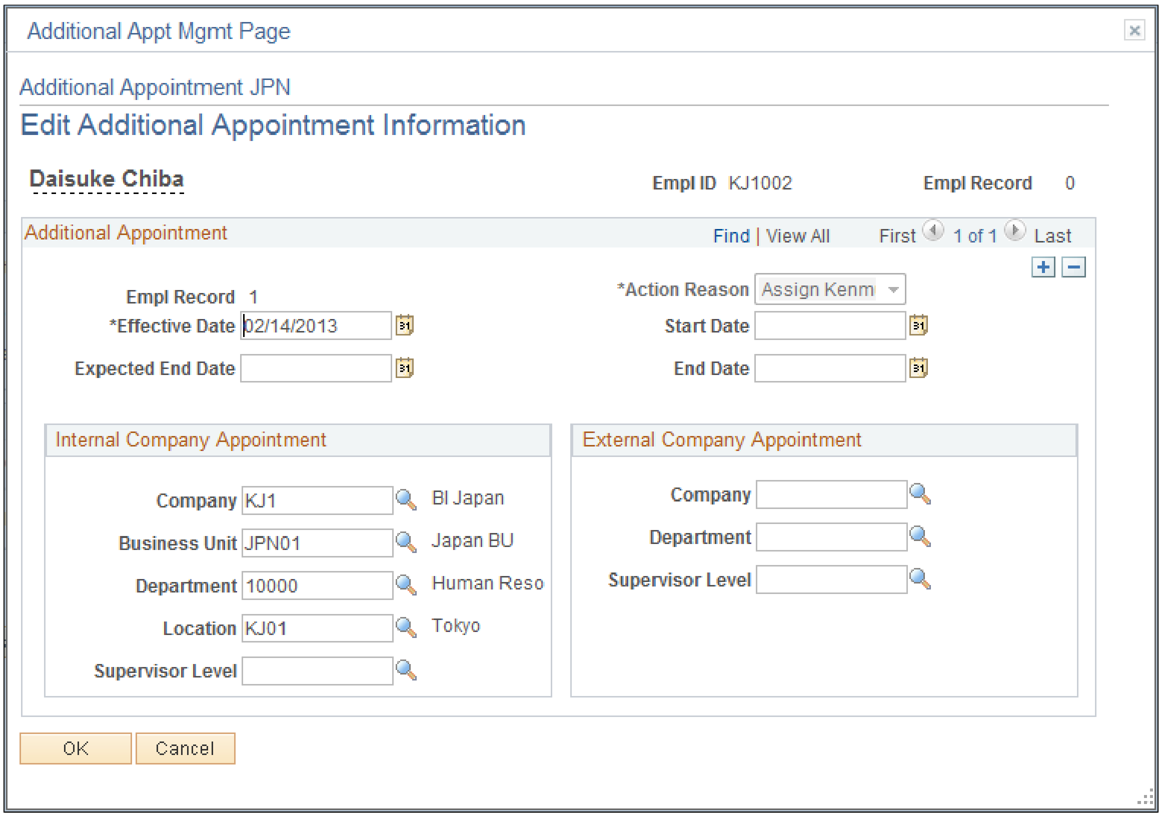
Use the Edit Additional Appointment Information page (AA_MGMT_JPN_SEC) to record details of additional appointments.

**Navigation**

Click the Add or Edit button on the Additional Appointment JPN page.

**Image: Edit Additional Appointment Information page**

This example illustrates the fields and controls on the Edit Additional Appointment Information page. You can find definitions for the fields and controls later on this page.




## Additional Appointment

**Empl Record (employment record)**

The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

**Action Reason**

Three action reason codes are valid for additional appointments:

*Asn Kenmu* (assign kenmu): If you click the Add button on the Additional Appointment JPN page to access this page, the system enters *Asn Kenmu* and you cannot change it. If you click

| | |
|---|---|
| | the Edit button to access the page, you cannot save the page if you select *Asn Kenmu.*<br><br>*Data Chg* (data change): Select this value if you are changing ( but not releasing) an additional appointment.<br><br>*Rel Kenmu* (release kenmu): Select this value if you are releasing the kenmu assignment.<br><br>**Note:** The codes that you enter on this page are translated into action and reason codes on the Job record as follows:<br>*Asn Kenmu:* The Job record action is *ADL* (additional job) and the reason is *AKM* (assign kenmu).<br>*Data Chg:* The Job record action is *DTA* (data change) and no action reason is associated with it.<br>*Rel Kenmu:* The Job record action is *TER* (termination) and the reason is *RKM* (release kenmu).<br>These Job record rows are not visible to users. |
| **Start Date** | Enter the date on which this additional appointment starts. |
| **Expected End Date** | Enter the date on which the additional appointment is expected to end. |
| **End Date** | Enter the date on which the additional appointment actually ends.<br><br>**Note:** The system displays a warning if the End Date value is later than the Effective Date value of the additional appointment release. Security access to the data row ceases with the effective date of the additional appointment release. |

**Note:** You can enter information in either the Internal Company Appointment group box or the External Company Appointment group box. You cannot use both group boxes at the same time.

### Internal Company Appointment

Use this group box if the additional appointment is with a company that is included in your organization's database (internal company).

See Internal and External Companies.

### External Company Appointment

Use this group box if the additional appointment is with a company that is outside of your organization's database (external company). Prompt values come from the data that you set up on the IC Trans External Company/Dept page and the IC Trans External Superv Lvl page.

### Related Links

Prerequisites

## Cost Rate JPN Page

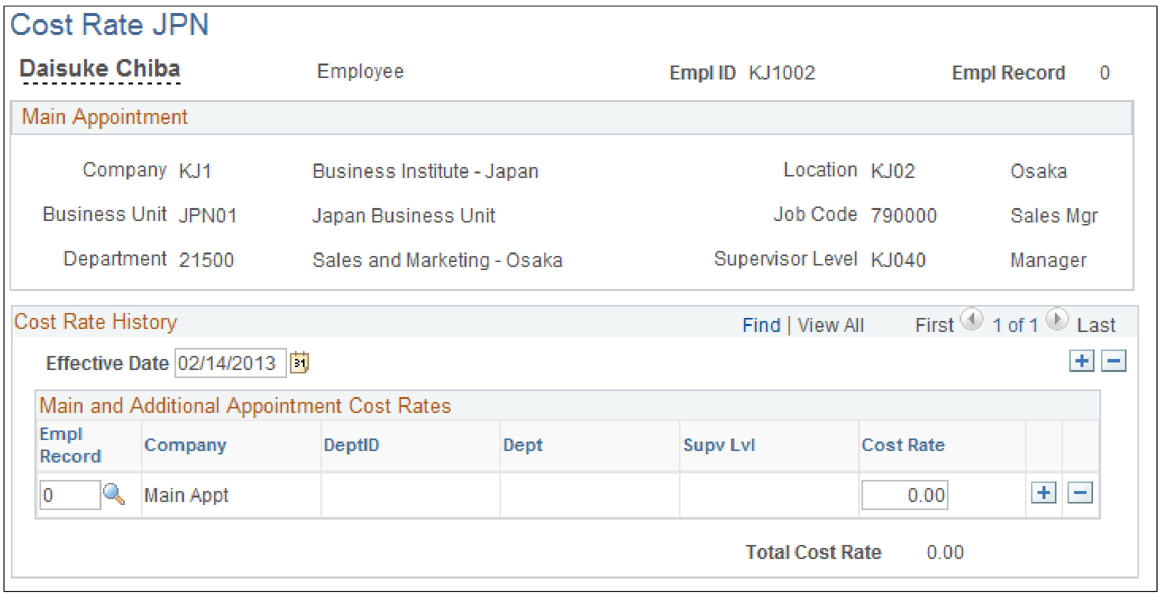
Use the Cost Rate JPN page (AA_MGMT2_JPN) to distribute the cost of a main appointment among its additional appointments.

**Navigation**

Workforce Administration, Job Information, Cost Rate JPN, Cost Rate JPN

**Image: Cost Rate JPN page**

This example illustrates the fields and controls on the Cost Rate JPN page. You can find definitions for the fields and controls later on this page.




**Effective Date** Enter an effective date for when the additional appointment cost rates are being distributed or redistributed.

### Main and Additional Appointment Cost Rates

**Empl Record (employment record)** Choose the employment record number for each main or additional appointment that has an associated cost. The only values available in the list are the record numbers of additional appointments associated with the main appointment that you entered to access the page.

When you save the page, the system validates that the employment record is active as of the selected effective date.

**Cost Rate** Enter the percentage cost associated with the main appointment and each additional appointment.

**Total Cost Rate** When you save the page, the system validates that the total cost rate for the main appointment and all of its additional appointments equals 100 percent.

Chapter 14

# (JPN) Tracking Intercompany Transfers (Shukkou)

## Understanding Intercompany Transfer Tracking

Whenever you need to track intercompany transfers (shukkou), whether as a home company or a host company, you enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers. You can use the Pay Group field on the Job Data - Payroll page to indicate which company is the compensation owner.

This topic discusses home and host data for intercompany transfers and lists prerequisites.

### Home and Host Data for Intercompany Transfers

The tables in the two topics that follow provide summarized data entry obligations and requirements for different intercompany transfer scenarios. The first table addresses only the hosting of intercompany transfers; the second table addresses both temporary and permanent intercompany transfers.

A later topic provides details of data entry for a series of scenarios.

See Entering and Maintaining Home and Host Data for Intercompany Transfers.

This table explains the abbreviations that are used in the two subsequent tables:

| ***Code*** | ***Description*** | ***Action*** |
| --- | --- | --- |
| ICT | Intercompany Transfer | Shukkou |
| TICT | Temporary Intercompany Transfer | Zaiseki-Shukkou |
| PICT | Permanent Intercompany Transfer | Tenseki-Shukkou |
| HICT | Hosting Intercompany Transfer | Shukkou-Ukeire |
| HTICT | Hosting Temporary Intercompany Transfer | Zaisekki-Shukkou no Ukeire |
| HPICT | Hosting Permanent Intercompany Transfer | Tenseki-Shukkou no Ukeire |
| SL | Supervisor Level | Yakushoku |
| AA | Additional Appointment | Kenmu |
| PA | Primary Appointment | Shumu |

## Hosting Temporary and Permanent Intercompany Transfers

The following table summarizes the information and security requirements for hosting temporary intercompany transfers from companies within a group that uses PeopleSoft HCM and from other companies that don't use PeopleSoft HCM:

| ICT Type | PA Location | Information and Security Required Within Affiliated Companies that Use PeopleSoft HCM | Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft HCM |
|---|---|---|---|
| 1<br><br>HTICT | Host (Own Company) | • Host company information, using shared codes.<br>• The owner of payroll.<br>• ICT period, department, SL, and so on.<br>• In general, employee information is maintained at host (own) company when PA is moved from PA's own company. | • Host company information, using Intercompany Transfer Company/Department and Intercompany Transfer Supervisor Level codes.<br>• The owner of payroll.<br>• ICT period. |
| 2<br><br>HPICT | Host (Own Company) | Employee information is maintained at host (own) company only. | Host company information, using Intercompany Transfer Company/Department and Intercompany Transfer Supervisor Level codes. |

## Temporary and Permanent Intercompany Transfers

This table summarizes the information and security requirements for temporary intercompany transfers to companies within a group that uses PeopleSoft HCM and to other companies that don't use PeopleSoft HCM:

| ICT Type | PA Location | AA at Home Company? | Information and Security Required Within Affiliated Companies that Use PeopleSoft HCM | Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft HCM |
|---|---|---|---|---|
| TICT | Host | No | • Host company information, using shared codes (in case of PS – using group–company).<br>• The owner of payroll.<br>• TICT period, department, SL, and so on.<br>• In general, employee information is maintained at host (own) company when PA is moved from PA's own company. | • Host company information, using Intercompany Transfer Company/ Department and IC Transfer Supervisor Level codes.<br>• The owner of payroll.<br>• TICT period. |
| PICT | N/A (Completely terminated from home company) | N/A | Employee information will be maintained at host company only. | N/A |

## Prerequisites

Before you enter intercompany transfers for an employee, complete these steps:

- Set up a dummy pay group to use as the compensation indicator if you track intercompany transfers in which the host company (that is, not your company) is responsible for paying the employee.

  **Note:** This setup is reversed if your company is the hosting company; that is, you set up a dummy pay group to track hosted intercompany transfers where the home company pays the employee.

- Set up company and department codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.
- Set up supervisor level and IC Trans External supervisor level codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.

**Note:** You can track intercompany transfers (shukkou) as additional appointments (kenmu) if you set up and use the additional appointment functionality.

### Related Links

(JPN) Setting Up Intercompany Transfer Company Data

Understanding Additional Appointments

Indicating the Home or Host Compensation Owner

# Setting Up Employee Data for Intercompany Transfers

These topics discuss how to:

- Track intercompany transfers.
- Indicate the home or host compensation owner.

**Note:** This topic discusses the basics of how to set up an intercompany transfer. See the next topic for detailed examples of data entry and maintenance.

### Related Links

Entering and Maintaining Home and Host Data for Intercompany Transfers

## Tracking Intercompany Transfers

Whenever you need to track intercompany transfers, whether as a home company or a host company, set up the employee data:

- Enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers.
- Complete the intercompany transfer fields in the Japan section of the Work Location page.

### Selecting Actions and Reasons for Intercompany Transfers

These are the actions and reasons that you use on the Administer Workforce pages when you work with intercompany transfers:

| ***Action*** | ***Reason*** |
|---|---|
| Transfer | • Intercompany transfer.<br>• Completion of intercompany transfer. |
| Termination | • Permanent intercompany transfer.<br>• Completion of (hosted) intercompany transfer. |
| Hire | • Temporary intercompany transfer.<br>• Permanent intercompany transfer. |

### Related Links

Work Location Page

## Indicating the Home or Host Compensation Owner

You can use the Pay Group field on the Job Data - Payroll page (Workforce Administration, Job Information, Job Data, Payroll) to identify whether the home or the host company is responsible for paying an employee on temporary intercompany transfer. If the home company is paying, put the employee in a standard pay group with other employees. If the host company is paying, put the employee in a designated dummy pay group that has no payroll processing implications for your (home) company.

Similarly, if you are the host for a temporary intercompany transfer, put the employee in a standard pay group if you are paying the employee, or into a designated dummy pay group if the home company is paying the employee.

---

**Note:** When the Payroll System field is set to *Other* on the Job Data - Payroll page, the Pay Group field is not a required field. You can use the field as described previously whether it is required or not.

---

### Related Links

Job Data - Payroll Page

# Entering and Maintaining Home and Host Data for Intercompany Transfers

The following three sets of scenarios detail the data input and maintenance requirements by the home or host company. Sets B and C are similar, but reflect different security conditions.

The sets of scenarios are:

- Set A: Single Company Using a Single PeopleSoft HCM Database.
- Set B: Multiple Companies Using a Single PeopleSoft HCM Database (with security restrictions).
- Set C: Multiple Companies Using a Single PeopleSoft HCM Database (without security restrictions).

## Single Company Using a Single PeopleSoft HCM Database: Scenarios A1-8

This topic discusses several scenarios for a single company that uses a single human resources database.

---

**Note:** Additional Employment Instance is not used for any scenarios in set A. The scenarios in set A are applicable when multiple companies use a single human resources database but the information—for the home or host company relevant to a particular intercompany transfer—is not stored in that database.

---

### Scenario A1: TICT

*Home Company Inputs*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Transfer. |
| | Reason | Temporary intercompany transfer. |
| | Department ID | Department ID that indicates temporary intercompany transfer. |
| | Pay Group | If the home company is responsible for compensation, no change occurs to the pay group.<br><br>If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. No processing is associated with dummy pay groups. |
| JOB_JR | Intercompany Transfer Flag | Host company information. |
| | Business Unit code | If the home company is a normal ( internal) company, enter the code. If not, leave this field blank. |
| | Company code | If the Host company is a normal ( internal) company, enter the code. If it is an external company, enter the ICT Company code. |
| | Department code | If the host company is a normal ( internal) company, enter the department code. If it is an external company, enter the ICT Department code. |
| | Sup Lvl ID code | If the host company is a normal ( internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID. |
| | ICT Start Date | Actual start date of intercompany transfer. |
| | ICT End Date | Expected end date of ICT. |

*Host Company Inputs*

Not applicable.

## Scenario A2: Completion of TICT

*Home Company Inputs*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Transfer. |
| | Reason | Completion of ICT. |
| | Department ID | Employee's home company department. |
| | Pay Group | Employee's home company pay group. |

*Host Company Inputs*

Not applicable.

## Scenario A3: PICT

*Home Company Inputs*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| Job | Action | Termination. |
| | Reason | Permanent intercompany transfer. |
| JOB_JR | Intercompany Transfer Flag | Host company information. |
| | Business Unit (code) | If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank. |
| | Company code | If the host company is a normal ( internal) company, enter the code. If it is an external company, enter the ICT Company code. |
| | Department code | If the host company is a normal ( internal) company, enter the Department code. If it is an external company, enter the ICT Department code. |
| | Sup Lvl ID code | If the host company is a normal ( internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID. |

*Host Company Inputs*

Not applicable.

## Scenario A4: HTICT

*Home Company Inputs*

Not applicable.

*Host Company Inputs*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Hire. |
| | Reason | Temporary intercompany transfer. |
| | Pay Group | If host (own) company is responsible for compensation, enter the pay group in which you want the employee.<br><br>If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation. |
| | Employee Class | Hosting intercompany transfer. |
| JOB_JR | Intercompany Transfer Flag | Home company information. |
| | Business Unit (code) | If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank. |
| | Company code | If the host company is a normal ( internal) company, enter the code. If it is an external company, enter the ICT Company code. |
| | Department code | If the host company is a normal ( internal) company, enter the Department code. If it is an external company, enter the ICT Department code. |
| | Sup Lvl ID code | If the host company is a normal ( internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID. |
| | ICT Start Date | Actual start date of intercompany transfer. |
| | ICT End Date | Expected end date of ICT. |

## Scenario A5: Completion of HTICT

*Home Company Inputs*

Not applicable.

*Host Company Inputs*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Termination. |
| | Reason | Completion of TICT. |

## Scenario A6: HPICT

*Home Company Inputs*

Not applicable.

*Host Company Inputs*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Hire. |
| | Reason | Permanent intercompany transfer. |
| | Pay Group | Pay group in which you want this employee. |
| | Employee Class | Hosting intercompany transfer. |
| JOB_JR | Intercompany Transfer Flag | Home company information. |
| | Business unit code | If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank. |
| | Company code | If the host company is a normal ( internal) company, enter the code. If it is an external company, enter the ICT Company code. |
| | Department: code | If the host company is a normal ( internal) company, enter the Department code. If it is an external company, enter the ICT Department code. |

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| | Sup Lvl ID code | If the host company is a normal ( internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID. |

## Multiple Companies Using a Single PeopleSoft HCM Database: Scenarios B1-6

This topic discusses several scenarios for multiple companies that use a single human resources database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings make it impossible for either company to access the other's information.

### Scenario B1: TICT

*Home Company Inputs (Temporary Intercompany Transfer - TICT)*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Transfer. |
| | Reason | Temporary intercompany transfer. |
| | Department ID | Dummy ID that indicates temporary intercompany transfer. |
| | Pay Group | If home (own) company is responsible for compensation, no change occurs to the pay group.<br><br>If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. No processing is associated with dummy pay groups. |
| | Job Indicator | Because the host company enters information by using concurrent jobs functionality, it is *Secondary.* |
| JOB_JR | Intercompany Transfer Flag | Host company information. |
| | Business unit code | Business unit to which the employee will be sent. |

| Table | Fields | Input |
|---|---|---|
| | Company code | Host company to which the employee will be sent. |
| | Department ID code | Host department in which the employee will be. |
| | Sup Lvl ID code | Supervisor level that employee will take in host company. |
| | ICT Start Date | Actual start date of intercompany transfer. |
| | ICT End Date | Expected end date of ICT. |

*Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)*

| Table | Fields | Input |
|---|---|---|
| JOB | Employee ID | If accessing through Add Employment Instance, use the same employee ID as the home company.<br><br>If accessing through the Add a Person page, assign a new ID. |
| | Employee Record # | Employee ID is *1* or higher. |
| | Action | Hire. |
| | Reason | Temporary intercompany transfer. |
| | Company | Host company. |
| | Department ID | Host department in which the employee will be. |
| | Pay Group | If host (own) company is responsible for compensation, the pay group in which you want this employee.<br><br>If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation. |
| | Employee Class | Hosting intercompany transfer. |
| | Job Indicator | Primary. |

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB_JR | Intercompany Transfer Flag | Home company information. |
| | Business unit code | Employee's home business unit. |
| | Company code | Employee's home company. |
| | Department ID code | Employee's home department. |
| | ICT Start Date | Actual start date of intercompany transfer. |
| | ICT End Date | Expected end date of ICT. |

## Scenario B2: Completion of TICT

*Home Company Inputs (Completion of Temporary Intercompany Transfer)*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Transfer. |
| | Reason | Completion of temporary intercompany transfer. |
| | Department ID | Home company department in which the employee will be. |
| | Pay Group | Pay group for home company that is responsible for compensation. |
| | Job Indicator | Primary. |

*Host Company Inputs (Completion of Hosting Temporary Intercompany Transfer)*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Termination. |
| | Reason | Completion of temporary intercompany transfer. |
| | Job Indicator | Secondary. |

## Scenario B3: PICT

*Home Company Inputs (Permanent Intercompany Transfer - PICT)*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Termination. |
| | Reason | Permanent intercompany transfer. |
| | Job Indicator | Because the host company entered information by using concurrent jobs functionality, it is *Secondary.* |
| JOB_JR | Intercompany Transfer Flag | Host company information. |
| | Business unit code | Business unit to which the employee is transferring. |
| | Company code | Host company to which the employee is transferring. |
| | Department ID code | Employee's host department. |
| | Sup Lvl ID code | Supervisor level that employee will have in host company. |

*Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Employee ID | If accessing through Add Employment Instance, use the same employee ID as the home company.<br><br>If accessing through the Add a Person page, assign a new ID. |
| | Employee Record # | If accessing through the Concurrent Jobs page, the employee ID is *1* or higher. |
| | Action | Hire. |
| | Reason | Permanent intercompany transfer. |
| | Pay Group | Regular host company pay group in which the employee will be. |
| | Employee Class | Hosting intercompany transfer. |
| | Job Indicator | Primary. |
| JOB_JR | Intercompany Transfer Flag | Home company information. |

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| | Business Unit code | Business unit from which the employee comes. |
| | Company code | Home company to which the employee belongs. |
| | Department ID code | Home department in which the employee was. |

## Multiple Companies Using a Single HCM Database: Scenarios C1-6

This topic discusses several scenarios for multiple companies that use a single PeopleSoft HCM database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings allow all companies to access each other's information.

### Scenario C1: TICT

*Home Company Inputs (Temporary Intercompany Transfer - TICT)*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Transfer. |
| | Reason | Temporary intercompany transfer. |
| | Department ID | Dummy ID that indicates temporary intercompany transfer. |
| | Pay Group | If home (own) company is responsible for compensation, no change occurs to the pay group.<br><br>If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. |
| | Job Indicator | Because the host company enters information by using concurrent jobs functionality, it is *Secondary.* |
| JOB_JR | Intercompany Transfer Flag | Host company information. |
| | ICT Start Date | Actual start date of intercompany transfer. |

| Table | Fields | Input |
|---|---|---|
| | ICT End Date | Expected end date of ICT. |

*Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)*

| Table | Fields | Input |
|---|---|---|
| JOB | Employee ID | If accessing through Add Employment Instance, use the same employee ID as the home company.<br><br>If accessing through the Add a Person page, assign a new ID. |
| | Employee Record # | If accessing through the Concurrent Jobs page, the employee ID is *1* or higher. |
| | Action | Hire. |
| | Reason | Temporary intercompany transfer. |
| | Company | Host company. |
| | Department ID | Host department in which the employee will be. |
| | Pay Group | If host (own) company is responsible for compensation, the pay group in which you want this employee.<br><br>If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation. |
| | Employee Class | Hosting intercompany transfer. |
| | Job Indicator | Primary. |
| JOB_JR | Intercompany Transfer Flag | Home company information. |
| | ICT Start Date | Actual start date of intercompany transfer. |
| | ICT End Date | Expected end date of ICT. |

## Scenario C2: Completion of TICT

See Scenario B2: Completion of Temporary Intercompany transfer.

### Scenario C3: PICT

*Home Company Inputs (Permanent Intercompany Transfer - PICT)*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Action | Termination. |
| | Reason | Permanent intercompany transfer. |
| | Job Indicator | Because the host company entered information by using concurrent jobs functionality, it is *Secondary.* |
| JOB_JR | Intercompany Transfer Flag | Host company information. |

*Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)*

| ***Table*** | ***Fields*** | ***Input*** |
|---|---|---|
| JOB | Employee ID | If accessing through Add Employment Instance, use the same employee ID as the home company.<br><br>If accessing through the Add a Person page, assign a new ID. |
| | Employee Record # | If accessing through the Concurrent Jobs page, the employee ID is *1* or higher. |
| | Action | Hire. |
| | Reason | Permanent intercompany transfer. |
| | Pay Group | Regular host company pay group in which the employee will be. |
| | Employee Class | Hosting intercompany transfer. |
| | Job Indicator | Primary. |
| JOB_JR | Intercompany Transfer Flag | Home company information. |

## Working with Search Page Security

This topic discusses how department security (Search Page Security on PERS_SRCH_COR and EMPLMT_SRCH_COR) works when you use the system's Multiple Jobs functionality.

---

**Note:** You can set up this security in many different ways. Your specific business requirements determine how you set up yours. This topic describes one example of how you may set up your security.

---

This information makes the following assumptions:

- You want to manage two companies in one database: company A and company B, where company B is a subsidiary of company A.
- The entire organization of company A belongs to business unit A (BUA), and the entire organization of company B belongs to business unit B (BUB).
- You have defined two setIDs: SIDA and SIDB for companies A and B, respectively.
- Neither company's workers have meaningful employee IDs; that is, the ID does not identify the company.

  For example, a person with employee ID 1002 may belong to company B, whereas workers with employee IDs 1001 and 1003 belong to company A.
- This security has two users: USR1 and USR2.

  USR1 has the right to access the sales department of company A, and USR2 has the right to access the sales department of company B.

Following these assumptions, the next table represents the job rows for the person with employee ID 1001, who:

- Was originally hired by company A.
- Went on a temporary intercompany transfer to company B (scenario B1).
- Returned to company A (scenario B3).
- Went on permanent intercompany transfer to company B (scenario B6).

*Key:* In this table, Empl Rec# = Employment Record Number, Co. = Company, ICT = InterCompany Transfer, A/R = Action/Reason, D = Department, and J = Job Indicator.

| ***Event*** | ***Empl Rec#0*** | ***Empl Rec#1*** |
|---|---|---|
| 1. Hired by company A | A/R − Hired<br>Co. − A<br>D − Sales<br>J − Primary | NA |
| 2. Temporary ICT to company B | A/R − Transfer/ICT<br>Co. − A<br>D − Human Resources<br>J − Secondary | A/R − Hire/Temporary ICT<br>Co. − B<br>D − Sales<br>J − Primary |

| ***Event*** | ***Empl Rec#0*** | ***Empl Rec#1*** |
|---|---|---|
| 3. Returned to company A | A/R −Transfer/Completion of Temporary ICT<br><br>Co. − A<br><br>D − Sales<br><br>J − Primary | A/R −Termination/Completion of Temporary ICT<br><br>Co. − B<br><br>D − Sales<br><br>J − Secondary |
| 4. Permanent ICT to company B<br><br>4a. Terminated from company A<br><br>4b. Hired (or rehired) by company B | A/R − Termination / Permanent ICT<br><br>Co. − A<br><br>A/R − Hired or rehired / Permanent ICT<br><br>Co. − B<br><br>D − Sales<br><br>J − Primary | NA |

This example shows how departmental security (search page security) works for users who have security right access to a department. Users can do one of the following:

- Access all employees whose current jobs belong to that department when PERS_SRCH_GBL is used as the search table.
- Access the particular record numbers for employees whose current job is in the department when EMPLMT_SRCH_GBL is used as the search table.

This table shows which users have access to which data at each of the four events described for employee 1001:

| ***Event*** | ***Personal Data*** | ***Empl Rec#0 Data*** | ***Empl Rec#1 Data*** |
|---|---|---|---|
| | PERS_SRCH_GBL | EMPLMT_SRCH_GBL | EMPLMT_SRCH_GBL |
| 1. Hired by company A | USR1 | USR1 | NA |
| 2. Temporary ICT to company B | USR1 and USR2 | USR1 | USR2 |
| 3. Returned to company A | USR1 and USR2 | USR1 | USR2 |
| 4a. Permanent ICT to company B<br><br>4b. Hired or rehired by company B | USR1 and USR2<br><br>USR2 | USR1<br><br>USR2 | USR2<br><br>USR2 |

# Running the Intercompany Transfer Report

This topic lists the page used to run the JPN Completion of IC Transfer report.

## Page Used to Run the Intercompany Transfer Report

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
| --- | --- | --- | --- |
| Completion of IC Transfer JPN | RUNCTL_PER065_JPN | Workforce Administration, Job Information, Reports, Completion of IC Transfer JPN, Completion of IC Transfer JPN | Run the JPN Completion of IC Transfer report ( PER065JP), which lists employees on temporary intercompany transfer. The home company uses this report to confirm employees who are anticipated to return from temporary intercompany transfer. |

## Chapter 15

# (JPN) Mass Organization Change

## Understanding Mass Organization Change

Japanese companies change organizational structure periodically. Consequently, employees are transferred to new roles and departments within the revised structure. This change is referred to as mass period transfers (teiki ido). With rapid changes in the business environment, organizational changes and mass transfers play an integral part for businesses in Japan and take place in short cycles.

Job rotation is viewed as an integral part of employee development in Japan. Human resources (HR) departments intentionally transfer some employees to multiple departments over a period of time. This practice is aimed at developing generalists who are knowledgeable about several jobs within the company. It also provides employees more experience and a broader vision of the company. The period of service in a department is often the selection criterion for job rotation. Employees who are identified as transferable are called transfer candidate employees.

Many companies in Japan employ a split HR organizational structure made up of division HR and corporate HR. Corporate HR is an HR department located in the main company headquarters of a large company or group of companies. Division HR departments are HR departments within a business unit or division. The division HR departments report to the corporate HR department (and the general manager of the business unit, subsidiary companies, and so on).

The division HR department formulates and implements activities related to changes in organizational strategy and employee placement at the departmental level. When division HR finishes its work, it reports to corporate HR. Corporate HR then coordinates and adjusts activities and placements among departments based on company strategy.

### Tamatsuki Placement

The Japanese word tamatsuki combines the words ball (tama) and hit (tsuku) and means *billiards* in Japanese. Tamatsuki placement begins when an employee is assigned to a newly created post. The existing post is vacated and is available to be filled.

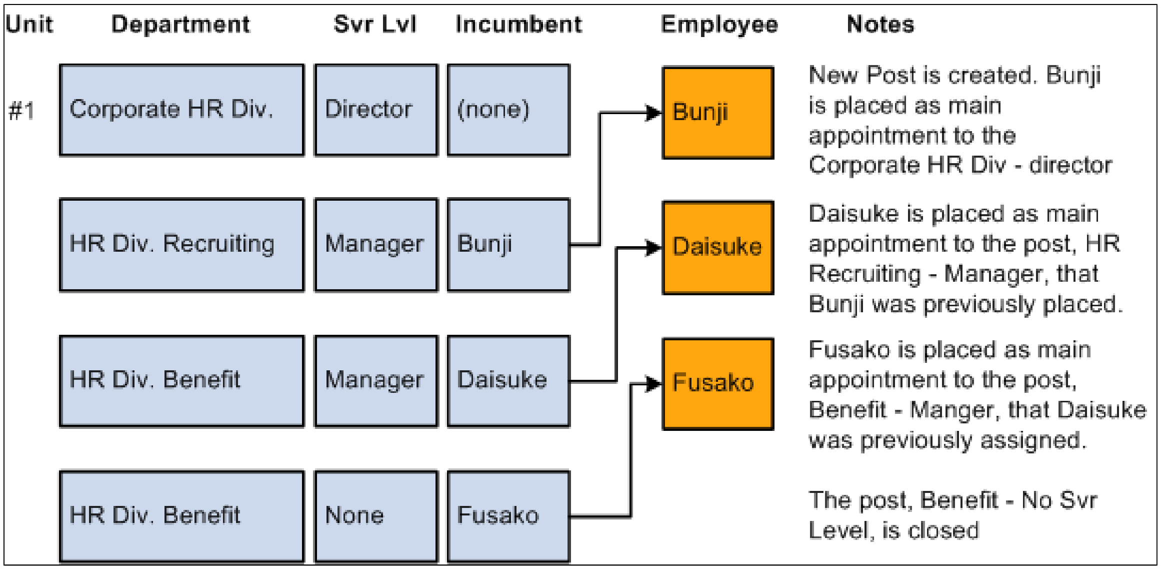
**Note:** A post is equivalent to a supervisory level role (yakushoku) in a department. It is different from a position, which is maintained in the Position Management feature.

When restructuring an organization, Tamatsuki placement is usually conducted along the same job level. Tamatsuki placement can also occur when an employee has requested a transfer. Job rotation for higher level management positions are also done across the same job level, which starts a job transfer chain of events.

**Image: Example of** Tamatsuki **placement**

For example, Bunji is assigned a new post, Corporate HR Division Director, and his previous post becomes available. Other employees are then assigned to similar posts at the same level by the cascading effect of a person moving from one post to another and leaving the existing post vacant. Daisuke is assigned to Bunji's previous post, Fusako is assigned to Daisuke's previous post, and Fusako's previous post is closed.

This example of tamatsuki placement is pictured in the following diagram:




**Note:** This feature does not support transfer between business units as table sets may differ from one business unit to the next.

# Changing Plans for Restructuring an Organization

These topics provide an overview of change plans for restructuring an organization and discuss how to:

- Create an Organization Plan.
- Specify Headcount Plan by department.
- View the Headcount Plan listing.

## Understanding Change Plans for Restructuring An Organization

To plan a new organizational structure, you enter information about the new structure in the system. This information includes the department hierarchy and size by supervisor level, job code, and grade. You can store multiple structures under different names. After entering the information for a new plan, you verify the information using a visual chart.

### Organizational Structure

You build the existing and planned organizational structures using PeopleSoft Tree Manager. Tree Manager provides a graphical user interface that enables you to create organizational structures visually using drag-and-drop functionality. To create a new organizational structure using Tree Manager, copy the existing tree for the current organizational structure and save it by a different name.

---

**Note:** When using an initial tree structure, Oracle recommends that customers create a tree based on the DEPT_SECURITY tree but with a different name. Then, after the tree is approved, rename the tree DEPT_SECURITY with a new effective date.

---

## Pages Used to Change Plans for Restructuring an Organization

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Tree Manager | PSTREEMGR | Tree Manager, Tree Manager | Base the new tree on the existing organization structure's tree and copy it or create a tree for the new organization structure. Add departments using Tree Manager functionality. |
| Organization Plan | IDO_ORG_PLAN_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Organization Plan, Organization Plan | Set up Ido organization plans. |
| Headcount Plan by Department | IDO_HC_DEPT_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan by Department, Headcount Plan by Department | Specify head count targets by department. |
| Headcount Plan Listing | RC_IDO_HC_RPT_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing, Headcount Plan Listing | Use this page to run a report that compares the head count goals established for departments with the simulated result of the organization plan. |

## Organization Plan Page

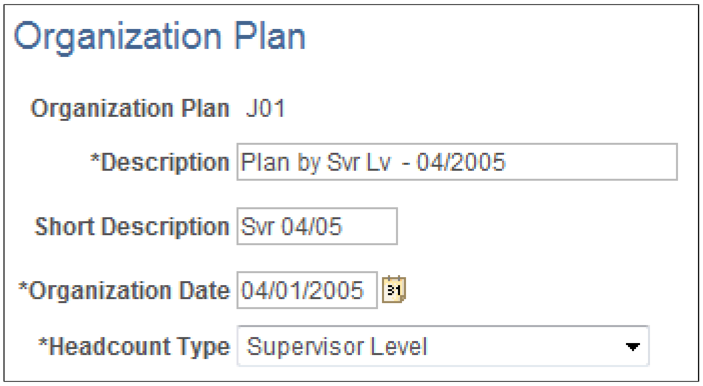
Use the Organization Plan page (IDO_ORG_PLAN_JPN) to set up Ido organization plans.

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Organization Plan, Organization Plan

**Image: Organization Plan page**

This example illustrates the fields and controls on the Organization Plan page. You can find definitions for the fields and controls later on this page.




An Organization Plan enables you to track several different ways of reorganizing the company. After running reports modeling the different options, you can select one of the Organization Plans as the *official* plan and insert it into the Job record.

| | |
|---|---|
| **Organization Date** | Enter the date from which the new organization plan will be effective. |
| **Headcount Type** | Select *Job Code, Sal Admin Plan/Grade,* or *Supervisor Level.* |

## Headcount Plan by Department Page

Use the Headcount Plan by Department page (IDO_HC_DEPT_JPN) to specify head count targets by department.

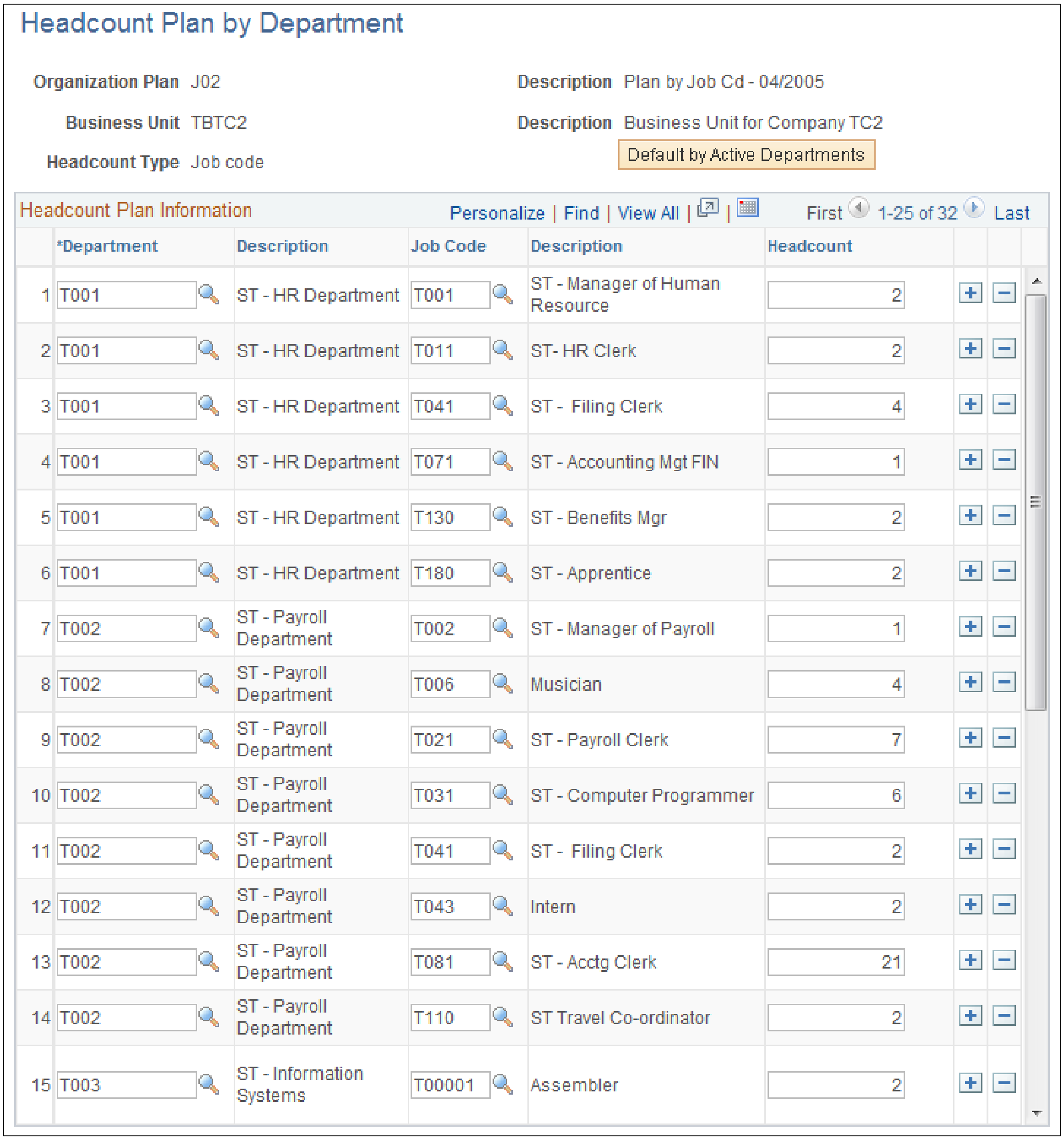
 

### Navigation

Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan by Department, Headcount Plan by Department

### Image: Headcount Plan by Department page

This example illustrates the fields and controls on the Headcount Plan by Department page. You can find definitions for the fields and controls later on this page.


Headcount Plan by Department

Organization Plan J02 Description Plan by Job Cd - 04/2005

Business Unit TBTC2 Description Business Unit for Company TC2

Headcount Type Job code Default by Active Departments

Headcount Plan Information Personalize | Find | View All | First 1-25 of 32 Last

| | *Department | Description | Job Code | Description | Headcount |
|---|---|---|---|---|---|
| 1 | T001 | ST - HR Department | T001 | ST - Manager of Human Resource | 2 |
| 2 | T001 | ST - HR Department | T011 | ST- HR Clerk | 2 |
| 3 | T001 | ST - HR Department | T041 | ST - Filing Clerk | 4 |
| 4 | T001 | ST - HR Department | T071 | ST - Accounting Mgt FIN | 1 |
| 5 | T001 | ST - HR Department | T130 | ST - Benefits Mgr | 2 |
| 6 | T001 | ST - HR Department | T180 | ST - Apprentice | 2 |
| 7 | T002 | ST - Payroll Department | T002 | ST - Manager of Payroll | 1 |
| 8 | T002 | ST - Payroll Department | T006 | Musician | 4 |
| 9 | T002 | ST - Payroll Department | T021 | ST - Payroll Clerk | 7 |
| 10 | T002 | ST - Payroll Department | T031 | ST - Computer Programmer | 6 |
| 11 | T002 | ST - Payroll Department | T041 | ST - Filing Clerk | 2 |
| 12 | T002 | ST - Payroll Department | T043 | Intern | 2 |
| 13 | T002 | ST - Payroll Department | T081 | ST - Acctg Clerk | 21 |
| 14 | T002 | ST - Payroll Department | T110 | ST Travel Co-ordinator | 2 |
| 15 | T003 | ST - Information Systems | T00001 | Assembler | 2 |

Use this page to track goals by department. For example, if you have two people in department 100 and you want four people after the reorganization is completed, you enter the number *4* for department 100 on this page. You then perform your transfers. After your reorganization is finished (but before you insert it into the Job record), run the Headcount Plan Listing (PER071JP.SQR) report to see if your transfers have increased the headcount in the department from two to four.

| | |
|---|---|
| **Default by Active Departments** | Click the Default by Active Departments button to populate the Headcount Plan Information grid with data about the active departments. |

As well as using the Default by Active Departments button, you can enter the head count for each department.

---

**Note:** This page provides a lower level of detail than the Headcount by Department page. It also breaks down this information by supervisor level, job code, and grade. If you currently had a head count of two in department 100, one with a supervisor level of S10 and one with a supervisor level of S20, you could change the settings to two for S10 and two for S20, resulting in a projected total head count of four for the department.

---

**Note:** If you do not want to use headcount planning, then do not enter any data on the Headcount Plan by Department page for that organization plan.

---

## Headcount Plan Listing Page

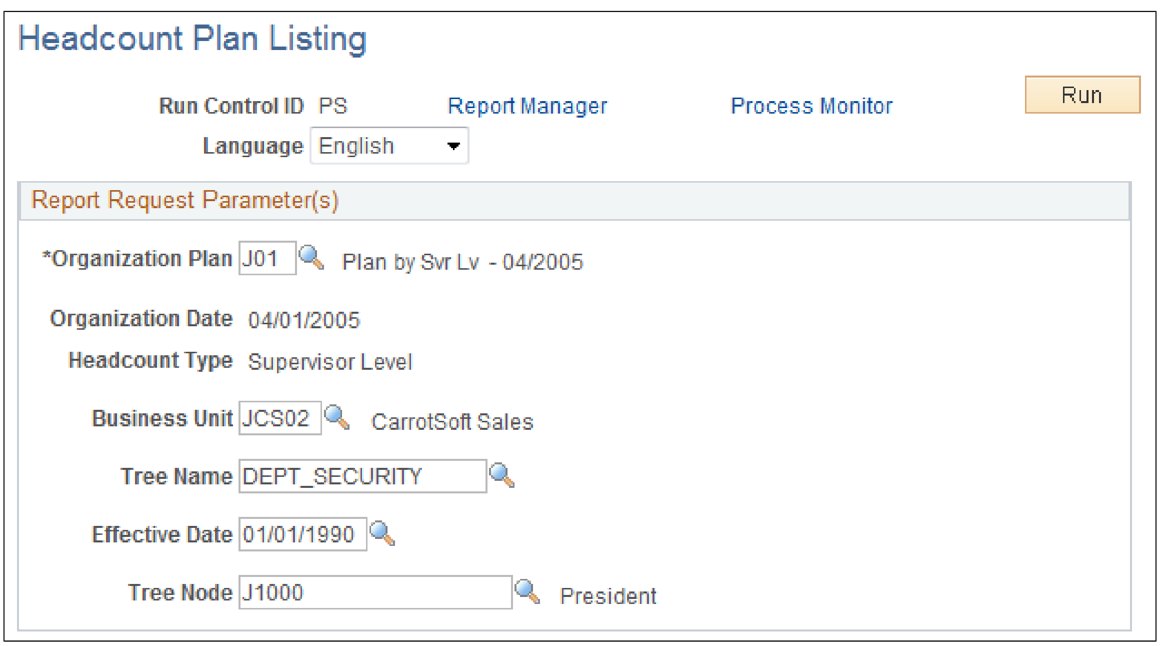
Use the Headcount Plan Listing page (RC_IDO_HC_RPT_JPN) to use this page to run a report that compares the head count goals established for departments with the simulated result of the organization plan.

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing, Headcount Plan Listing

**Image: Headcount Plan Listing page**

This example illustrates the fields and controls on the Headcount Plan Listing page. You can find definitions for the fields and controls later on this page.




Enter values on this page that will be used to compare the head count goals established for departments with the simulated result of the organization plan.

# Aligning Employee Placement Plans with the New Organization Structure

These topics provide an overview of employee placement plans and discuss how to:

- List Ido.
- Transfer entries by department.
- Transfer entries by using trees.
- Select *tamatsuki* transfer candidates.
- Enter *tamatsuki* transfers.
- List *tamatsuki* placements.
- Transfer *tamatsuki* data to the job record.
- Delete and maintain transfer data.

## Understanding Employee Placement Plans

Multiple ways exist to create employee placement plans. The first way is to use the Transfer Entry by Dept page. With this method, you enter the placement by department. The second method is to use the Transfer Entry with Trees page. You see the current organization structure and placement, and you enter plans.

These methods are similar in that you create an Ido candidate listing, use the Transfer Entry by Dept or Transfer Entry with Trees pages, and then use the Transfer Data Maintenance page, if required. You can then check, undo, and adjust placements using the Transfer Data Maintenance page.

The third method is the Tamatsuki Transfer method to enter placements. The Tamatsuki Transfer is an optional step. Using this method, you create an Ido candidate listing, use the Transfer Entry by Dept or Transfer Entry with Trees pages, use the Tamatsuki Transfer Candidate Entry, Tamatsuki Transfer Entry, Tamatsuki Placement Check List, and Tamatsuki to Transfer Record pages, and then you use the Transfer Data Maintenance page, if required.

Security setup does not prevent users from transferring employees. Consequently, limit access to the Mass Employee Transfer page to trusted users only. Security access is invoked whenever a user clicks the View links on the Transfer Entry by Dept and Transfer Entry by Tree pages.

## Pages Used For Employee Placement Plans

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Ido Candidate Listing | RC_IDO_EE_LIST_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Candidate Listing, Ido Candidate Listing | Run a report that lists current information for employees. Use it to help plan future organizational changes. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Transfer Entry by Dept | IDO_MASS_TRANS_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry by Dept, Transfer Entry by Dept | Transfer multiple employees from one department to another. |
| Transfer Entry with Trees | IDO_XFR_TREE_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry with Trees, Transfer Entry with Trees | Transfer employees between departments using trees. |
| Tamatsuki Transfer Candidates | IDO_CANDIDATE_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Candidates, Tamatsuki Transfer Candidates | Specify a list of tamatsuki candidates. |
| Tamatsuki Transfer Entry | IDO_TAMATSUKI_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Entry, Tamatsuki Transfer Entry | Assign tamatsuki candidates to posts. |
| Tamatsuki Placement Check List | RC_IDO_TAM_CL_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Placement Check List, Tamatsuki Placement Check List | Summarize the tamatsuki transfers that are planned. |
| Tamatsuki to Transfer Record | RC_IDO_TAM_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki to Transfer Record, Tamatsuki to Transfer Record | Copy data from the record IDO_TAMATSU_JPN to the record IDO_FUT_UPD_JPN. |
| Transfer Data Maintenance | IDO_MAINT_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Data Maintenance, Transfer Data Maintenance | Maintain the Future Update record. |

## Candidate Listing Page

Use the Ido Candidate Listing page (RC_IDO_EE_LIST_JPN) to run a report that lists current information for employees.

Use it to help plan future organizational changes.

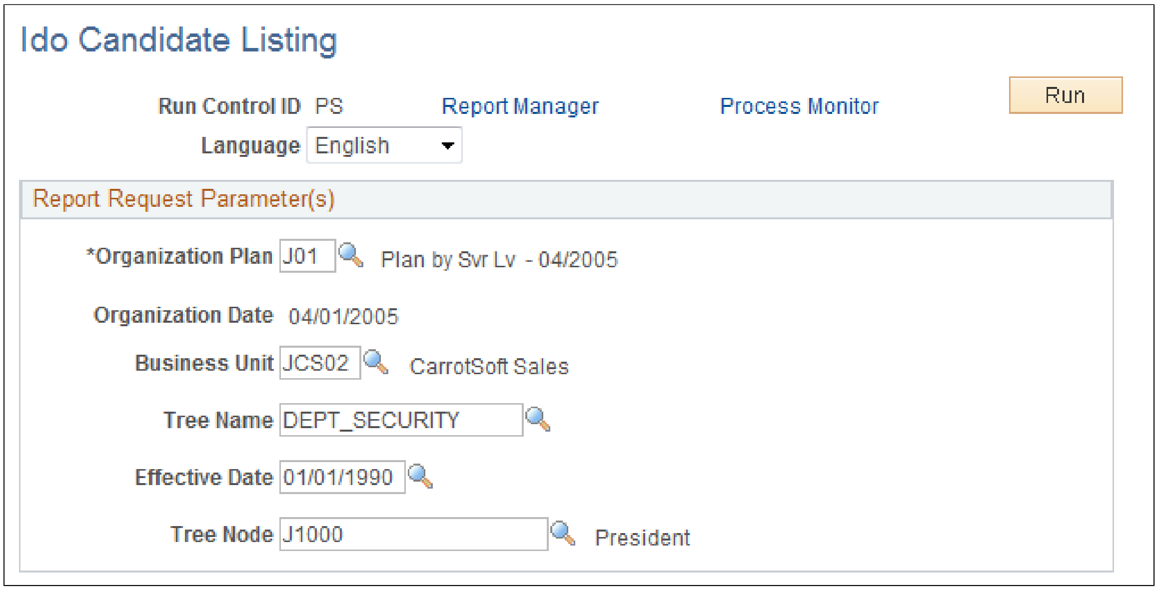
 

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Candidate Listing, Ido Candidate Listing

**Image: Ido Candidate Listing page**

This example illustrates the fields and controls on the Ido Candidate Listing page. You can find definitions for the fields and controls later on this page.




Use this page to run a report to determine which employees are subject to a reorganization or tamatsuki placement. The report is in comma delimited file (CSV) format so that you can open the file as a spreadsheet.

## Transfer Entry by Dept Page

Use the Transfer Entry by Dept page (IDO_MASS_TRANS_JPN) to transfer multiple employees from one department to another.

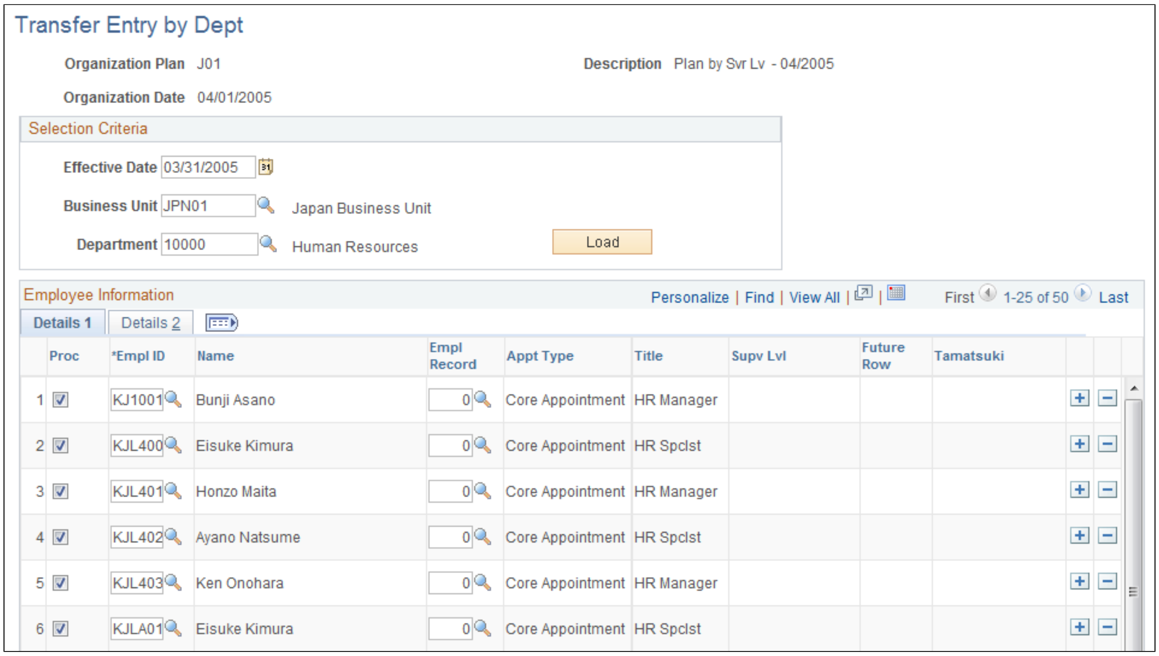
 

## Navigation

Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry by Dept, Transfer Entry by Dept

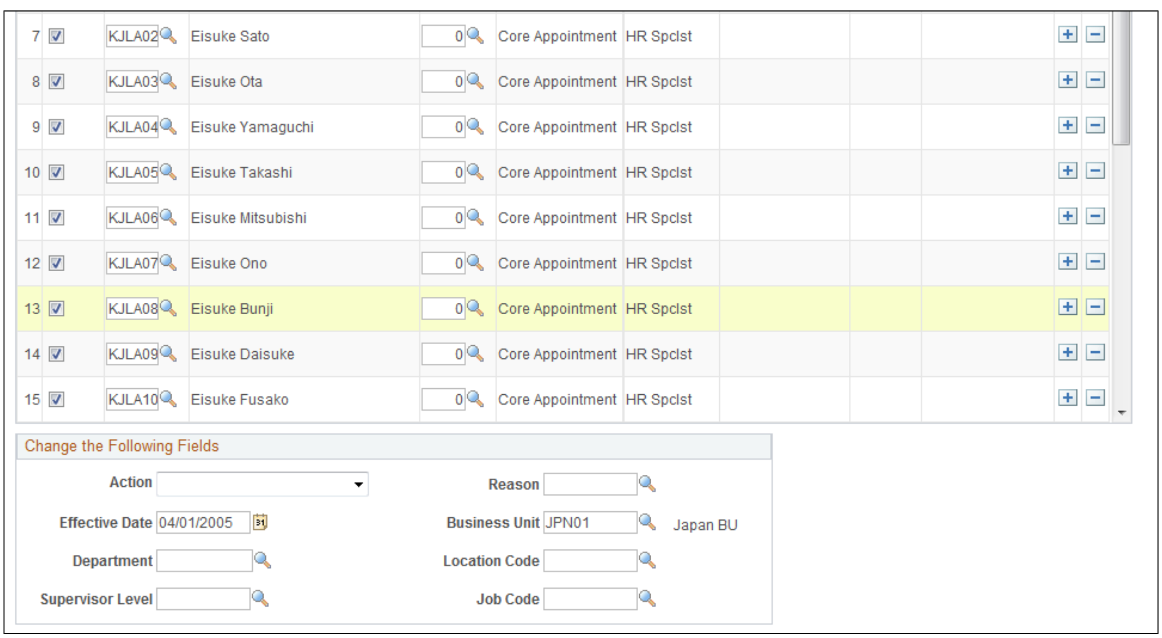
### Image: Transfer Entry by Dept page (1 of 2)

This example illustrates the fields and controls on the Transfer Entry by Dept page (1 of 2). You can find definitions for the fields and controls later on this page.




### Image: Transfer Entry by Dept page (2 of 2)

This example illustrates the fields and controls on the Transfer Entry by Dept page (2 of 2). You can find definitions for the fields and controls later on this page.



| | |
|---|---|
| **Load** | Click the Load button to list the employees for a particular business unit and department who are available for transfer to another department. |
| **Proc (Process)** | The Proc check box is selected by default. When it is selected, employees are transferred to another department or have other job-related information changed. The changes are applied when the page is saved.<br><br>For example, department 100 is being closed. Half the employees in that department will be assigned to department 110, and the other half will be assigned to department 120. First, open this page and display all employees in department 100. Then enter a transfer to department 110 in the Change the Following Fields group box and deselect the Proc check box for those employees who should be transferred to department 120. After saving the page, enter a transfer for department 120, deselect the employees in department 110, reselect the employees to be transferred to department 120, and save the page again. |
| **Action** | Select the action to use for inserting a new Job row. |
| **Reason** | Select a code to specify why the value is being changed. |
| **Effective Date** | Enter a date to specify when the change becomes effective. |
| **Business Unit, Department, Location Code, Supervisor Level, and Job Code** | Enter values in these fields to specify new information for the employees selected.<br><br>**Note:** These fields should be left blank if a user does not want to change the data for the employees. For example, if you want to move employees from department 100 to 110 but want them to keep their old job codes, you would leave the Jobcode field blank on the page.<br>On the other hand, if you want to assign all the employees to job code J200 and change their departments, you would enter *J200* in the Jobcode field. |

## Transfer Entry with Trees Page

Use the Transfer Entry with Trees page (IDO_XFR_TREE_JPN) to transfer employees between departments using trees.

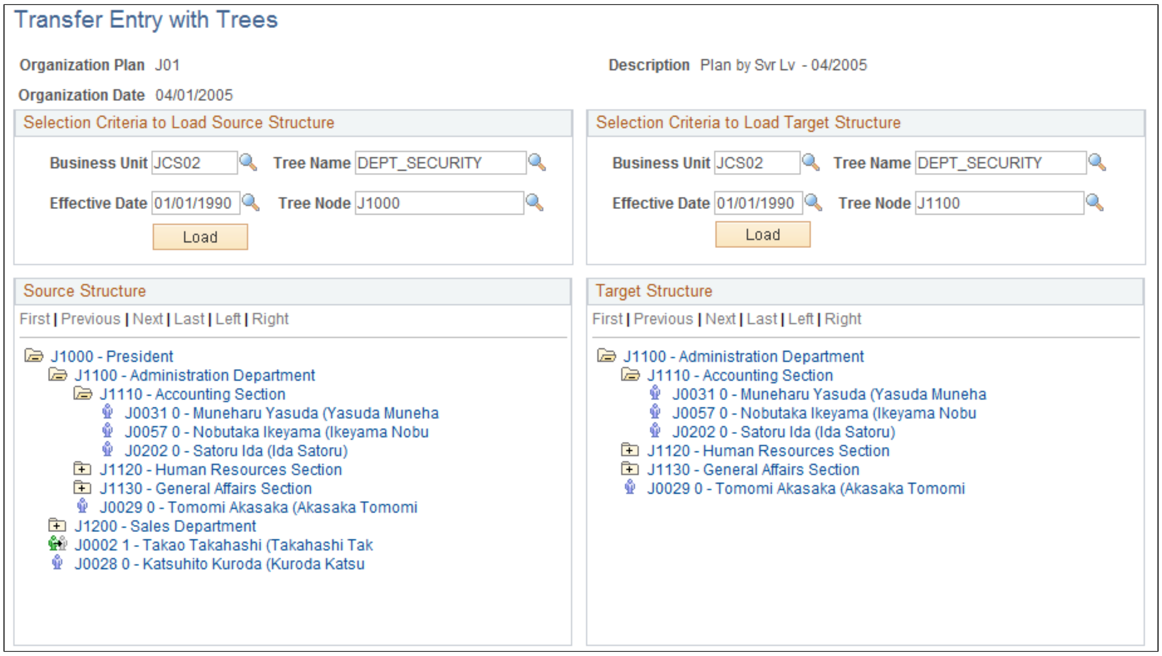
 

### Navigation

Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry with Trees, Transfer Entry with Trees

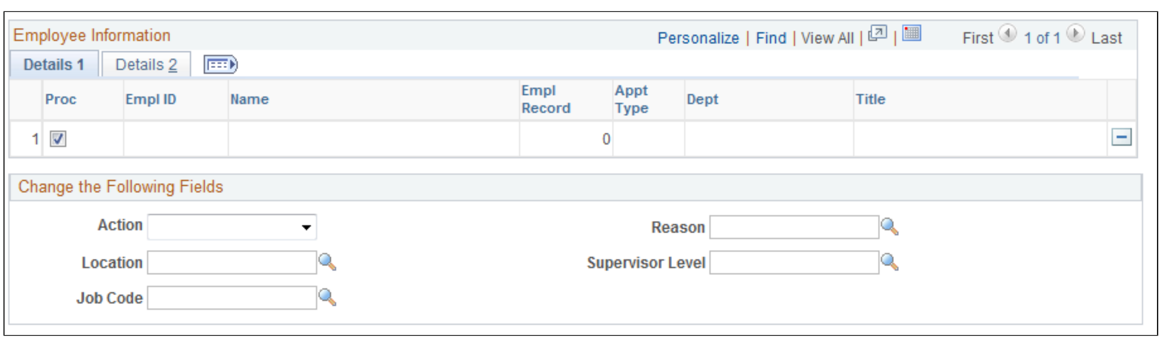
### Image: Transfer Entry with Trees page (1 of 2)

This example illustrates the fields and controls on the Transfer Entry with Trees page (1 of 2). You can find definitions for the fields and controls later on this page.




### Image: Transfer Entry with Trees page (2 of 2)

This example illustrates the fields and controls on the Transfer Entry with Trees page (2 of 2). You can find definitions for the fields and controls later on this page.




---

**Note:** Before using this page, consider and decide on each employee's transfer data, including locations, supervisor levels, job codes, and actions and reasons.

---

Enter values for the Business Unit, Tree Name, Effective Date,and Tree Node fields in both the Selection Criteria to Load Source Structure group box and the Selection Criteria to Load Target Structure group box. Click the respective Load buttons for each section.

To transfer entries by using trees:

1. Select an employee to be transferred from the Selection Criteria to Load Source Structure tree, and click the Department folder to list all employees in the department.
2. Click the employee's name to display information on the Details 1 and Details 2 grids.
3. View information in the Details 1 and Details 2 grids, as necessary.
4. Enter values in the Action and Reason fields.

   The Location, Supervisor Level, and Jobcode fields are optional.
5. Click a new department for the employee in the Selection Criteria to Load Target Structure tree.

## Tamatsuki Transfer Candidates Page

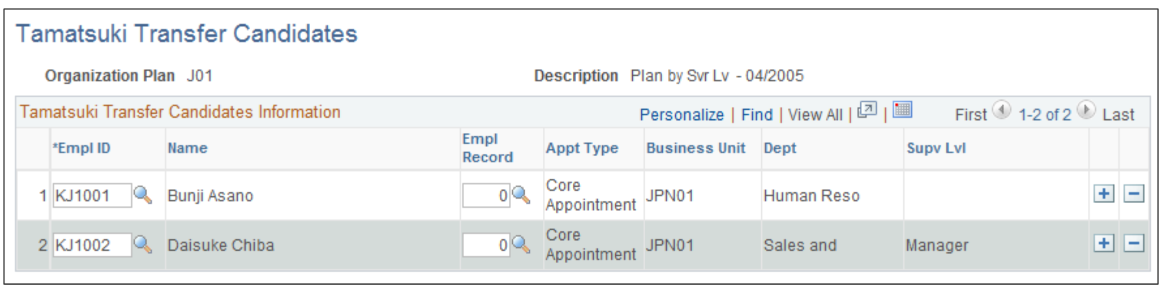
Use the Tamatsuki Transfer Candidates page (IDO_CANDIDATE_JPN) to specify a list of tamatsuki candidates.

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Candidates, Tamatsuki Transfer Candidates

**Image: Tamatsuki Transfer Candidates page**

This example illustrates the fields and controls on the Tamatsuki Transfer Candidates page. You can find definitions for the fields and controls later on this page.


Tamatsuki Transfer Candidates

Organization Plan J01 Description Plan by Svr Lv - 04/2005

Tamatsuki Transfer Candidates Information Personalize | Find | View All | | First 1-2 of 2 Last

| | *Empl ID | Name | Empl Record | Appt Type | Business Unit | Dept | Supv Lvl |
|---|---|---|---|---|---|---|---|
| 1 | KJ1001 | Bunji Asano | 0 | Core Appointment | JPN01 | Human Reso | |
| 2 | KJ1002 | Daisuke Chiba | 0 | Core Appointment | JPN01 | Sales and | Manager |

Enter employees who are potentially candidates for transfer using the Tamatsuki transfer method.

---

**Note:** Use this page to begin the Tamatsuki process. Select employee IDs that will appear on other pages that are part of the tamatsuki functionality.

---

**Note:** Once employees have been assigned as a tamatsuki transfer candidate, they cannot be transferred using the Transfer Entry by Dept or Transfer Entry by Tree pages.

---

## Tamatsuki Transfer Entry Page

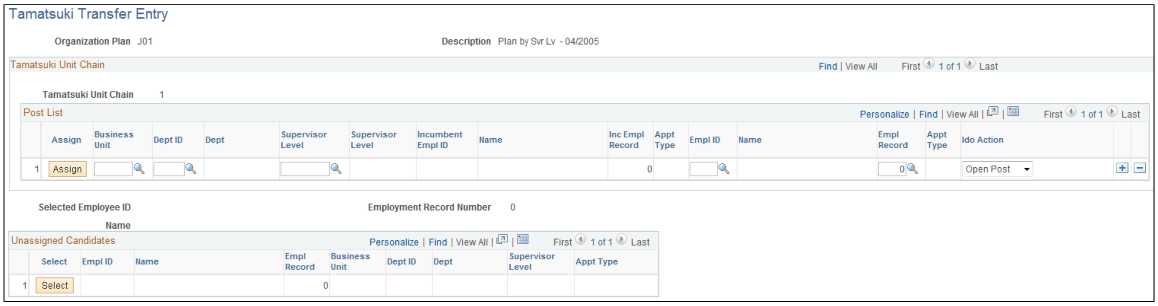
Use the Tamatsuki Transfer Entry page (IDO_TAMATSUKI_JPN) to assign tamatsuki candidates to posts.

### Navigation

Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Entry, Tamatsuki Transfer Entry

### Image: Tamatsuki Transfer Entry page

This example illustrates the fields and controls on the Tamatsuki Transfer Entry page. You can find definitions for the fields and controls later on this page.




---

**Note:** When the user needs to change the middle of the Tamatsuki Chain (Unit), the user should delete the whole unit and enter information from the first row.

---

## Post List

**Assign**

Use this button to assign the selected employee to the open post. When no one is selected from the unassigned candidate grid, the selected employee's post is entered on the first row.

**Business Unit**

This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.

**Dept ID**

This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.

**Supervisor Level**

This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.

**Ido Action**

*Open Post* is the default value when you insert a new row. When an employee is placed in an open post, the system automatically inserts a new row so that another employee can be assigned to the open (vacated) post. Possible values are:

- *Assigned* status indicates that the post is filled.
- *Close Post* status indicates that a post is terminated.
- *Create AA* status is used to assign an employee an additional appointment.

  Two circumstances can result in an additional appointment. The first is a post that was a main appointment and then changed to an additional appointment. The second is a post that is an additional appointment and remains an additional appointment.

---

**Note:** If the Additional Appointment Enabled field on the Installation - Country Specific page is not selected, additional appointment related data does not appear on this page.

---

### Unassigned Candidates

**Select**

In the Unassigned Candidates group box, click the Select button next to the row of the employee that will be assigned to a post. The Selected Employee ID field shows the currently selected employee.

## Tamatsuki Placement Check List Page

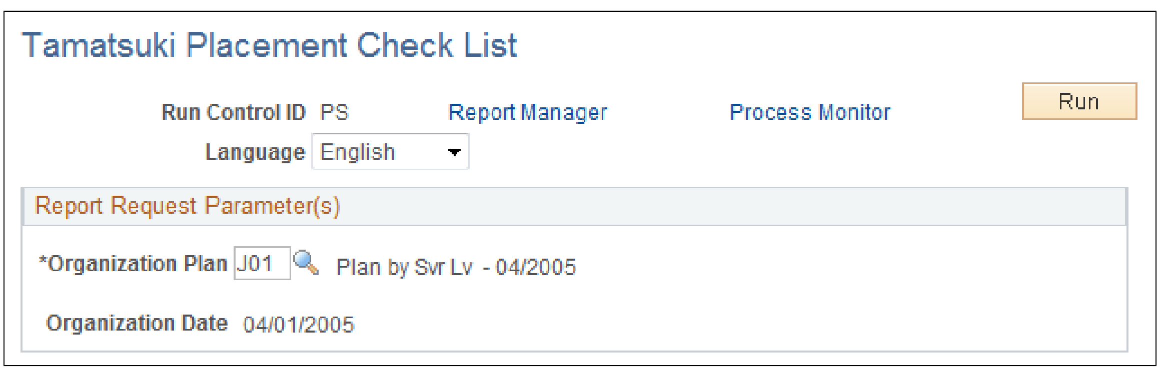
Use the Tamatsuki Placement Check List page (RC_IDO_TAM_CL_JPN) to summarize the tamatsuki transfers that are planned.

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Placement Check List, Tamatsuki Placement Check List

**Image: Tamatsuki Placement Check List page**

This example illustrates the fields and controls on the Tamatsuki Placement Check List page. You can find definitions for the fields and controls later on this page.




Use this report to confirm that placements align with the organizational plan and verify that candidates have been placed in the correct posts or that the posts have been assigned the correct candidates.

## Tamatsuki to Transfer Record Page

Use the Tamatsuki to Transfer Record page (RC_IDO_TAM_JPN) to copy data from the record IDO_TAMATSU_JPN to the record IDO_FUT_UPD_JPN.

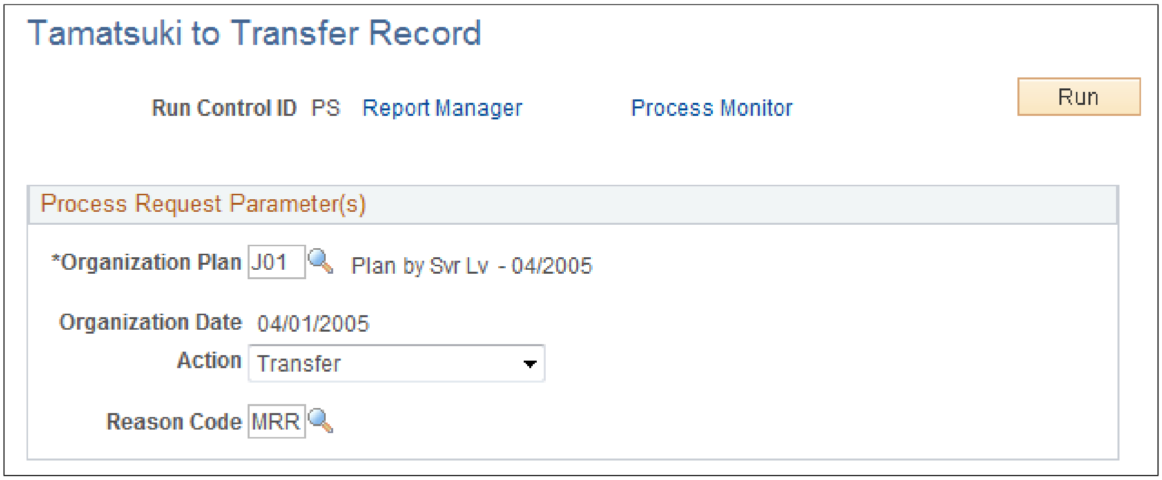
 

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki to Transfer Record, Tamatsuki to Transfer Record

**Image: Tamatsuki to Transfer Record page**

This example illustrates the fields and controls on the Tamatsuki to Transfer Record page. You can find definitions for the fields and controls later on this page.




Tamatsuki data is tracked by the IDO_TAMATSU_JPN record. This process moves the data to the IDO_FUT_UPD_JPN record. The Mass Employee Transfer process takes the data from the IDO_FUT_UPD_JPN record and inserts it into the Job record.

---

**Note:** If the Tamatsuki to Transfer Record process is never run, the Mass Employee Transfer process will not insert the tamatsuki post changes into the Job record.

---

## Transfer Data Maintenance Page

Use the Transfer Data Maintenance page (IDO_MAINT_JPN) to maintain the Future Update record.

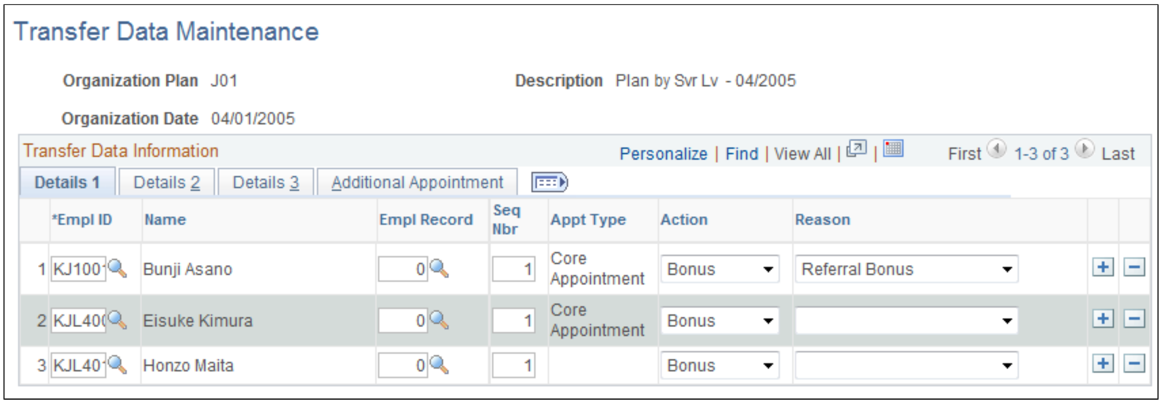
 

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Data Maintenance, Transfer Data Maintenance

**Image: Transfer Data Maintenance page**

This example illustrates the fields and controls on the Transfer Data Maintenance page. You can find definitions for the fields and controls later on this page.




---

**Note:** Use caution in modifying information on this page because few validations are made here. The primary purpose of the page is to delete unwanted transfers. It is not intended for data entry that you make on other pages in the Tamatsuki process. If you perform actions beyond deleting rows on this page, be careful to validate your entries.

---

# Finalizing Organization and Employee Placement Plans

These topics provide an overview of finalizing organization and employee placement plans and discuss how to:

- Create an Organization Plan checklist.
- Create a Headcount Plan listing.
- Run the Future Employee Assignment List.
- Run the Transfers After Organization Change query.
- Run the Ido Employee Listing report.
- Run the Mass Employee Transfer process.
- Clean up temporary data.

## Understanding Finalizing Organization and Employee Placement Plans

In order to finalize organization and employee placement plans, a number of checks should be run to ensure that the intended structure is correct and that changes to the organization, employees, and departments are acceptable. HR administrators should also review the Ido Employee Listing and Future Employee Assignment List before the Mass Employee Transfer process.

## Pages Used For Finalizing Organization and Employee Placement Plans

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Org Plan Checklist | RC_IDO_AUD1_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Org Plan Checklist, Org Plan Checklist | • Run the Employees in Inactive Department report PER069JP) to list employees who will be in inactive departments.<br>• Run the Open Post Checklist report ( PER070JP) to list the Open Post Checklist. |
| Headcount Plan Listing | RC_IDO_HC_RPT_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing, Headcount Plan Listing | Use this report to list the head count of the new organization structure. |
| Future Empl Assignment List | RC_IDO_FUT_ASN_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Future Empl Assignment List, Future Empl Assignment List | Use this report to simulate the way that the organization would look at an employee level if the selected organization plan is processed. |
| Query Viewer | QUERY_VIEWER_SRCH | Reporting Tools, Query, Query Viewer | Run the HR_ TRANSAFTERORGCHG query to view a list of transferred employees that are affected after the organization change. |
| Ido Employee Listing | RC_IDO_AUD2_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Employee Listing, Ido Employee Listing | This report summarizes the changes that will be made if the selected organization plan is processed. |
| Mass Employee Transfer | RC_IDO_MASS_TR_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Mass Employee Transfer, Mass Employee Transfer | Run this process to copy data from the Update Transfer Data table and insert it into the Job record. |
| Temporary Data Cleanup | RC_IDO_CLEAN_JPN | Workforce Administration, Collective Processes, Mass Organization Change JPN, Temporary Data Cleanup, Temporary Data Cleanup | Run this process to delete data associated with an organization plan. |

## Org Plan Checklist Page

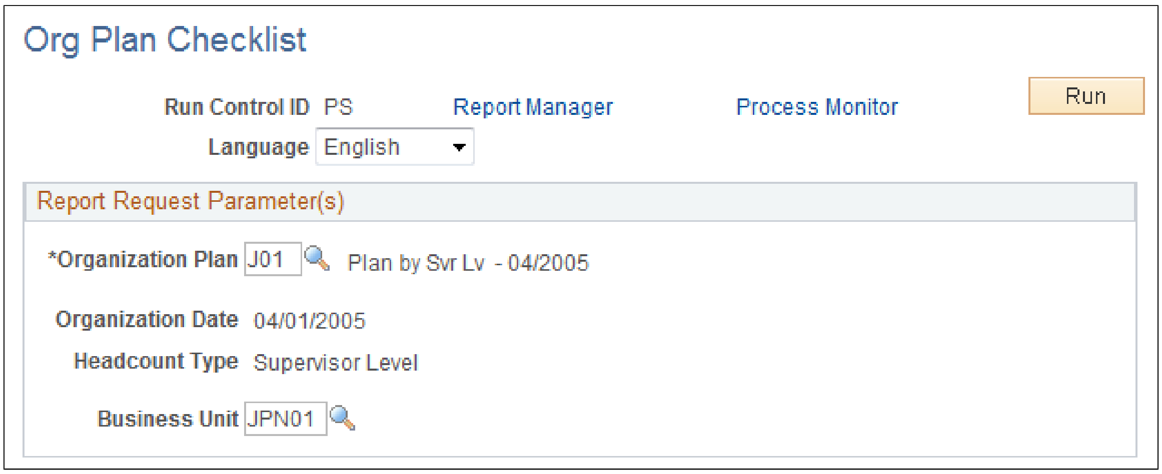
Use the Org Plan Checklist page (RC_IDO_AUD1_JPN) to run the Employees in Inactive Department report PER069JP) to list employees who will be in inactive departments and run the Open Post Checklist report (PER070JP) to list the Open Post Checklist.

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Org Plan Checklist, Org Plan Checklist

**Image: Org Plan Checklist page**

This example illustrates the fields and controls on the Org Plan Checklist page. You can find definitions for the fields and controls later on this page.




Use this page to run the Employees in Inactive Department (PER069JP) report and the Open Post Checklist report (PER070JP).

The purpose of the Open Post Checklist report is to list cases where the actual head count in a department (after simulating the insert into the Job record) does not match the head count goals entered in the Headcount Plan by Department page. The Open Post checklist report only lists head count when the goal and actual numbers do not match.

## Headcount Plan Listing Page

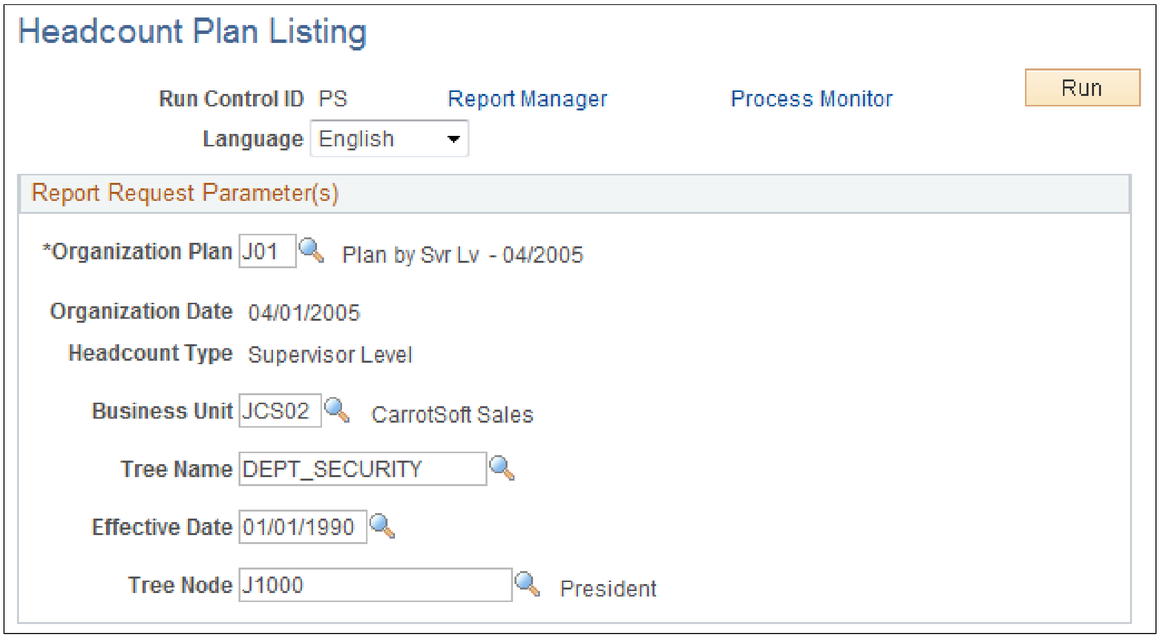
Use the Headcount Plan Listing page (RC_IDO_HC_RPT_JPN) to use this report to list the head count of the new organization structure.

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing, Headcount Plan Listing

**Image: Headcount Plan Listing page**

This example illustrates the fields and controls on the Headcount Plan Listing page. You can find definitions for the fields and controls later on this page.




Use the Actual Headcount Report to list the actual headcount of an organization plan. This report is the same as the Open Post Checklist report except that it lists both matching and unmatching headcount numbers.

## Future Empl Assignment List Page

Use the Future Empl Assignment List page (RC_IDO_FUT_ASN_JPN) to use this report to simulate the way that the organization would look at an employee level if the selected organization plan is processed.

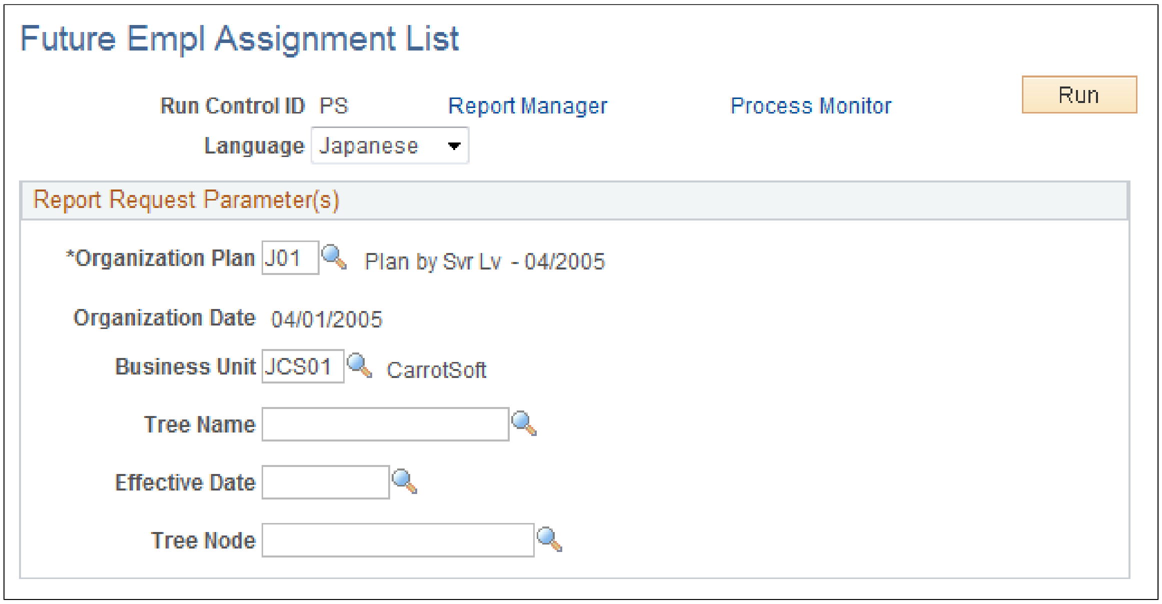
 

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Future Empl Assignment List, Future Empl Assignment List

**Image: Future Empl Assignment List page**

This example illustrates the fields and controls on the Future Empl Assignment List page. You can find definitions for the fields and controls later on this page.




Use this report to simulate the way that the organization would look at an employee level if the organization plan is processed.

## Query Viewer Page

Use the Query Viewer page (QUERY_VIEWER_SRCH) to run the HR_TRANSAFTERORGCHG query to view a list of transferred employees that are affected after the organization change.

**Navigation**

Reporting Tools, Query, Query Viewer

The purpose of this query is to list employees with an effective date greater than the Organization Plan effective date. Employees listed on this report will require manual intervention after the Mass Employee Transfer process has been run.

For example, an employee has the following job data:

| ***Date*** | ***Action*** | ***DeptID*** |
|---|---|---|
| January 1, 2003 | HIR | 100 |
| February 1, 2004 | PRO | 200 |

You decide to use the Ido functionality to transfer an employee to department 300 effective on January 1, 2004, before the February 1 date that already exists in the employee's record. Effective February 1, this transfer will be canceled due to the future-dated row. In most cases, you will want to update the February 1, 2004 date to reflect the new department, which is 300. This query enables you to detect when this type of situation occurs and manually update employees records after you process the Ido job insert.

## Ido Employee Listing Page

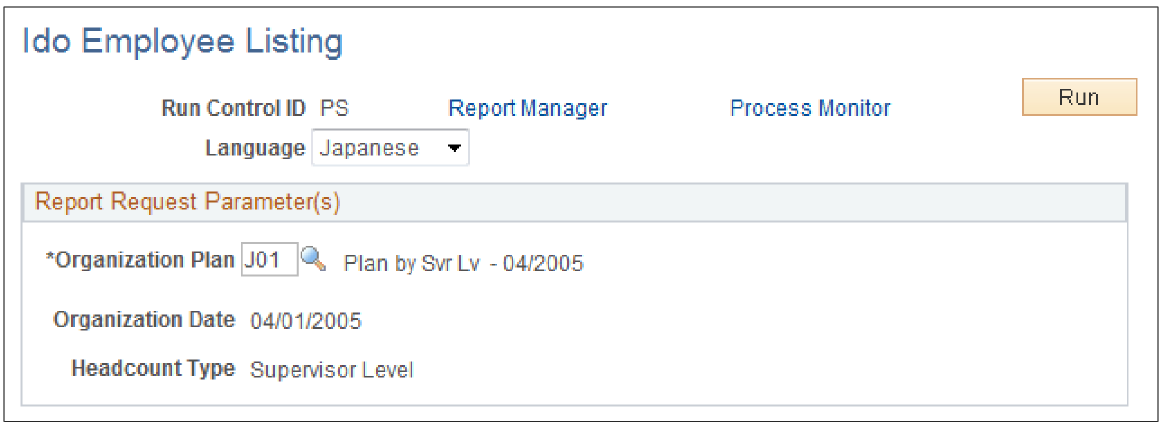
Use the Ido Employee Listing page (RC_IDO_AUD2_JPN) to this report summarizes the changes that will be made if the selected organization plan is processed.

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Employee Listing, Ido Employee Listing

**Image: Ido Employee Listing page**

This example illustrates the fields and controls on the Ido Employee Listing page. You can find definitions for the fields and controls later on this page.




This report summarizes the changes that will be made if the organization plan is processed. The report is in CSV format so that you can open the file as a spreadsheet.

## Mass Employee Transfer Page

Use the Mass Employee Transfer page (RC_IDO_MASS_TR_JPN) to run this process to copy data from the Update Transfer Data table and insert it into the Job record.

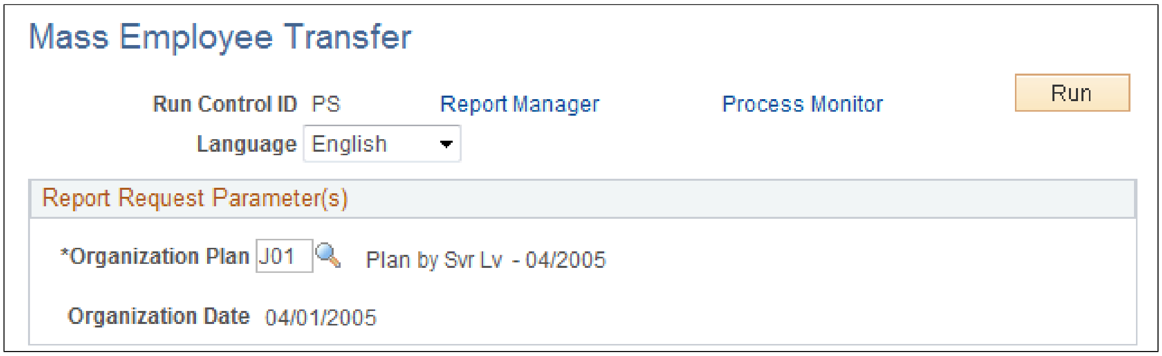
 

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Mass Employee Transfer, Mass Employee Transfer

**Image: Mass Employee Transfer page**

This example illustrates the fields and controls on the Mass Employee Transfer page. You can find definitions for the fields and controls later on this page.




After you decide which organization plan to use, run the batch Mass Employee Transfer process. This process updates the database with the new the organization plan. It copies data from the Update Transfer Data table and inserts it into the Job record.

If multiple job rows exist with the same effective date, the same effective date is used, however the effective sequence is incremented. For example, if you want to insert a row into the Job table effective January 1, 2004, but a January 1, 2004 row already exists (with an effective sequence of *0*), the process will insert the new row with an effective sequence of *1*.

## Temporary Data Cleanup Page

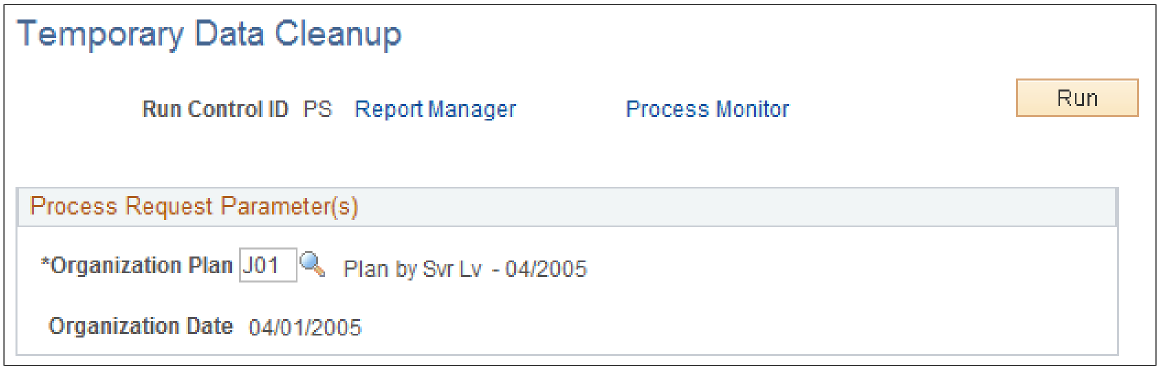
Use the Temporary Data Cleanup page (RC_IDO_CLEAN_JPN) to run this process to delete data associated with an organization plan.

**Navigation**

Workforce Administration, Collective Processes, Mass Organization Change JPN, Temporary Data Cleanup, Temporary Data Cleanup

**Image: Temporary Data Cleanup page**

This example illustrates the fields and controls on the Temporary Data Cleanup page. You can find definitions for the fields and controls later on this page.




Run this process after the Mass Employee Transfer process completes successfully. After the employees are reorganized and their data inserted into the Job record, there is no longer a need to keep the planning information in the database. For the organization plan selected, this process deletes rows from these tables:

- IDO_FUT_UPD_JPN
- IDO_TAMATSU_JPN
- IDO_CANDIDT_JPN
- IDO_HC_DEPT_JPN

## Chapter 16

# Updating Person and Job Information

## Understanding the Process of Updating Person and Job Information

A person's history with your organization may involve many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, and so on. To maintain a complete history of the person's tenure, enter these changes regularly in PeopleSoft Human Resources.

### Updating Job Information When You've Implemented PeopleSoft Payroll for North America

When you modify job data that affects payroll, the system marks payline records for recalculation where needed. When payroll is recalculated, the payroll system uses the new information.

### Updating Job Information When You've Implemented PeopleSoft Benefits Administration

When you modify job or employment data that affects benefits, the system sets the flags that control event maintenance to indicate that a change has occurred. Then, during the next event maintenance process, the system processes the event.

## Changing Personal Data

To update personal information without changing job information, use the Modify a Person component (PERSONAL_DATA), which contains the same pages that you use to add personal data records with the exception of the Organizational Relationship page:

| ***Component*** | ***Pages in the Group*** | ***Usage*** |
|---|---|---|
| Personal Data<br><br>• Workforce Administration, Personal Information, Modify a Person<br><br>• Workforce Administration, Personal Information, Biographical, Modify a Person<br><br>• Stock, Modify a Person<br><br>• Administer Training, Modify a Person | Biographical Details (PERSONAL_ DATA1)<br><br>Contact Information (PERSONAL_ DATA2)<br><br>Regional (PERSONAL_DATA3) | Update a person's personal information without changing job information. |

### Related Links

Updating Personal Data

Adding a Person

# Changing Job Data

Use one of the three update components on the Workforce Administration menu to update a person's job data. These components are configured to simplify updating a person's record in different business situations. The following table describes each component and its navigational path:

| ***Component*** | ***Pages in the Component*** | ***Usage*** |
|---|---|---|
| Job Data<br><br>Workforce Administration, Job Information, Job Data | Work Location (JOB_DATA1)<br><br>Job Information (JOB_DATA_ JOBCODE)<br><br>Job Labor (JOB_LABOR)<br><br>Payroll (JOB_DATA2)<br><br>Salary Plan (JOB_DATA_SALPLAN)<br><br>Compensation (JOB_DATA3)<br><br>Employment Information ( EMPLOYMENT_DTA1)<br><br>Job Earnings Distribution (JOB_DATA_ ERNDIST)<br><br>Benefit Program Participation (JOB_ DATA_BENPRG) | Work with historical effective-dated rows of the person's job data (work with past, present, and future job data). |
| Current Job<br><br>Workforce Administration, Job Information, Current Job | Work Location (JOB_DATA1)<br><br>Job Information (JOB_DATA_ JOBCODE)<br><br>Job Labor (JOB_LABOR)<br><br>Payroll (JOB_DATA2)<br><br>Salary Plan (JOB_DATA_SALPLAN)<br><br>Compensation (JOB_DATA3)<br><br>Employment Information ( EMPLOYMENT_DTA1)<br><br>Job Earnings Distribution (JOB_DATA_ ERNDIST)<br><br>Benefit Program Participation (JOB_ DATA_BENPRG) | Update only the person's *current* job record. Doing so improves processing time and system performance. You can add new current effective-dated rows to the job record, but you cannot see or add historical job records. |

| ***Component*** | ***Pages in the Component*** | ***Usage*** |
|---|---|---|
| Pay Rate Change<br><br>Workforce Administration, Job Information, Pay Rate Change | Employee Profile (PAY_RT_ CHANGE1)<br><br>Salary Plan (PAY_RT_CHG_ SALPLAN)<br><br>Compensation (PAY_RT_CHANGE2)<br><br>Job Earnings Distribution (PAY_RT_ CHANGE3) | Change the person's compensation without changing job data. |

### Updating Compensation Packages Without Using an Update Component

If you update job record data without using one of the update components, for example when initially loading data or when using your own written processes, the system does not update the calculated fields on the job record. To update the calculated fields, run the Employee Compensation process. If you update job record data by using one of the update components or a component interface built on one of the update components, you do not need to run the Employee Compensation process because the update components run all PeopleCode that is run online (including updating calculated fields). Using the update components is the best way to update the job table because the system runs all business logic.

See "Refreshing Worker Compensation Packages *(PeopleSoft HCM 9.2: Human Resources Administer Compensation)*".

### Related Links

Understanding Job Data

## Locating Personnel Records

The first time that you open an update page, the system displays a search page for you to select the person on whose records you want to work. If you do not know the person's ID, use the page to search for the correct record by name, partial last name, alternate character name, department, set ID, or employment status. If you prefer, use the Search By National ID page to find a person's record by using a national ID.

## Changing and Deleting IDs

These topics provide an overview of ID modification and discuss how to:

- Modify IDs.
- Delete IDs.
- View the ID change and delete process log.

## Understanding ID Modification

IDs are the means by which you identify employees, contingent workers, and people of interest throughout PeopleSoft Human Resources. Maintaining a precise roster of IDs is critical to the accuracy of your data.

To help you keep accurate records, you can change or delete IDs. Though you rarely need to do this, it is necessary in cases where you entered an ID in error or where you no longer need an ID.

The ID modification process changes the ID in every record where PeopleSoft Human Resources uses it, so keep in mind that modifications might affect other functions, such as payroll and benefits processing. Deleting an ID also deletes all security profiles associated with the ID; therefore, it is recommended that you delegate this responsibility to your system administrator.

### Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Restricting the Deletion of IDs *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Pages Used to Change and Delete Employee IDs

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| ID Change | RUNCTL_ID_CHANGE | Set Up HCM, System Administration, Database Processes, ID Change, ID Change | Modify IDs. |
| ID Delete | RUNCTL_ID_CHANGÈ | Set Up HCM, System Administration, Database Processes, ID Delete, ID Delete | Remove IDs from the system.<br><br>If you've already run payroll with this ID included, you must manually delete payroll records, such as tax and deduction records. |
| ID Change/Delete Process Log | HR_PER502_LOG | Set Up HCM, System Administration, Database Processes, ID Change/Delete Process Log, ID Change/ Delete Process Log | Generate a log that lists which rows of data were affected when you changed or deleted an ID. |

## ID Change Page

Use the ID Change page (RUNCTL_ID_CHANGE) to modify IDs.

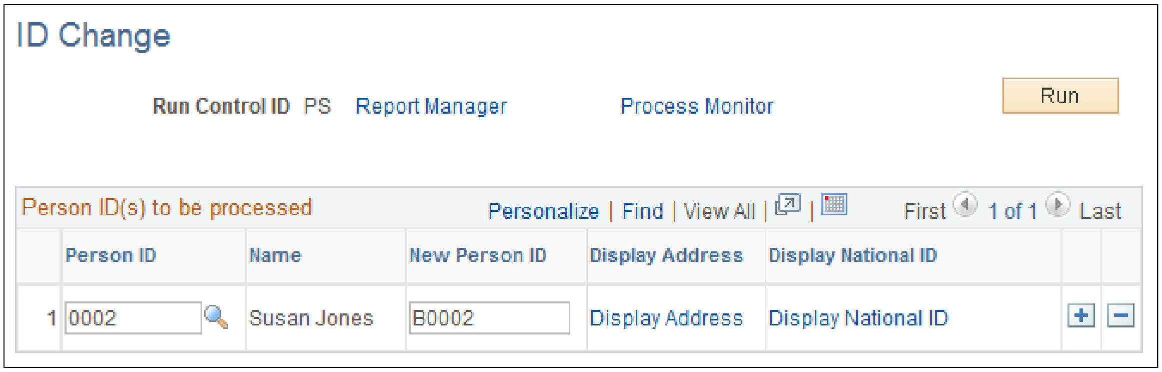
 

**Navigation**

Set Up HCM, System Administration, Database Processes, ID Change, ID Change

**Image: ID Change page**

This example illustrates the fields and controls on the ID Change page. You can find definitions for the fields and controls later on this page.




Select the current ID of the person that you want to process and enter the new ID. You can see display-only information on the person to whom the system or you assigned the original ID. Confirm that this is the correct person before you process the ID change.

## ID Delete Page

Use the ID Delete page (RUNCTL_ID_CHANGÈ) to remove IDs from the system.

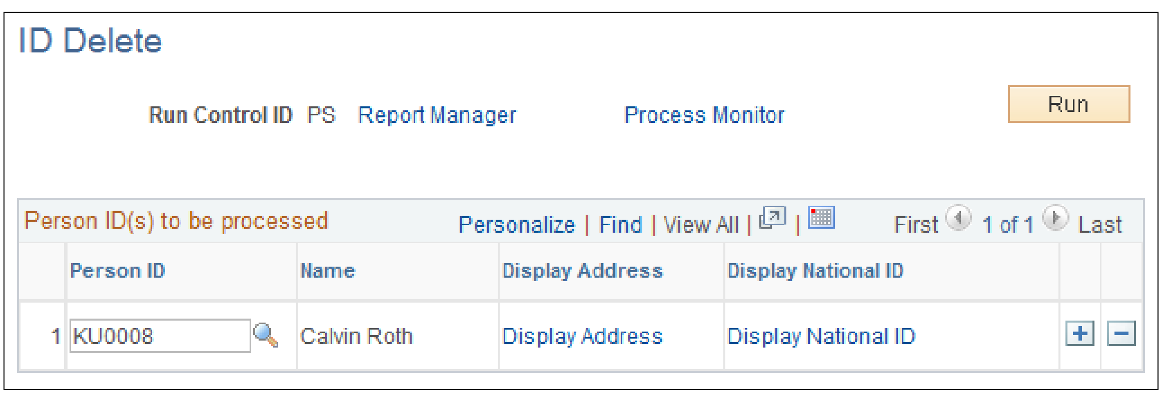
If you've already run payroll with this ID included, you must manually delete payroll records, such as tax and deduction records.

**Navigation**

Set Up HCM, System Administration, Database Processes, ID Delete, ID Delete

**Image: ID Delete page**

This example illustrates the fields and controls on the ID Delete page. You can find definitions for the fields and controls later on this page.




Enter information and then run the Change/Delete Person ID process.

### Person ID(s) to be processed

| | |
|---|---|
| **Person ID and Name** | Enter the ID that you want to delete. The system displays the name of the person with that ID. |
| **Display Address** | Click this link to access the page on which you can review address data to further determine if this is the correct ID to delete. |
| **Display National ID** | Click this link to access the Display National ID page, on which you can review the individual's national ID numbers to further determine if this is the correct ID to delete. |

After running the Change/Delete Person ID process, you can review the updated records for the specific individual on the ID Change/Delete Process Log.

## ID Change/Delete Process Log Page

Use the ID Change/Delete Process Log page (HR_PER502_LOG) to generate a log that lists which rows of data were affected when you changed or deleted an ID.

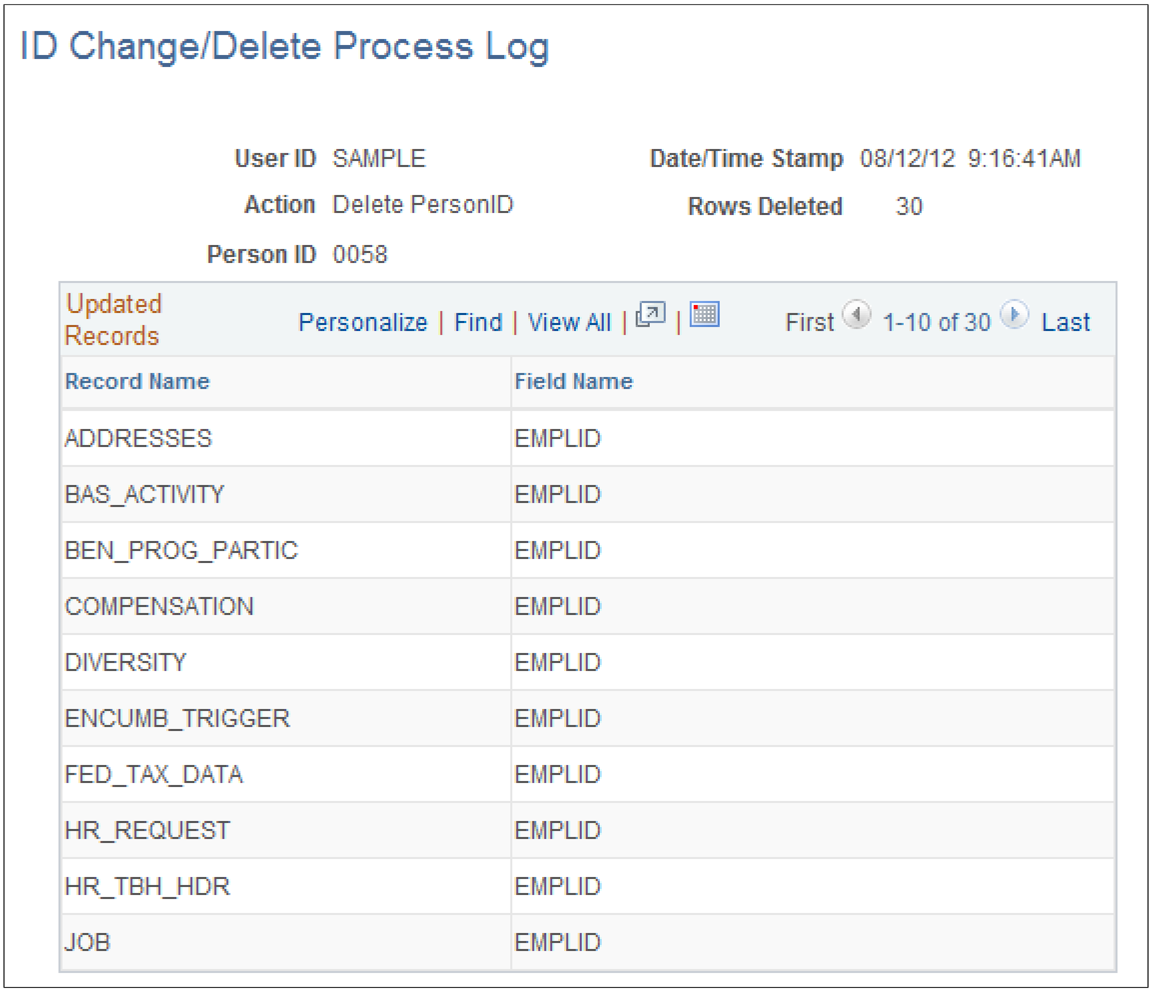
 

**Navigation**

Set Up HCM, System Administration, Database Processes, ID Change/Delete Process Log, ID Change/Delete Process Log

**Image: ID Change/Delete Process Log page**

This example illustrates the fields and controls on the ID Change/Delete Process Log page. You can find definitions for the fields and controls later on this page.



ID Change/Delete Process Log

User ID SAMPLE
Date/Time Stamp 08/12/12 9:16:41AM
Action Delete PersonID
Rows Deleted 30
Person ID 0058

Updated Records | Personalize | Find | View All | First 1-10 of 30 Last

| Record Name | Field Name |
| --- | --- |
| ADDRESSES | EMPLID |
| BAS_ACTIVITY | EMPLID |
| BEN_PROG_PARTIC | EMPLID |
| COMPENSATION | EMPLID |
| DIVERSITY | EMPLID |
| ENCUMB_TRIGGER | EMPLID |
| FED_TAX_DATA | EMPLID |
| HR_REQUEST | EMPLID |
| HR_TBH_HDR | EMPLID |
| JOB | EMPLID |

This page lists the records and fields that the system modified when you changed or deleted the selected ID.

## Deleting Employment Record Numbers (ERNs)

These topics provide an overview of deleting ERNs and discuss how to:

- Define Person ID/Employee Record field names maintained in the system.
- Define exceptions for record processing.
- Define exception tables for ERN deletion.

- Process ERN deletions.
- List and review ERN Delete process results.

## Understanding the Delete ERNs Component

Use the Delete ERNs component when ERNs are created in error or when ERNs exist for "no show" new hires (for example, workers who never reported for their first day of work and for whom there is no need to maintain an ERN). This component verifies that no combinations of PersonID/ERN exist that will cause problems for other processes, such as payroll or benefits, that are dependent on the ERN data.

Before using this component, consider these points:

- This feature is designed to be used by HR System Administrators who have a good understanding of implications and processes related to deleting data across systems. Functional business users should not have access to this feature.
- This feature is not designed to delete ERN records for PersonID/Empl_Rcd combinations that have been used in key processes such as payroll, benefits, and time reporting. If the ERN has been used in key processes, the system will block deletion.

  **Note:** If an ERN (Empl Rcd Number) is added by mistake for a multiple job employee whose payroll is managed in Payroll for North America, and that employee has one or more other jobs (ERNs) with the same company, then the ERN cannot be deleted.

- PeopleSoft delivers system data conflict checks, but enables you to add additional logic and conflict checks to meet your organization's requirements for ERN deletion.

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**Note:** Use this feature to avoid "false" same-day terminations that may cause errors in unemployment insurance eligibility and termination reports.

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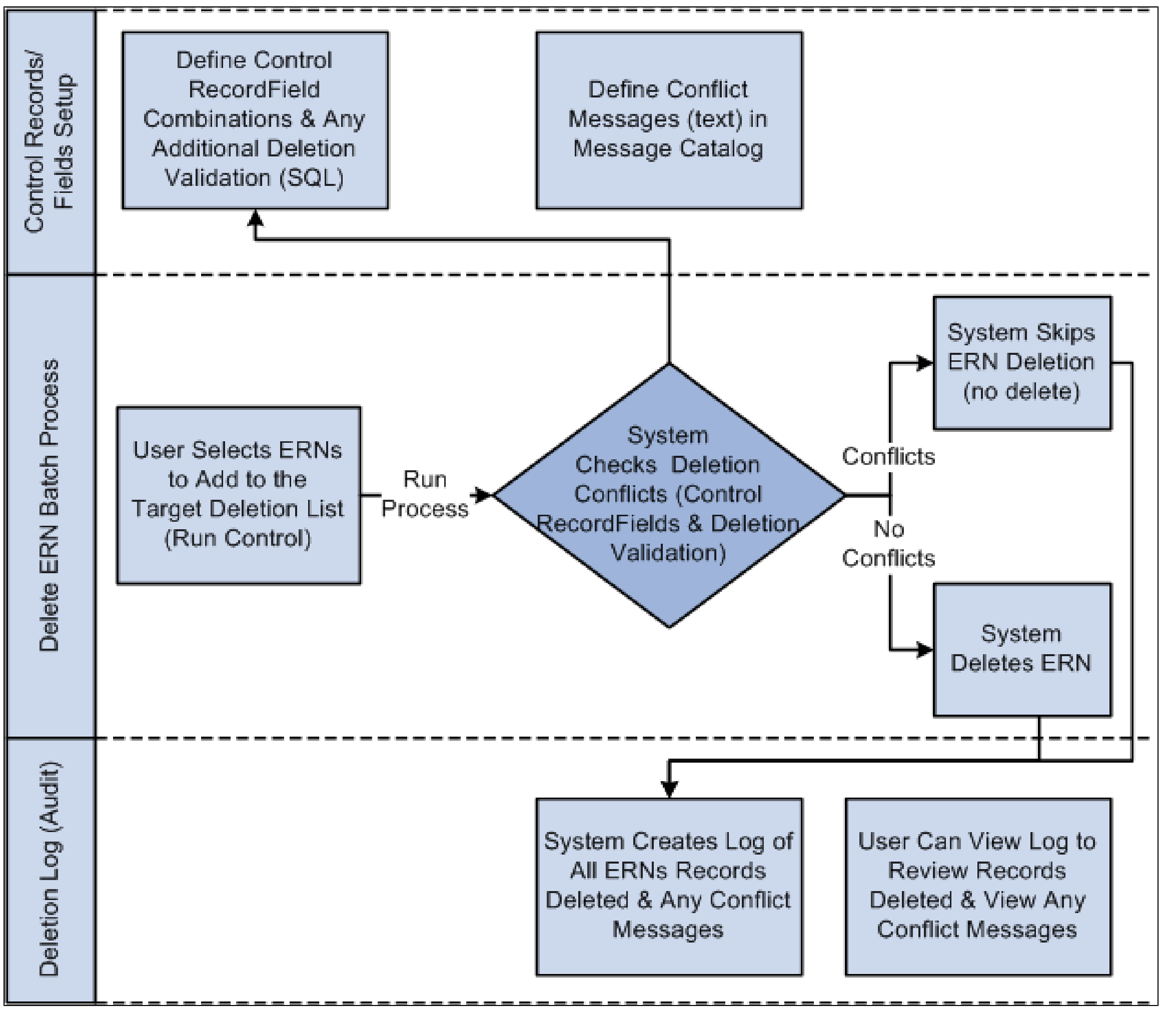
**Image: Delete ERN process flowchart showing setup tasks, business process steps, and audit functions**

This flowchart illustrates the Delete ERN process. Setup tasks include defining deletion criteria, validations, and error messages. Then, during the deletion batch process, the administrator chooses ERNs to be deleted, and the system checks the ERNs against the deletion criteria, deleting only those with no conflicts. Finally, during the audit phase of the process, the system creates a log showing the deleted ERNs and the conflict messages for the ERNs that were not deleted:




## Deleting ERNs in a Multi-Product Environment

The steps to delete ERNs affect HCM data only. No controls are delivered that check across products in a multi-product environment. Be aware of the impact of the delete process on other products and set up additional controls to avoid integrity issues.

For example, if an employee record number is created in HCM and then used in a product order, you can remove the ERN in HCM, but it still exists in the order database.

**Note:** PeopleSoft provides a Message Subscription (service operation PERSON_ERN_DELETE) that is used to synchronize two HCM databases. It can be configured to synchronize other products.

## Pages Used to Delete ERNs

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| ERN Delete Field Names | HR_EERCDDEL_FIELDS | Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Field Names, ERN Delete Field Names | Define Person ID field names and Empl Rcd Nbr field names maintained in the system. |
| Tables with Person ID and ERN | HR_EERCDDEL_FLDSEC | Click Display Tables on the ERN Delete Field Names page. | Displays all tables in the system that have any combination of these defined PersonID and ERN fields. |
| ERN Delete Control | HR_EERCDDEL_CTL | Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Control, ERN Delete Control | Define which Message Catalog message text to display for each Control Table/Field conflict. Define deletion restrictions to avoid deletion of ERNs with dependencies in the system. |
| ERN Delete Exception Tables | HR_EERCDDEL_EXC | Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Exception Tables, ERN Delete Exception Tables | Define exceptions for the deletion logic. |
| ERN Delete Process | HR_RUNCTL_EERCDDEL | Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Process, ERN Delete Process | Remove a Person ID or Empl _Rcd from the database. |
| ERN Delete Process Results | HR_EERCDDEL_RESULT | Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Process Results, ERN Delete Process Results | Lists ERN Delete Process results information. |

## ERN Delete Field Names Page

Use the ERN Delete Field Names page (HR_EERCDDEL_FIELDS) to define Person ID field names and Empl Rcd Nbr field names maintained in the system.

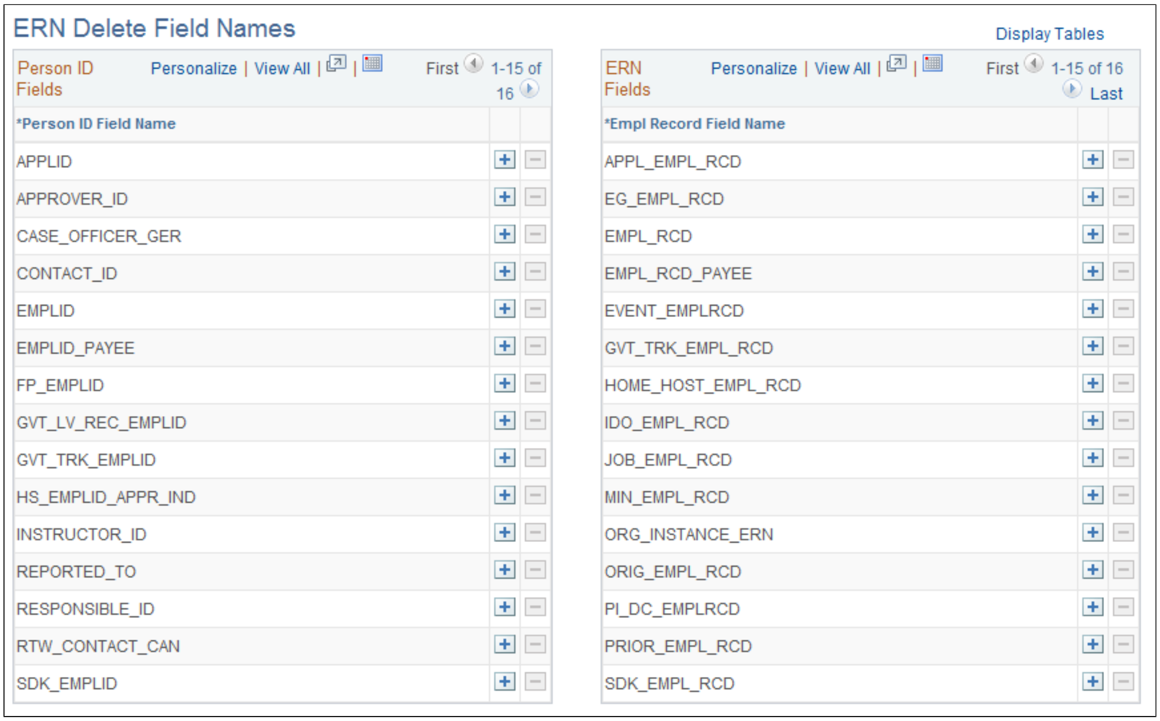
 

#### Navigation

Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Field Names, ERN Delete Field Names

#### Image: ERN Delete Field Names page

This example illustrates the fields and controls on the ERN Delete Field Names page. You can find definitions for the fields and controls later on this page.




**Person ID Field Name** Use this table to specify the field names for the Person ID available in the system.

**ERN Fields** Use this table to specify the field names for the Empl Rcd available in the system.

**Display Tables** Click this link to display all tables in the system that have any combination of these defined PersonID and ERN fields. This display enables system administrators to review tables potentially impacted by the ERN Delete process.

## ERN Delete Control Page

Use the ERN Delete Control page (HR_EERCDDEL_CTL) to define which Message Catalog message text to display for each Control Table/Field conflict.

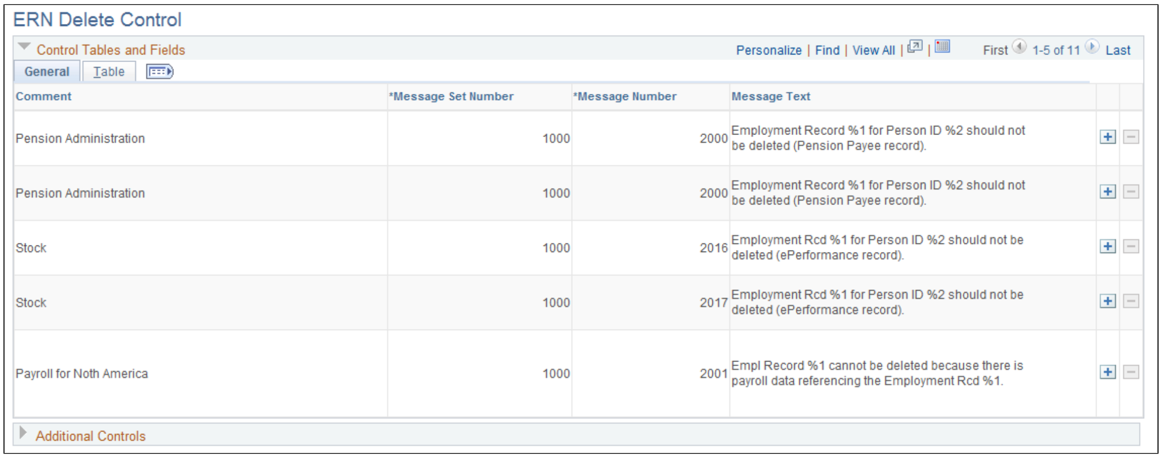
Define deletion restrictions to avoid deletion of ERNs with dependencies in the system.

### Navigation

Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Control, ERN Delete Control

### Image: ERN Delete Control page: General tab

This example illustrates the fields and controls on the ERN Delete Control page: General tab. You can find definitions for the fields and controls later on this page.



ERN Delete Control

Control Tables and Fields — Personalize | Find | View All | First 1-5 of 11 Last

General | Table

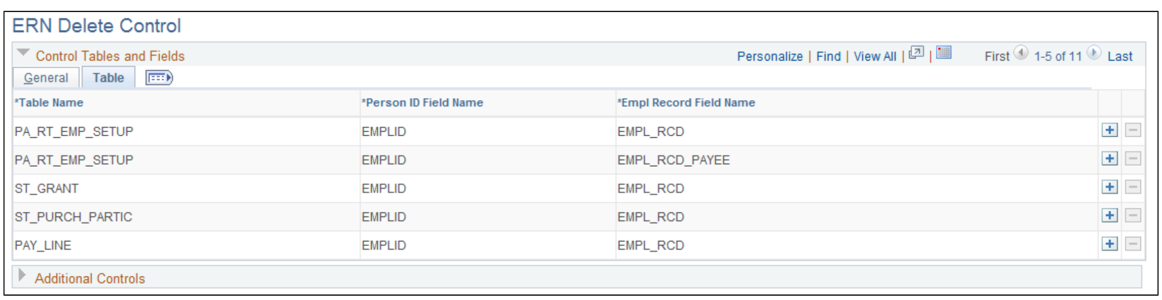
| Comment | *Message Set Number | *Message Number | Message Text |
|---|---|---|---|
| Pension Administration | 1000 | 2000 | Employment Record %1 for Person ID %2 should not be deleted (Pension Payee record). |
| Pension Administration | 1000 | 2000 | Employment Record %1 for Person ID %2 should not be deleted (Pension Payee record). |
| Stock | 1000 | 2016 | Employment Rcd %1 for Person ID %2 should not be deleted (ePerformance record). |
| Stock | 1000 | 2017 | Employment Rcd %1 for Person ID %2 should not be deleted (ePerformance record). |
| Payroll for Noth America | 1000 | 2001 | Empl Record %1 cannot be deleted because there is payroll data referencing the Employment Rcd %1. |

Additional Controls

Each of the conflict checks has a configurable conflict message. You can assign conflict messages using the Message Catalog. Conflict messages are displayed on the ERN Delete Process Results page.

### Image: ERN Delete Control page: Table tab

This example illustrates the fields and controls on the ERN Delete Control page: Table tab . You can find definitions for the fields and controls later on this page.



ERN Delete Control

Control Tables and Fields — Personalize | Find | View All | First 1-5 of 11 Last

General | Table

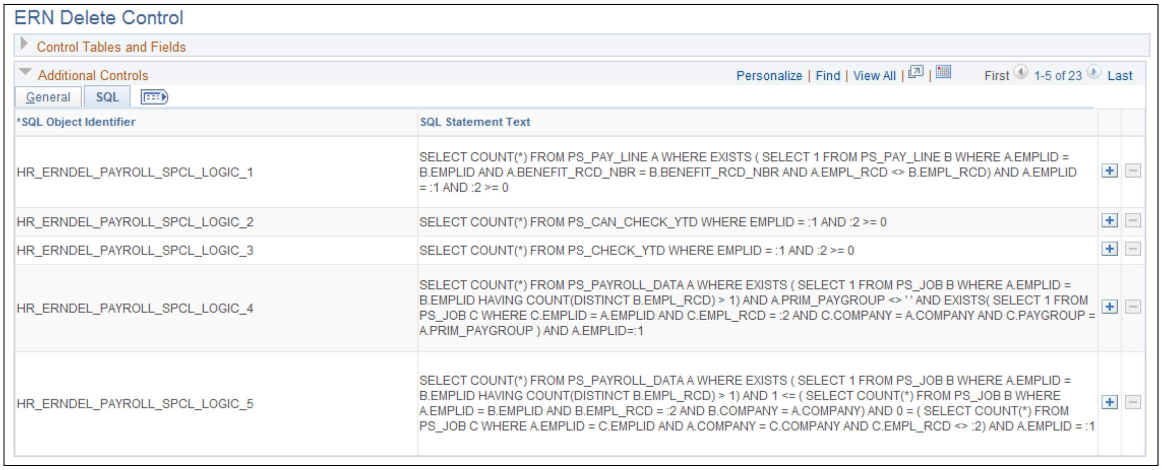
| *Table Name | *Person ID Field Name | *Empl Record Field Name |
|---|---|---|
| PA_RT_EMP_SETUP | EMPLID | EMPL_RCD |
| PA_RT_EMP_SETUP | EMPLID | EMPL_RCD_PAYEE |
| ST_GRANT | EMPLID | EMPL_RCD |
| ST_PURCH_PARTIC | EMPLID | EMPL_RCD |
| PAY_LINE | EMPLID | EMPL_RCD |

Additional Controls

The system checks these table and field combinations prior to running the Delete ERN process to help ensure that no key dependent data or process will be negatively impacted by the delete. The system scans the record/field combinations defined in this table and if an ERN that is targeted for deletion is identified in one of these control table/field combinations, the system prevents the ERN from being deleted.

**Image: ERN Delete Control page: Additional Controls - SQL tab**

This example illustrates the fields and controls on the ERN Delete Control page: Additional Controls - SQL tab. You can find definitions for the fields and controls later on this page.


ERN Delete Control

Control Tables and Fields

Additional Controls — Personalize | Find | View All | First 1-5 of 23 Last

General | SQL

| *SQL Object Identifier | SQL Statement Text |
|---|---|
| HR_ERNDEL_PAYROLL_SPCL_LOGIC_1 | SELECT COUNT(*) FROM PS_PAY_LINE A WHERE EXISTS ( SELECT 1 FROM PS_PAY_LINE B WHERE A.EMPLID = B.EMPLID AND A.BENEFIT_RCD_NBR = B.BENEFIT_RCD_NBR AND A.EMPL_RCD <> B.EMPL_RCD) AND A.EMPLID = :1 AND :2 >= 0 |
| HR_ERNDEL_PAYROLL_SPCL_LOGIC_2 | SELECT COUNT(*) FROM PS_CAN_CHECK_YTD WHERE EMPLID = :1 AND :2 >= 0 |
| HR_ERNDEL_PAYROLL_SPCL_LOGIC_3 | SELECT COUNT(*) FROM PS_CHECK_YTD WHERE EMPLID = :1 AND :2 >= 0 |
| HR_ERNDEL_PAYROLL_SPCL_LOGIC_4 | SELECT COUNT(*) FROM PS_PAYROLL_DATA A WHERE EXISTS ( SELECT 1 FROM PS_JOB B WHERE A.EMPLID = B.EMPLID HAVING COUNT(DISTINCT B.EMPL_RCD) > 1) AND A.PRIM_PAYGROUP <> ' ' AND EXISTS( SELECT 1 FROM PS_JOB C WHERE C.EMPLID = A.EMPLID AND C.EMPL_RCD = :2 AND C.COMPANY = A.COMPANY AND C.PAYGROUP = A.PRIM_PAYGROUP ) AND A.EMPLID=:1 |
| HR_ERNDEL_PAYROLL_SPCL_LOGIC_5 | SELECT COUNT(*) FROM PS_PAYROLL_DATA A WHERE EXISTS ( SELECT 1 FROM PS_JOB B WHERE A.EMPLID = B.EMPLID HAVING COUNT(DISTINCT B.EMPL_RCD) > 1) AND 1 <= ( SELECT COUNT(*) FROM PS_JOB B WHERE A.EMPLID = B.EMPLID AND B.EMPL_RCD = :2 AND B.COMPANY = A.COMPANY) AND 0 = ( SELECT COUNT(*) FROM PS_JOB C WHERE A.EMPLID = C.EMPLID AND A.COMPANY = C.COMPANY AND C.EMPL_RCD <> :2) AND A.EMPLID = :1 |

Use the SQL tab in the Additional Controls section of the page to enter more complex product specific conflict checking that cannot be represented through the simple entry of control records and fields. Add additional SQL logic that the system needs to check prior to deleting ERNs.

---

**Note:** You cannot delete ERN delete controls that are delivered as system data.

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## ERN Delete Exception Tables Page

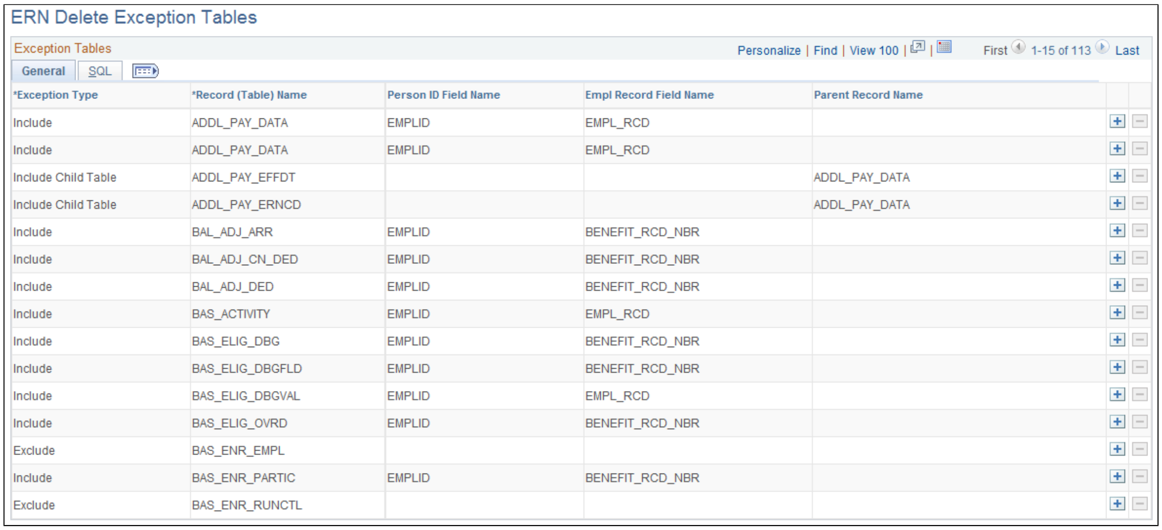
Use the ERN Delete Exception Tables page (HR_EERCDDEL_EXC) to define exceptions for the deletion logic.

### Navigation

Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Exception Tables, ERN Delete Exception Tables

### Image: ERN Delete Exception Tables page: General tab

This example illustrates the fields and controls on the ERN Delete Exception Tables page: General tab. You can find definitions for the fields and controls later on this page.


ERN Delete Exception Tables

Exception Tables — Personalize | Find | View 100 | First 1-15 of 113 Last

General | SQL

| *Exception Type | *Record (Table) Name | Person ID Field Name | Empl Record Field Name | Parent Record Name |
|---|---|---|---|---|
| Include | ADDL_PAY_DATA | EMPLID | EMPL_RCD | |
| Include | ADDL_PAY_DATA | EMPLID | EMPL_RCD | |
| Include Child Table | ADDL_PAY_EFFDT | | | ADDL_PAY_DATA |
| Include Child Table | ADDL_PAY_ERNCD | | | ADDL_PAY_DATA |
| Include | BAL_ADJ_ARR | EMPLID | BENEFIT_RCD_NBR | |
| Include | BAL_ADJ_CN_DED | EMPLID | BENEFIT_RCD_NBR | |
| Include | BAL_ADJ_DED | EMPLID | BENEFIT_RCD_NBR | |
| Include | BAS_ACTIVITY | EMPLID | EMPL_RCD | |
| Include | BAS_ELIG_DBG | EMPLID | BENEFIT_RCD_NBR | |
| Include | BAS_ELIG_DBGFLD | EMPLID | BENEFIT_RCD_NBR | |
| Include | BAS_ELIG_DBGVAL | EMPLID | EMPL_RCD | |
| Include | BAS_ELIG_OVRD | EMPLID | BENEFIT_RCD_NBR | |
| Exclude | BAS_ENR_EMPL | | | |
| Include | BAS_ENR_PARTIC | EMPLID | BENEFIT_RCD_NBR | |
| Exclude | BAS_ENR_RUNCTL | | | |

**Exception Type** Select one of three options in this field:

- *Include* includes the table in the deletion process. Select this option when the table does not follow the standard rule, but specific requirements.
- *Exclude* excludes the table from the deletion process.
- *Include Child Table* includes a table that does not contains an ERN but is attached as a child to a table that must be deleted.

**Record (Table) Name** The name of the table to be included or excluded.

**Person ID Field Name** The name of the EmplD field to be used for deletion.

**Empl Record Field Name** The name of the EMPL_RCD field to be used for deletion.

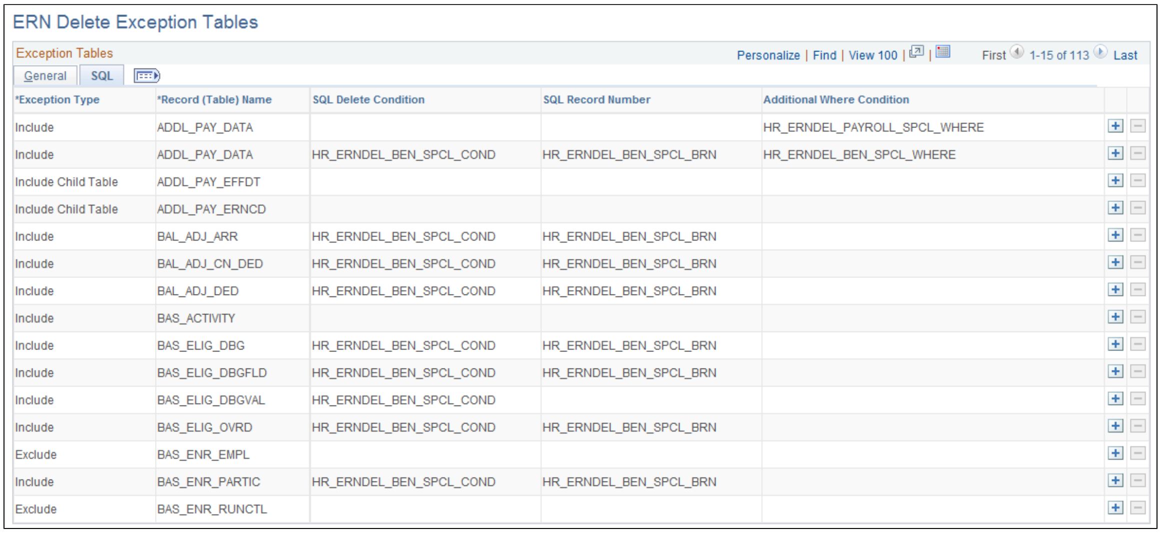
**Parent Record Name** The parent table of child table to be included in the deletion.

Access the SQL tab on the ERN Delete Exception Tables page.

**Image: ERN Delete Exception Tables page: SQL tab**

This example illustrates the fields and controls on the ERN Delete Exception Tables page: SQL tab. You can find definitions for the fields and controls later on this page.


ERN Delete Exception Tables

Exception Tables — Personalize | Find | View 100 | First 1-15 of 113 Last

General | SQL

| *Exception Type | *Record (Table) Name | SQL Delete Condition | SQL Record Number | Additional Where Condition |
|---|---|---|---|---|
| Include | ADDL_PAY_DATA | | | HR_ERNDEL_PAYROLL_SPCL_WHERE |
| Include | ADDL_PAY_DATA | HR_ERNDEL_BEN_SPCL_COND | HR_ERNDEL_BEN_SPCL_BRN | HR_ERNDEL_BEN_SPCL_WHERE |
| Include Child Table | ADDL_PAY_EFFDT | | | |
| Include Child Table | ADDL_PAY_ERNCD | | | |
| Include | BAL_ADJ_ARR | HR_ERNDEL_BEN_SPCL_COND | HR_ERNDEL_BEN_SPCL_BRN | |
| Include | BAL_ADJ_CN_DED | HR_ERNDEL_BEN_SPCL_COND | HR_ERNDEL_BEN_SPCL_BRN | |
| Include | BAL_ADJ_DED | HR_ERNDEL_BEN_SPCL_COND | HR_ERNDEL_BEN_SPCL_BRN | |
| Include | BAS_ACTIVITY | | | |
| Include | BAS_ELIG_DBG | HR_ERNDEL_BEN_SPCL_COND | HR_ERNDEL_BEN_SPCL_BRN | |
| Include | BAS_ELIG_DBGFLD | HR_ERNDEL_BEN_SPCL_COND | HR_ERNDEL_BEN_SPCL_BRN | |
| Include | BAS_ELIG_DBGVAL | HR_ERNDEL_BEN_SPCL_COND | | |
| Include | BAS_ELIG_OVRD | HR_ERNDEL_BEN_SPCL_COND | HR_ERNDEL_BEN_SPCL_BRN | |
| Exclude | BAS_ENR_EMPL | | | |
| Include | BAS_ENR_PARTIC | HR_ERNDEL_BEN_SPCL_COND | HR_ERNDEL_BEN_SPCL_BRN | |
| Exclude | BAS_ENR_RUNCTL | | | |

**SQL Delete Condition**

Define a condition for deletion based on EMPLID and EMPL_RCD. If the request defined in the setup returns a number greater than 0, the record will be skipped during the deletion process.

**SQL Record Number**

Define a request that returns the number to be used as the ERN based on EMPLID and EMPL_RCD.

**Additional Where Condition**

Request that defines an additional where clause added during the deletion process.

## ERN Delete Process Page

Use the ERN Delete Process page (HR_RUNCTL_EERCDDEL) to remove a Person ID or Empl_Rcd from the database.

### Navigation

Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Process, ERN Delete Process

### Image: ERN Delete Process page

This example illustrates the fields and controls on the ERN Delete Process page. You can find definitions for the fields and controls later on this page.


| | |
|---|---|
| **Person ID** | Use this lookup to select the person for whom you want to delete an ERN. |
| **Name** | Displays the name of person selected. Click the link to display biographical data that enables you to confirm that this is the correct person. |
| **Empl Record** | Use this lookup to select the employment record number to delete. You can delete any employment record, including future-dated records. |
| **Organizational Relationship** | Click the links to view the Personal Organizational Summary page. This page enables you to confirm that you have selected the appropriate ERN. |
| **Company** | The company that is related to the ERN. |
| **Department** | The department that is related to the ERN. |
| **Job Code** | The job code that is related to the ERN. |

---

**Note:** If an ERN (Empl Rcd Number) is added by mistake for a multiple job employee whose payroll is managed in Payroll for North America, and that employee has one or more other jobs (ERNs) with the same company, then the ERN cannot be deleted.

---

## ERN Delete Process Results Page

Use the ERN Delete Process Results page (HR_EERCDDEL_RESULT) to lists ERN Delete Process results information.

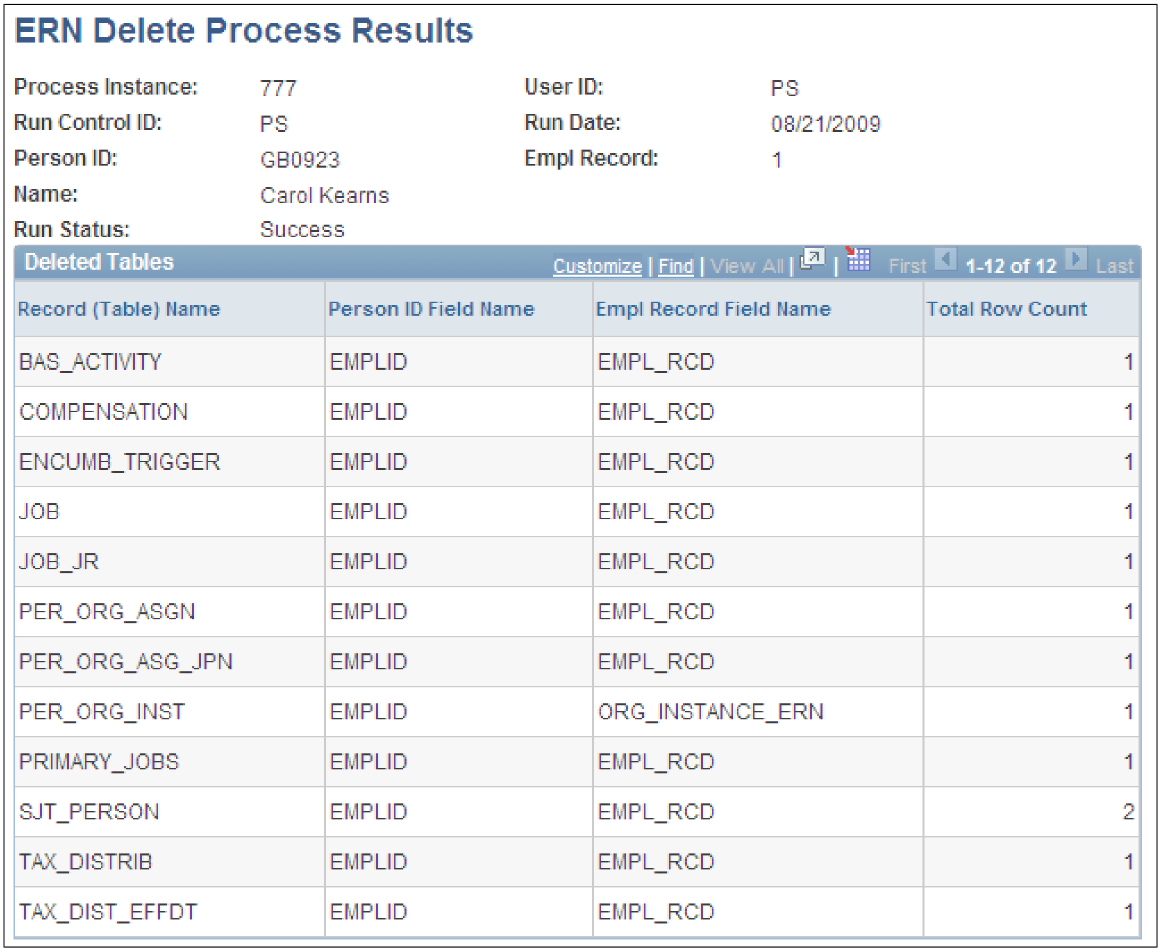
### Navigation

Set Up HCM, System Administration, Database Processes, ERN Delete Process, ERN Delete Process Results, ERN Delete Process Results

This page displays results for a single ERN. The page appearance changes depending whether the ERN was successfully deleted.

**Image: ERN Delete Process Results page - Run Status - Success**

This example illustrates the fields and controls on the ERN Delete Process Results page - Run Status - Success. You can find definitions for the fields and controls later on this page.



## ERN Delete Process Results

| | | | |
|---|---|---|---|
| **Process Instance:** | 777 | **User ID:** | PS |
| **Run Control ID:** | PS | **Run Date:** | 08/21/2009 |
| **Person ID:** | GB0923 | **Empl Record:** | 1 |
| **Name:** | Carol Kearns | | |
| **Run Status:** | Success | | |

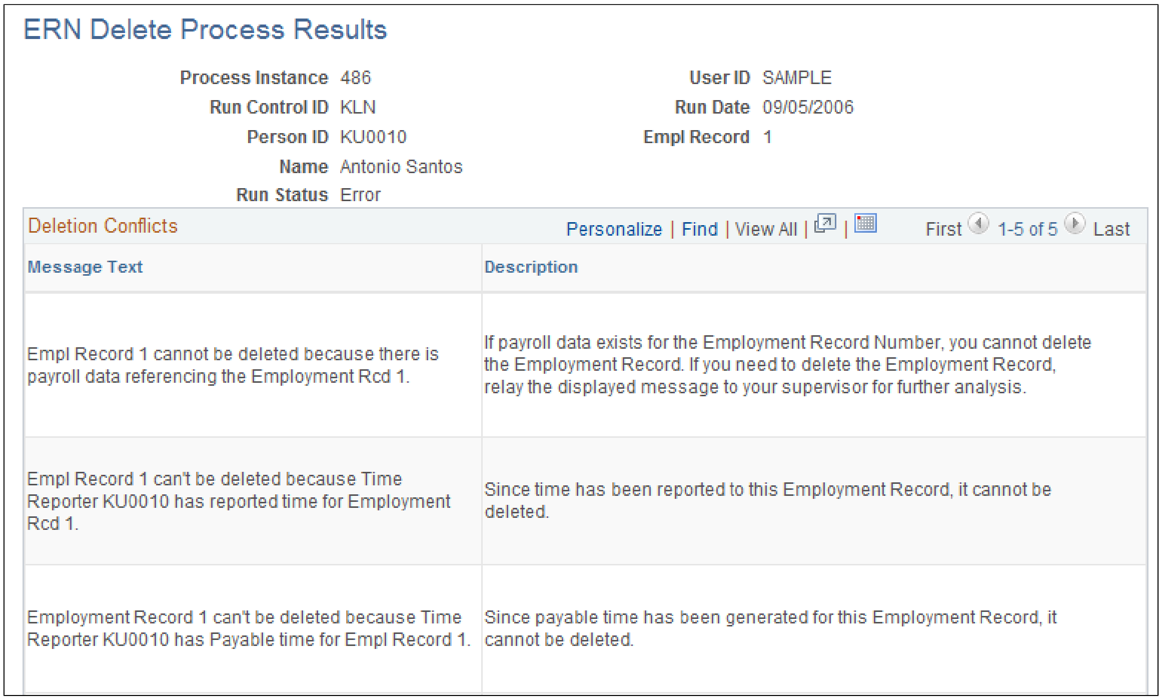
**Deleted Tables** Customize | Find | View All | | First 1-12 of 12 Last

| Record (Table) Name | Person ID Field Name | Empl Record Field Name | Total Row Count |
|---|---|---|---|
| BAS_ACTIVITY | EMPLID | EMPL_RCD | 1 |
| COMPENSATION | EMPLID | EMPL_RCD | 1 |
| ENCUMB_TRIGGER | EMPLID | EMPL_RCD | 1 |
| JOB | EMPLID | EMPL_RCD | 1 |
| JOB_JR | EMPLID | EMPL_RCD | 1 |
| PER_ORG_ASGN | EMPLID | EMPL_RCD | 1 |
| PER_ORG_ASG_JPN | EMPLID | EMPL_RCD | 1 |
| PER_ORG_INST | EMPLID | ORG_INSTANCE_ERN | 1 |
| PRIMARY_JOBS | EMPLID | EMPL_RCD | 1 |
| SJT_PERSON | EMPLID | EMPL_RCD | 2 |
| TAX_DISTRIB | EMPLID | EMPL_RCD | 1 |
| TAX_DIST_EFFDT | EMPLID | EMPL_RCD | 1 |

When the deletion is successful, you can review a list of tables where data was deleted.

**Image: ERN Delete Process Results - Run Status - Error**

This example illustrates the fields and controls on the ERN Delete Process Results - Run Status - Error. You can find definitions for the fields and controls later on this page.


ERN Delete Process Results

Process Instance 486 User ID SAMPLE
Run Control ID KLN Run Date 09/05/2006
Person ID KU0010 Empl Record 1
Name Antonio Santos
Run Status Error

Deletion Conflicts Personalize | Find | View All | First 1-5 of 5 Last

| Message Text | Description |
| --- | --- |
| Empl Record 1 cannot be deleted because there is payroll data referencing the Employment Rcd 1. | If payroll data exists for the Employment Record Number, you cannot delete the Employment Record. If you need to delete the Employment Record, relay the displayed message to your supervisor for further analysis. |
| Empl Record 1 can't be deleted because Time Reporter KU0010 has reported time for Employment Rcd 1. | Since time has been reported to this Employment Record, it cannot be deleted. |
| Employment Record 1 can't be deleted because Time Reporter KU0010 has Payable time for Empl Record 1. | Since payable time has been generated for this Employment Record, it cannot be deleted. |

When the deletion is not successful, the page displays message text describing why the ERN deletion was not processed.

# Updating Personal Data

Use the Modify a Person component to update a person's name, address, phone numbers, marital status, education, and other personal information.

These topics provide an overview of types of personal data, using workflow to update person addresses, and discuss how to:

- Update effective-dated personal information.
- Update emergency contact information.
- Modify addresses.

## Understanding Types of Personal Data

The Personal Data pages include two different types of personal data:

- Effective-dated data.

Name, address, biographical (such as education, marital status, and language), checklist, and some regional fields are effective-dated. Enter current, historical, or future information in these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time.

Effective-dated biographical data is stored in the Personal Data History record (PERS_DATA_EFFDT). Name information is stored in the NAMES record with its own effective date. Address information is stored in the ADDRESSES record with its own effective date.

- Noneffective-dated data.

  Some personal data fields aren't linked to an effective date. In these fields, new entries overwrite and delete the previous entries. This situation means that you can store only current information. The system stores noneffective-dated data in the Personal Data record (PERSON).

---

**Note:** PeopleSoft Human Resources also includes a workflow process for updating employee addresses.

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## Using Workflow to Update Person Addresses

Keeping a person's personal information current can be time-consuming. With workflow, users who do not ordinarily have access to the PeopleSoft Human Resources system can update their address data by using an email program to send the information to your PeopleSoft Human Resources system.

## Pages Used to Update Personal Data

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Biographical Details | PERSONAL_DATA1 | • Workforce Administration, Personal Information, Modify a Person, Biographical Details<br>• Workforce Administration, Personal Information, Biographical, Modify a Person, Biographical Details<br>• Stock, Modify a Person, Biographical Details<br>• Administer Training, Modify a Person, Biographical Details<br>• Pension, Payments, Create Payee, Create Payee<br>Click the Personal Data link on the Create Payee page, and then access the Payee Name page. | Update a person's personal information. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Contact Information | PERSONAL_DATA2 | • Workforce Administration, Personal Information, Modify a Person, Contact Information<br>• Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information<br>• Stock, Modify a Person, Contact Information<br>• Administer Training, Modify a Person, Contact Information<br>• Pension, Payments, Create Payee, Create Payee<br>Click the Personal Data link on the Create Payee page, and then access the Biographical Data page. | Update a person's name, address, phone, and email information. |
| Regional | PERSONAL_DATA3 | • Workforce Administration, Personal Information, Modify a Person, Regional<br>• Workforce Administration, Personal Information, Biographical, Modify a Person, Regional<br>• Stock, Modify a Person, Regional<br>• Administer Training, Modify a Person, Regional | Maintain regionally-required information about a person. |
| Contact Address/Phone | EMERGENCY_CONTACT | Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Contact Address/Phone | Enter names, addresses, and primary phone information for people to contact in the event of a worker emergency. |

## Related Links

Adding a Person

 

## Updating Effective-Dated Personal Information

To update effective-dated information on the Personal Data pages:

1. Insert a new data row in the effective-dated group boxes.

   Each of these group boxes can use different effective dates. They are not related.

2. Enter the date when the new personal data that you're entering will take effect.

   This date can be current or in the future.

3. Enter the new information.

4. Save the pages.

### Related Links

"Effective Dates *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Updating Emergency Contact Information

The system updates a worker's emergency contact information automatically if you specify that the contact information is the same as the worker's contact information. When the emergency contact information is different from the worker's contact information, you must maintain the emergency contact information manually on the Contact Address/Phone page.

To activate the automatic emergency contact address update:

1. Access the Contact Address/Phone page.

2. Select the Same Address as Employee and Same Phone as Employee check boxes *before* you update the worker's address.

3. Select the type of address and type of phone number that is the same as the emergency contact.

   When you update the worker's address, the system automatically updates the emergency contact address. It also updates the Update Dependent/Beneficiary pages in the Benefits menu and the Payroll Options pages in the Payroll menus.

   If the emergency contact address changes and is no longer the same as the worker's, deselect the Same Address as Employee and the Same Phone as Employee check boxes. The system makes the address fields on the Contact Address/Phone page available, and you can enter a different address. After you deselect the check box, the system no longer updates the emergency contact address automatically.

   Even if the emergency contact address is the same as the worker's, you can enter a different phone number.

4. Use the Other Phone Numbers page to record emergency contact phone numbers for the emergency contact in addition to the primary number that is recorded on the Contact Address/Phone page.

### Related Links

Tracking Emergency Contacts

## Modifying Addresses

To enter a new address for a worker:

1. Access the Contact Information page (Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information).
2. Insert a new data row in the Current Addresses region.
3. Enter a new effective date for the new address information and click the Add Address link.
4. Enter the worker's new address information.

### Updating Emergency Contact Address Information

The system also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Maintain Payroll Data (USF) menu when the Same Address as Employee and Same Phone as Employee check boxes are selected.

# Running Personal Data Reports

This topic lists the pages used to run personal data reports.

## Pages Used to Run Personal Data Reports

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Birthdays Report | RUNCTL_PER002 | Workforce Administration, Personal Information, Biographical, Birthdays Report, Birthdays Report | Run the Employee Birthdays report (PER002). This report lists employees and contingent workers, their birthdays, and other identifying information.<br><br>Run the Refresh Employees Table process before running this report. |
| Employee Home Address Listing | PRCSRUNCNTL | Workforce Administration, Personal Information, Biographical, Home Address Report, Employee Home Address Listing | Run the Employee Home Address Listing report ( PER020), which contains a complete listing of all employees and contingent workers, including addresses and home phone numbers. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Mailing Labels | PRCSRUNCNTL | Workforce Administration, Personal Information, Biographical, Mailing Labels Report, Mailing Labels | Run the Mailing Labels report (PER006), which produces a three-across set of mailing labels for all employees and contingent workers in your PeopleSoft Human Resources database.<br><br>Run the Refresh Employees Table process before running this report. |
| Employee Listing SGP | RUNCTL_EMP_LIST | Workforce Administration, Job Information, Reports, Employee Listing SGP, Employee Listing SGP | Run the Employee Listing report (PER801SG). This report provides employee and contingent worker information based on the run control selections of department, employee name, or employee ID. |

## Updating Job Data

Use the Job Data component when you want to work with a person's historical job data. If you need to work with a person's current job only, use the Current Job component for faster system performance. You can work only with current and future job data on the Current Job pages.

**Note:** The Job Data and Current Job components are made up of the same pages as the Add Employment Instance, Add Contingent Worker Instance, and Add a POI (person of interest) Relationship components. If you are using position management, you will want to update most job data on the Position Data pages. (USF) Update job information using the U.S. Federal pages.

See Understanding Job Data.

See "Maintaining Position Data *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*".

See Understanding PARs.

These topics provide overviews of updating effective-dated job data, security for updating job data, and personnel actions and human resources and payroll status, and discuss how to:

- Update effective-dated job data.
- Enter promotions.
- Enter departmental transfers.
- Enter pay rate changes.
- Track leaves of absence.
- Enter terminations and retirements.

 

- Enter deaths.
- Enter rehires.
- Assign workers to different positions.
- Pay workers on disability.

## Understanding Updating Effective-Dated Job Data

You usually update job data by inserting new effective-dated data rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them two years ago or want them to go into effect two months into the future. With this information, you can review historical data from a particular time to analyze position data or employee records. Or you can plan ahead and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables that you see list only data that is valid as of the effective date of the current page. For example, if you create a new department code with an effective date of May 1, 2009 and enter a new data row (or update an existing row) on the Job Data pages that has an effective date *before* May 1, 2009, you won't see the new code as a valid choice when you select a department because the new code hasn't taken effect yet.

When you enter a new data row, the system copies the contents of the previous row into the new row—thus you do not have to retype any information that stays the same. (Ensure that you position the cursor on the data row that you want to copy before you insert the new row.) The only new information is the effective date, which is set by default to the system date (usually today's date).

## Understanding Security for Updating Job Data

When you update a job record, keep in mind two special security issues.

### Security and Effective-Dated Sequence Numbers

When you transfer people from one department to another by using a data row that contains an effective-dated sequence number, the system currently allows users with security access to the old or new department to have access to all the job data. The system is delivered this way because implementing security in system views that are specific to the function Max (effseq) on PS_JOB would slow down online response time.

For example, when you transfer an employee from department 1 to department 2 and give the employee a promotion on the same day, users with access to either department 1 or 2 have access to the employee's data because the transfer data row contains an effective-dated sequence number.

You can prevent this access by changing the security views for the PeopleSoft applications that you use. Keep in mind, however, that making the change affects system performance.

### Security for Transfers Between Departments

PeopleSoft Human Resources enables users to assign people to departments that they cannot access for updates. If you want to prevent a user from transferring a person into a department for which the person does not have access, use the PeopleSoft Human Resources DEPT_TBL_ACCESS view, which shows only those department IDs that a user can access based on the security permission lists to which they belong.

 

**Note:** If you choose to use this view, you must create a permission list for users who have access to all departments so that they can perform transfers.

### Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Understanding PeopleSoft HCM System Data Regulation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Understanding Personnel Actions and Human Resources and Payroll Status

When you select an action to change a person's job data, the system may change the person's HR or payroll, or job status. For example, when you select *Retired,* the system changes the HR status from *Active* to *Inactive.*

HR status indicates whether the person is still active in the human resources system. The Payroll Status field (for employees) indicates the payroll status or job status of the person. A person can have an active HR record but not be currently receiving pay (employee) or holding a job (contingent worker). Conversely, a person could have an inactive job record but continue to receive pay. For example, if you select retirement with pay, the system changes the HR status to *Inactive* and changes the payroll status from *Active* to *Retired with Pay.* The two status fields enable you to accurately identify the different types of people in your organization.

The statuses are based on either the personnel action or, in a few cases, the *reason* for the action, such as death. A change in HR status or payroll status can affect PeopleSoft Human Resources Manage Base Benefits, PeopleSoft Benefits Administration, PeopleSoft Payroll processing, and PeopleSoft Pension Administration. For example, a promotion or a job reclassification might affect an employee's benefit coverage, or you might need to suspend benefit coverage during a leave of absence or a suspension.

This table explains how the system sets status:

| ***Personnel Action*** | ***HR Status*** | ***Payroll Status*** | ***Payroll Processing for PeopleSoft Payroll for North America and the Payroll Interface*** |
|---|---|---|---|
| Hire<br><br>Add contingent worker<br><br>Add person of interest<br><br>Rehire (employees only)<br><br>Return from leave<br><br>Return from disability<br><br>Additional job<br><br>Recall from suspension or layoff<br><br>Assignment | *Active* | *Active* | Yes |
| Leave of absence<br><br>Short-term disability<br><br>Long-term disability | *Active* | *Leave of Absence* | No |
| Paid leave of absence<br><br>Short-term disability with pay<br><br>Long-term disability with pay | *Active* | *Leave with Pay* | Yes |
| Retirement with pay (employees only) | *Inactive* | *Retired with Pay* | Yes |
| Terminated with benefits<br><br>Terminated with pay | *Inactive* | *Terminated with Pay* | Yes |
| Layoff<br><br>Suspension<br><br>Temporary assignment | *Active* | *Suspended* | No |
| Retirement | *Inactive* | *Retired* | No |
| Assignment completion<br><br>Completion (contingent workers only)<br><br>Termination | *Inactive* | *Terminated* | No |

 

| ***Personnel Action*** | ***HR Status*** | ***Payroll Status*** | ***Payroll Processing for PeopleSoft Payroll for North America and the Payroll Interface*** |
|---|---|---|---|
| Pay rate change<br><br>Demotion<br><br>Data change<br><br>Earnings distribution change<br><br>Job reclassification<br><br>Position change<br><br>Probation<br><br>Completion of probation<br><br>Promotion<br><br>Transfer | The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.* | The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.* | Varies |

**Note:** If your organization uses PeopleSoft Payroll for North America, the system does not generate payroll paysheets for workers whose status is *Retired* or *Terminated.* If you need to pay workers for a partial pay period or for a time after they leave the company, select the personnel action *Retired with Pay* or *Terminated with Pay.*

### Related Links

"Understanding Payroll Data *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Pages Used to Update Job Data and Salary Data

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Work Location | JOB_DATA1 | • Workforce Administration, Job Information, Job Data, Work Location<br><br>• Workforce Administration, Job Information, Current Job, Work Location | Update position and location information for a person's job. |

 

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Job Information | JOB_DATA_JOBCODE | • Workforce Administration, Job Information, Job Data, Job Information<br>• Workforce Administration, Job Information, Current Job, Job Information | Update information about a person's job. |
| Job Labor | JOB_LABOR | • Workforce Administration, Job Information, Job Data, Job Labor<br>• Workforce Administration, Job Information, Current Job, Job Labor | Update national labor agreement data. |
| Payroll | JOB_DATA2 | • Workforce Administration, Job Information, Job Data, Payroll<br>• Workforce Administration, Job Information, Current Job, Payroll | Update payroll processing data. |
| Salary Plan | JOB_DATA_SALPLAN | • Workforce Administration, Job Information, Job Data, Salary Plan<br>• Workforce Administration, Job Information, Current Job, Salary Plan | Update a person's salary plan information. |
| Compensation | JOB_DATA3 | • Workforce Administration, Job Information, Job Data, Compensation<br>• Workforce Administration, Job Information, Current Job, Compensation | Update a person's compensation information. |

 

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Employment Information | EMPLOYMENT_DTA1 | Click the Employment Data link at the bottom of any page in the Job Data or Current Job component.<br><br>• Workforce Administration, Job Information, Job Data<br><br>• Workforce Administration, Job Information, Current Job | Update optional employment information. |
| Job Earnings Distribution | JOB_DATA_ERNDIST | Click the Earnings Distribution link at the bottom of any page in the Job Data or Current Job components.<br><br>• Workforce Administration, Job Information, Job Data<br><br>• Workforce Administration, Job Information, Current Job | Update a person's compensation information. |
| Benefit Program Participation | JOB_DATA_BENPRG | Click the Benefit Program Participation link at the bottom of any page in the Job Data or Current Job components.<br><br>• Workforce Administration, Job Information, Job Data<br><br>• Workforce Administration, Job Information, Current Job | Update a person's benefit enrollment information. |

## Updating Effective-Dated Job Data

Use the Job Data components to update job data, such as position and location information for a person's job, by effective date.

**Navigation**

- Workforce Administration, Job Information, Job Data, Work Location
- Workforce Administration, Job Information, Current Job, Work Location

To update effective-dated job data:

1. Locate the person whose record you want to change.

Always start on the Work Location page because that's where the Effective Date field is. From there, you may have to go to other pages to enter more information about the personnel action that you're taking.

2. Insert a new data row.
3. In the Effective Date field, enter the date when the new action will take effect.
4. Select an action code for the change, such as *Transfer* or *Promotion.*
5. If applicable, enter a reason code to explain why this action is occurring.
6. Change any other data needed to complete the new action, either on this page or on other pages in the component.

   For example, when you promote an employee, you most likely enter a new job code or a new position number on the Work Location page. You might also select a new salary administration plan, grade, and step, enter a new compensation rate on the Job Data - Compensation page, and enter a new business title and work phone on the Employment Information page.
7. Save the pages.

### Entering Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one action that takes effect on the same day. Entering two actions with the same effective date is especially common when you are tracking compound percentage pay increases that take effect at the same time. Use effective sequence numbers to combine multiple actions and specify which one to process first.

For example, a promotion (which produces a percentage pay increase) and a merit increase may take effect on the same day.

To enter multiple personnel actions with the same effective date:

1. Access the Work Location page (Workforce Administration, Job Information, Job Data, Work Location) for the person whose data you're updating.
2. Insert a new data row for the first action.

   The effective date is set by default to the system date, usually today's date, which you can override if necessary. Leave the effective sequence number set at *0.*
3. Enter any other information that you need to complete the action, either here or in other pages in the same component.
4. To enter the second action, return to the Work Location page and insert another data row.
5. Enter the same effective date as the first action, but enter an effective date sequence number of *1*.
6. Select the appropriate personnel action and enter any other information required to implement the action, either here or on other pages.

 

# Entering Promotions

A promotion usually involves a change of salary grade and new job code. This table lists the pages and fields that you typically update when you enter a promotion (you may need to update additional pages and fields):

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
| --- | --- | --- |
| Work Location | Effective Date<br><br>Action Code: *Promotion*<br><br>Reason Code (if applicable)<br><br>Position Number | All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job.<br><br>If you're organizing part or all of PeopleSoft Human Resources by position, review *PeopleSoft HR: Manage Positions*. |
| Job Information | Job Code<br><br>Regular/Temporary<br><br>Full/Part<br><br>Standard Hours<br><br>Work Period<br><br>FTE<br><br>Shift<br><br>Shift Rate<br><br>Contract Number<br><br>Local country fields | All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job.<br><br>If you're organizing part or all of PeopleSoft Human Resources by position, review *PeopleSoft HR: Manage Positions*. |
| Salary Plan<br><br>Compensation | Salary Administration Plan/Grade/Step<br><br>Compensation Rate | Update Salary Plan/Grade/Step on the Salary Plan page. Also update compensation information on the Job Data - Compensation page. |
| Employment Information | Business Title<br><br>Work Phone | Update these fields as needed. |

### Related Links

"Understanding Compensation Defaults *(PeopleSoft HCM 9.2: Human Resources Administer Compensation)*"

# Entering Departmental Transfers

Enter a transfer action when you want to assign a person to a new department without changing the person's job code. A transfer also implies that the worker's salary grade and compensation remain the same.

 

If you're organizing part or all of PeopleSoft Human Resources by position, use the transfer action to move a worker from one position to another. To move the position *and* the incumbent to a new location or department, use the Position Data pages.

This table lists the pages and fields that you typically update when you enter a transfer (you may need to update additional pages and fields):

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Work Location | Effective Date<br><br>Action Code: *Transfer*<br><br>Reason Code (if applicable)<br><br>Department | The system automatically enters a new location if it finds matching location setIDs in the Department table and the Tableset Record Group Control for the business unit that you're using. |
| Employment Information | Business Title<br><br>Work Phone | Update these fields as needed. |

### Related Links

"Understanding Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*"

"Understanding PeopleSoft HCM System Data Regulation *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Entering Pay Rate Changes

This table lists the pages and fields that you typically change when you enter a pay rate change. You may need to update additional pages and fields, as well.

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**Note:** If you do not need to modify any job-related information, you can use the Pay Rate Change component.

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See Updating Salary Information.

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Work Location | Effective Date<br><br>Action Code: *Pay Rt Chg* (pay rate change)<br><br>Reason Code (if applicable) | Enter *Pay Rate Change* to enter a salary change that isn't related to a change in salary grade or job code. If the pay rate change results from a salary grade or job code change, enter the change as a promotion or some other action. |

 

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Salary Plan | Salary Administration Plan/Grade/Step | Enter a new salary step if the pay rate change involves a change in step.<br><br>You cannot select a new grade because if the pay rate resulted from a change in salary grade, you enter the rate change as part of a promotion or other action.<br><br>If you selected the Multi-Step/Grade check box on the Installation Table page and you enter a new step on this page, click the Default Pay Components button on the Job Data - Compensation page if you want the system to supply default values for that step. Doing so is necessary unless you have distributed the worker's earnings by amount on the Job Earnings Distribution page. For job earnings distributions, manually update the distribution for the new rate. |

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Compensation | All fields | To enter a new pay rate, enter a new compensation rate, rate change amount, or rate change percent. When you enter any one of these three amounts, the system automatically calculates the other two.<br><br>Based on the compensation rate and frequency, the system calculates and displays the hourly rate, daily rate, monthly rate, and annual rate for this worker.<br><br>If you selected the Multi-currency check box on the Installation Table page and entered the compensation rate in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.<br><br>If necessary, enter a new annual benefits base rate for calculating this employee's benefits.<br><br>The system calculates the compa-Ratio (or percent through range calculation) based on the salary plan and grade and in the base currency that your organization uses, which you specify on the Installation Table page. The system also calculates the percent through range. This figure determines where a worker falls in the range by taking the salary minus the minimum divided by the spread. For example, if an employee has a salary of 26,000 USD in a range of 25-30,000 USD for the salary grade, the percent through range is 20 percent. |
| Compensation (continued) | | Modify any other information that has changed because of the pay rate change, such as holiday schedule, pay group, employee type, standard hours, or work period on the Job Data, Payroll, or Job Information pages. |
| Job Earnings Distribution | | Update as needed to distribute the worker's compensation hours or earnings. |

 

# Tracking Leaves of Absence

Many workers take a leave of absence at some point in their careers. Leaves can occur for any number of reasons, including sickness, vacation, maternity or paternity leave, jury duty, suspensions, or unpaid leave.

If your company tracks workers' absence history, you can acknowledge a leave of absence in the Monitoring Absences pages and Job Data pages.

This table lists the pages and fields that you typically change when you enter a leave of absence (you may need to update additional pages and fields, as well):

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Work Location | Effective Date<br><br>Action: *Leave of Absence, Leave of Absence with Pay,* or *Paid Leave of Absence*<br><br>Reason Code (if applicable) | None |
| Employment Information | Expected Return Date | Enter the date when you expect the worker to start work again. When you save the pages, the system displays the day before the leave of absence date as the date last worked. You can change it if necessary. When the worker returns from leave, the system deselects this field. |

## Tracking Multiple Types of Leave for One Worker

You might encounter situations in which you need to enter multiple types of leave for the same worker. For example, an employee might take a six-week leave with disability pay, take the following two weeks with vacation pay, and then take an additional month without pay.

You can enter all these leave types at the same time by inserting a new data row in the Work Location page for each type of leave and entering the effective date when each leave type begins. Then you access the appropriate page to make any other changes pertaining to that leave, such as compensation changes.

## Entering Returns from Leave

Most workers eventually come back from leaves of absence and resume their job duties. In fact, you often know at the time workers begin their leaves when they plan to return to work. Enter the return from leave information at the same time that you enter the leave of absence, or as soon as you have a confirmed return date.

This table lists the pages and fields that you typically change when you enter a return from leave (you may need to update additional pages and fields, as well):

| *Affected Pages* | *Affected Fields* | *Comments* |
| --- | --- | --- |
| Work Location | Effective Date<br><br>Action: *Return from Leave*<br><br>Reason Code (if applicable) | None |
| Employment Information | Expected Return Date | When you save the pages, the system deselects this field. |

## Entering Terminations and Retirements

When a worker retires or leaves your organization for some other reason, you enter the termination into the person's record.

This table lists the pages and fields that you typically change when you enter a termination or retirement (you may need to update additional pages and fields, as well):

| *Affected Pages* | *Affected Fields* | *Comments* |
| --- | --- | --- |
| Work Location | Effective Date<br><br>Action: *Terminated, Terminated with Pay, Terminated with Benefits, Retirement,* or *Retirement with Pay*<br><br>Reason Code, if applicable | The system treats the effective date that you enter as the day the termination starts and the first day the worker is no longer paid.<br><br>For example, if the worker's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the worker isn't paid for the last day of work. |
| Employment Information | Termination Date | The system displays the day *before* the effective date as the termination date and last date worked. If you rehire the worker, the system deselects both these fields. When a worker returns from leave, the system deselects only the Date Last Worked field. |

### Inactivating a Person's Job Profiles Upon Termination

The Event Manager event AssignmentTerminated is raised when an employee's status is changed to inactive on the job record. The Event Manager also raises the HJPM_EM_EVENTS:Handlers:InactivatePersonProfile event to determine if all the worker's job assignments are inactive. If all job assignments are inactive, then the person profiles in the Manage Profiles application for that employee ID are also inactivated.

See "Person Profile Page *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

PeopleSoft: Events and Notifications *(PeopleSoft 9.2: Events and Notifications Framework)*

 

## Entering Deaths

This table lists the pages and fields that you typically change when you enter a termination due to death:

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Work Location | Effective Date<br><br>Action: *Terminated*<br><br>Reason Code: *Death* | The system treats the effective date that you enter as the day the termination starts and the first day that the worker is no longer paid. |
| Identity/Diversity | Date of Death | Record the date that the worker died. |
| Employment Information | | The system displays the termination effective date as the termination date, and the day before the termination date as the date last worked. The system uses these dates and the effective date in payroll processing and reporting. |

## Entering Rehires

You may want to rehire a person who worked for your company in the past. Information on a rehired worker is probably already in PeopleSoft Human Resources, unless the worker data was deleted or archived. Before you rehire workers, you may want to make sure that the personal, employment, and job data is current. If a rehired worker doesn't have a record in the system, do not use the update pages. Instead, add a new employment or contingent worker instance.

See Understanding Job Data.

See Defining Personnel Actions and Reasons.

Because you probably rehire a worker whose previous job was in a department (organizational entity) for which you do not have security access, it's helpful to provide security access to all departments to at least one user performing rehires.

This table lists the pages and fields that you typically change when you enter a rehire (you may need to update additional pages and fields):

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Work Location | Effective Date<br><br>Action: *Rehire*<br><br>Reason Code, if applicable<br><br>Last Start Date | You can rehire only workers whose payroll or job status is *Terminated, Terminated with Pay, Retired,* or *Retired with Pay.*<br><br>When you save the pages, the system automatically completes the last start date. |

 

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
| --- | --- | --- |
| Employment Information | Company Seniority Date<br><br>Benefits Service Date, Years, Months, and Days<br><br>Seniority Pay Calc Date, Years, Months, and Days | You may want to change the company seniority date and other assignment dates. The company seniority date can serve as the basis for the worker's seniority, or you can use it for other tracking and reporting purposes. The benefits service date is the date on which the worker's service ranking is based and is used for benefit-related matters. The seniority pay calculation date is the date that the system uses to calculate seniority-based pay.<br><br>When you save the pages, the system automatically recalculates the corresponding years, months, and days. |

### Related Links

Understanding Job Data

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Assigning Workers to Different Positions

If you're organizing part or all of PeopleSoft Human Resources by position, you often move workers from one position to another as a result of promotions, transfers, rehires, or other personnel actions. Because both position and worker data are already in the system, you connect the two by selecting a position number, entering the effective date of the assignment, and entering any exceptions to the default data.

The following table lists the pages and fields that you typically change in the Job Data component when you enter a change of position. You may need to update additional pages and fields. When you change an assignment, the system also updates the Position Data - Work Location page. It automatically calculates and displays the new head count and shows the appropriate indicator in the Open/Filled field.

 

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Work Location | Effective Date<br><br>Action: *Position Change, Transfer, Promotion,* or *Rehire*<br><br>Reason Code, if applicable<br><br>Position Number | After you enter a position number, the system automatically completes position-related fields, including job code, department, and location. The system enters the position entry date as the effective date of the position change action. You cannot change the position entry date. To change the entry date, you must change the effective date for the position change action.<br><br>To override the position defaults, select the Override Position Data button, which makes the previously unavailable fields available for entry, such as the Location and Department fields on this page, or the Job Code field on the Job Information page. You can then enter exceptions in these fields.<br><br>The Position Management Record check box is display-only. The system uses this check box to indicate that it has automatically inserted a data row on the Job Data pages due to changes that you made to fields on the Position Data pages.<br><br>**Note:** If you override the defaults, you must maintain the job data manually—the system does not update position data automatically again until you deselect the Position Data Override check box.<br><br>The system issues a warning message if you assign a worker to a position that has already been filled by another worker and if a new appointment exceeds the maximum head count for that position. |

### Related Links

"Understanding Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*"

## Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

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**Note:** This feature works only for hourly employees, not for salaried employees.

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When you enter an action of *STD* (short-term disability with pay) or *LTD* (long-term disability with pay), the system changes the employee's status to *Leave With Pay.*

To send 100 percent of the employee's pay to the disability plan earnings code, access the Job Data - Job Earnings Distribution page, select the By Percent option, enter the appropriate disability earnings code, and enter a percent of *100.*

---

**Note:** When you put an employee on disability, don't forget to check additional pay records and make any necessary changes.

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# Setting Up and Tracking Military Job Updates

To set up and track military service job updates, use the Approval Levels (MIL_APPRVL_LVL_DFN) and Order Codes (MIL_ORD_CODE_DEFN) components.

This topic discusses how to track approvals for mass or individual job updates.

## Pages Used to Track Military Job Updates

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Approval Levels | MIL_APPRVL_LVL_DFN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Approval Levels, Approval Levels | Define military approval levels to describe the various levels used for approving orders that affect military members' Job rows. The approval levels codes are associated with the service member's Job Data rows on the Employee Data Tracking MIL page. |
| Order Codes | MIL_ORD_CODE_DEFN | Set Up HCM, Product Related, Workforce Administration, Workforce Data MIL, Order Codes, Order Codes | Enter military order codes ( such as legislative orders) that would indicate a reason for a job change. The order codes are associated with the service member's Job Data rows on the Employee Data Tracking MIL page. |
| Employee Data Tracking MIL | MIL_EE_DATA_TRK | Workforce Administration, Job Information, Employee Data Tracking MIL, Employee Data Tracking MIL | Track approvals for mass or individual job updates. When an employee or group of employees have a new Job row created as a result of a specific event (for example, mass deployment), use this component to indicate the approvals that occurred for this Job Data change. Changes to the job rows can be done manually or through the Mass Update process. |

## Employee Data Tracking MIL Page

Use the Employee Data Tracking MIL page (MIL_EE_DATA_TRK) to track approvals for mass or individual job updates.

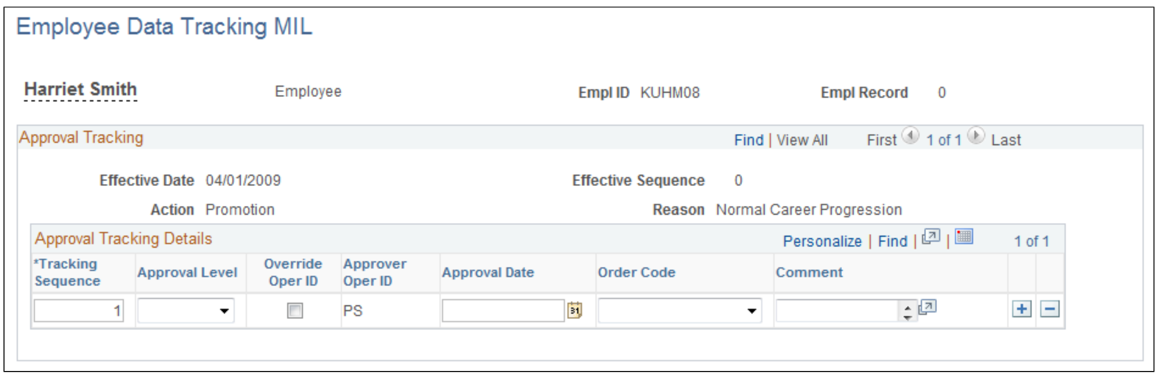
When an employee or group of employees have a new Job row created as a result of a specific event (for example, mass deployment), use this component to indicate the approvals that occurred for this Job Data change. Changes to the job rows can be done manually or through the Mass Update process.

**Navigation**

Workforce Administration, Job Information, Employee Data Tracking MIL, Employee Data Tracking MIL

**Image: Employee Data Tracking MIL page**

This example illustrates the fields and controls on the Employee Data Tracking MIL page. You can find definitions for the fields and controls later on this page.




**Tracking Sequence**

Enter a tracking sequence number.

**Approval Level**

Select a level, such as an initial request or final, for approving a military order. Define approval levels in the Approval Levels table.

**Override Oper ID (override operator identification) and Approver Oper ID (approver operator identification)**

The system displays the operator that entered the approval information. Select the Override Oprid check box to manually update the approving operator id.

**Approval Date**

Enter the date for this approval level.

**Order Code**

Select an order that explains the purpose of this job change. Define order codes in the Order Codes table.

**Comment**

Enter additional comments regarding this job update and approval.

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**Note:** The Mass Update process will update this component by calling the service MassUpdateMilitaryApproval, which in turn will call the Component Interface HCR_MIL_EE_TRK_SRV.

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# Updating Military Ranks

This topic provides an overview of military rank updates in Job Data and rank tracking in Manage Profiles.

## Understanding Military Rank Updates in Job Data

Military rank changes are tracked in a person's Job Data record. This table lists the pages and fields that you typically update when you enter a military rank change (you may need to update additional pages and fields):

| ***Affected Pages*** | ***Affected Fields*** | ***Comments*** |
|---|---|---|
| Work Location | Effective Date<br><br>Action Code: *Data Change*<br><br>Reason Code (if applicable)<br><br>Position Number<br><br>Service Component<br><br>Component Category | All the entries on the page could change depending on what the rank change involves and the service member's job. An action code may vary too depending upon other job changes related to the rank change, such as promotion or department transfer.<br><br>If you're organizing part or all of PeopleSoft Human Resources by position, military rank information does not default from the position. |
| Job Information | Job Family<br><br>Job Function<br><br>Job Subfunction | Update any other fields as needed. |
| Salary Plan | Rank<br><br>Rank Entry Data<br><br>Skill Grade<br><br>Worn Rank<br><br>Worn Rank Type<br><br>Salary Administration Plan<br><br>Grade | Rank is tied to Salary Plan and Grade. This may also involve updating compensation information on the Job Data - Compensation page. |
| Employment Information | Engagement Date<br><br>Early Promotion Date | Update other fields as needed. |

## Understanding Rank Tracking in Manage Profiles

PeopleSoft Human Resources Manage Profiles manages the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person as well as a service member's military ranks. The profile search and compare features enable you to perform searches for profiles that match user-defined criteria and easily compare profiles.

In order to keep military rank profiles up to date with Job Data, use the Refresh Names and Profiles MIL process (MIL_NAME_BLD). The system uses the HCM Event Manager to raise an event when a change to an assignment's military rank has occurred and execute this change.

The following prerequisites must be in place prior to running the Refresh Names and Profiles MIL process:

- The Integration Broker must be active.
- In HCM Event Manager, the event *AssignmentMilitaryRankChanged* must be active.

See *PeopleSoft: Events and Notifications,* "Understanding the Events and Notifications Framework"

See *PeopleSoft HR: Manage Profiles.*

## Page Used to Synchronize Ranks in Job Data with Manage Profiles

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Refresh Names and Profiles MIL | MIL_REBUILD_NAMES | Workforce Administration, Collective Processes, Refresh Names and Profiles MIL, Refresh Names and Profiles MIL | Run this process to rebuild the names and profiles of all the military personnel and synchronize this data with the Manage Profile records. |

# Managing Military Rank Change Requests

These topics provide an overview of military rank change processing and discuss how to:

- Create and manage military rank change requests.
- Enter the proposed military rank change details.
- Enter military rank change notification information.
- Record postal information for stakeholders you have notified manually.
- Approve or deny rank change requests.
- Generate service member rank change notices

## Understanding Military Rank Change Processing

The overall process of issuing a military rank change can occur multiple times during a service member's career and for various reasons, such as natural progression, performance and training, and other assessment-related testing. After an organization has gone through the evaluation and selection process and have identified the candidates who should receive a rank change, the organization can use the PeopleSoft Military Rank Change process.

 

The PeopleSoft Military Rank Change process enables the tracking of the various states of military service member rank changes, notifying stakeholders that are involved in this business process, and generating official documentation. When a rank change transaction is completely processed, a new row is inserted into the service member's Job Data to reflect the new rank change. Through the Military Rank Change pages and process, you can:

- Enter (new, amended, or cancelled) rank changes details in a specified rank change component.
- Use templates, which would provide default values for the rank change request and cut down on the number of key strokes required when entering requests.
- Retrieve and view history, including amendments and cancellations, to all employee rank changes.
- Enter notification details to be triggered based on current or future promulgation dates.
- Work closely with stakeholders (any individual that needs to be notified of a service member's rank change) through email notification and recording their approvals or denials through the manager self service pages.
- Have the system update service member job data and profile records to reflect the new rank changes.
- Generate rank change documents.

When a rank change transaction is added (a new request, an amendment, or a cancellation) for a service member, an email notification is sent to stakeholders, the career manager and a list of other reviewers and approvers you identify in the Rank Change MIL component, using the Approval Framework. This notification alerts them that the rank change process has begun and any stakeholders who have been specified as approvers will be notified that their review and approval is required for the rank change process to continue. Approvers will then approve or deny the rank change transaction in the Review Rank Change Request MIL component in the manager self service pages. If the stakeholders approve the rank change, the system then routes the information to the candidate's unit commander for final approval. The unit commander is determined based on the access type on the Military Processing Definition setup page.

See "Configuring Direct Reports Functionality *(PeopleSoft HCM 9.2: Application Fundamentals)*".

See "Setting Up Access to Direct Reports Data *(PeopleSoft HCM 9.2: Application Fundamentals)*".

The Career Manager can monitor rank change approvals and denials by reviewing the status monitor on the Review Rank Change Request MIL page. When a new or amended rank change has been approved, the system will insert and record this rank change row in the Job Data component through the MIL_UDJOB_AE Application Engine. The date this happens is based on the Application Date field value defined in Rank Change MIL component for this transaction. The Career Manager should review the status monitor on the Review Rank Change Request MIL page for denials and insert a new row in the Rank Change MIL component indicating a cancellation of the rank change transaction. This process enables you to keep a record of all military rank change propositions, amendments, and cancellations without inserting numerous rows into Job Data.

If the Military Processing Definition page is set up to enable prenotification, the system will provide a prenotification message to the stakeholders as a final reminder that this rank change is going to happen within a specified period.

You can also create rank change notices utilizing XML Publisher for the service members you select.

 

### Military Rank Change Processes

The Military Rank Change process uses these processes:

- Launch AWE for Mil Rank Change (MIL_AWE_AE)

  Launches the approval process. This application engine checks for all the rank changes that needs an approval and whose Start Approvals On date in the Rank Change MIL component is less than or equal to the current date.

- Prenotifications for Mil Rank (MIL_NOTFY_AE)

  Sends out the prenotification emails based on the Prenotification Date field in the Rank Change MIL component.

- Update Job Data for Mil Rank (MIL_UDJOB_AE)

  Updates Job Data with the rank changes that have been approved. This application engine checks for all the approved rank changes that are not yet applied to the database and that have an Application Date value in the Rank Change MIL component of less than or equal to the current date. This updates Job Data with an effective date that matches the Application Date value.

- Military Rank Change Notices (MILRNKNOT)

  Generates the rank change notices. You run these notices by navigating to Workforce Administration, Job Information, Reports, Generate Rank Change Notices. Identify the rank change notifications you wish to print and click Run to initiate the MILRNKNOT XML Publisher process, which calls the MILRNKNOT Application Engine process. Separate files are generated for each employee and the files are stored in the report folders of the respective server.

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**Note:** Run the approval, prenotification, and job update application engines by navigating to PeopleTools, Process Scheduler, System Process Requests and selecting the process you need to run. You can also trigger these processes to run automatically through the Process Scheduler by setting up a recurrence that is linked to the processes in order run them daily without additional manual intervention.

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See *PeopleTools: PeopleSoft Process Scheduler,* "Defining PeopleSoft Process Scheduler Support Information," Defining Recurrence Definitions

## Prerequisites

In order for you to use the Military Rank Change feature, you must ensure the following items have been setup:

- Military Rank functionality is enabled and the military rank setup tables have been defined.
- User profiles and roles have been set up with email and worklist notification preferences.
- Approval Framework has been set up for notification.
- Workflow with email is enabled.
- Event Manager has been configured.
- Integration Broker is running correctly.

- XML Publisher has been set up to create official document generation.

### Related Links

Setting Up Military Rank Change Notification and Documentation

## Pages Used to Track Military Rank Changes

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Military Rank Change | MIL_RANK_CHNG_CNTL | Workforce Administration, Job Information, Rank Change MIL, Military Rank Change | Create and manage military rank change requests by entering the controlling factors for this military rank change transaction. You can also enter predefined templates to populate the authorizing organization, career manager, and notification details. |
| Rank Change MIL - Details | MIL_RANK_CHNG_DTLS | Workforce Administration, Job Information, Rank Change MIL, Details | Enter the proposed military rank change details. |
| Rank Change MIL - Stakeholder | MIL_STKHLDR_NOTIF | Workforce Administration, Job Information, Rank Change MIL, Stakeholder | Enter military rank change notification information. This page is specifically designed to capture when the approval process will begin and who will be involved. List reviewers and approvers for this rank change that will receive an electronic notification and when the system should trigger approval workflow. If prenotification has been enabled, enter a prenotification date on which these stakeholders should be notified of the rank change. |
| Rank Change MIL - Postal | MIL_RANK_POSTAL | Workforce Administration, Job Information, Rank Change MIL, Postal | Record postal information for stakeholders that you have notified manually. Enter stakeholders that you are not notifying electronically and the date and address of where you mailed the notification. |
| Review Rank Change Request MIL | MIL_RANK_CHNG_APPR | Manager Self Service, Job and Personal Information, Review Rank Change Request MIL, Review Rank Change Request MIL | Approve or deny rank change requests. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Generate Rank Change Notices | MIL_NOTICE_RUN_CTL | Workforce Administration, Job Information, Reports, Generate Rank Change Notices, Generate Rank Change Notices | Generate service member rank change notices using XML Publisher. A report can be generated in any status, at any point in time. |

## Rank Change MIL - Military Rank Change Page

Use the Rank Change MIL - Military Rank Change page (MIL_RANK_CHNG_CNTL) to create and manage military rank change requests by entering the controlling factors for this military rank change transaction.

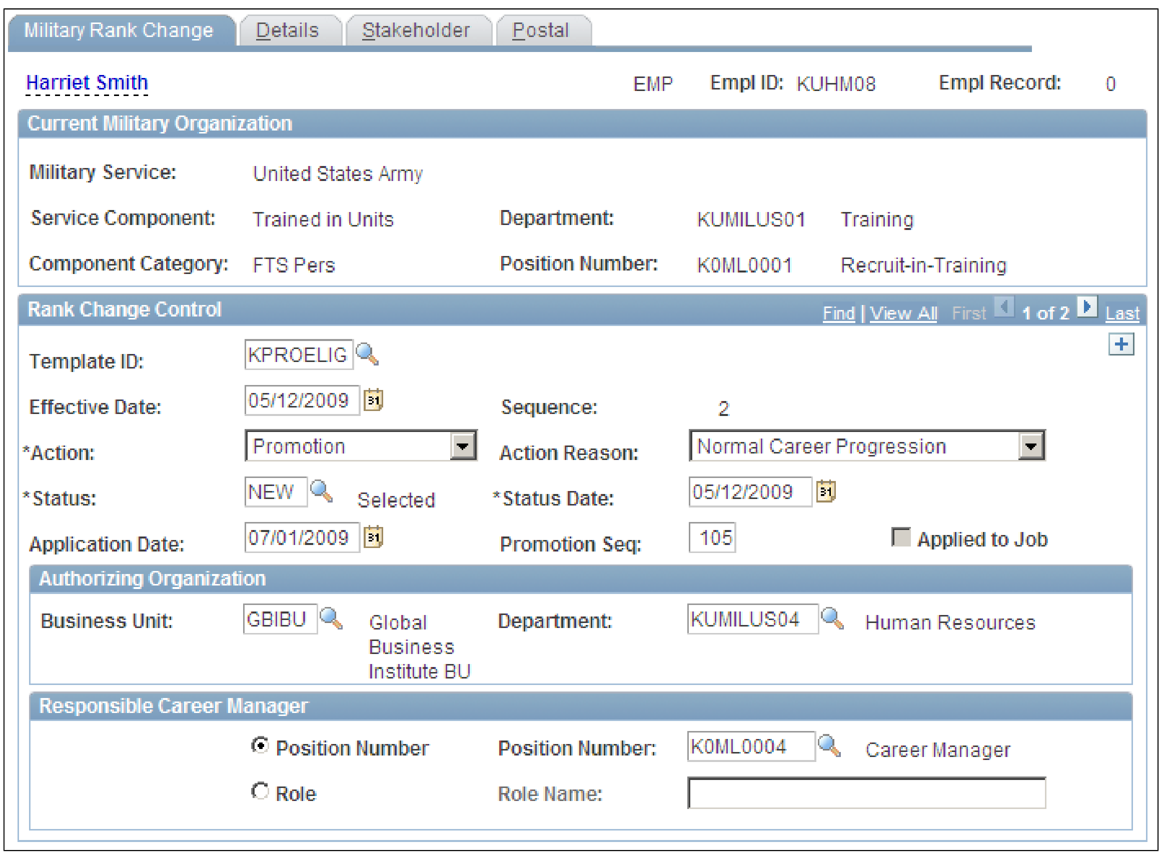
You can also enter predefined templates to populate the authorizing organization, career manager, and notification details.

**Navigation**

Workforce Administration, Job Information, Rank Change MIL, Military Rank Change

**Image: Rank Change MIL - Military Rank Change page**

This example illustrates the fields and controls on the Rank Change MIL - Military Rank Change page. You can find definitions for the fields and controls later on this page.




This page displays the employment and current military organization information that is recorded in the Job Data component for this person.

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**Note:** To have the system display the worn rank in front of the employee's name at the top of the military pages, you must have Military, Event Manager, and Publish/Subscribe enabled in the system and the domain status should be active. When a rank is changed on the current row, the event AssignmentMilitaryRankChanged is raised and the Event Manager triggers the handler to update the names.

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See *PeopleSoft: Events and Notifications*

## Rank Change Control

**Template ID**

Select a rank change template to populate the component with predefined fields from the Military Rank Change Template component, such as the Action, Reason, Status, Business Unit, Department, Career Manager, and role notification fields. This field is optional.

**Effective Date**

Enter the date the person was selected for a rank change. This field, along with the EmplID, Empl Record, Sequence, and Action fields, uniquely identify this transaction row.

**Sequence**

Defaults to 1 for a new effective-dated row and automatically increments by one when a new row is inserted in the scroll area for the same effective date.

**Action**

Select a valid action associated with the Military Rank Change process. Valid rank change actions are defined in the Rank Change Status MIL component for PeopleSoft actions. The system will use this value in the Action field when this rank change is inserted into Job Data.

**Action Reason**

Select a valid action reason for the service member's rank change. Values are defined in the PeopleSoft Action Reason table. The system will use this value in the Action Reason field when this rank change is inserted into Job Data. This field is an optional.

**Status and Status Date**

Enter a disposition status of this rank change and the date of this disposition status. Values for this field may include *NEW, AMD* (rank change amendment), *CNA* (administrator canceled rank change), or *CNC* (rank change commander cancellation), depending up how the disposition status was set up in the Rank Change Status MIL component.

**Application Date**

Enter the date this rank change should be inserted into Job Data, if known. Since this date is not always known when the rank change for the service member is first defined, you can enter this date at a later time. However, this field is required in order for the row to be processed and inserted to the service member's Job Data.

**Note:** In order for the system to write this rank change to Job Data, the Apply Row to Job Data check box must be selected for the action's Status value on the Rank Change Status MIL page, approvals for military rank changes must be enabled, and the rank change must be approved.

See Rank Change Status MIL Page.

**Promotion Seq (promotion sequence)** Indicate the order that a promotion should be granted to the service member. This field is available only when the action is *Promotion.* This field is an optional.

**Apply to Job** Indicates whether or not the rank change has been inserted into the Job Data record.

### Authorizing Organization

**Business Unit** Enter the business unit that is authorizing this rank change. This is required in order to enter an authorizing department.

**Department** Enter the department that is authorizing this rank change. An authorizing business unit must be entered first in order to enter a department.

### Responsible Career Manager

Every service member has a career manager working for their career interests. Due to the fluid nature of the military, the Career Manager is determined by either a position or a role as determined by your organization. Use this section to determine whether the Career Manager should be identified by a position or role.

**Position Number** Select this option if the career manager responsible for this service member's rank change is associated with a designated position. When you select this option, the Position Number field becomes available to enter the career manager's position number.

**Role andRole Name** Select this option if the career manager responsible for this service member's rank change is associated with a PeopleSoft role. When you select this option, the Role Name field becomes available to enter the career manager's role.

For more information on setting up roles, see the product documentation for *PeopleTools: Security Administration*.

### Related Links

Setting Up Military Rank Change Notification and Documentation

## Rank Change MIL - Details Page

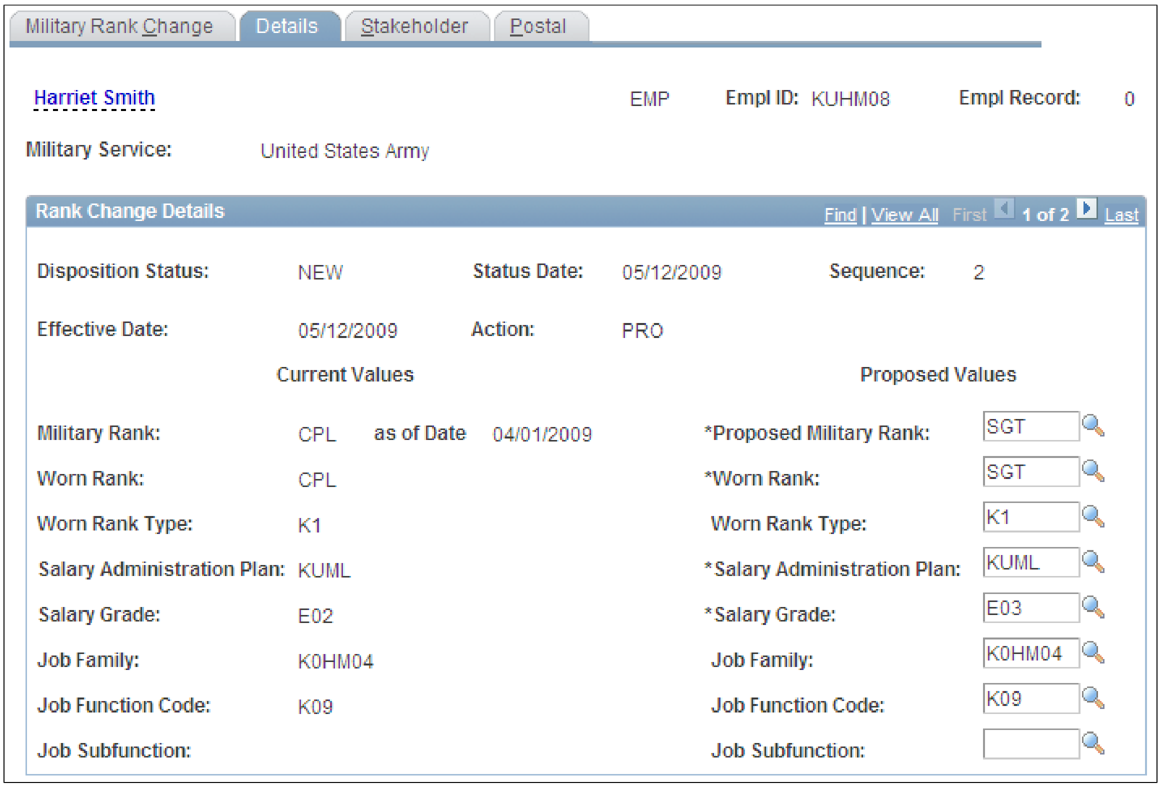
Use the Rank Change MIL - Details page (MIL_RANK_CHNG_DTLS) to enter the proposed military rank change details.

**Navigation**

Workforce Administration, Job Information, Rank Change MIL, Details

**Image: Rank Change MIL - Details page**

This example illustrates the fields and controls on the Rank Change MIL - Details page. You can find definitions for the fields and controls later on this page.




Use this page to view the service member's current military rank information (the left side of the page) and enter the proposed rank changes (the right side of the page).

The Current Values fields display the military services member's information from Job Data as of the effective date of this rank change. The values for the current rank and salary information come from the Salary Plan page, the job fields come from the Job Information page.

The Proposed Values fields will be written to the military service member's Job Data pages upon meeting approval requirements, if applicable, and reaching the Application Date you entered on the Military Rank Change page. These field are unavailable when you enter a cancellation.

| | |
|---|---|
| **Proposed Military Rank** | Enter the new rank that was proposed for the service member. |
| **Worn Rank** | Enter the new worn rank that is proposed for the service member. |

| | |
|---|---|
| **Worn Rank Type** | Enter the new worn rank type, such as temporary, substantive, or acting, that is proposed for the service member. |
| **Salary Administration Plan and Salary Grade** | Enter the new salary administration plan and grade proposed for the service member. Valid salary plans and grades for military ranks are defined in the Military Service component.<br><br>See Military Service - Service Ranks Page. |
| **Job Family** | Enter the new job family that is proposed for the service member, if applicable. |
| **Job Function Code and Job Subfunction** | Enter a new job function and a subfunction that is proposed for the service member, if applicable. A job subfunction is a subset of a job function, such as benefits or payroll might be subset of HR. A subfunction can only be selected if you have entered a job function first. |

## Rank Change MIL - Stakeholder Page

Use the Rank Change MIL - Stakeholder page (MIL_STKHLDR_NOTIF) to enter military rank change notification information.

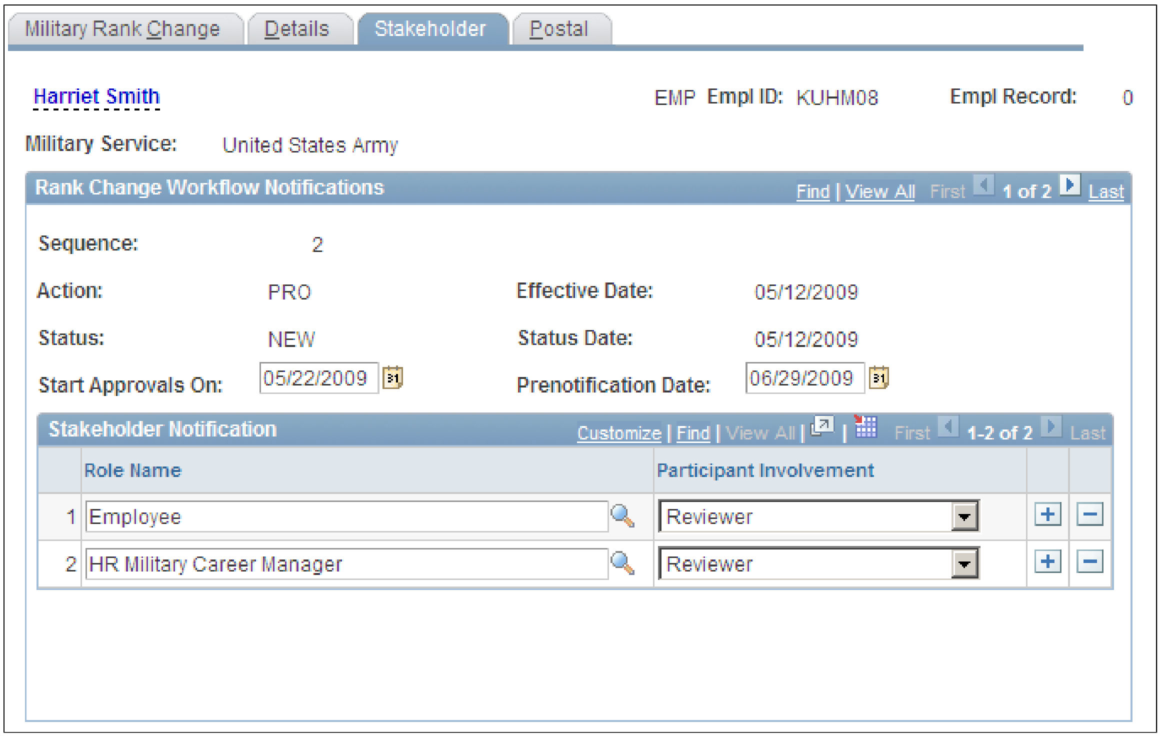
This page is specifically designed to capture when the approval process will begin and who will be involved. List reviewers and approvers for this rank change that will receive an electronic notification and when the system should trigger approval workflow. If prenotification has been enabled, enter a prenotification date on which these stakeholders should be notified of the rank change.

**Navigation**

Workforce Administration, Job Information, Rank Change MIL, Stakeholder

**Image: Rank Change MIL - Stakeholder page**

This example illustrates the fields and controls on the Rank Change MIL - Stakeholder page. You can find definitions for the fields and controls later on this page.




Use this page to identify stakeholders that will be notified electronically and set the date on which the system will send out the approval workflow through Approval Framework. The employee's unit commander will always be notified via workflow. As delivered, unit commander has the final approval for their service members.

---

**Note:** The unit commander is determined by the Access Type selected on the Military Processing Definition page.

---

| | |
|---|---|
| **Start Approvals On** | Enter the date that the electronic notifications will be sent out to the stakeholders in notification list for their approval or review. This date should be the current date or a future date. If an earlier date is provided, the approvals will start immediately upon save, just like the current date.<br><br>After notifications have been sent out to the stakeholders, changes to a rank change request would have to be made by adding an amendment row. |
| **Prenotification Date** | Enter the date that the online stakeholder should receive a prenotification message of the service member's rank change that will be made in the system. This date is typically set in conjunction with the Application Date field on the Military Rank Change page, notifying stakeholders for a final time |

that the rank change is going to occur. This provides a final opportunity to stop or modify the rank change one last time.

If you are using a template for this rank change, you can have the system automatically enter a Prenotification Date value based on the Application Date value you have entered on the Military Rank Change page.

For example, you have a template that has the Prenotification Date = Effective Date - Days field is set to *3* in the Military Rank Change Template component. You then create a rank change request using this template. You enter an Application Date value of *June 20,* and the system automatically populates the Prenotification Date field with *June 17,* three days before the rank change is applied to the service member's Job Data.

---

**Note:** The Allow Prenotification check box must be selected on the Military Processing Definition page and the Include in Prenotification check box should be selected for the action specified on the Rank Change Status MIL page for prenotification to take place.

---

See Military Processing Definition Page.

See Rank Change Status MIL Page.

See Understanding Military Rank Change Processing.

**Role Name**

Select any additional roles, other than the unit commander, that should be included in the notification process. Roles are created in the PeopleTools Roles table. The unit commander will automatically be notified and does not need to be entered in this Stakeholders Notification group box.

**Participant Involvement**

Identify the level of involvement of the stakeholder. Values are *Approver* or *Reviewer.*

## Rank Change MIL - Postal Page

Use the Rank Change MIL - Postal page (MIL_RANK_POSTAL) to record postal information for stakeholders that you have notified manually.

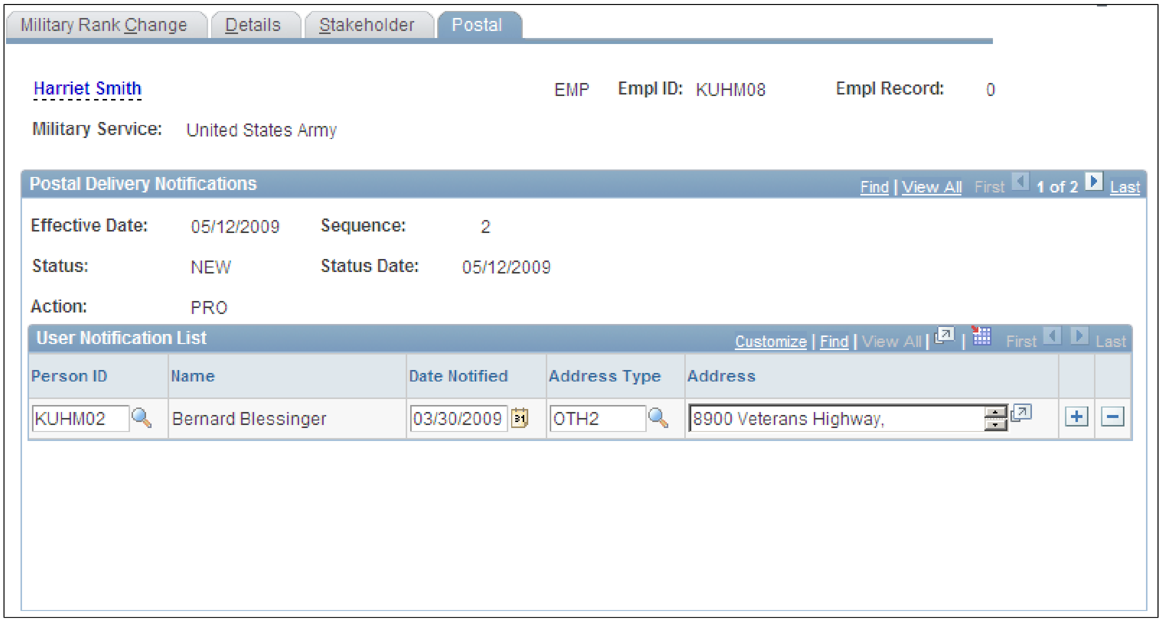
Enter stakeholders that you are not notifying electronically and the date and address of where you mailed the notification.

### Navigation

Workforce Administration, Job Information, Rank Change MIL, Postal

### Image: Rank Change MIL - Postal page

This example illustrates the fields and controls on the Rank Change MIL - Postal page. You can find definitions for the fields and controls later on this page.




Use this page to record those stakeholders that you are notifying of the rank change outside of the AWE process, as specified on the Stakeholder page.

---

**Note:** The system does not generate any automatic notifications or letters based on information entered on this page. This page is informational only and should be used to record those notifications you performed yourself.

---

| | |
|---|---|
| **Person ID and Name** | Enter the PeopleSoft employee ID and the system displays the name of the individual to be notified of this service member's rank change via postal delivery. |
| **Date Notified** | Enter the date that you notify the person about the military rank change outside of the automatic electronic notification. |
| **Address Type andAddress** | Select an address type such as *Home, Mailing,* or *Business.* If an address is associated with this address type, the system will populate the Address field. If there is no address provided from the system, you can manually enter the address. |

## Review Rank Change Request MIL Page

Use the Review Rank Change Request MIL page (MIL_RANK_CHNG_APPR) to approve or deny rank change requests.

### Navigation

Manager Self Service, Job and Personal Information, Review Rank Change Request MIL, Review Rank Change Request MIL

### Image: Review Rank Change Request MIL page (1 of 2)

This example illustrates the fields and controls on the Review Rank Change Request MIL page (1 of 2). You can find definitions for the fields and controls later on this page.

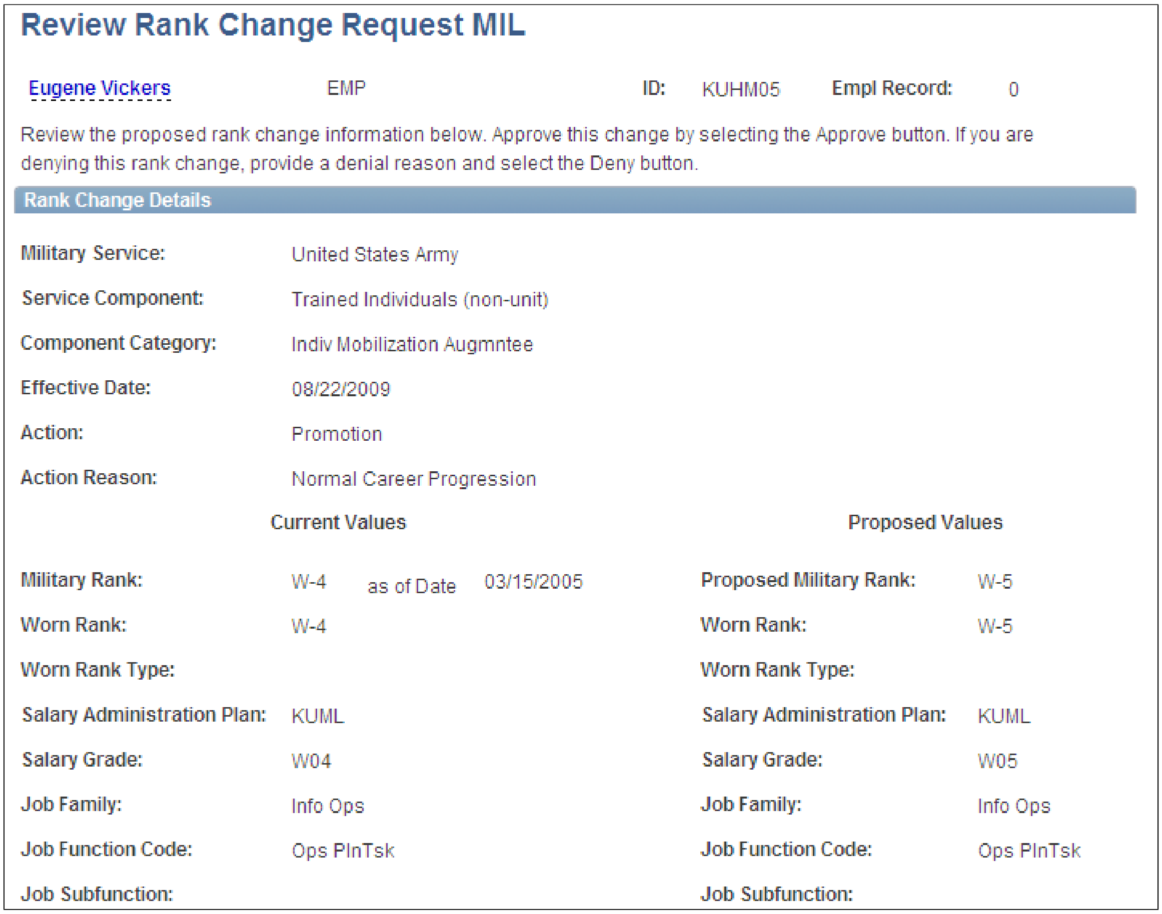
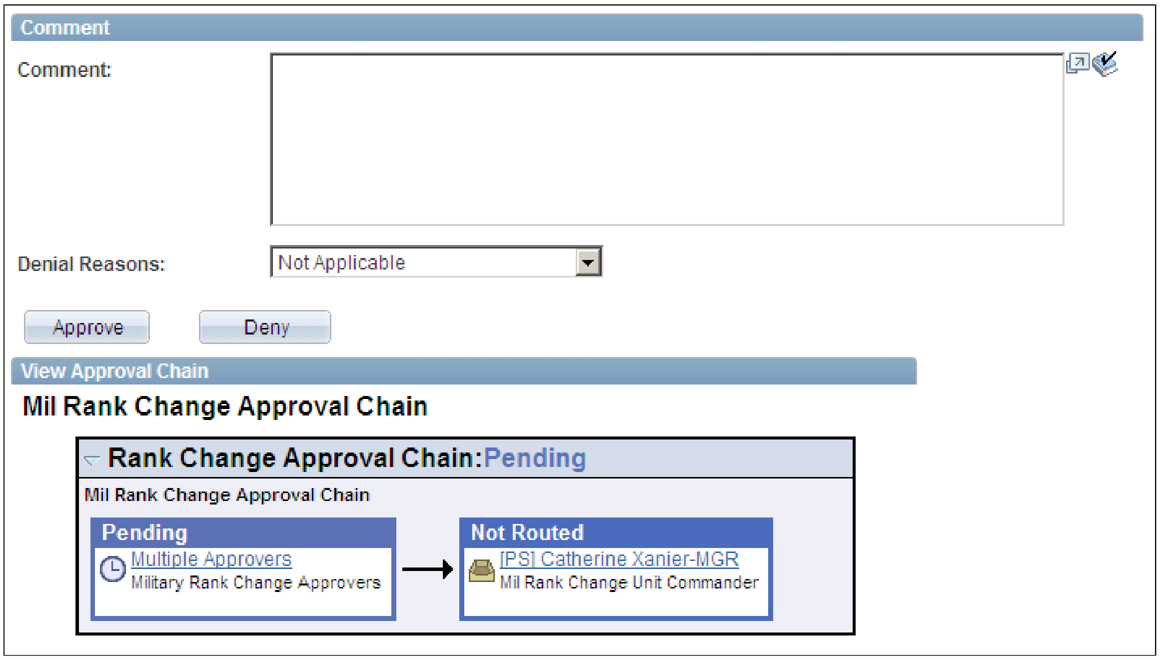


**Image: Review Rank Change Request MIL page (2 of 2)**

This example illustrates the fields and controls on the Review Rank Change Request MIL page (2 of 2). You can find definitions for the fields and controls later on this page.




This page is available to approvers who have not yet approved the transaction as well as reviewers. Approval notifications are sent out via the Launch AWE for Mil Rank Change (MIL_AWE_AE) Application Engine process, which you can schedule to run daily or on an as needed basis.

See Understanding Military Rank Change Processing.

## Rank Change Details

This page displays the current and proposed rank change values. Approve or deny the rank change request by selecting the appropriate button. If you are denying the request, select a reason from the Denial Reasons drop down box.

The effect date comes from the Effective Date field in the Rank Change MIL component.

---

**Note:** When a rank change is denied, the Career Manager should insert a cancellation row in the Rank Change MIL component for this person to record the change of disposition. The system will also send out an updated notification and will not insert the rank change into Job Data.

---

## View Approval Chain

You can also view the status of the rank change approval chain in the View Approval Chain section of the page. This approval process is a two step process: first the system sends out notifications to the approvers specified on the Rank Change MIL - Stakeholder page, then, if approved, the system forwards the notification to the unit commander for approval. When there is no approver for the first step of the process, then the transaction is immediately routed to the unit commander.

## Generate Rank Change Notices Page

Use the Generate Rank Change Notices page (MIL_NOTICE_RUN_CTL) to generate service member rank change notices using XML Publisher.

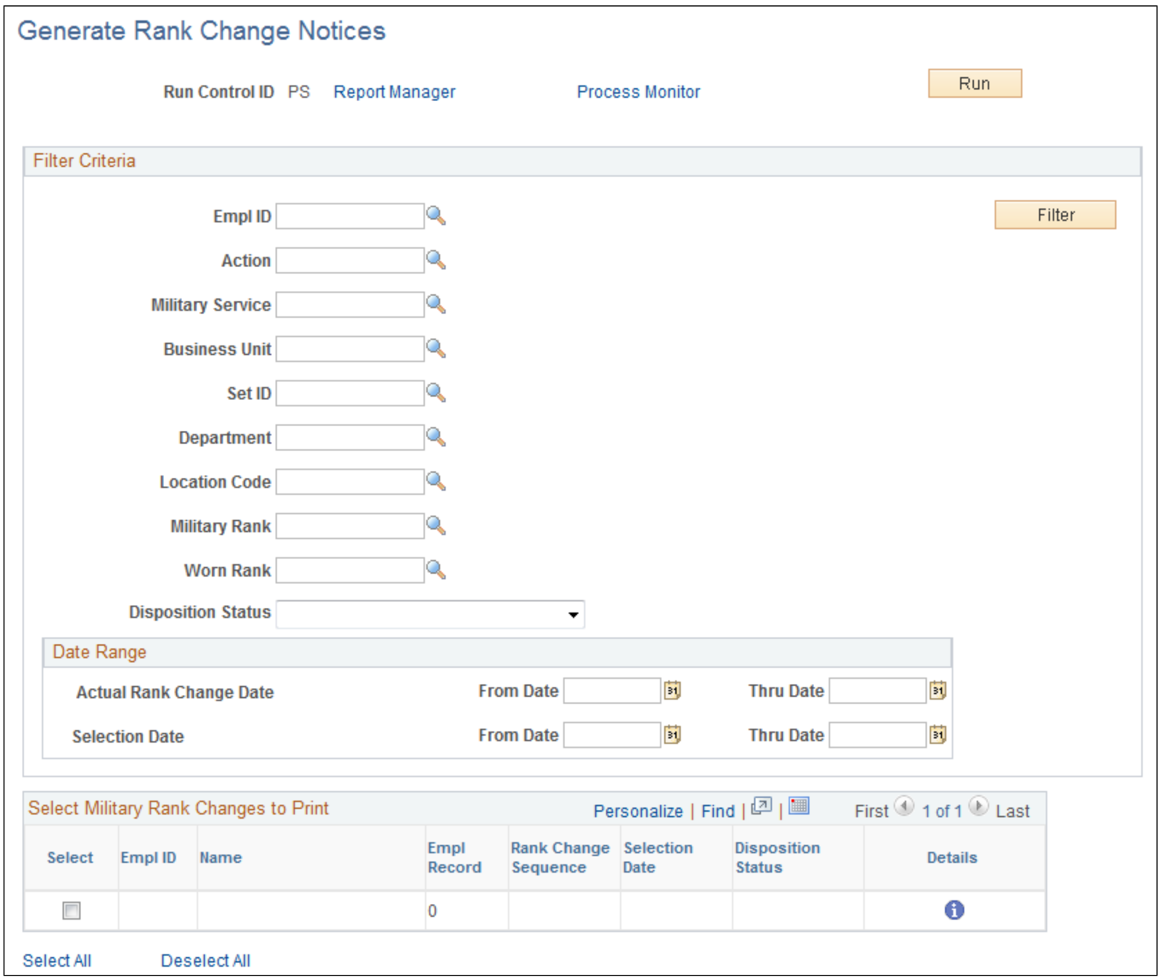
A report can be generated in any status, at any point in time.

**Navigation**

Workforce Administration, Job Information, Reports, Generate Rank Change Notices, Generate Rank Change Notices

**Image: Generate Rank Change Notices page**

This example illustrates the fields and controls on the Generate Rank Change Notices page. You can find definitions for the fields and controls later on this page.




Generate this report for a single individual or for several people for which you have entered a military rank change. Enter search criteria such as an employee ID, department or location information, rank details, a rank change date range, or any combination of these items. The Actual Rank Change Date fields use the Application Date from the rank change request, and the Selection Date field uses the effective date that the person was selected for the rank change.

Click Filter to initiate the search. The system will display those who meet this criteria in the Select Military Rank Changes to Print grid. Select those for whom you wish to print the report and run the process This process initiates the Military Rank Change Notices (MILRNKNOT XML Publisher) process, which calls the MILRNKNOT Application Engine process.

**Important!** Separate files are generated for each employee and the files are stored in the report folders of the respective server.

See Understanding Military Rank Change Processing.

# Updating Organizational Instance and Assignment Relationships

These topics provide an overview of organizational instance and assignment relationships and discuss how to:

- Promote an assignment to an instance.
- Move an assignment to another instance.
- Demote an instance.

## Understanding Organizational Instance and Assignment Relationships

When you promote an assignment to an instance, so that it is no longer subordinate to another organizational instance, you make an additional assignment into its own instance. For example, you might want to terminate a controlling instance, but maintain the additional assignment. If the additional assignment is subordinate to the controlling instance, they share the same organizational instance number, the additional job is terminated automatically when you terminate the controlling instance. To promote an instance for a single employee online, add a new row on the Work Location page of the Job Data component. Use the Promote an Assignment page to promote assignments for multiple employees as a batch process.

Use the Demote Instance page to make a controlling instance into an additional assignment under another instance. To demote an instance, the controlling instance should not have any additional assignments.

Use the Move Assignment to another Inst page to move an additional assignment to another instance. This is useful to correct errors. For example, when you select the wrong employee record number to be the controlling instance.

These restrictions apply to modifying organizational instance and assignment relationships:

- These actions are valid only for employees and contingent workers; persons of interest are not eligible.
- These actions are not valid for Japan additional appointments and temporary assignments.
- You can only promote a host assignment to an instance if the host assignment is terminated and there are no future assignment rows with action ASG (Assignment) or ASC (Assignment Completion).
- Assignments with future rows with action ADL (Additional Job) are ineligible.
- You cannot change or delete a row after you confirm any of these actions.

The action codes that are entered on the rows for these actions are:

- OCA – Promote an Assignment to an Instance.
- OCI – Demote an Instance.
- OCM – Move an Assignment to another Instance.

## Prerequisites

You must define action reasons that correspond to the delivered actions OCA, OCI, and OCM before using this component.

## Pages Used to Modify Organizational Instance and Assignment Relationships

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Work Location | JOB_DATA1 | Workforce Administration, Job Information, Job Data, Work Location | Enter a new row on this page to modify instance and assignment relationships. |
| Promote an Assignment | RUNCTL_OC_PRO_ASG | Workforce Administration, Collective Processes, Promote an Assignment, Promote an Assignment | Batch process to promote assignments for multiple employees. |
| Promote an Assignment - Details | HCR_OC_PRO_ASG_SEC | Click the Details link on the Promote an Assignment page. | Review the errors and warnings returned by the component interface. |
| Move Assignment to another Inst | HCR_OC_CHG_ASGN | Workforce Administration, Job Information, Move Assignmnt to another Inst, Move Assignment to another Inst | Move an additional assignment to another instance. |
| Demote an Instance | HCR_OC_CHG_ASGN | Workforce Administration, Job Information, Demote an Instance, Demote an Instance | Change a controlling instance to an additional assignment under another instance. You can demote an instance to an assignment only if the instance does not have any additional assignments. |

## Promote an Assignment Page

Use the Promote an Assignment page (RUNCTL_OC_PRO_ASG) to batch process to promote assignments for multiple employees.

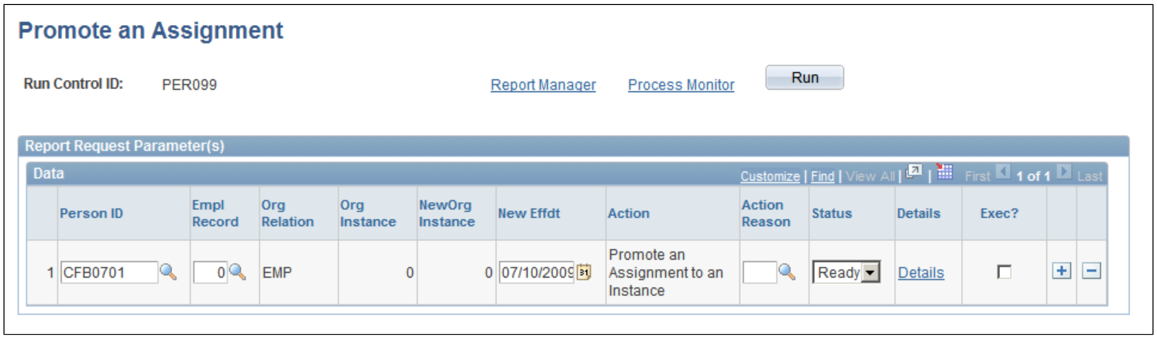
 

### Navigation

Workforce Administration, Collective Processes, Promote an Assignment, Promote an Assignment

### Image: Promote an Assignment page

This example illustrates the fields and controls on the Promote an Assignment page. You can find definitions for the fields and controls later on this page.




**Org Relation** The organizational relationship. Valid values are *EMP* for employee and *CWR* for contingent worker.

**Org Instance** The actual org instance.

**New Effdt** The new effective date defaults to today's date.

**Status** Available values are *Ready, Failure, Success,* and *Cancelled.* The default value is *Ready* for all rows.

After the process has run to completion, you can review the status. If, for any reason, the transaction has not been loaded to the records, the status of the row is set to *Failure.* Otherwise the status is *Success.* You must determine the reasons why transactions ended in *Failure* and change the status back to *Ready* or to *Cancelled* before you run the process again.

**Details** Click the link to open the Details page. Use this page to review the errors and warnings returned by the component interface.

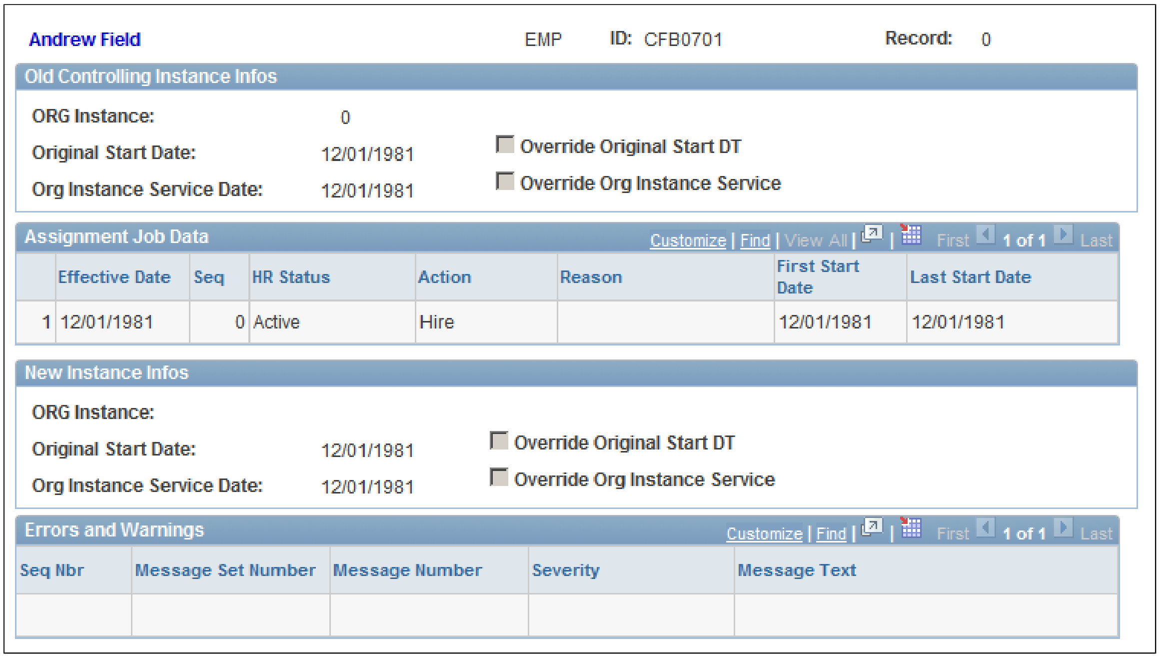
**Exec?** The process loads only the rows with Status set to *Ready* and with the Exec? check box selected.

Click the Details link to access the Details page for Promote Instance.

**Image: Promote an Assignment - Details page**

This example illustrates the fields and controls on the Promote an Assignment - Details page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Old Controlling Instance Infos** | This information is for display only. |
| **Assignment Job Data** | The grid displays job data for the selected assignment, sorted by effective date in ascending order. |

## Move Assignment to another Inst Page

Use the Move Assignment to another Inst page (HCR_OC_CHG_ASGN) to move an additional assignment to another instance.

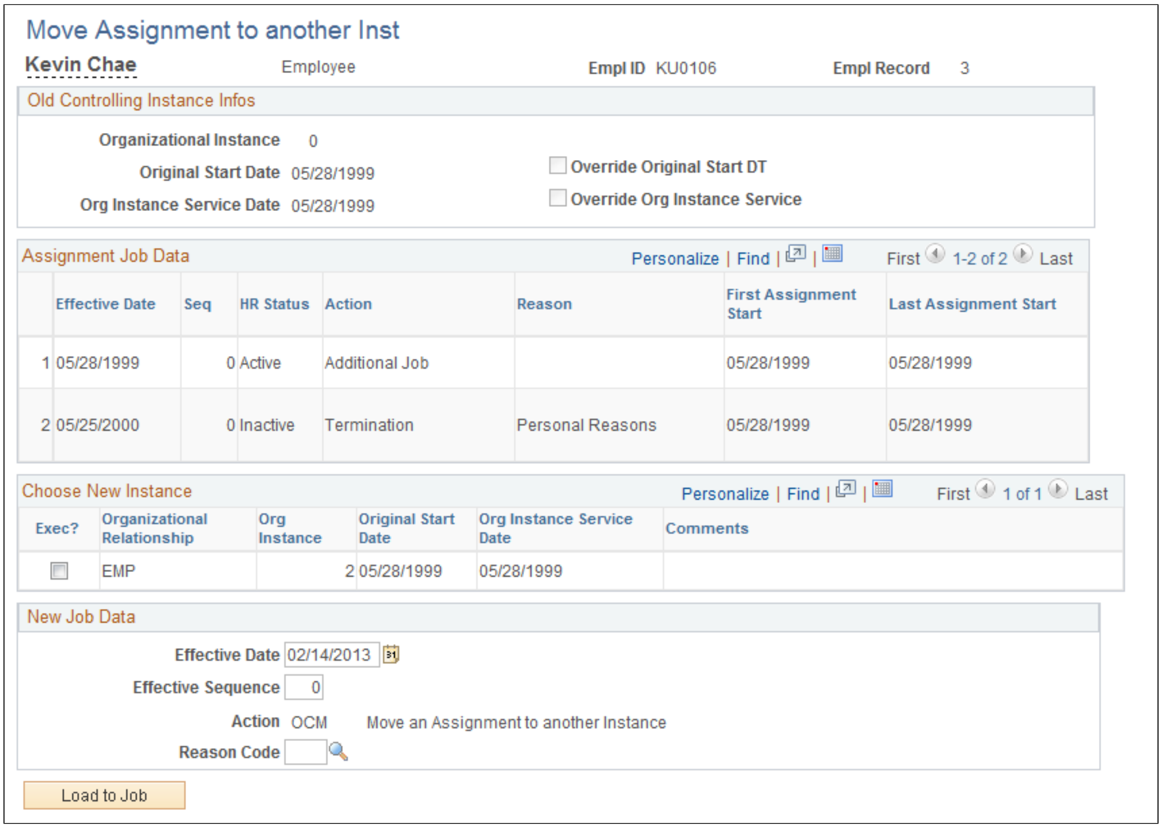
 

### Navigation

Workforce Administration, Job Information, Move Assignmnt to another Inst, Move Assignment to another Inst

### Image: Move Assignment to another Inst page

This example illustrates the fields and controls on the Move Assignment to another Inst page. You can find definitions for the fields and controls later on this page.




**Assignment Job Data** — The grid displays job data for the selected assignment, sorted by effective date in ascending order.

**Choose New Instance** — This grid lists all instances for this employee per organization. If you select an assignment that has a start date prior to the instance's first hire date, you cannot select that instance. You can only move an assignment to an instance if the active date of the assignment coincides with the dates of the instance.

**New Job Data** — Enter the job effective date, job effective sequence, the action reason for the action. The action code defaults to OCM (move an assignment to another instance), and cannot be changed.

**Load to Job** — Click this button to insert the new job data into the JOB record.

**Transfer to Job** — This button is displayed after the Load to Job process runs successfully. Click the Transfer to Job button to review the updated JOB data. If the process does not run successfully, an Errors and Warnings grid appears that lists the errors.

## Demote an Instance Page

Use the Demote an Instance page (HCR_OC_CHG_ASGN) to change a controlling instance to an additional assignment under another instance.

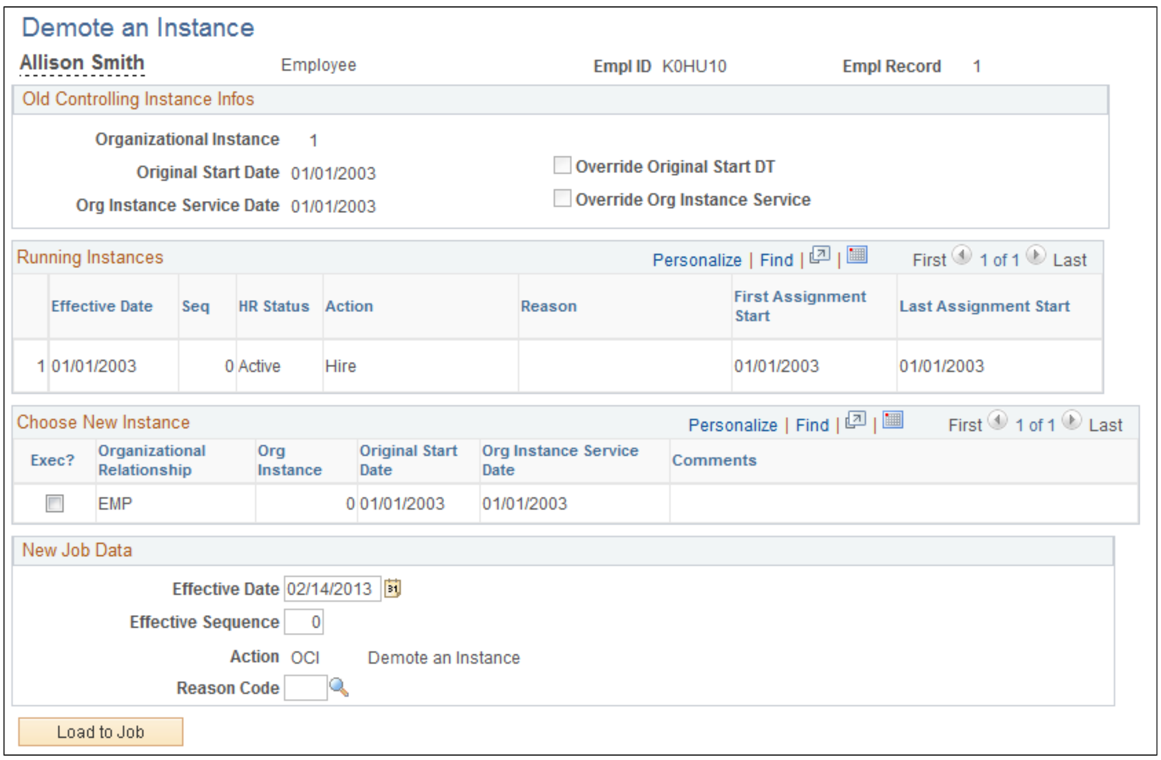
You can demote an instance to an assignment only if the instance does not have any additional assignments.

**Navigation**

Workforce Administration, Job Information, Demote an Instance, Demote an Instance

**Image: Demote an Instance page**

This example illustrates the fields and controls on the Demote an Instance page. You can find definitions for the fields and controls later on this page.




**Old Controlling Instance Infos**

This information is for display only.

**Running Instances**

The grid displays job data for the selected assignment, sorted by effective date in ascending order.

**Choose New Instance**

This grid lists all instances for this employee per organization. If you select an assignment that has a start date prior to the instance's first hire date, you cannot select that instance. You can only move an assignment to an instance if the active date of the assignment coincides with the dates of the instance.

**New Job Data**

Enter the job effective date, job effective sequence, the action reason for the action. The action code defaults to OCI (Demote and Instance), and cannot be changed.

**Load to Job** Click this button to insert the new job data into the JOB record.

**Transfer to Job** This button is displayed after the Load to Job process runs successfully. Click this button to review the updated JOB data. If the process does not run successfully, an Errors and Warnings grid appears that lists the errors.

# Updating Salary Information

The Pay Rate Change component provides a quick and simple option for making salary adjustments when the adjustment is not related to any other changes such as promotions or transfers. If any other job-related information needs to be modified for the salary change, use the Job Data component.

**Note:** The four pages in the Pay Rate Change component—Employee Profile, Salary Plan, Compensation, and Job Earnings Distribution—match related pages in the Job Data component (the Employee Profile page contains information from both the Work Location page and the Job Information page).

## Pages Used to Update Salary Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Employee Profile | PAY_RT_CHANGE1 | Workforce Administration, Job Information, Pay Rate Change, Employee Profile | Adjust the work periods and hours if it is necessary to do so for the pay rate change. |
| Salary Plan | PAY_RT_CHG_SALPLAN | Workforce Administration, Job Information, Pay Rate Change, Salary Plan | Adjust the salary step. |
| Pay Rate Change - Compensation | PAY_RT_CHANGE2 | Workforce Administration, Job Information, Pay Rate Change, Compensation | Adjust rates and frequencies. |
| Job Earnings Distribution | PAY_RT_CHANGE3 | Workforce Administration, Job Information, Pay Rate Change, Job Earnings Distribution | Adjust earnings distributions. |

### Related Links

Updating Job Data

Understanding Job Data

"Understanding Salary Plans *(PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)*"

"Understanding Salary Grades and Steps *(PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)*"

# Refreshing Compensation

When you run the Employee Compensation Application Engine process (HR_PER501A) or click the Default Pay Components button on the Pay Rate Change - Compensation page, the same steps are executed, but you can update several records at once with the HR_PER501A process.

The Employee Compensation process:

- Inserts a new job row when you select Add new effective date, and uses the effective date that you entered in the As Of Date field.

  Alternatively, it updates the job row that is effective as of the date that you select in the As Of Date field.

- Updates any future rows (rows are considered future if they come into effect after the as of date) when you select Update Future Rows.
- Replaces manual changes with the new default values.

## Page Used to Refresh Compensation

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Calculate Compensation | RUNCTL_PER501 | Workforce Administration, Job Information, Calculate Compensation, Calculate Compensation | Use to run the Employee Compensation process to update compensation packages. |

# Running Job Data Reports

These topics provide an overview of reporting appointments for job data changes, list a common element, and discuss how to:

- (JPN) Run the Appointment Notification report.
- (JPN) Run the Appointment List report.
- (JPN) Run the Employee Assignment List report.

## (JPN) Understanding Reporting Appointments for Job Data Changes

When workers are newly hired or transferred, or have other job-related changes, many Japanese companies provide individual notifications of appointment to each worker. These notifications, known as appointment notifications (Jirei), contain different information depending on the action and action reason entered on the worker's new job record.

Periodically, many companies also distribute a listing of all new hires or transfers or other changes of job. This list is known as the appointment list (Tsuutatsu).

When you run the Appointment Notification report, the report headings change according to the actions for which you are running the report—you can select actions and action reasons on the report page.

### Reporting Appointments for Actions and Report Outputs

The following table illustrates what the appointment reports contain, depending on the action for which you run the report:

| ***Heading and Actions*** | ***Hire and Rehire*** | ***Transfer*** | ***Promotion*** | ***Termination*** |
|---|---|---|---|---|
| Announcement date | 3 | 3 | 3 | 3 |
| Company description ( of worker's company) | 3 | 3 | | 3 |
| Department | 3 | 3 | | 3 |
| Supervisor level | 3 | 3 | | 3 |
| Employee status | 3 | | | |
| Salary plan | | | 3 | |
| Salary grade | | | 3 | |

**Note:** For the actions *Transfer* and *Promotion,* the system automatically populates the Reason field. For a promotion, the system populates the field with *Grade Advance.* For a transfer, the system populates the field with *Employee Request* and *Internal Recruitment.* For all other actions in the table, you can select individual reasons (for the action that you selected) or have the system select all reasons (for the action that you selected).

With the Japanese appointment reporting functionality, if you are recording a worker's simultaneous change of department and supervisor level, enter the department change first. With both changes having the same effective date, the change of supervisor level has the higher sequence number and ensures that the system selects the changes for reporting on both the appointment notification and appointment list.

In addition, when you record job data changes with the Japanese appointment reporting functionality, reports are available for the following actions:

- Hire
- Rehire
- Termination
- Transfer
- Promotion

### Sorting Appointment Lists Using Tree Structures and Definitions

To have the system sort appointment lists by department and supervisor level, use the standard tree building features to create a tree structure and reporting definition for supervisor levels, and a reporting definition for departments. You then need to select only the Refer to the Tree Manager check box on the report page to have the system use your DEPT_SECURITY tree and, depending on the job action and reason to which the appointment information relates, your SUPERVISOR_LEVEL tree.

### Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Common Element Used To Run Job Data Reports

**Show Components** Select if you want your report to display compensation component information.

## Pages Used to Run Job Data Reports

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Personnel Actions History | RUNCTL_PER015 | Workforce Administration, Job Information, Reports, Personnel Actions History, Personnel Actions History | Run the Personnel Actions History report (PER015), which lists all workers affected by each of the job actions that you enter. |
| Pending Future Actions | RUNCTL_ASOFDT_COMP | Workforce Administration, Workforce Reports, Pending Future Actions, Pending Future Actions | Run the Pending Future Actions report (PER021), which lists all workers with job action notices scheduled for a future date. |
| Department Action Notices | PRCSRUNCNTL | Workforce Administration, Workforce Reports, Department Action Notices, Department Action Notices | Run the Department Action Notices report (PER001). This report lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices.<br><br>Run the Refresh Employees Table process before running this report. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Employees on Leaves of Absence | PRCSRUNCNTL | Workforce Administration, Job Information, Reports, Employees on Leave of Absence, Employees on Leaves of Absence | Run the Employees on Leave of Absence report (PER005). This report lists all workers on leave and their expected return dates. Use this report to compare the return date that you entered in PeopleSoft Human Resources with the worker's expected return date, or as a reminder to enter the return from leave information.<br><br>Run the Refresh Employees Table process before running this report. |
| Temporary Employees | RUNCTL_ASOFDATE | Workforce Administration, Job Information, Reports, Temporary Employees, Temporary Employees | Run the Temporary Employees report (PER007). This report provides an alphabetical list of all workers marked as temporary, along with length of service and other details of employment. |
| Years of Service | RUNCTL_PER003 | Workforce Administration, Job Information, Reports, Years of Service, Years of Service | Run the Years of Service report (PER003). This report lists workers who have completed the number of years of service that you specify, as of the point in time that you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards. |
| Primary Job Audit | RUNCTL_PER058 | Workforce Administration, Workforce Reports, Primary Job Audit, Primary Job Audit | Run the Primary Job Audit report (PER058). Use this report to check for discrepancies in the primary job designation for workers with multiple jobs. Run this report regularly to correct discrepancies in worker job records. |
| Employee Turnover Analysis | RUNCTL_FROMTHRU | Workforce Administration, Workforce Reports, Employee Turnover Analysis, Employee Turnover Analysis | Run the Employee Turnover Analysis report (PER010). This report lists each department ID and provides the worker counts as of the date that you specify. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Official List ESP | RUNCTL_PER054_ESP | Workforce Administration, Workforce Reports, Official List ESP, Official List ESP | Run the Spanish Official List report (PER054ES), which compiles the information that you need for Matricula book reporting. You can run the report for all matricula books, which includes historical worker data, or for the current book only, which includes only current data. |
| Appointment Notification JPN | RUNCTL_NTF_JPN | Workforce Administration, Job Information, Reports, Appointment Notification JPN, Appointment Notification JPN | Run the JPN Appointment Notifications report ( PER063JP). Depending on the combination of action and reason that you use in the run control, this report prints individual worker notifications of hire, rehire, termination, transfer, and promotion. |
| Appointment List JPN | RUNCTL_NTF2_JPN | Workforce Administration, Job Information, Reports, Appointment List JPN, Appointment List JPN | Run the Appointment List JPN report (PER064JP), which generates an appointment list. This report lists all workers who have been hired, rehired or retired, transferred or promoted. The information that the report provides varies according to the combination of action and reason that you enter on the Appointment List report page. |
| Employee Assignment List JPN | RUNCTL_EMPLIST_JPN | Workforce Administration, Job Information, Reports, Employee Assignment List JPN, Employee Assignment List JPN | Print the JPN Employee Assignment List report ( PER066JP), which lists workers by department, including additional appointment employees. |

### Related Links

Understanding PARs

## (JPN) Appointment Notification JPN Page

Use the Appointment Notification JPN page (RUNCTL_NTF_JPN) to run the JPN Appointment Notifications report (PER063JP).

Depending on the combination of action and reason that you use in the run control, this report prints individual worker notifications of hire, rehire, termination, transfer, and promotion.

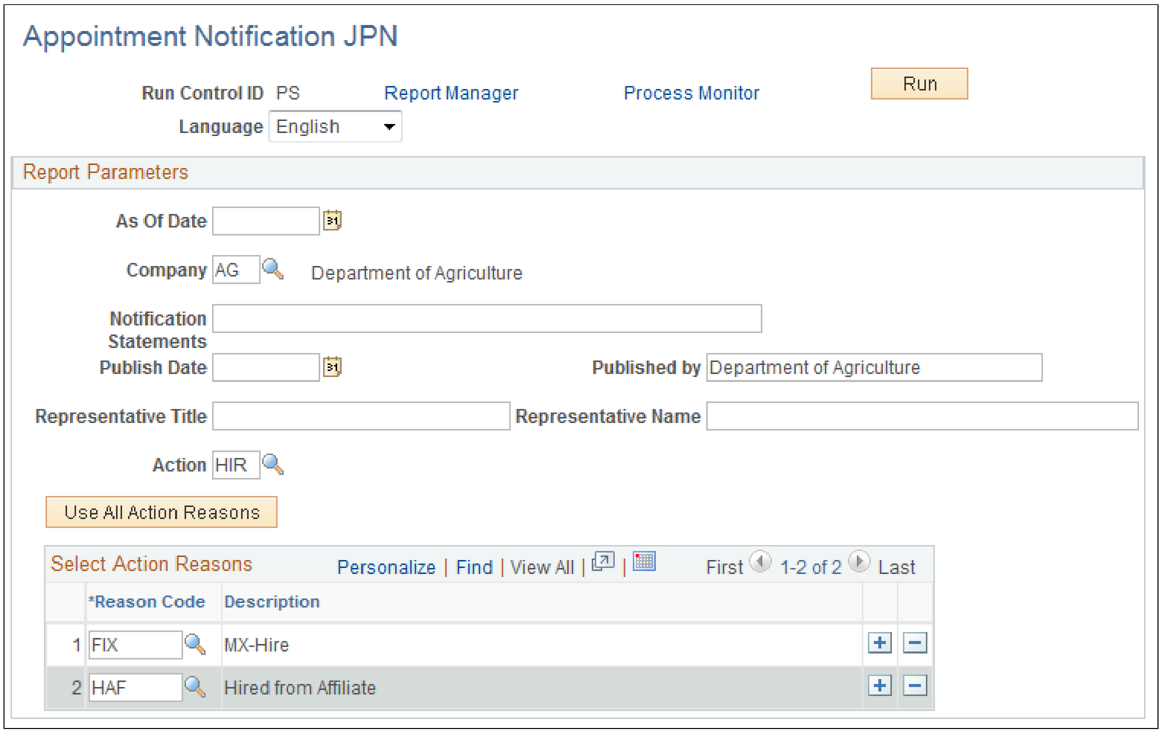
 

**Navigation**

Workforce Administration, Job Information, Reports, Appointment Notification JPN, Appointment Notification JPN

**Image: Appointment Notification JPN page**

This example illustrates the fields and controls on the Appointment Notification JPN page. You can find definitions for the fields and controls later on this page.




Report headings vary according to the combination of action and reason. Enter free-form text and a company official's title and name to appear on the report, and select the action and reason combinations on which you want to report.

| | |
|---|---|
| **Language** | Select the language for the report. |
| **As of Date** | This is the effective date of worker job data rows that the system searches and report on. It appears on the report as the announcement date.<br><br>**Note:** For termination notifications, enter the effective date of the termination row on the worker's job record. The system sets the announcement date on the printed notification as the As of Date minus 1 day, the same as the termination date on the worker's Employment Dates page. |
| **Company** | Select your company code. The company description appears by default in the Published by field. |
| **Notification Statements** | Enter any comments that you want to appear as an introduction to the list on the report: for example, *Hiring order is as follows.* |

**Publish Date**

Enter the publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment notification.

**Published by**

Displays the description of the company that you entered, but you can override the default with a free-form description of, for example, your human resources department.

**Representative Title**

Displays the default from the company table. You can override the default. This is the title of the company's representative that appears on the notification.

**Representative Name**

Displays the default from the company table. You can override the default. This is the name of the company's representative that appears on the notification.

**Action**

Select an action that you want to report on. You can only select *Hire, Rehire, Transfer, Promotion,* or *Termination.*

**Use All Action Reasons**

Click this button unless you want to select individual reasons for the action that you entered in the Reason Code grid. Even if you selected individual reasons in the grid, if you click this button, the system loads all reasons.

---

**Note:** You only need to select reasons (individual or all) for actions *Hire, Rehire,* and *Termination.* For actions *Transfer* and *Promotion,* the system automatically populates the Reason Code field. However, the process reports only job rows that have a reason code. If a job row has an action of *Hire, Rehire, Termination, Transfer,* or *Promotion,* but no action reason, the system does not report it.

---

**Reason Code**

Select all the reasons for the action that you entered that you want the report to include. If the Use All Action Reasons check box is deselected, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the previous note that discusses the Use All Action Reasons field.

## (JPN) Appointment List JPN Page

Use the Appointment List JPN page (RUNCTL_NTF2_JPN) to run the Appointment List JPN report (PER064JP), which generates an appointment list.

This report lists all workers who have been hired, rehired or retired, transferred or promoted. The information that the report provides varies according to the combination of action and reason that you enter on the Appointment List report page.

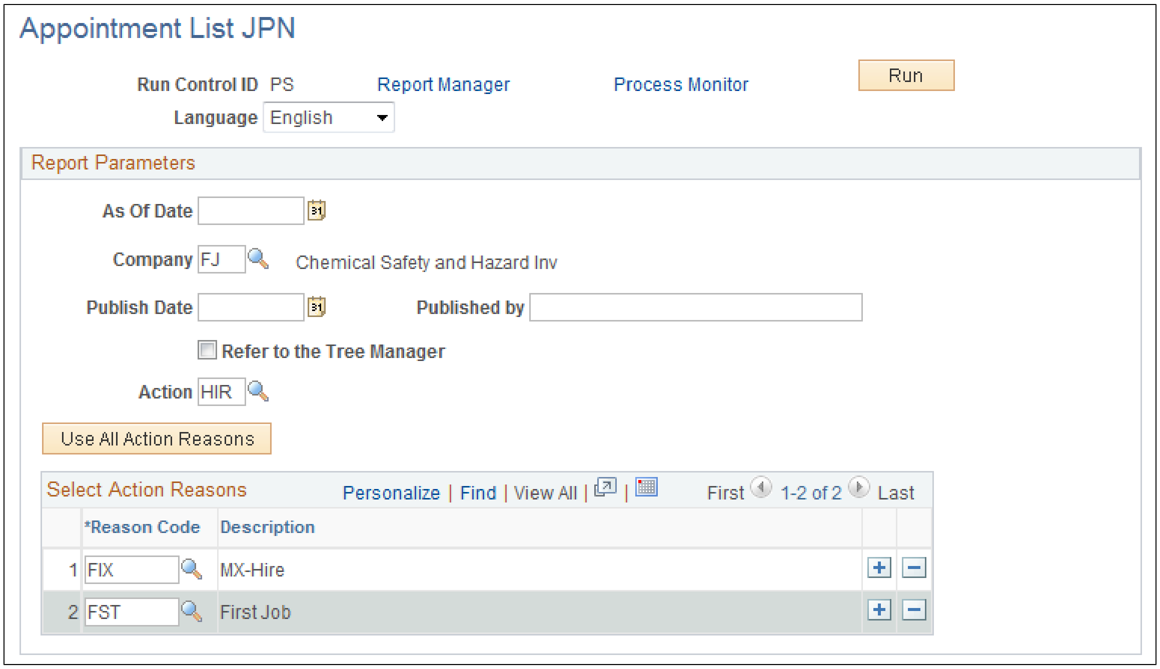
 

### Navigation

Workforce Administration, Job Information, Reports, Appointment List JPN, Appointment List JPN

**Image: Appointment List JPN page**

This example illustrates the fields and controls on the Appointment List JPN page. You can find definitions for the fields and controls later on this page.




You can enter free-form text and a company official's title and name to appear on the report, and you can select the action and reason combinations that you want to report on.

**As Of Date**

This is the effective date of worker job data rows on which the system will search and report.

**Note:** For *Termination* listings, you should enter the effective date of the job termination row. The system sets the announcement date on the printed list as the As Of Date minus 1 day, the same as the termination date on the worker's Employment Dates page.

**Company**

Select your company code. Unlike for appointment notification, the company description does *not* appear by default in the Published by field.

**Publish Date**

Enter a publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment list.

**Published by**

Enter a free-form description of the publishing department, such as your human resources department.

**Refer to the Tree Manager**

Select this check box if you want the system to sort the listing by using the DEPT_SECURITY tree and, depending on the action and reasons, the SUPERVISOR_LEVEL tree.

This is how the system sorts the listing when you select this check box:

- For actions *Hire* and *Rehire,* the system uses only the DEPT _SECURITY tree.
- For actions *Transfer* and *Termination,* the system uses both the DEPT_SECURITY tree and the SUPERVISOR_LEVEL tree.
- For action *Promotion,* the system sorts by salary plan, salary grade, and employee ID, whether the check box is selected or deselected.

  Trees have no effect.

If the Refer to the Tree Manager option is deselected, the system sorts the list by employee ID.

---

**Note:** Workers who do not have a supervisor level appear in the list by department, with the Supervisor Level column blank. They are sorted by employee ID, after all the workers who do have a supervisor level.

---

**Action**

Select an action that you want to report on. You can only select *Hire, Rehire, Transfer, Promotion,* or *Termination.*

**Use All Action Reasons**

Click this button unless you want to select individual reasons for the action that you entered in the Reason Code grid. Even if you have selected individual reasons in the grid, if you click this button, the system loads all reasons.

---

**Note:** You need to select reasons only for actions *Hire, Rehire,* and *Termination.* For actions *Transfer* and *Promotion,* the system automatically populates the Reason Code field. However, the process reports only job rows that have an action reason. If a job row has an action of *Transfer* or *Promotion,* but no action reason, the system does not report it.

---

**Reason Code**

Select all the reasons for the action that you entered that you want the report to include. If you click the Use All Action Reasons button, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the note above for the Use All Action Reasons field.

## (JPN) Employee Assignment List JPN Page

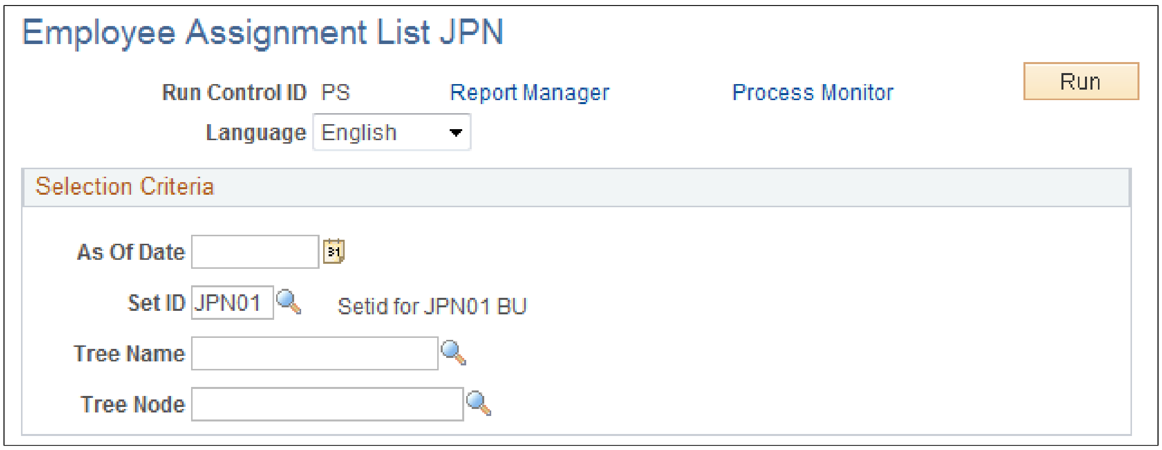
Use the Employee Assignment List JPN page (RUNCTL_EMPLIST_JPN) to print the JPN Employee Assignment List report (PER066JP), which lists workers by department, including additional appointment employees.

**Navigation**

Workforce Administration, Job Information, Reports, Employee Assignment List JPN, Employee Assignment List JPN

**Image: Employee Assignment List JPN page**

This example illustrates the fields and controls on the Employee Assignment List JPN page. You can find definitions for the fields and controls later on this page.




This report lists workers by department and supervisor level, including workers with additional appointments.

To run the report, at least one department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by department, and then by workers:

- With supervisor levels registered in the Supervisor Level tree, in tree order.
- With supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Without supervisor levels, in alphanumeric employee ID order.

**Note:** The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL. If you have not defined a Supervisor Level tree with that name, sorting is in alphanumeric supervisor level order.

# Viewing Quick Analytics Headcount Pivot Grids

These topics provide an overview of pivot grids and discuss how to:

- Run the Headcount Movement report.
- Run the Current Headcount report.

## Understanding Headcount Pivot Grids

Pivot Grid functionality provides grid and chart visualization with the ability to filter data by any dimension and drill down on facts to the individual detail level. Pivot grids use PS Queries as the basis to gather data and then transform the results into easy to use pivot tables or charts.

PeopleSoft HCM delivers headcount pivot grids to enable your organization to take a proactive approach to planning, analyzing, and anticipating workforce needs by filtering and presenting data graphically, using different views. Headcount grids enable HR Administrators to view headcount data visually and filter this data to a more granular level. These grids also provide managers with additional insight into the organization, particularly when looking to restructure. Users view the data within the context of the transaction, ensuring proper data security based on their current security access settings used for other reports executed from Workforce Reports.

Pivot Grid Overview

PeopleSoft HCM delivers these headcount pivot grids for the following users:

- Administrator
  - Headcount Movement - Shows administrators all job actions that occurred during the specified reporting period (the default chart renders the latest 12 months).
  - Current Headcount - Enables administrators to compare the distribution of the organizational population by employee, contingent worker, and persons of interest, based upon current job effective dated rows.
- Manager
  - Headcount Movement - Allows managers to compare the distribution of the organizational population by job code based upon current job effective dated rows.
  - Current Headcount - Displays job actions of those that report to the logged-in manager that occurred during the specified reporting period.

  The headcount pivot grids are accessible from the Direct Reports pagelet on the Manager Dashboard *(PeopleSoft HCM 9.2: eProfile Manager Desktop)*.

To provide flexibility, you can define prompts to enable the user to display the data they need in the pivot grid.

Filters can be applied to the data to further slice it for analysis. Once the results are rendered, the user is able to drill down to the data details and interact with the data in a table format.

You can use the delivered pivot grids, or quickly configure your own using a 5 step setup wizard based off of any PS Query. For more information on Pivot Grid functionality, see the product documentation for *PeopleTools: PeopleSoft Pivot Grid*.

**Note:** Pivot grids require that you use PeopleTools 8.53, or greater.

## Pages Used to Run Quick Analytics Reports

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Headcount Movement | PTPG_PGVIEWER | • Workforce Administration, Workforce Reports, Quick Analytics, Headcount Movement<br>• Manager Self Service, Manager Dashboard and then select the Headcount Analytics link, Headcount Movement link at the bottom of the Direct Line Reports pagelet. | Analyze the headcount movement within your organization by job actions, such as hires or terminations, over a period of time. |
| Current Headcount | PTPG_PGVIEWER | • Workforce Administration, Workforce Reports, Quick Analytics, Current Headcount<br>• Manager Self Service, Manager Dashboard and then select the Headcount Analytics link, Current Headcount link at the bottom of the Direct Line Reports pagelet. | View the distribution of the organizational population. Administrators can view this information for employees, contingent workers, and persons of interest based upon the current job effective dated rows. Managers can view the distribution of the organizational population by job code based upon the current job effective dated rows. |
| Prompts | PTPG_USERPROMPTS | Select the Prompts item from the Options Menu on the Headcount Movement or Current Headcount page. | Enter the default values to further refine a query when you run it. |
| Pivot Grid Data | PTPG_GRIDVIEWER | Select the View Grid item from the Options Menu on the Headcount Movement or Current Headcount page. | select filter options and view a number count for those that meet the criteria |
| User Charting Options | PTPG_DISPLAYOPT | Select the Chart Options item from the Options Menu on the Headcount Movement or Current Headcount page. | Define the display settings for the user results chart. |
| Pivot Grid Drilldown | PTPG_DRILLDN_PG | Select a specific bar or pie piece in the chart and select the Detailed View option. | View a list of employees that make up the results for the bar or pie piece selected in the chart. |

## Headcount Movement Page

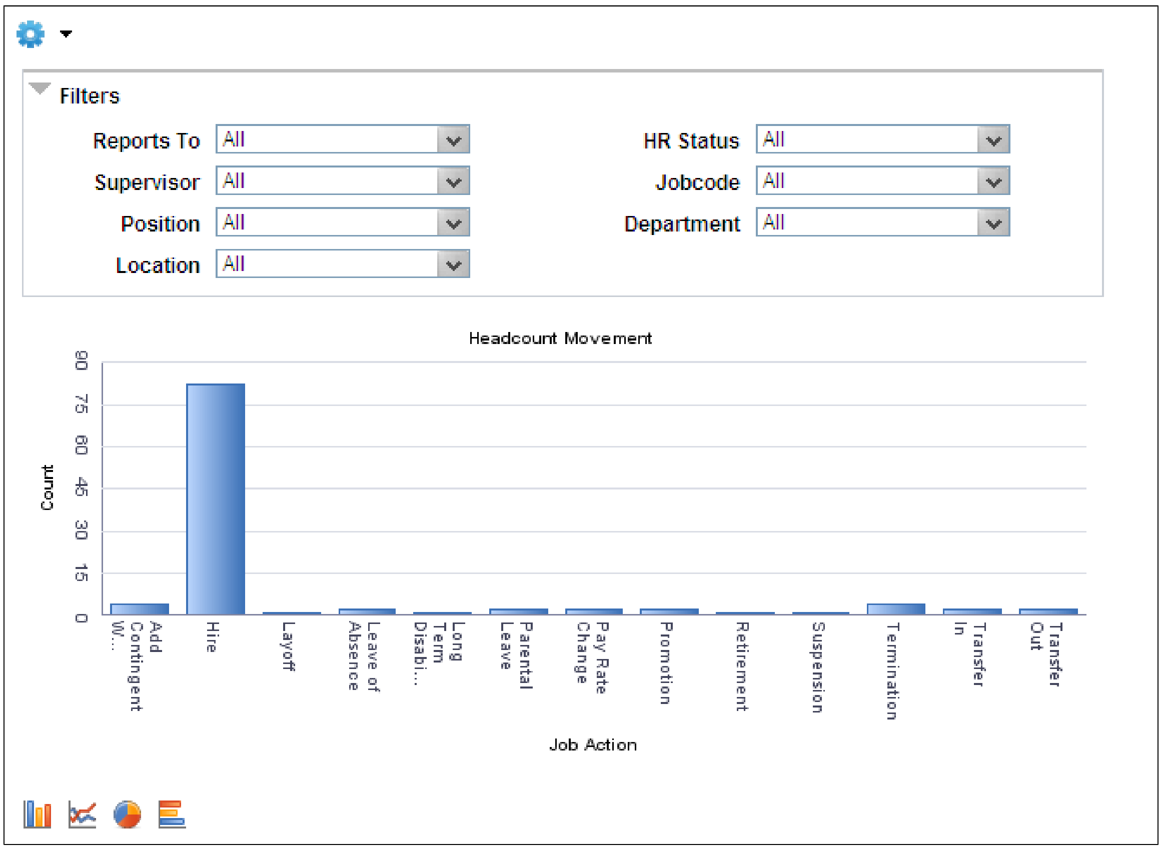
Use the Headcount Movement page (PTPG_PGVIEWER) to analyze the headcount movement within your organization.

**Navigation**

- Workforce Administration, Workforce Reports, Quick Analytics, Headcount Movement
- Manager Self Service, Manager Dashboard and then select the Headcount Analytics link, Headcount Movement link at the bottom of the Direct Line Reports pagelet.

**Image: Headcount Movement page**

This example illustrates the fields and controls on the Headcount Movement page. You can find definitions for the fields and controls later on this page.




**Filters**

Select values from the following filter drop-down fields to narrow your report results.

- Reports To
- HR Status
- Supervisor
- Direct/Indirect (manager page only)
- Job Code

- Position
- Department
- Location

All fields are set to *All* as a default value. The drop-down list contains values you can select or deselect, to enable you to include one or many criteria options for a field. For example, you can choose to view the results of one department, such as Finance, several departments, such a Finance and Human Resources, or select to include all valid departments in the drop-down list. When you select various options, the field will display *(Multiple Items)*.

Use the Select All check box in the drop-down list to select or deselect all field values. When you have not selected any items for the field, the filter field will default back to *All.*

The chart will update dynamically after selecting criteria for each filtering field. As you select items within each filtering field, other filter fields may be hidden or shown as display only, based on valid values that are available based on your current filter settings. For example, if you select a specific manager in the Supervisor field, only job codes associated with his employees will be available in the Jobcode field. If all the people reporting to this manager have the same job code, then the page presents the Jobcode field as display only with that one job code as the filter value.

To refresh the chart, change the available filter fields to *All.* This will reset the other fields in the Filter group box..

The page displays the chart in the middle of the page, based upon the search criteria filter settings. You can change how the chart appears by selecting from one of these icons at the bottom of the page:

- Bar Chart
- Line Chart
- Pie Chart
- Horizontal Bar Chart

Pause over each graphic items, such as a bar or pie fact, to view the job action details and count. Select the bar or pie piece to select from the following options:

- Detailed View:

  Select this option to access the Pivot Grid Drilldown page to view a list of employees that make up the results for the bar or pie piece.

- Drilldown To:

  Administrators can select this option to analyze report data by categories, such as:

- Full/Part time status
- Age group
- Paygroup
- Gender
- Marital status
- Regulatory region
- Salary administration plan
- Establishment

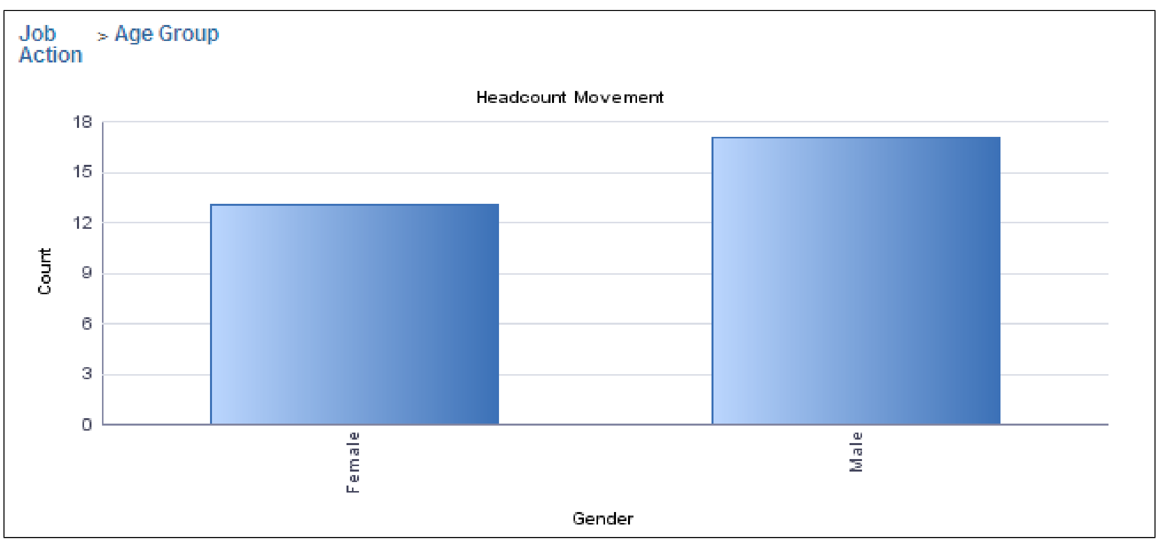
Managers can select this option to analyze report data by categories, such as:

- Full/Part time status
- Salary administration plan
- Regulatory region
- Establishment

You can perform drill-downs within a drill-down. When you do this, the page displays a set of breadcrumbs above the graphic to show the drill-down path you have taken.

**Image: Example of a pivot grid using a drill down**

For example, you can drill-down to view those people with a job action of *Hire* by age and then drill down again to view the gender of the people in the 35-44 age category. In the example shown here, the first bread crumb is Job Action (Hire), then Age Group (35-44), and the current graphic shows the Gender categories within the previously selected hires between the ages of 35 and 44:




Select any bread crumb to return to that view of the chart.

## Current Headcount Page

Use the Current Headcount page (PTPG_PGVIEWER) to view the distribution of the organizational population.

Administrators can view this information for employees, contingent workers, and persons of interest based upon the current job effective dated rows. Managers can view the distribution of the organizational population by job code based upon the current job effective dated rows.

### Navigation

- Workforce Administration, Workforce Reports, Quick Analytics, Current Headcount
- Manager Self Service, Manager Dashboard and then select the Headcount Analytics link, Current Headcount link at the bottom of the Direct Line Reports pagelet.

### Image: Current Headcount page for the administrator

This example illustrates the fields and controls on the Current Headcount page for the administrator. You can find definitions for the fields and controls later on this page.

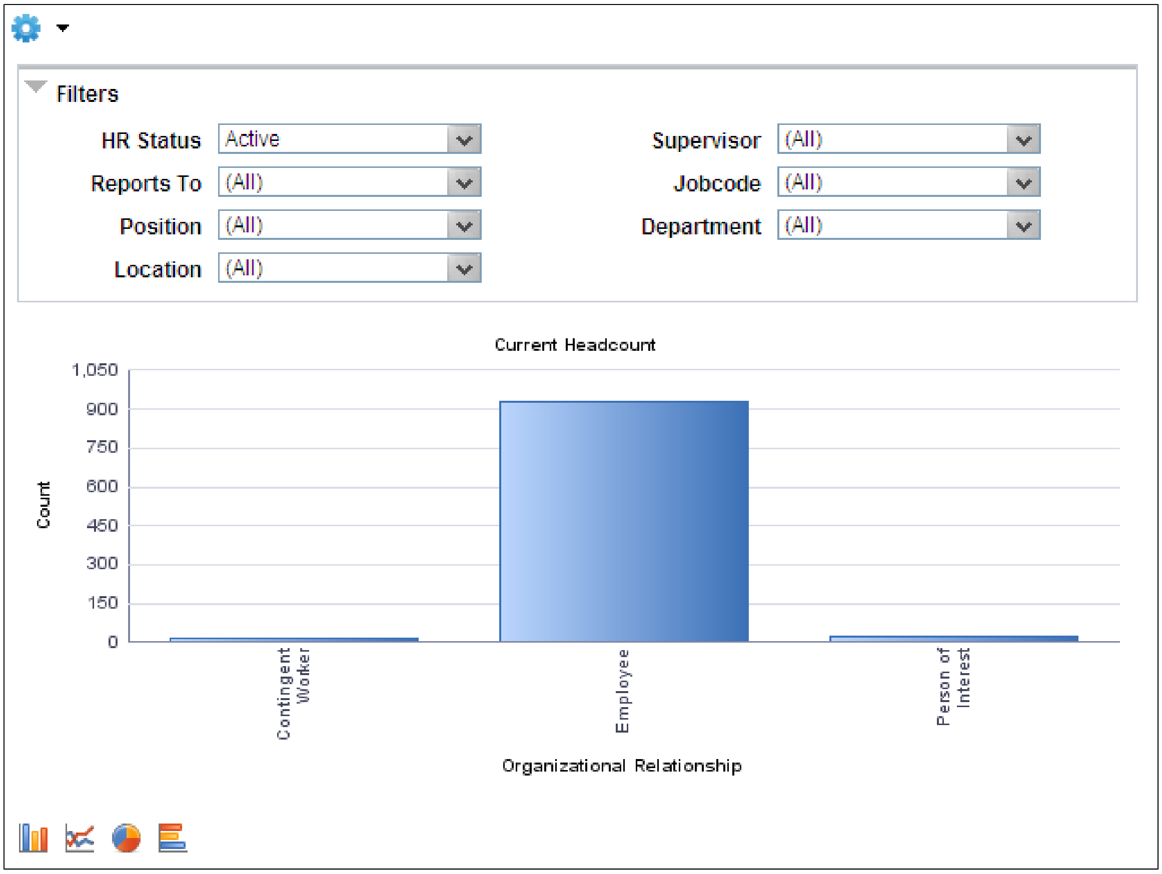
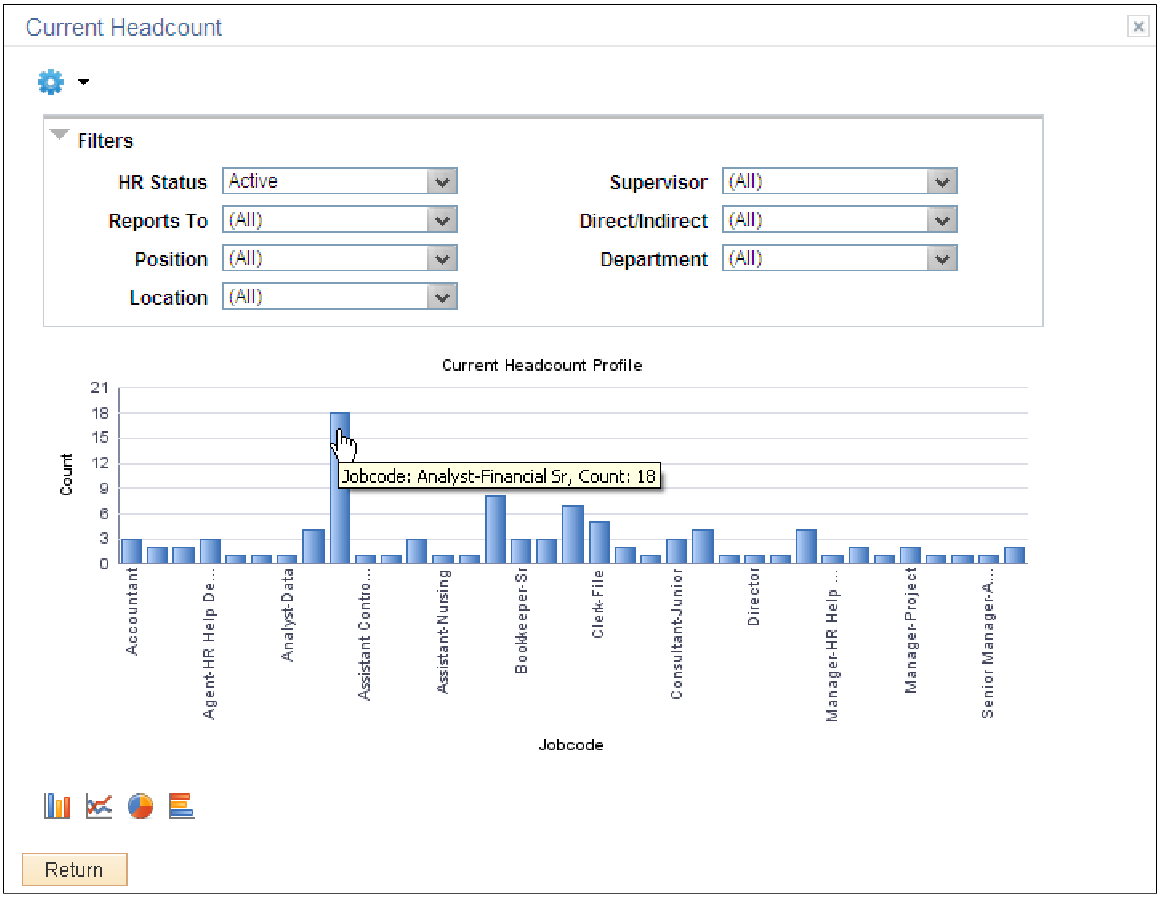


**Image: Current Headcount page for the manager**

This example illustrates the fields and controls on the Current Headcount page for the manager. You can find definitions for the fields and controls later on this page.




**Filters**

Select values from the following filter drop-down fields to narrow your report results.

- HR Status
- Reports To
- Position
- Location
- Supervisor
- Job Code (administrator page only)
- Direct/Indirect (manager page only)
- Department

All fields are set to *(All)* as a default value (with the exception of the HR Status field for the administrator view, which defaults to *Active*). The drop-down list contains values you can select or deselect, to enable you to include one or many criteria options for a field. For example, you can choose to view the results of one department, such as Finance, several departments, such a Finance and Human Resources, or select to include all valid departments in the drop-down list. When you select various options, the field will display *(Multiple Items)*.

Use the (Select All) check box in the drop-down list to select or deselect all field values. When you have not selected any items for the field, the filter field will default back to *(All)*.

The chart will update dynamically after selecting criteria for each filtering field. As you select items within each filtering field, other filter fields may be hidden or shown as display only, based on valid values that are available based on your current filter settings. For example, if you select a specific manager in the Supervisor field, only locations associated with the manager's employees will be available in the Location field. If all the people reporting to this manager have the same location, then the page presents the Location field as display only with that one location as the filter value.

To refresh the chart, change the available filter fields to *All.* This will reset the other fields in the Filters group box..

The page displays the chart in the middle of the page, based upon the search criteria filter settings. You can change how the chart appears by selecting from one of these icons at the bottom of the page:

- Bar Chart
- Line Chart
- Pie Chart
- Horizontal Bar Chart

Pause over each graphic items, such as a bar or pie fact, to view the organizational relationship (administrator) or job code (manager) details and count. Select the bar or pie piece to choose from the following options:

- Detailed View:

  Select this option to access the Pivot Grid Drilldown page to view a list of employees that make up the results for the bar or pie piece.

- Drilldown To:

  Administrators can select this option to analyze report data by categories, such as:

  - Business unit
  - Full/Part time status
  - Age group
  - Paygroup

- Gender
- Marital status
- Regulatory region
- Salary administration plan
- Establishment

Managers can select this option to analyze report data by categories, such as:

- Full/Part time status
- Organizational relationship
- Salary administration plan
- Regulatory region
- Establishment

You can perform drill-downs within a drill-down. When you do this, the page displays a set of breadcrumbs above the graphic to show the drill-down path you have taken. Select any bread crumb to return to that view of the chart.

## Prompts Page

Use the Prompts page (PTPG_USERPROMPTS) to enter the default values to further refine a query when you run it.

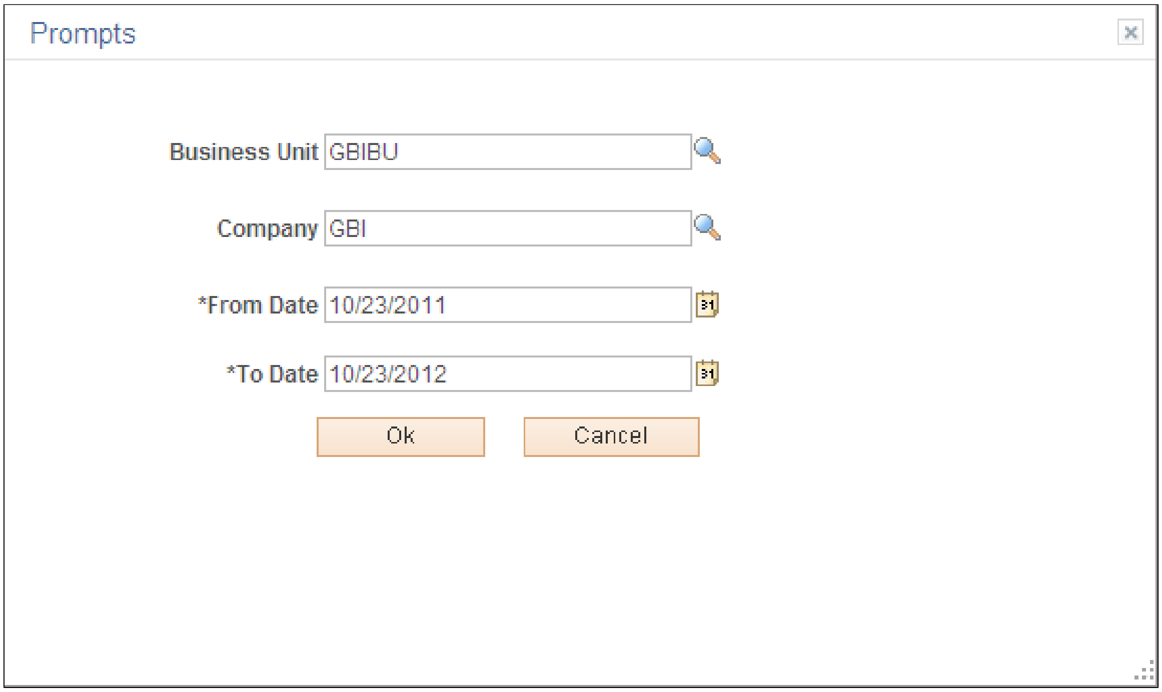
 

### Navigation

Select the Prompts option from the Options Menu drop-down arrow above the Filters group box on the Headcount Movement or Current Headcount page.

### Image: Prompts page

This example illustrates the fields and controls on the Prompts page for the administrator view of the Headcount Movement pivot grid.




The pivot grids will rendered data for values defined on the Prompts page. The initial values come from the primary permission list assigned to the user. You can change the prompt values during a session of viewing a pivot grid, but they default values will reset to those values associated with the primary permission list for the user after exiting a pivot grid.

The Prompts page and its corresponding fields are available for the following headcount pivot grids:

- Current Headcount (administrator view)
    - Business Unit
    - Company
- Headcount Movement (administrator view)
    - Business Unit
    - Company
    - From Date
    - To Date

- Headcount Movement (manager view)
  - From Date
  - To Date

---

**Note:** The from and to dates default to the last 12 months.

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## Pivot Grid Data Page

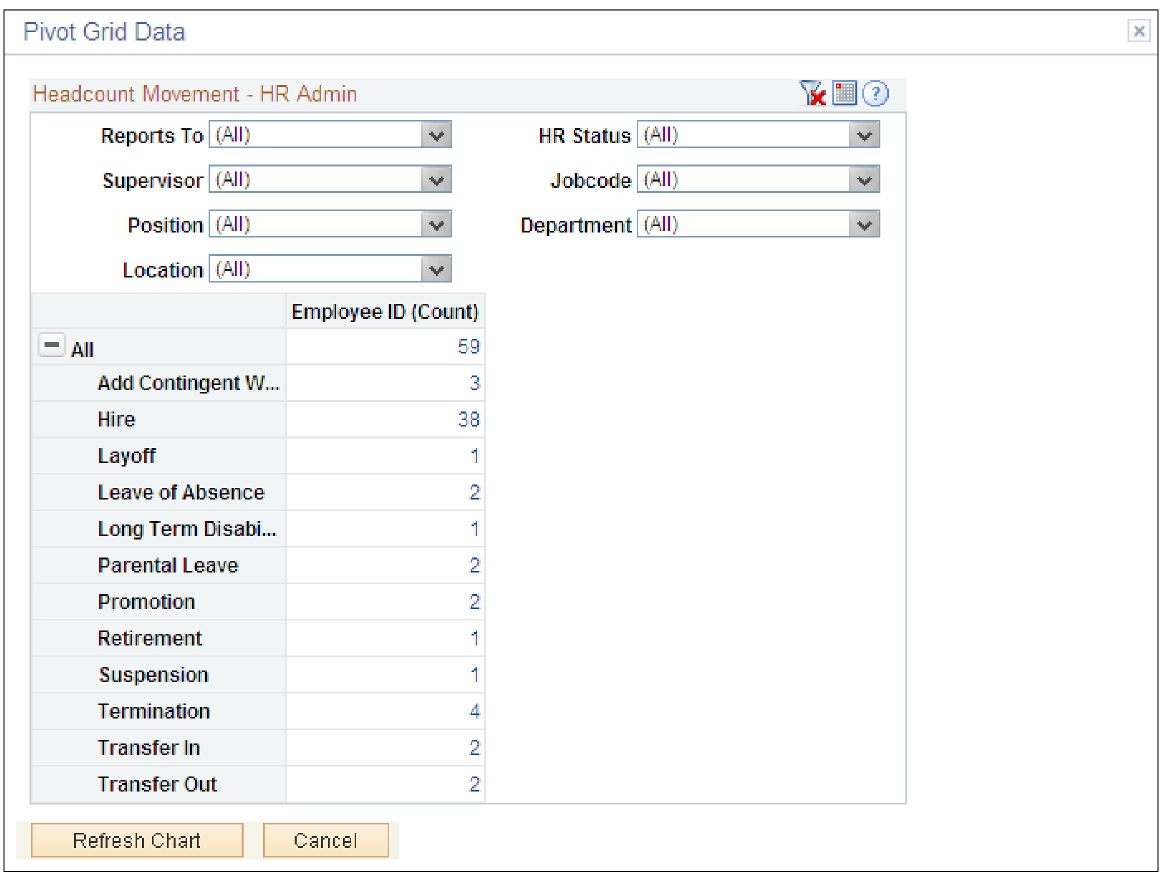
Use the Pivot Grid Data page (PTPG_GRIDVIEWER) to select filter options and view a number count for those that meet the criteria in a grid format.

**Navigation**

Select the View Grid option from the Options Menu drop-down arrow above the Filters group box on the Headcount Movement or Current Headcount page.

**Image: Pivot Grid Data page**

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




Use this page to view the pivot grid data as a list in a modal window. Use the filters the same as you would on the Current Headcount Page or Headcount Movement Page.

Select the count number link to access the Pivot Grid Drilldown page and view details about the count you selected.

Select the Refresh Chart button to return to the graphical view of the information reflecting the filters you set on the Pivot Grid Data page.

## User Charting Options Page

Use the User Charting Options page (PTPG_DISPLAYOPT) to define the display settings for the user results chart.

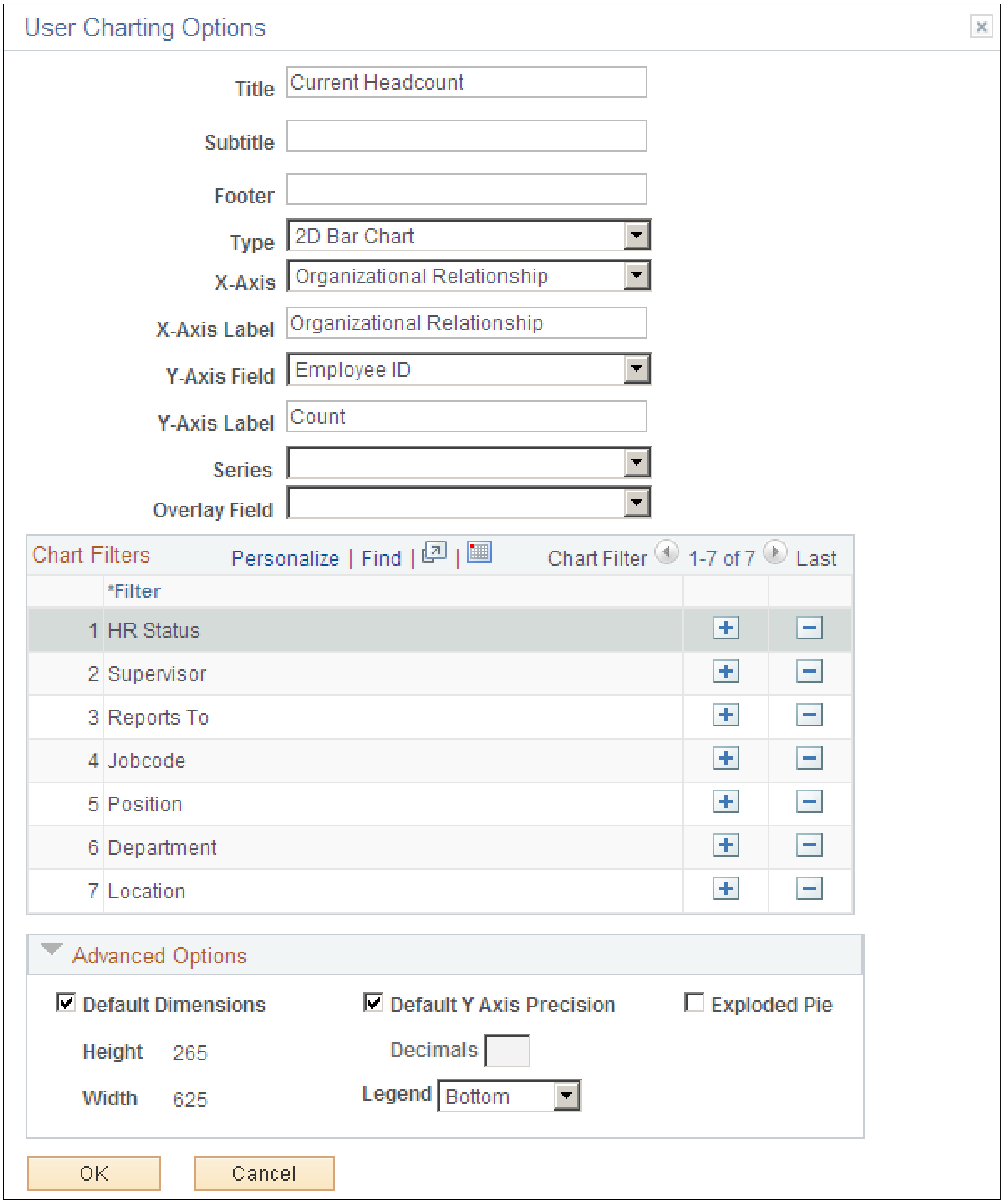
 

### Navigation

Select the Chart Options item from the Options Menu drop-down arrow above the Filters group box on the Headcount Movement or Current Headcount page.

### Image: User Charting Options page

This example illustrates the fields and controls on the User Charting Options page.




Use this page to change the chart title, chart type, data to be displayed on the x axis, data to be displayed on the y axis, or add or delete chart filters. Changes you make here are good for the current session of viewing the pivot grid.

For example, if you want to view a headcount profile by full time/part time status, select *Full/Part Time* from the X Axis drop-down list and click OK. The chart will refresh and display the full/part time label and data on the X axis.

### Chart Filters

Select the add a row icon button to include additional filters. Filter options vary according to the pivot grid and administrator or manager access.

Select the delete row icon button to remove filter options for this session.

### Advanced Options

**Default Dimensions**

Select this check box to have the system default the 265 height and 625 width for the bar or pie graphic. Deselect this check box to enter your own height and width.

**Default Y Axis Precision and Decimals**

Select to have the system default the decimal precision of 0. Deselect this check box to enter your own decimal precision number in the Decimals field.

**Legend**

Identify where the legend of the chart should appear. Valid values are:

- *Bottom*
- *Left*
- *None*
- *Right*
- *Top*

**Exploded Pie**

Select this check box to detach the pieces of a pie graphic.

# Viewing a Summary of All Job Records

This topic lists the page used to view a summary of all jobs records held by a person.

## Page Used to View a Summary of All Job Records

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Multiple Jobs Summary | MULTIPLE_JOBS | Workforce Administration, Job Information, Review Job Information, Multiple Jobs Summary, Multiple Jobs Summary | View a summary of all jobs and changes in job status for people that have more than one employment record. |

# Refreshing Tables to Facilitate Reporting

These topics provide overviews of the process of refreshing the Employees table and the process of refreshing the Personal Data table, list a common element, and list the pages used to refresh tables to facilitate reporting.

## Understanding the Process of Refreshing the Employees Table

To generate standard PeopleSoft Human Resources reports quickly, many human resources reports retrieve data from the Employees table (PS_EMPLOYEES). To make reporting in PeopleSoft Human Resources more efficient, this table combines information from the following records into an extract file:

| ***Person Data Tables*** | ***Job Data Tables*** | ***Other Tables*** |
| --- | --- | --- |
| • PS_PERSON<br>• PS_PERS_DATA_EFFDT<br>• PS_PERSON_NAME<br>• PS_ADDRESSES<br>• PS_PERSONAL_PHONE<br>• PS_PERS_DATA_USA (USA data only)<br>• PS_PERS_DATA_FRA (French data only) | • PS_JOB (Besides Work Location and Job Information, it also includes Job Labor, Payroll, Salary Plan, and Compensation)<br>• PS_JOB_USF (Federal Only)<br>• PS_JOBCODE_TBL<br>• PS_DEPT_TBL | These additional records consist of tables related to organizational relationships, national identity, disability, and ethnic groups for the US and Asia pac.<br>• PS_PER_ORG_ASGN<br>• PS_PER_ORG_INST<br>• PS_PERS_NID<br>• PS_CITIZENSHIP<br>• PS_DISABILITY<br>• PS_DIVERS_ETHNIC<br>• PS_ETHNIC_GRP_TBL |

The extract file's sole purpose is as a report source. Because it isn't updated dynamically when you add people or job records to the system or update their data (doing so would have negative online processing impact), you must refresh the Employees table before running any reports.

When you run this process, the system updates the Employees table with data that is valid before or on the as-of date that you specify. When retrieving data from setup components such as the Department component and Job Code pages, the system uses the effective date of the specific core setup table records that the data relates to.

The system uses the Employees table to run these reports:

- ABS001. SQR (Employee Absence Report)
- ABS003. SQR (Time Lost Due to Absence)
- ABS004UK. SQR (Bradford Report)
- BEN001.SQR (Health Plan Participants)
- BEN002.SQR (Life InsuranceParticipants)
- ESPP005.SQR (ESPP Purchase Distribution)

- PAY110CN.SQR (Statistics-Canada [Educational Institutions])
- PER001.SQR (Department Action Notices)
- PER002.SQR (Employee Birthdays)
- PER004.SQR (Emergency Contacts)
- PER005.SQR (Employees on Leave of Absence)
- PER008.SQR (Employee Review Audit)
- PER009.SQR (Union Membership)
- PER011.SQR (Competency Inventory)
- PER012.SQR (Departmental Salaries)
- PER006 - Crystal (Mailing Labels)

A useful feature of the Employees table is that you can refresh it to show a specific date, so you can report based on how things were at that time. This might be useful if an organization needed to reconstruct its organization over the last several years to research its promotion policies.

Update the Employees table using the Refresh Employees Table Application Engine process (PER099) before running any of these reports so that the report contains all changes made to your employee files.

### (USA) Understanding How the Employees Table Selects Ethnicity for U.S. Personnel

The PeopleSoft system enables you to enter more than one ethnicity group for people in the U.S.. You can select a primary ethnicity for a person within in USA section of the Regional page of Personal Data, however, you are not required to select a primary ethnicity. Although the system can store more than one ethnic group per person, the Employees table can only story one ethnicity for an individual.

The Refresh Employees Table Application Engine process (PER099) uses the following methodology to determine which ethnicity to use when storing information for a person in the Employees table:

1. If only one ethnicity value exists for a person, the process retrieves this value for the Employees record.
2. If more than one ethnicity value exists for a person and the Primary check box value is selected in Personal Data, the process retrieves the ethnicity identified as the primary value for the Employees record.
3. If more than one ethnicity value exists for a person and the Primary check box option is not select, the process uses the previous value found on the Employees record, if one exists. If one does not exist, the field is left blank.

## Understanding the Process of Refreshing the Personal Data Table

PeopleSoft Human Resources reports also retrieve data from the Personal Data table. This table combines information from these tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE. Like the Employees table, the Personal Data table is a report source only. It updates through the process described below. The Personal Data table is updated with changes to current data when the changes are made online. Future dated information is not updated unless a batch process is run. You may want to update the Personal Data table before running reports. You can update the Personal Data table for future dated information that has become current at any time without affecting the online updates.

**Note:** Do not run the Refresh Personal Data process, it interferes with online transactions.

## Common Element Used When Refreshing Tables to Facilitate Reporting

**As Of Date** Indicate the As Of Date to run the processes. The process selects the new data based on the date that you enter and populates the table. It includes only workers who are active, on leave of absence, or suspended. The process excludes any *terminated* workers.

## Pages Used to Refresh Tables to Facilitate Reporting

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Refresh EMPLOYEES Table - Parameters | RUNCTL_ASOFDATE | Set Up HCM, System Administration, Database Processes, Refresh EMPLOYEES Table, Parameters | Reflect back to a specific date or period for employee data reporting. |
| Refresh Personal Data | PRCSRUNCNTL | Set Up HCM, System Administration, Database Processes, Refresh Personal Data, Refresh Personal Data | This process rebuilds the Personal Data table after deleting all rows in the table.<br><br>This process should only be run during an upgrade or installation. |
| Update Personal Data - Future | PRCSRUNCNTL | Set Up HCM, System Administration, Database Processes, Update Personal Data - Future, Update Personal Data - Future | Run this process to update the Personal Data table for future dated information. |
| Ad-Hoc Process Request | PRCSRUNCNTL | Workforce Administration, Workforce Reports, Request Ad hoc Process, Ad-Hoc Process Request | Run several or all Administer Workforce reports that do not require parameters. |
| As-of-Date Request | RUNCTL_ASOFDATE | Workforce Administration, Workforce Reports, Create As-of-Date Request, As-of-Date Request | Run several or all Administer Workforce reports for which you specify an as of date. |
| Create Calendar Year Request | RUNCTL_CALENDARYR | Workforce Administration, Workforce Reports, Create Calendar Year Request, Create Calendar Year Request | Run several or all Administer Workforce reports for which you specify a calendar year. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| From/Thru Dates Request | RUNCTL_FROMTHRU | Workforce Administration, Workforce Reports, Create From/Thru Dates Request, From/Thru Dates Request | Run several or all Administer Workforce reports for which you specify a from and through date range. |

# Running Database Audits

Database audits monitor changes, additions, or deletions made to sensitive fields such as salary amounts.

## Page Used to Run Database Audits

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Database Audit | RUNCTL_FROMTHRU | Workforce Administration, Workforce Reports, Database Audit, Database Audit | Run the Database Audit report (PER029). |

## Chapter 17

# Viewing Summary Workforce Information

## Using the Org Chart Viewer

Use the Org Chart Viewer component to view employee personal and job data within the context of your organization's various hierarchical reporting structures.

These topics provide an overview of the Org Chart Viewer, folder tabs, and page functionality and discuss how to:

- Define Org Chart Viewer personal preferences.
- Search for a person in the Org Chart Viewer.
- View the organizational chart for a person.
- View a person's profile.
- Update a personal photo.
- Manage additional contact information.
- Manage personal links.
- Enter a personal statement or text.
- View the Teams page.

### Understanding the Org Chart Viewer, Folder Tabs, and Page Functionality

The Org Chart Viewer enables your employees and managers to search for people across the organization, to see a visual representation of the organization based on your defined hierarchical structures, and enable actions from the visualization. Users are able to collaborate with co-workers by selecting the communication methods available within the organization including email, telephone options, instant messaging, links to social networks, and a free form text field to add additional personalized information.

The Org Chart Viewer pages present the user with different views of the organization. When enabled and granted access, users can view the hierarchical structure of their organizations through the Company Directory folder or tab, view their direct-line structure through the Direct-Line Reports folder or tab, or view matrix teams through the Org Chart Viewer matrix folders or tabs or Teams menu links.

See Understanding the Org Chart Viewer Features and Functionality.

| |
|---|
| Org Chart Viewer |

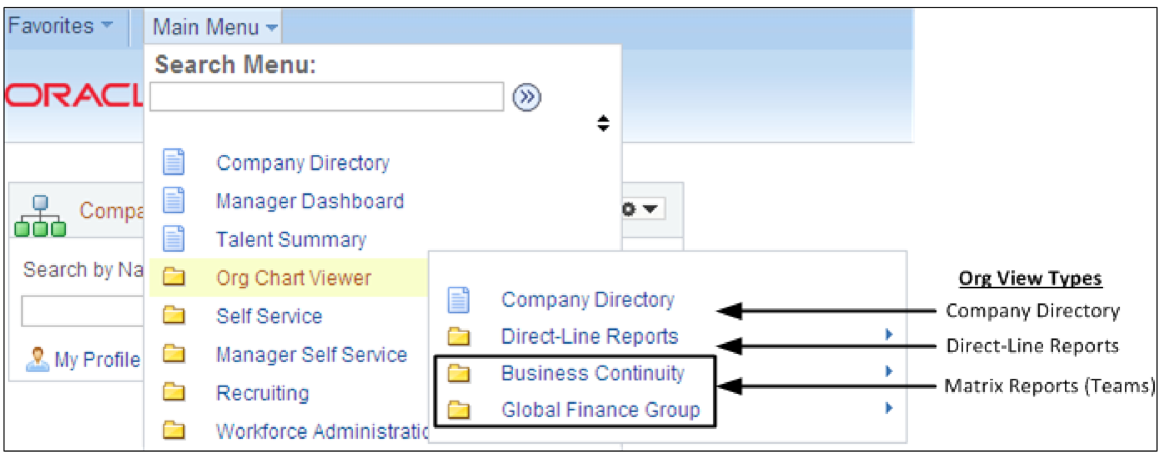
| |
|---|
| PeopleSoft Mobile Company Directory |

Access the Org Chart Viewer component by selecting an org view type folder directly from the root menu.

## Folder Tabs to Represent Org View Types

**Image: Org Chart Viewer drop-down menu navigation**

When you access the Org Chart Viewer, you could be present with the option to select from three types of org view types: a Company Directory folder, a Direct-Line Reports folder (if you are a manager with direct reports), or folders that represent matrix teams (dotted-line reports), with which you are associated.




The menu navigation structure provides a quick overview of the reporting structures for each organizational viewer format. The menu navigation shows the following folder order structure when all folders are enabled and a user has access:

| ***Org View Type***<br><br>***Folder*** | ***Description*** |
|---|---|
| Company Directory | The first menu folder displays the Company Directory.<br><br>The Company Directory folder tab appears as the first tab in the Org Chart Viewer tab folders. Depending upon your security access and reporting structure, this may be the only org view type for which you have access.<br><br>The Org Chart page reflects the reporting structure of your organization and you can perform searches for anyone in the Company Directory. |

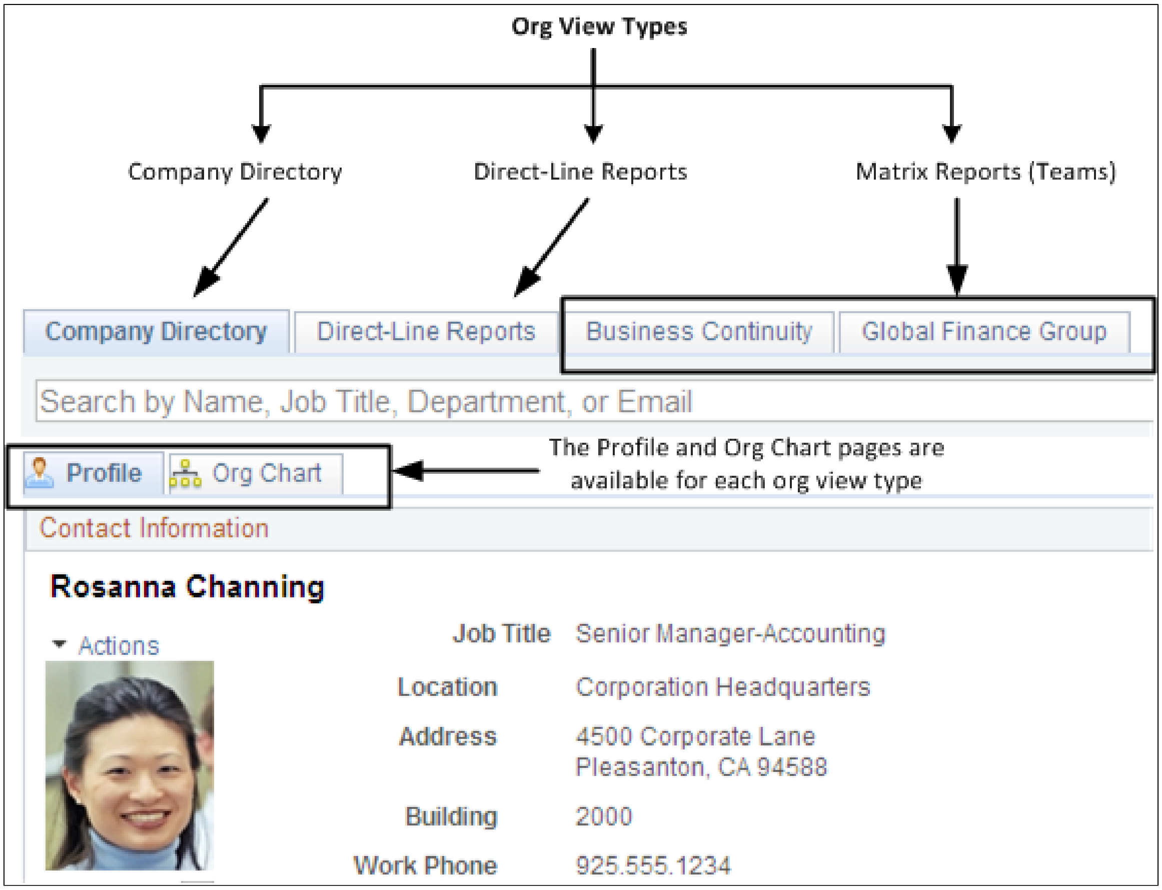
| ***Org View Type***<br><br>***Folder*** | ***Description*** |
|---|---|
| Direct-Line Reports | If applicable, the next folder in the menu structure shows the Direct-Line Reports folder for managers.<br><br>The Direct-Line Reports folder tab typically appears as the second tab in the Org Chart Viewer tab folders. If you do not have access to this page or do not have direct reports, this folder tab will not be available to you.<br><br>The Org Chart page reflects the reporting structure of your direct and indirect reports. You can perform searches for any employees that report to you.<br><br>If you have access to the Manager Dashboard page, you can also access that page from this folder tab by clicking the Manager Dashboard link in the Search bar. |

| ***Org View Type***<br><br>***Folder*** | ***Description*** |
|---|---|
| Matrix Reports (teams) | The remaining folders, if applicable, represent the Matrix Reports (teams) folders and are identified by the team name.<br><br>You can view matrix teams through these various methods:<br><br>• Matrix reports folder tabs at the top of the Org Chart Viewer component<br><br>A matrix report folder tab, which reflects the name of the matrix team, appears at the top of the Org Chart Viewer component and is available for team owners and members, depending upon how the team matrix was set up.<br><br>• Teams page<br><br>Teams that are made public and viewable for org view types will be shown in the Teams fields for individuals associated with a team. You can view a list of team members by selecting the matrix team link for an individual on the Profile or by selecting the matrix team from the Teams drop-down list on the org chart nodes.<br><br>See Org Chart Viewer - Teams Page.<br><br>The matrix team pages reflect the reporting structure of each team and you can perform searches for anyone in that team.<br><br>See Matrix Team Page. |

**Image: The Org Chart Viewer showing the folder tab after you access the component**

After you have accessed the Org Chart Viewer component, you can use the folder tabs to access the different org view types, as shown in this example.




There are also elements within the Org Chart Viewer common to all org view types. These include:

- At the top of Org Chart Viewer users will have access to set personal preferences.
- A search feature that enables users to look for individuals within the org view type tab folder from which the search was initiated.
- Each org view type folder consists of a Profile and an Org Chart page.
  - The Profile page enables users to view profile details about a person, such as job specifics, and provides access to additional contact information.
  - The Org Chart page shows the reporting structure specific to the org view type folder you have accessed. You can view this information in a chart or list format.
- When the appropriate functionality is enabled, users can initiate IM chats and email communication directly from the Org Chart Viewer pages.
- When the appropriate functionality is enabled, users can export Org Chart Viewer details to Excel or Visio.

## Pages Within Each Org View Type

Each org view type folder contains two page tabs:

| ***Page Within the Org Chart Viewer Folder*** | ***Description*** |
|---|---|
| Org Chart Viewer | View a person within the context of the reporting structure for the org view type you are accessing. It displays a three-tiered graphical representation. The chart focuses on a person and where he or she fits within the reporting structure or that org view type. |
| Profile Page | Displays up to five group boxes: two company related group boxes on the left side and three personalized group boxes on the right. The Profile tab of the page provides additional information about a person, such as his or her job details; links to other people with whom he or she is associated, such as direct reports, peers, and the manager; as well as personalized group boxes, which enable the user to enter additional contact details, personal links, and free from text.<br><br>Information the user enters on his or her own Profile page will appear on the Profile page of each org view type folder, it is not org view type specific. |

## Performing Personal Updates Through Self Service Transactions

When an individual views his or her content, whether from the Org Chart tab or the Profile tab within the Org Chart Viewer pages, he or she can be granted the ability to access HCM related self service transactions using the Actions menu link. The manager can also be granted the ability to access HCM related manager self service transactions using the Actions menu link for his or her subordinates.

For a list of delivered Self Service and Manager Self Service transactions, see the “Setting Up the Administer Workforce Business Process” topic in this book.

See Understanding Related Actions and Self Service Transactions.

See "Reviewing and Updating Personal Information *(PeopleSoft HCM 9.2: eProfile)*".

See "Understanding the Management of Direct Reports *(PeopleSoft HCM 9.2: eProfile Manager Desktop)*".

## Pages Used to View the Org Chart Viewer

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Org Chart Viewer - Preferences | HRCD_USER_PREF_SEC | Click the Preferences link at the top of any of the Org Chart Viewer pages. | Define Org Chart Viewer personal preferences to determine how you want the startup page content or layout to appear. The start page content is specific to the Org Chart Viewer: Company Directory page. |
| Org Chart Viewer- Search for People | HRCD_SEARCH | Click the Advanced Search link within the header of any of the Org Chart Viewer folders or pages. | Search for a person in the Org Chart Viewer by entering any number of search criteria to locate an individual in the corresponding Org Chart Viewer folder tab. For example, if you perform a search from the Direct-Line Reports tab, the system will search for that person within your direct-line reports.<br><br>Use the Advanced Search page to enter multiple criteria to search for an individual, or use a basic search by entering a name, job title, department, or email in the search field in the Org Chart Viewer header.<br><br>Searches from within an org view type folder tab will perform a search within that folder only. |
| Company Directory: Org Chart | HRCD_MAIN | • Org Chart Viewer, Company Directory: Org Chart tab<br><br>• Company Directory, Company Directory: Org Chart tab<br><br>• Click the My Org Chart link from the Company Directory header where the Company Directory: Org Chart tab is showing.<br><br>• Click the Org Chart link from within any node box for a person on the Company Directory: Org Chart page. | View an organizational chart for a person as a three-tiered chart with the person in the focus node in the middle level. Or, you can view a hierarchal list of people with the retrieved person's record at the top of the list. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Company Directory: Profile | HRCD_MAIN | • Org Chart Viewer, Company Directory: Profile tab<br>• Company Directory, Company Directory: Profile tab<br>• Click the My Profile link from the Company Directory heading where the Company Directory, Profile tab is showing.<br>• Click the name link of a person on either the Company Directory: Org Chart or Profile page. | View a person's profile information from the Company Directory folder, such as contact information, HR details, and other personal information. Users can enter additional contact information, links, and text on this page for their own profile. |
| Direct-Line Reports: Org Chart | HRCD_MAIN | • Org Chart Viewer, Direct-Line Reports, Org Chart tab<br>• Click the My Org Chart link from the Direct-Line Reports header when the Direct-Line Reports: Org Chart page is showing.<br>• Click the Org Chart link from within any node box for a person on the Direct-Line Reports: Org Chart page. | View an organizational chart with you as the top node and your direct reports below. Or, you can view a hierarchical list of your direct-line reports with you at the second level and your manager at the top. When you search for a specific person, the page will display that person's manager at the top with their direct-line reports below. |
| Direct-Line Reports: Profile | HRCD_MAIN | • Org Chart Viewer, Direct-Line Reports: Profile tab<br>• Click the My Profile link from the Direct-Line Reports header when the Direct-Line Reports: Profile tab is showing.<br>• Click the name link of a person on either the Direct-Line Reports: Org Chart or Profile page. | View a person's profile information from the Direct-Line Reports folder for you or one of your direct-line reports, such as contact information, company details, and other personal information. Users can enter additional contact information, links, and text on this page for their own profile. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| <matrix team name>: Org Chart | HRCD_MAIN | • Org Chart Viewer, <matrix team name>, <matrix team name>: Org Chart<br>• Click the My Org Chart link from the <matrix team name> header when the <matrix team name>: Org Chart page is showing.<br>• Click the Org Chart link from within any node box for a person on the <matrix team name>: Org Chart page. | View a tiered organizational chart containing the matrix team's members. |
| <matrix team name>: Profile | HRCD_MAIN | • Org Chart Viewer, <matrix team name>, <matrix team name>: Profile tab<br>• Click the My Profile link from the <matrix team name> header when the <matrix team name>: Profile tab is showing.<br>• Click the name link of a person on either the <matrix team name>: Org Chart or Profile page. | View a matrix team member's profile information, such as contact information, HR details, and other personal information. Users can enter additional contact information, links, and text on this page for their own profile. |
| Teams | HRCD_LIST_SEC | Click the name of a matrix team on any person's node or profile. | View all the members of a matrix team as an Hgrid list, with matrix leads appearing as expandable rows. |
| Org Chart Viewer - Update Photo | HRCD_USER_PICS_SEC | Click the Update Photo link on any Org Chart Viewer - Profile page when you are on your own profile. | Select photo display options, such as no photo, upload your own photo, or use the HR photo that is on file, for your personal profile. The photo selected here is used for all the org chart view types. |
| Edit Additional Contacts | HRCD_USER_CNTC_SEC | Click the Edit Additional Contact (pencil ) button on the Profile page when you are in your own profile. | Add additional contact information to your personal profile, such as home phone number, mobile, IM address, or email addresses. The data you enter here is the same across all org view type Profile pages. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Edit My Profile Links | HRCD_USER_LINK_SEC | Click the Edit My Profile Links (pencil ) button on the Profile page when you are in your own profile. | Add web site links to your own personal profile. The data you enter here is the same across all org view type Profile pages. |
| Edit Personal Statement | HRCD_USER_TEXT_SEC | Click the Edit Personal Statement (pencil ) button on the Profile page when you are in your own profile. | Include a personal statement or comments using a rich text formatting to your own personal profile. The data you enter here is the same across all org view type Profile pages. |

## Org Chart Viewer - Preferences Page

Use the Org Chart Viewer - Preferences page (HRCD_USER_PREF_SEC) to define Org Chart Viewer personal preferences to determine how you want the startup page content or layout to appear.

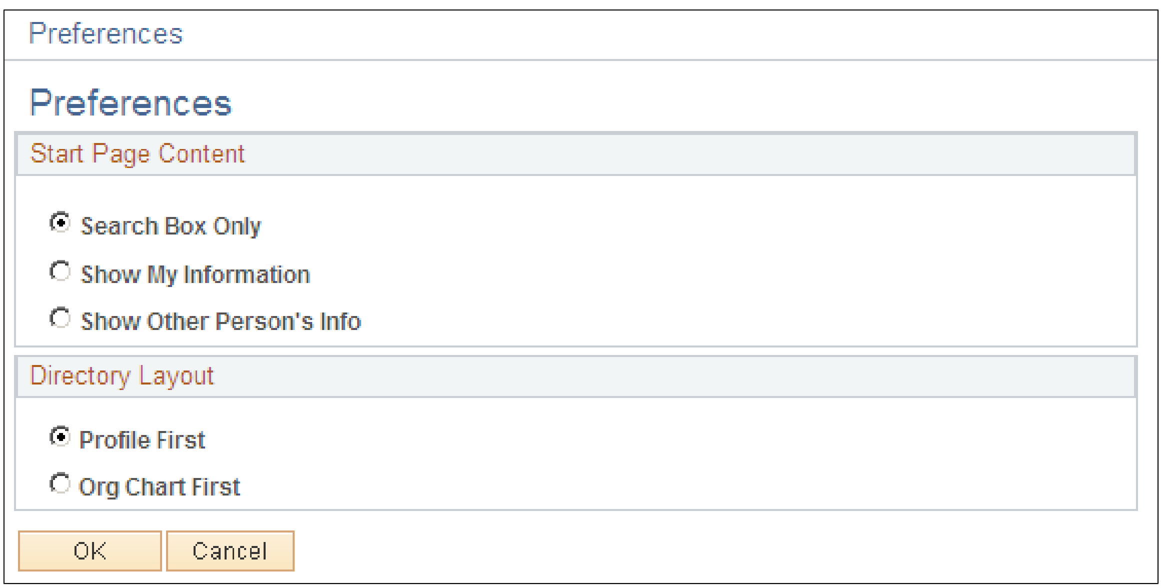
The start page content is specific to the Org Chart Viewer: Company Directory page.

**Navigation**

Click the Preferences link at the top of any of the Org Chart Viewer pages.

**Image: Org Chart Viewer - Preferences page**

This example illustrates the fields and controls on the Org Chart Viewer - Preferences page. You can find definitions for the fields and controls later on this page.




### Start Page Content

This group box enables you to determine how the start page of the Company Directory folder tab should display for yourself as a user.

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**Note:** This group box is specific to the Company Directory tab and does not display when you access the Preferences link from the Direct-Line Reports or matrix team folder tabs.

---

**Search Box Only**

Select this option to display the search field only, where you can search by name, job title, department, or email for any active person in the system.

**Show My Information**

Select this option to have the system display your information as the user accessing the page. Your information will appear as the focus of the Org Chart node or on the Profile page, depending on the layout setting you have selected.

The search field is also available at the top of the page when you select this option.

**Show Other Person's Info**

Select this option to enter a person's name in the Enter a Name field. This person's information will appear as the initial focus of the Org Chart node or Profile page, depending on the layout setting you have selected.

The search field is also available at the top of the page when you select this option.

**Enter a Name**

Enter the name of the person who should appear as the focus when you first access the Company Directory page. For example, you may want to enter the name of a person you contact frequently, such as your HR or accounting representative. This field is available only when Show Other Person's Info is selected.

### Directory Layout

This group box enables you to select which page within the Org Chart Viewer folder tabs the system should display first: the Org Chart or Profile page. This group box applies to all the Org Chart Viewer tabs and changing the layout style on one folder tab will change it for all of them.

**Profile First**

Select this option to have the system display the Profile page for the focus person of the page. The Profile page displays detailed information about the person, such as contact information, HR details, and personalized links and information.

**Org Chart First**

Select this option to have the system display the Org Chart page for the focus person of the page. The Org Chart page displays a three-leveled graphical representation of this person's reporting structure, with the focus person in the middle level.

## Searching for a Person in the Org Chart Viewer

The Org Chart Viewer feature enables you to search and retrieve people through various methods. You can use the basic search field, enter multiple search criteria through an advanced search page, use SmartNavigation that appears in the navigation header as breadcrumbs and fly-out menus, or select the links of other names on the Org Chart or Profile pages of the Org Chart Viewer component.

The Org Chart Viewer will perform a search for an individual based on the org view type folder tab you are currently viewing. For example, if you have accessed a matrix team folder tab from within the Org Chart Viewer, the system will search for that person within that team. If the person does not exist in that matrix team, the search will return no results.

These topics discuss:

- The search for people: single field search.
- The search for people: advanced search page.
- The SmartNavigation menu structure.
- The search for people with multiple jobs.

## The Search for People: Single Field Search

Access the search header of any Org Chart Viewer page.

---

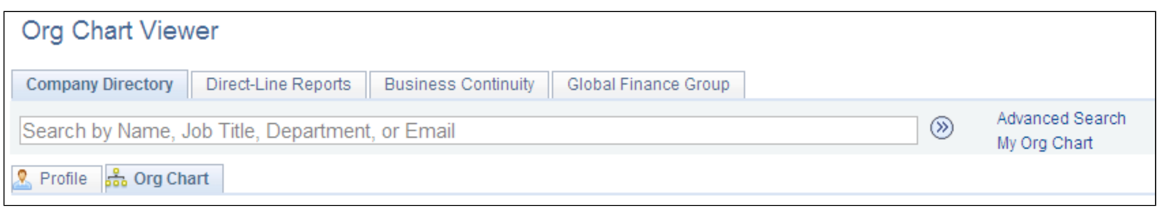
**Note:** Searches from within an org view type folder tab will perform a search within that folder only.

---

For example, if you perform a search from the Direct-Line Reports tab, the system will search for that person within your direct-line reports. Use the Advanced Search page to enter multiple criteria to search for an individual, or use a basic search by entering a name, job title, department, or email in the search field in the Org Chart Viewer header.

**Image: Org Chart Viewer search header that uses a single field search**

This example illustrates the fields and controls on the Org Chart Viewer search header that uses a single field search. You can find definitions for the fields and controls later on this page.




The header for each org view type folder will display this search field and enables you to perform a single field search for a person. When a user accesses the Company Directory org view type folder tab, only the header (with the search field) will display on the page when the Search Box Only option is selected for the user's personal preferences.

**Search by Name, Job Title, Department, or Email**

Enter the name, job title, department, or email for the person that you want to retrieve. Searches are not case sensitive and will perform partial name searches.

---

**Note:** Searches are specific to the org view type folder you have selected.

---

**Advanced Search**

Click this link to access the Advanced Search page where you can enter multiple search criteria to narrow a search.

**My Org Chart**

Click this link to have the system display your information as the focus on the Org Chart page. This link appears if the layout for the start page is set to show the Org Chart page first or when you are on the Org Chart page.

**My Profile**

Click this link to have the system display your information as the focus on the Profile page. This link appears if the layout for the start page is set to show the Profile page first or when you are on the Profile page.

**Preferences**

Click this link to access the Preferences page and configure personal start up page and layout preferences.

See Org Chart Viewer - Preferences Page.

**(Export to CSV icon button)**

Select the button in the page header to export profile or org chart information to a CSV file. Exporting must be enabled when setting up the org view types.

Export types are:

*CSV file for Excel*

*CSV file for Visio:* The CSV file is a datasource that contains the hierarchy data. You will need to import this file from Visio manually.

## The Search for People: Advanced Search Page

Use the Org Chart Viewer- Search for People page (HRCD_SEARCH) to search for a person in the Org Chart Viewer by entering any number of search criteria to locate an individual in the corresponding Org Chart Viewer folder tab.

**Note:** Searches from within an org view type folder tab will perform a search within that folder only.

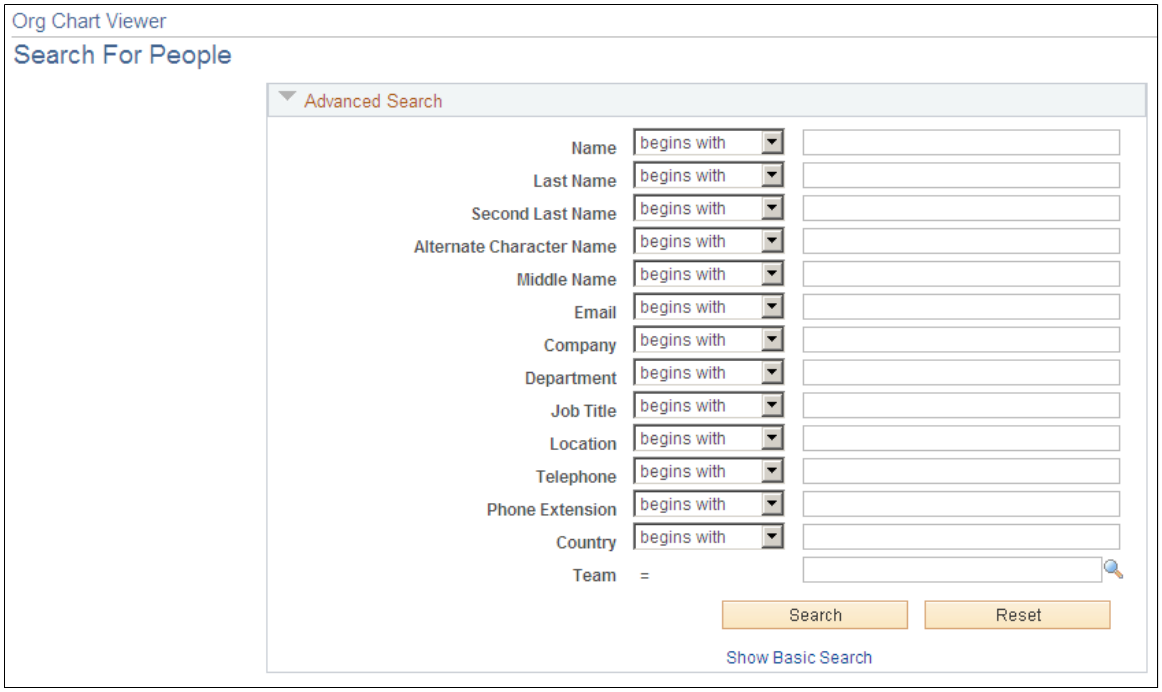
For example, if you perform a search from the Direct-Line Reports tab, the system will search for that person within your direct-line reports. Use the Advanced Search page to enter multiple criteria to search for an individual, or use a basic search by entering a name, job title, department, or email in the search field in the Org Chart Viewer header.

### Navigation

Click the Advanced Search link within the header of any of the Org Chart Viewer folders or pages.

**Image: Org Chart Viewer - Search For People: Advanced Search page**

This example illustrates the fields and controls on the Org Chart Viewer - Search For People: Advanced Search page. You can find definitions for the fields and controls later on this page.




Enter search criteria in one or more of the fields on this page and click Search.

## The SmartNavigation Menu Structure

The system uses Application Based Navigation (ABN), or SmartNavigation, which enables you an alternative method of navigating directly to an employee in the Org Chart Viewer (bypassing the search).

The SmartNavigation menu navigation and breadcrumbs also provide a quick overview of the reporting structure of the employee jobs in the directory.

**Image: Example of the menu navigation using SmartNavigation fly-outs**

This example illustrates the fields and controls on the Example of the menu navigation using SmartNavigation fly-outs. You can find definitions for the fields and controls later on this page.

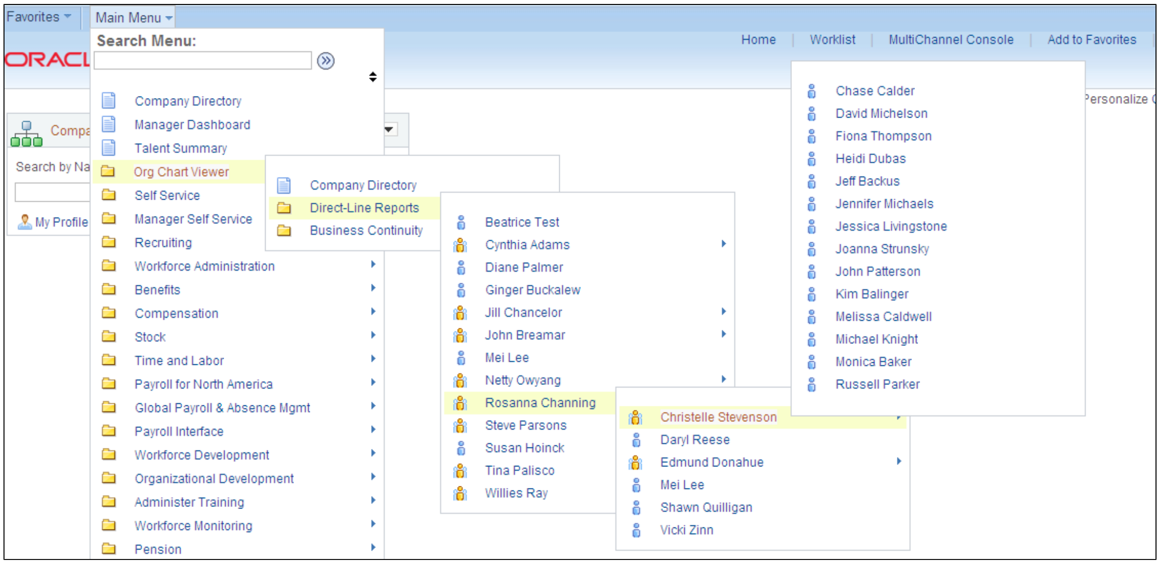
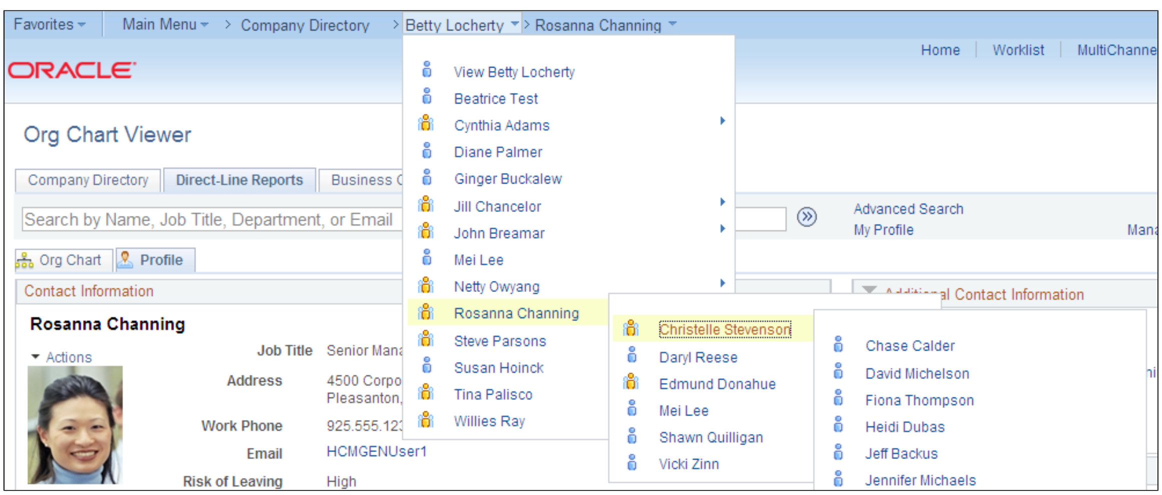



**Image: Example of the breadcrumb navigation using SmartNavigation fly-outs**

This example illustrates the fields and controls on the Example of the breadcrumb navigation using SmartNavigation fly-outs. You can find definitions for the fields and controls later on this page.

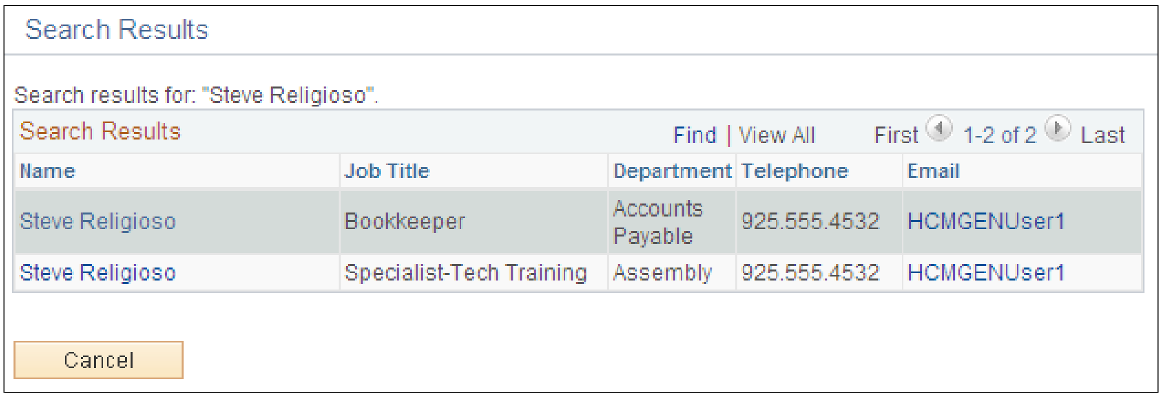


### Searches for People with Multiple Jobs

When searching for a person who holds multiple jobs or assignments, and the Org Chart Viewer setup tables and trees are set up to support multiple jobs, the search will retrieve each active job held by the employee.

**Image: Search Results page showing an employee with multiple jobs**

This example illustrates the fields and controls on the Search Results page showing an employee with multiple jobs. You can find definitions for the fields and controls later on this page.




Click the name link for the job title you wish to view. If, after clicking the name you find you accessed the wrong job information, you can select another job title for the person from the Org Chart or Profile pages.

## Org Chart Page

Use the Company Directory: Org Chart page (HRCD_MAIN) to view an organizational chart for a person as a three-tiered chart with the person in the focus node in the middle level.

Or, you can view a hierarchal list of people with the retrieved person's record at the top of the list.

**Navigation**

- Org Chart Viewer, Company Directory: Org Chart tab
- Company Directory, Company Directory: Org Chart tab
- Click the My Org Chart link from the Company Directory header where the Company Directory: Org Chart tab is showing.
- Click the Org Chart link from within any node box for a person on the Company Directory: Org Chart page.

Use the Direct-Line Reports: Org Chart page (HRCD_MAIN) to view an organizational chart with you as the top node and your direct reports below.

Or, you can view a hierarchical list of your direct-line reports with you at the second level and your manager at the top. When you search for a specific person, the page will display that person's manager at the top with their direct-line reports below.

### Navigation

- Org Chart Viewer, Direct-Line Reports, Org Chart tab
- Click the My Org Chart link from the Direct-Line Reports header when the Direct-Line Reports: Org Chart page is showing.
- Click the Org Chart link from within any node box for a person on the Direct-Line Reports: Org Chart page.

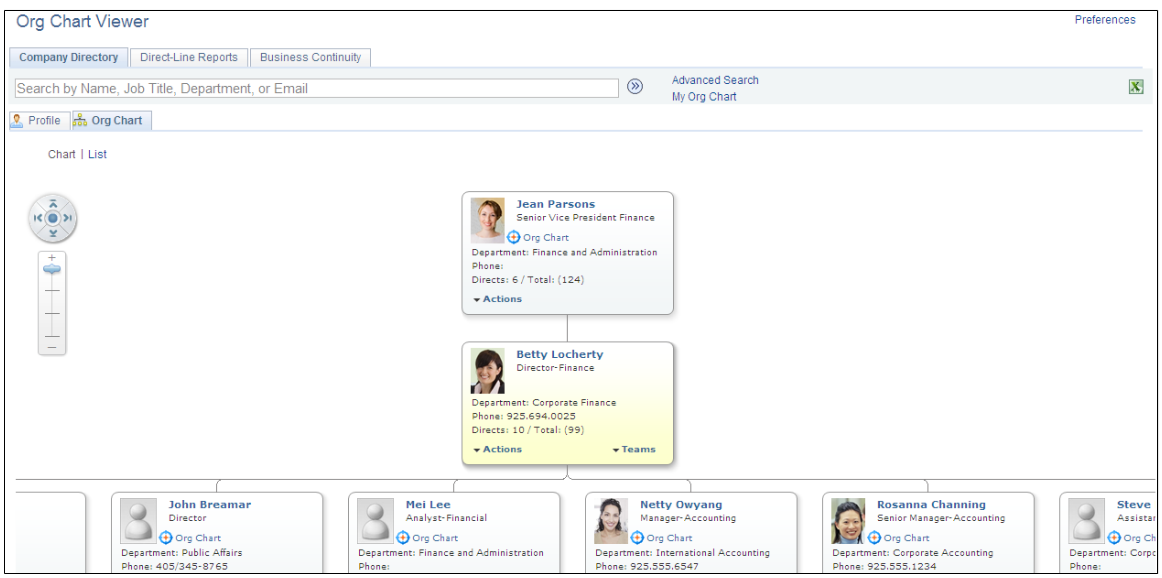
Use the <matrix team name>: Org Chart page (HRCD_MAIN) to view a tiered organizational chart containing the matrix team's members.

### Navigation

- Org Chart Viewer, <matrix team name>, <matrix team name>: Org Chart
- Click the My Org Chart link from the <matrix team name> header when the <matrix team name>: Org Chart page is showing.
- Click the Org Chart link from within any node box for a person on the <matrix team name>: Org Chart page.

**Image: Org Chart page for the org view type Company Directory folder tab showing the user as the focus node of the tree with no siblings showing**

This example illustrates the fields and controls on the Org Chart page for the org view type Company Directory folder tab showing the user as the focus node of the tree with no siblings showing. You can find definitions for the fields and controls later on this page.

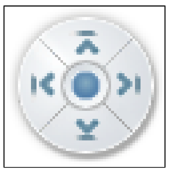
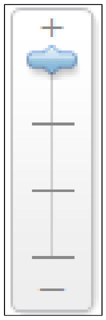



Each Org Chart page reflects the reporting structure of the org view type folder tab you are currently viewing.

The chart displays a maximum of three vertical levels at any time. If the person in the focus node does not report to another person (is in the top-most or root node position), or when the person in the focus node does not have any direct reports, the Org Chart page will display two levels only.

The focus node is displayed in a contrasting color from other nodes in the chart. You can change the focus node by clicking the Org Chart link in each node of the chart. Changing the focus node updates the contents of the Profile page to reflect the person who is in the focus node. Clicking the name link on a node will transfer you to the Profile page for that person and refocus the org chart on that node.

The fields that appear within the nodes are determined on the Chart and Profile Settings - Org Chart Content page.

 **and** 

The org chart appears with a navigator widget and zoom bar in the upper left-hand corner of the chart. Use the directional arrows to navigate left, right, up, or down. Click the dot in the center of the widget to center the chart on the focus node. If all of the nodes fit within the visible area of the chart, this widget does not appear.

Use the zoom in feature (plus sign) to see more detail about a person in the node. As you zoom out (negative sign), you will see more nodes on a level associated with the hierarchical structure but less detail on each individual node.

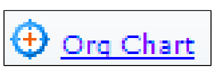
**Chart and List**

Select either of these links at the top of the Org Chart page to view the reporting structure as a three-tiered org chart or in an hierarchical grid (Hgrid) list format.

See the Viewing the Org Chart as a List subtopic in this topic.

**<a person's name link>**

Click the name to access profile information for the person you have selected.




Click the Org Chart link to move the focus of the chart to another node. This also sets the focus of profile page to the newly selected node.

**Actions**

Select a self service action for yourself, or as a manager, select an action to perform for your employees. The system will direct you to the respective self service page. The Actions menu link will display only for yourself or your direct reports if enabled.

PeopleSoft delivers the various self service transactions to work in conjunction with the Org Chart Viewer. These related actions enable employees or managers to view or manage personal or employee information in the PeopleSoft database as they would from the self service pages.

See the self service information under Understanding the Org Chart Viewer, Folder Tabs, and Page Functionality.

See "Reviewing and Updating Personal Information *(PeopleSoft HCM 9.2: eProfile)*".

**Teams**

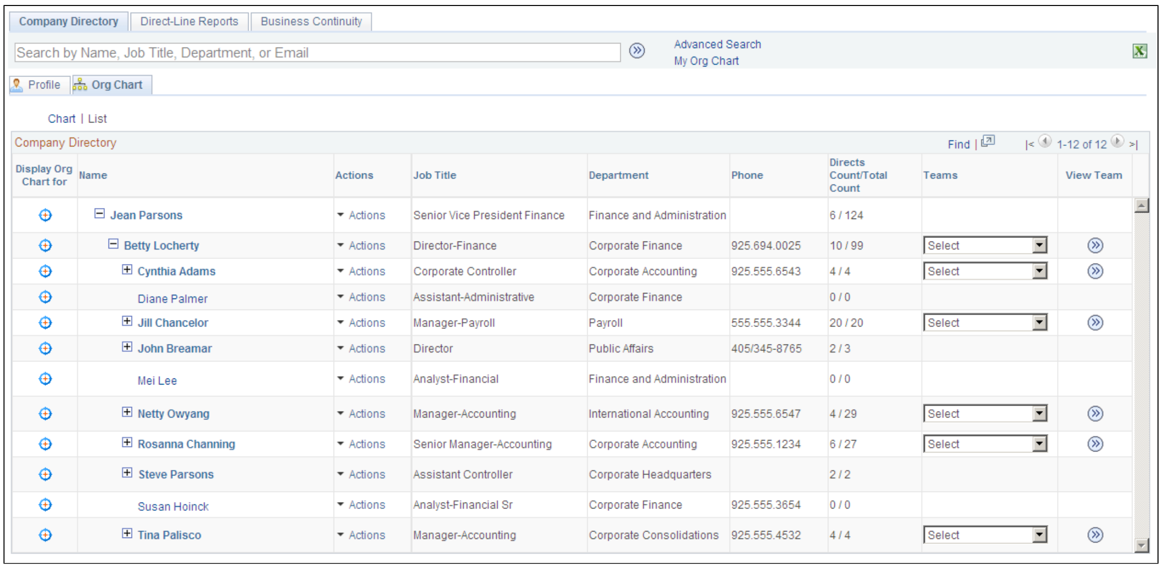
Click this menu drop-down list to see a list of teams with which this person is associated. Select a team to open the Teams page and view the matrix team structure in a list format. The Team drop-down is not available if the person is not associated with a team or the team has not been made public.

## Viewing the Org Chart as a List

Access the List page (click the List link at the top of the Org Chart page).

**Image: Org Chart page displaying the reporting structure in an hierarchal (Hgrid) list format**

This example illustrates the fields and controls on the Org Chart page displaying the reporting structure in an hierarchal (Hgrid) list format. You can find definitions for the fields and controls later on this page.




When you select the List link, you change the display of the Org Chart page to a grid or hierarchal list view. You can expand or collapse the reporting structure to see who reports to whom.

The List layout contains the same fields as the Chart option, as defined by the Org Chart Viewer administrator on the setup pages.

**Focus Org Chart on** 

Click the icon button in the Focus Org Chart on column to transfer back to the chart layout, with that person as the focus.

**Actions**

Select an transaction to perform self service actions for yourself, your direct reports, or for those team members for which you are granted self service access.

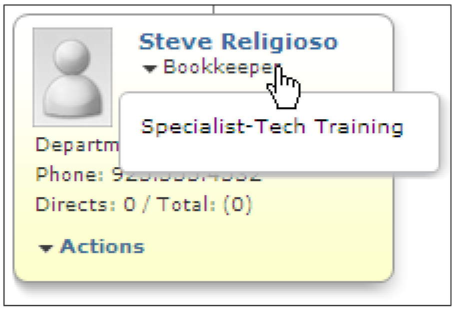
 

### Viewing a Person's Multiple Jobs from the Org Chart Page

When you are on the Org Chart page and a person holds multiple jobs, the node will display a Job Title drop-down arrow and menu link that enables you to select any job that this person holds. When you select a job from the drop-down list, the org chart refocuses on the newly selected job.

**Image: Focus node showing a person with multiple jobs**

This example illustrates the fields and controls on the Focus node showing a person with multiple jobs. You can find definitions for the fields and controls later on this page.




Information about setting up the Org Chart Viewer to support multiple jobs is documented in the set up pages of the Org Chart Viewer.

See Setting Up the Org Chart Viewer.

## Profile Page

Use the Company Directory: Profile page (HRCD_MAIN) to view a person's profile information from the Company Directory folder, such as contact information, HR details, and other personal information.

Users can enter additional contact information, links, and text on this page for their own profile.

**Navigation**

- Org Chart Viewer,  Company Directory: Profile tab
- Company Directory,  Company Directory: Profile tab
- Click the My Profile link from the Company Directory heading where the Company Directory, Profile tab is showing.
- Click the name link of a person on either the Company Directory: Org Chart or Profile page.

Use the Direct-Line Reports: Profile page (HRCD_MAIN) to view a person's profile information from the Direct-Line Reports folder for you or one of your direct-line reports, such as contact information, company details, and other personal information.

Users can enter additional contact information, links, and text on this page for their own profile.

### Navigation

- Org Chart Viewer, Direct-Line Reports: Profile tab
- Click the My Profile link from the Direct-Line Reports header when the Direct-Line Reports: Profile tab is showing.
- Click the name link of a person on either the Direct-Line Reports: Org Chart or Profile page.

Use the <matrix team name>: Profile page (HRCD_MAIN) to view a matrix team member's profile information, such as contact information, HR details, and other personal information.

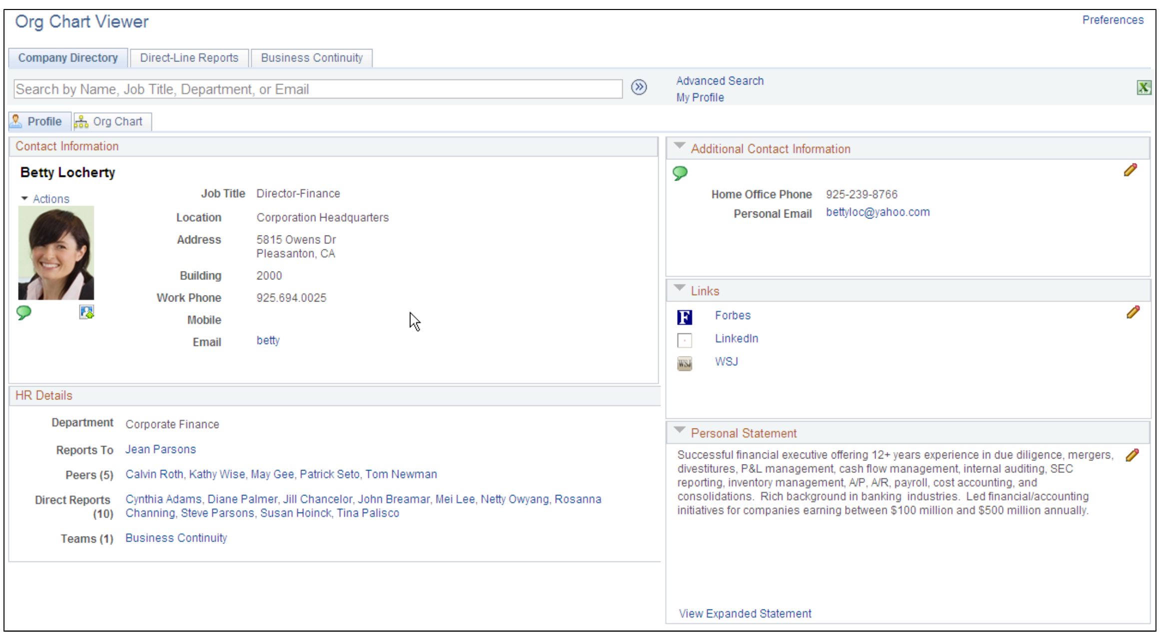
Users can enter additional contact information, links, and text on this page for their own profile.

### Navigation

- Org Chart Viewer, <matrix team name>, <matrix team name>: Profile tab
- Click the My Profile link from the <matrix team name> header when the <matrix team name>: Profile tab is showing.
- Click the name link of a person on either the <matrix team name>: Org Chart or Profile page.

### Image: Profile page

This example illustrates the fields and controls on the user's Profile page in the Company Directory. You can find definitions for the fields and controls later on this page.




This page displays details regarding the person in focus on the organizational chart. This page displays up to five group boxes, depending on how the system administrator has configured this page on the Chart and Profile Settings - Profile Content page. A user can modify the group boxes on the right side of the Profile page when viewing his or her own profile. These group boxes are:

- Contact Information

Depending on the set up, this group box can include items such as job and location information, contact information, links for e-mail addresses, and a drop-down list for a user to perform self service actions for him or herself. This group box is not editable to the user.

- HR Details

  Depending on the set up, this group box can include items such additional job information and co-worker and reports to links. This group box is not editable to the user.

- Additional Contact Information

  Users can enter their own person contact data, such as phone numbers and emails, on their own profile.

- Links

  Users can enter person links, such as web engines and social web sites, on their own profile.

- Personal Statement

  Users can enter personalized text to appear on their own profile. Users can view another person's statement. For large amounts of text, select the View Expanded Statement link to view all the text in another window. If there is no text in the Personal Statement group box, the View Expanded Statement link will not appear on the page.

Fields on this page will also vary depending upon the setup. Use the links on the page to access other people's Profile pages. Enter or edit content for the personalized group boxs by using the edit (pencil) icon to access the specific pages for your own profile.

**Actions**

Select a self service action for yourself, or as a manager, select a self service action to perform for your employees. The system will direct you to the appropriate self service page.

PeopleSoft delivers the various self service transactions to work in conjunction with the Org Chart Viewer that enable employees or managers to view or manage personal or employee information in the PeopleSoft database as they would from the self service pages. This link will be available for your profile or for your direct-line reports' profiles, if enabled.

See Understanding Related Actions and Self Service Transactions.

See "Reviewing and Updating Personal Information *(PeopleSoft HCM 9.2: eProfile)*".

See "Understanding the Management of Direct Reports *(PeopleSoft HCM 9.2: eProfile Manager Desktop)*".

 **(Update Photo icon)**

Click this icon to open the Org Chart Viewer - Update Photo page and change your photo display options.

See Org Chart Viewer - Update Photo Page.

 **(Edit icon)**

Click this edit icon to access the corresponding edit page for the personalization group boxes on the Profile page

This icon is available for your Profile only.

---

**Note:** Any edits or updates made in the editable group boxes of this page are not written to the HR records. This data is stored in the Org Chart Viewer only

---

**Teams**

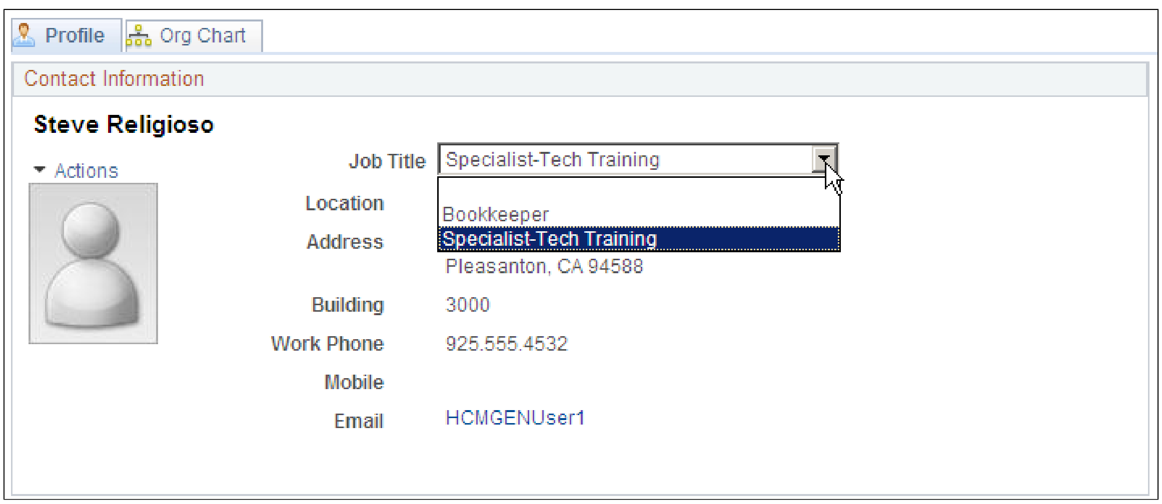
Displays a list of published matrix teams with which this person is associated. Click a team link to open the Teams page and see a list of team members.

### Viewing a Person's Multiple Jobs from the Profile Page

When you are viewing the Profile page and a person holds multiple jobs, the Job Title field will display a drop-down list that enables you to select another job for this person. Select another job to have the system redirect you to the Profile page for that job.

**Image: Profile page showing a person with multiple jobs**

This example illustrates the fields and controls on the Profile page showing a person with multiple jobs. You can find definitions for the fields and controls later on this page.




See Setting Up the Org Chart Viewer.

## Org Chart Viewer - Update Photo Page

Use the Org Chart Viewer - Update Photo page (HRCD_USER_PICS_SEC) to select photo display options, such as no photo, upload your own photo, or use the HR photo that is on file, for your personal profile. The photo selected here is used for all the org chart view types.

The photo select here is used on all the org chart view types.

### Navigation

Click the Update Photo link on any Org Chart Viewer - Profile page when you are on your own profile.

**Image: Org Chart Viewer - Update Photo page**

This example illustrates the fields and controls on the Org Chart Viewer - Update Photo page. You can find definitions for the fields and controls later on this page.


This page is available when the Photo check box is enabled during setup. The photo option you select on this page will also appear on the Org Chart page.

| | |
|---|---|
| **No Photo** | Select this option to have the Profile page display a default photo image. |
| **Display HR System Photo** | Select this option to have the Profile page display the company stored photo image of yourself. |
| **Display My Photo** | Select this option to have the Profile page display a photo image of yourself you have uploaded. If you have not uploaded an image for yourself, this option will not be available. |
| **Upload a Photo** | Click this link to upload your own photo image to appear on the Profile page. Photo must be of file type JPEG and not exceed 256KB. |

This option is available when the Allow User to Add Own Image check box is selected on the Chart and Profile Settings - Profile Content page

## Edit Additional Contacts Page

Use the Edit Additional Contacts page (HRCD_USER_CNTC_SEC) to add additional contact information to your personal profile, such as home phone number, mobile, IM address, or email addresses.

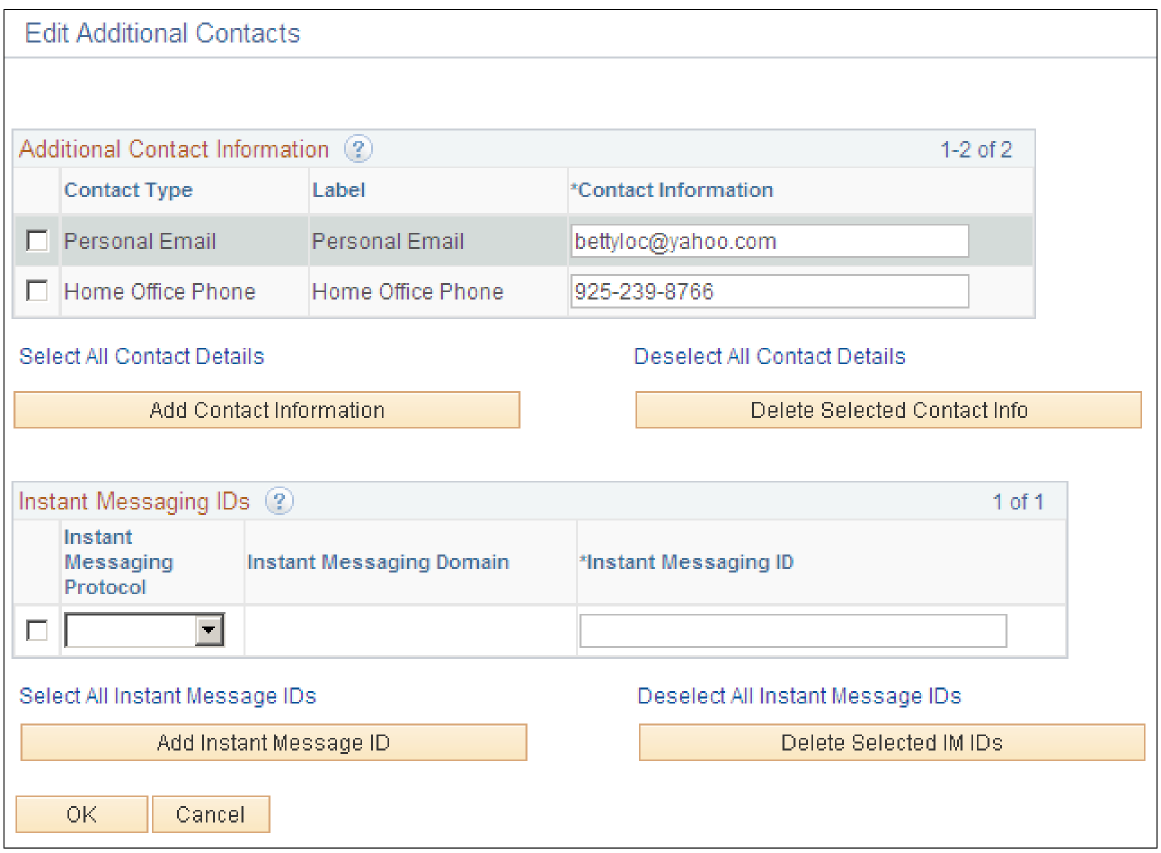
The data you enter here is the same across all org view type Profile pages.

**Navigation**

Click the Edit Additional Contact (pencil ) button on the Profile page when you are in your own profile.

**Image: Edit Additional Contacts page**

This example illustrates the fields and controls on the Edit Additional Contacts page. You can find definitions for the fields and controls later on this page.




### Additional Contact Information

| | |
|---|---|
| **Contact Type, Label, and Contact Information** | Select a contact type and the related label will appear. You can enter your specific contact details in the Value field. |

| | |
|---|---|
| | When the *Other* contact type is available and selected, the you can enter your own label name, which will serve as the field description on the Profile page.<br><br>Contact types are defined by the administrator on the Additional Contacts page. |
| **Add Contact Information** | Select this button to insert another contact row and add additional contact types. |
| **Select All Contact Details, Deselect All Contact Details, and Delete Selected Contact Info (delete select contact information)** | Select the appropriate check box to select or deselect all additional contact information rows. Or, select rows individually for deletion.<br><br>Select the Delete Selected Contact Info button to remove the contact rows you have selected. |

**Note:** Any edits or updates made in the Additional Contact Information group box are not written to the HR records. This data is stored in the Org Chart Viewer only.

### Instant Messaging IDs

| | |
|---|---|
| **Instant Messaging Protocol, Instant Messaging Domain, and Instant Messaging ID** | Identify the IM protocol that the system should use when displaying the IM icon. Valid values include *GTALK, MSN, XMPP,* and *YAHOO,* which will display the Instant Message domain associated with the IM Protocol. Enter the you chat ID as the Network ID. |
| **Add Instant Message Contact** | Select this button to insert another IM contact row. |
| **Select All Instant Messaging IDs, Deselect All All Instant Messaging IDs, and Delete Selected IM IDs** | Select the appropriate check box to select or deselect all instant messaging ID rows. Or, select rows individually for deletion.<br><br>Select the Delete Selected IM IDs button to delete the IM contact rows you have selected. |

## Edit My Profile Links Page

Use the Edit My Profile Links page (HRCD_USER_LINK_SEC) to add web site links to your own personal profile.

The data you enter here is the same across all org view type Profile pages.

**Navigation**

Click the Edit My Profile Links Contact (pencil ) button on the Profile page when you are in your own profile.

**Image: Edit My Profile Links page**

This example illustrates the fields and controls on the Edit My Profile Links page. You can find definitions for the fields and controls later on this page.


| | |
|---|---|
| **Profile Link Name and Web Address** | Enter the label name and web site address that should appear as a link on your Profile page. |
| **Add Link** | Select this button to insert another link row and enter how the name should display in your profile and the web address. |
| **Select All Links, Deselect All Links, and Delete Selected** | Select the appropriate check box to select or deselect all profile link rows. Or, select rows individually for deletion.<br><br>Select the Delete Selected button to delete the link rows you have selected. |

**Note:** Any edits or updates made in the My Profile Links group box are *not* written to the HR records. This data is stored in the Org Chart Viewer only.

## Edit Personal Statement Page

Use the Edit Personal Statement page (HRCD_USER_TEXT_SEC) to include a personal statement or comments using a rich text formatting to your own personal profile.

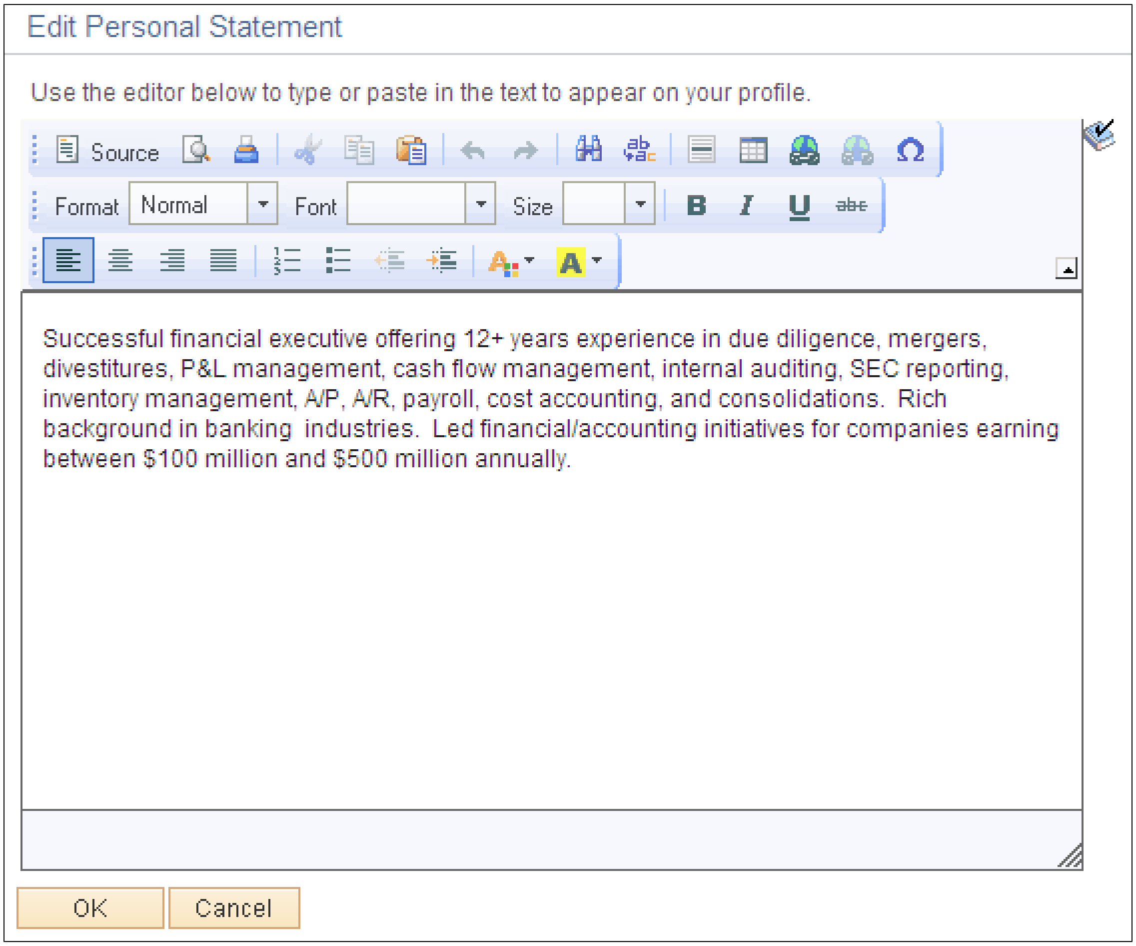
The data you enter here is the same across all org view type Profile pages.

**Navigation**

Click the Edit Personal Contact (pencil ) button on the Profile page when you are in your own profile.

**Image: Edit Personal Statement page**

This example illustrates the fields and controls on the Edit Personal Statement page. You can find definitions for the fields and controls later on this page.




The Edit Personal Statement page opens up in a modal, resizable window. Enter data and click OK to save your text that will display on the Profile page, Personal Statement group box.

---

**Note:** Any edits or updates made in the Personal Statement group box are not written to the HR records. This data is stored in the Org Chart Viewer only.
For more information on using the Rich Text Editor, see *PeopleTools: Using PeopleSoft Applications,* "Using PeopleSoft Application Pages," Working With the Rich Text Editor.

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## Org Chart Viewer - Teams Page

Use the Teams page (HRCD_LIST_SEC) to view all the members of a matrix team as an Hgrid list, with matrix leads appearing as expandable rows.

### Navigation

Click the name of a matrix team on any person's node or profile.

### Image: Teams page

This example illustrates the fields and controls on the Teams page. You can find definitions for the fields and controls later on this page.


Teams

Global Finance Group — Find | 1-4 of 4

| Name | Actions | Job Title | Department | Email | Phone |
|---|---|---|---|---|---|
| ⊟ Rosanna Channing | Actions | Senior Manager-Accounting | Corporate Accounting | HCMGENUser1 | 925.555.1234 |
| Calvin Roth | Actions | Director-Information Systems | Information Systems | | |
| Julie Dyer | Actions | Auditor-General | Finance and Administration | | |
| ⊞ Netty Owyang | Actions | Manager-Accounting | International Accounting | netty.owyang | 925.555.6547 |

Return

Use this page to view the members and reporting structure of a matrix team. The fields on this page are determined by the Org Chart Viewer administrator during setup of the Matrix Reports.

User access to the self service self service transaction pages is determined by security access or when setting up the matrix team.

### Related Links

Matrix Team Page
Action Assignment Page
Assign Transaction Access Page

# Using Mobile Company Directory

The PeopleSoft application enables users to install the mobile Company Directory application using the Install Mobile Applications component under the Self Service menu group. This will allow them to use the Company Directory on their smartphone or tablet.

The mobile Company Directory provides you with access to your company directory much the same as you do in the PeopleSoft application desktop version of the Org Chart Viewer feature.

PeopleSoft Mobile Company Directory

These topics will provide an overview of the mobile Company Directory home page, the profile pages, recently viewed purge process, and discuss how to:

- Install the Company Directory mobile application.
- Search for people.
- View an individual's contact information.

- View a person within an organization chart using the tablet.
- View HR details for a worker using the tablet.
- View personal information using the tablet.
- Display recently viewed people.
- Add and view people in your favorites list.
- View your direct reports.
- View your peers.

## Understanding the Mobile Company Directory Home Page

When you log into the Company Directory, the application displays the home page.

**Image: Example of the mobile Company Directory home page for the tablet in landscape mode**

This example illustrates the mobile Company Directory home page for the tablet in landscape mode.

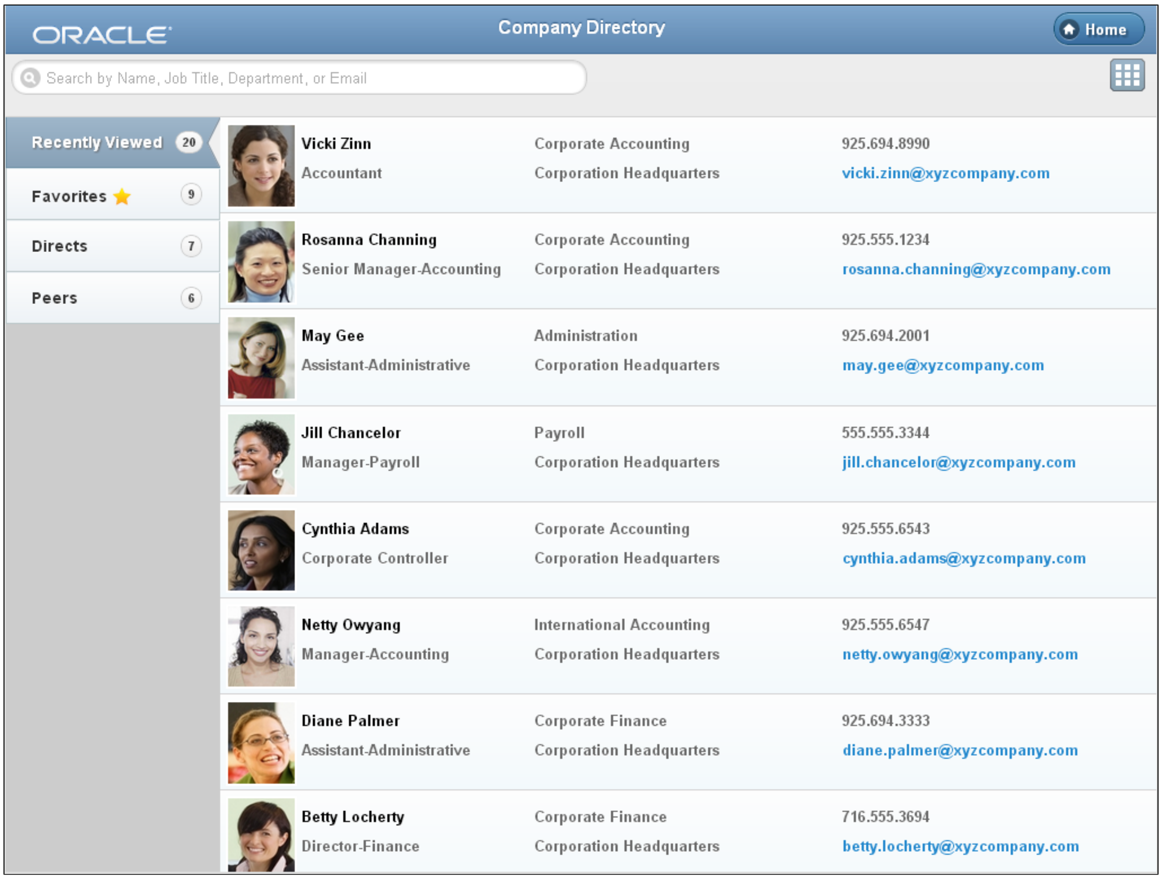


**Image: Example of the mobile Company Directory home page for the tablet in portrait mode with the category drop-down menu showing**

This example illustrates the mobile Company Directory home page for the tablet in portrait mode.

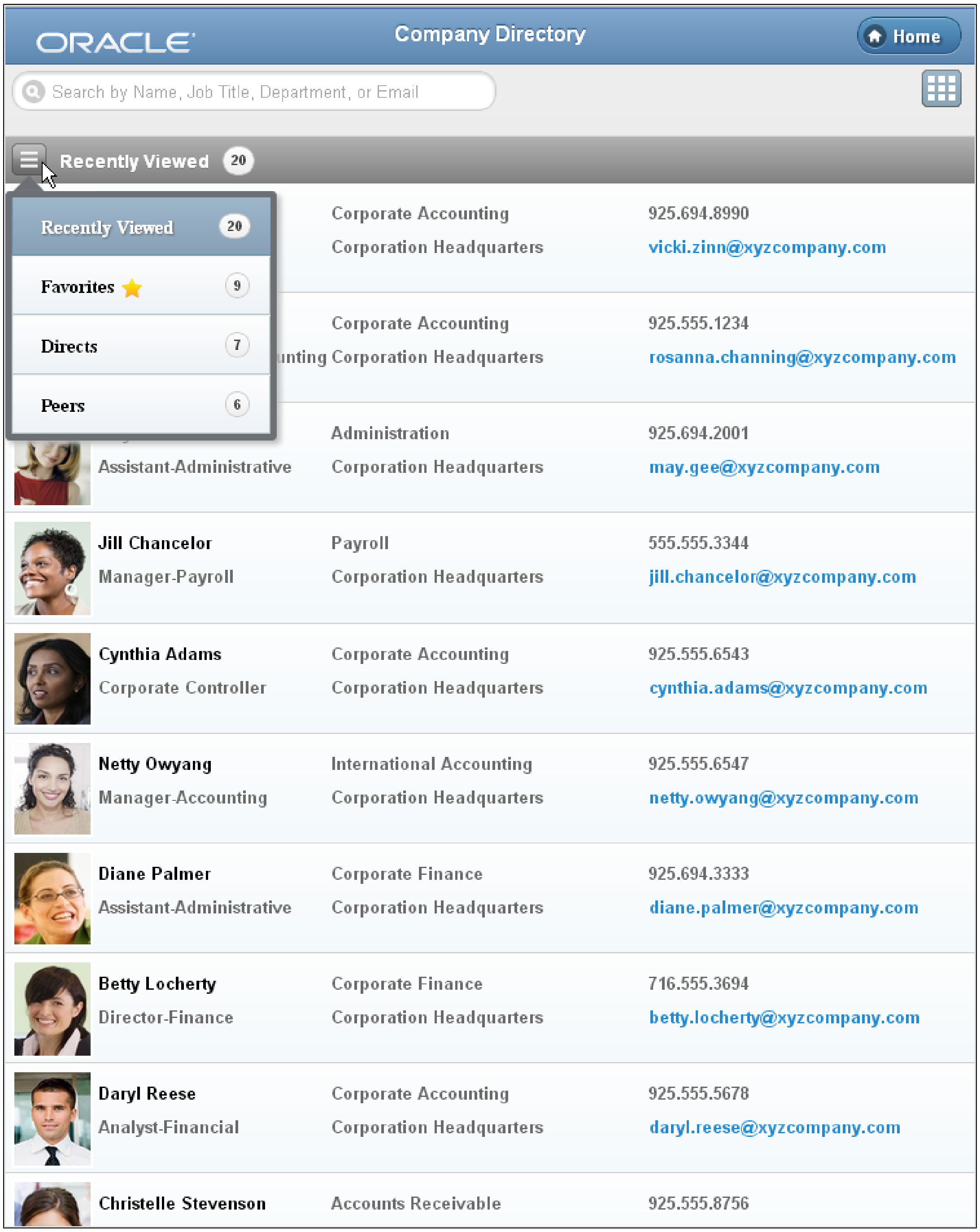
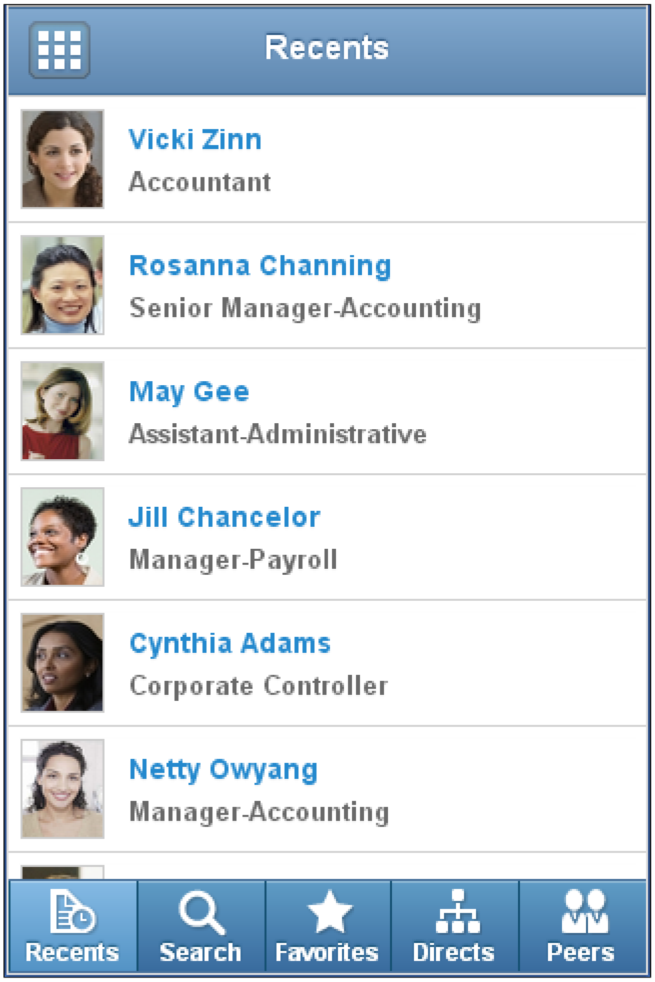


**Image: Example of the mobile Company Directory home page for the smartphone**

This example illustrates the mobile Company Directory home page for the smartphone.




The home page displays the following sections based on the device and its orientation:

- Header

  (Tablet) The header appears at the top of the page and may contain a logo, the Company Directory application name, and the Home button, which enables you to log out of the application.

  (Smartphone) The header appears at the top of the page and displays the page name preceded by the view icon.

- Search bar or tile

  The Search field enables you to find individuals by name, job title, department, or email address.

  (Tablet) The tablet displays the Search field at the top of the home page followed by the view icon.

  (Smartphone) To view the Search field on the smartphone, tap the Search tile in the footer of the page.

  See (Tablet) Search Results Page or (Smartphone) Search Page,

- Category panel, bar, or tile

Choose to view a list of people within a category. Select from the following categories.

- Search Results (tablet) or Search (smartphone)
- Recently Viewed (tablet) or Recents (smartphone)
- Favorites
- Directs
- Peers

---

**Note:** In landscape mode, the category panel appears in the left-side panel of the page. In portrait mode, the category bar and button appear below the search bar. Select the category button on the tablet to open the categories drop-down menu. On the smartphone, the categories appear as tiles along the bottom of the page.

---

In the tablet, each category displays a count to the right of its label. If there are no recently viewed or favorites, the counts for those categories will display *0.*

For both the tablet and the smartphone, when you do not have direct reports or peers, the corresponding category will not appear in the category list or as a footer tile.

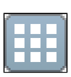
- Content list

  View a list of workers that fall within the category type you have selected. The application displays the people according to the display icon you have selected (list or tile view). To view an individual's profile information, tap the row or tile for the person from the content list. This will open the profile pages for the individual.

## View Icons

A view icon appears in the Search bar (tablet) or in the header (smartphone).

Use the view icons to specify how you want to display individuals in the content list

| | |
|---|---|
|  **(Tile View icon button)** | Displays the photo and name of the employees only, with no other details. These appear as tiles on the page and are sorted from left to right, then top to bottom. |
|  **(List View icon button)** | Displays a list (rows) of employees with their photo, name, and job title for both the smartphone and tablet. The tablet will also display the department, location, phone number, and email of the people when using this view. This is the default view display. |

If there are no people listed on the content page, neither the Tile View nor the List View icon buttons will appear in the bar.

## Company Directory Could Not Be Accessed Error Message

It is possible to have an invalid or missing tree assigned to their Company Directory folder in the Portal Registry. The tree name may be invalid or missing, or the tree name could be valid, but the tree effective date could be set to a value that does not exist in Tree Manager. When this happens, the user will access the mobile Company Directory and instead of the regular home page, the applications displays the message:

“Company Directory could not be accessed. Please contact your system administrator.”
If a user cannot access data due to any reason while the user is navigating through the application, the application the following error message:

“Your request could not be processed. Please contact your system administrator.”

## Understanding the Profile Pages

The profile pages contain company and personal details for a person. When you select a person from a category list, the application displays the contact information for the person.

**Image: (Tablet) Example of a person's profile data, showing additional profile pages (tiles) listed at the bottom of the page**

This example illustrates a person's profile data, showing additional profile pages (tiles) listed at the bottom of the page.

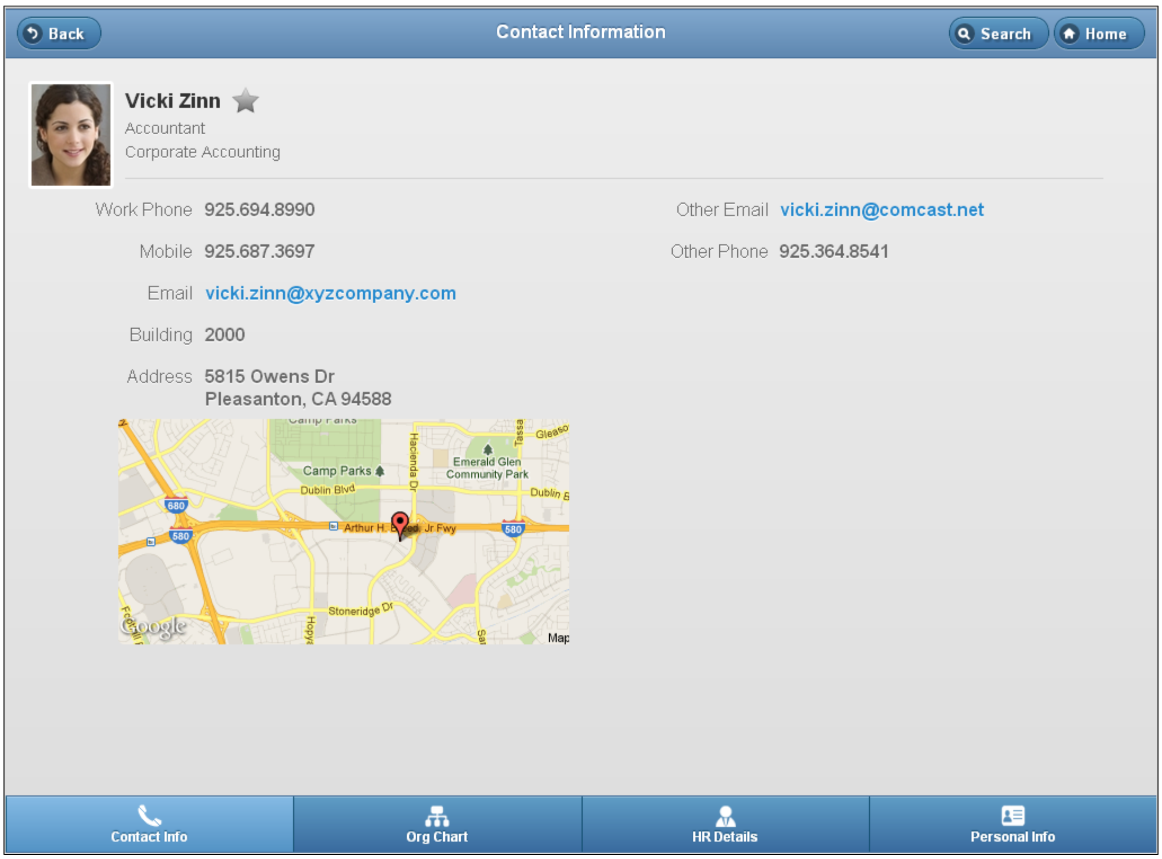
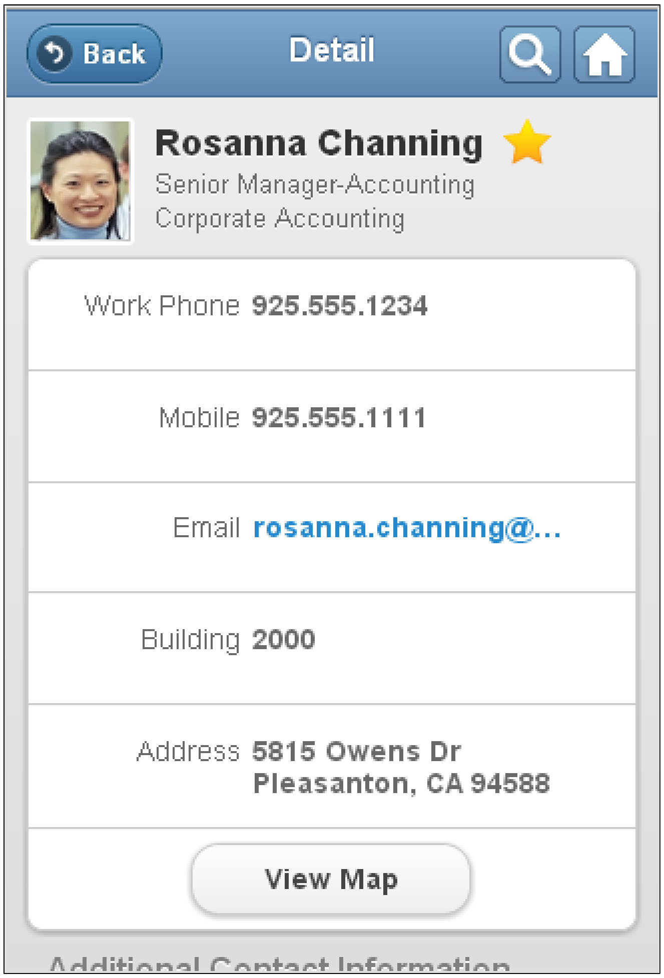


**Image: (Smartphone) Example of a person's profile data on the Details page**

This example illustrates a person's profile data, showing additional profile pages (tiles) listed at the bottom of the page.




Use the buttons at the top of the profile pages to perform the following tasks:


Tap the Back button to return to the previous page you accessed.

or

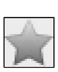

Tap the Search button to display the Search field at the top of the page and perform a search.

or


Tap the Home button to return to the home page of the Company Directory.

View a person's photo, name, title, and department at the top of the profile pages.

The Favorites (star) icon is available at the top of the profile pages, next to the person's name, when viewing details for a specific person. This icon enables you to quickly view and manage those individuals that are or are not in your Favorites list.



Indicates that you have not added this person to your Favorites list. Tap the grey star icon to add this person to your Favorites list. The favorites star icon will turn gold and a message will appear saying that you have added the person to your Favorites list.

Indicated that you have added this person to your Favorites list. Tap the gold star to remove the person from your Favorites list. This will turn the Favorites star icon gray and a message will appear saying that you have removed the person from your Favorites list.

See Favorites Page.

---

**Note:** The Favorites (star) icon does not appear in a category list of either mobile device or on the Org Chart page or nodes of the tablet.

---

To access your Favorites list, tap the Home button and then tap Favorites from the category list or footer tile.

### (Tablet) Viewing Additional Personal Information Using the Tablet

Tap the tile options at the bottom of the profile pages in the tablet to select and view additional information about the person. The four options are:

**Contact Info**

Lists contact information, such as phone numbers, email addresses, and the work location with a map of the location. The fields that appear on this page are based on the setup configurations determined on the Profile Content setup page.

**Org Chart**

Displays a three-tiered graphical representation of the reporting structure for a person, with the person in the focus node typically in the middle level. The focus node appears larger and in another color.

**HR Details**

Provides reporting information about an individual.

For the tablet, you can also view job-related information, such as job family and function, years of service, standard hours, and the direct organizational structure for the person. The fields that appear on this page are based on the setup configurations determined on the Profile Content setup page.

**Personal Info**

Displays a personal statement or various links the employee has entered on the Profile page of the Org Chart Viewer in the desktop version of the application, if applicable.

---

**Note:** This option is hidden when the person has not entered information in the Links or Personal Statement sections of the Profile tab in the desktop version of the Org Chart Viewer.

---

### (Smartphone) Viewing Additional Personal Information Using the Smartphone

Use the vertical scroll feature to view additional profile information on the smartphone. This page includes the following content, when available:

- Company contact information.
- Additional contact information, if added by the person.
- Manager and direct reports, if applicable to the person.
- Links, if added by the person.

### Related Links

(Smartphone) Detail Page
(Tablet) Contact Information Page
(Tablet) Org Chart Page
(Tablet) HR Details Page
(Tablet) Personal Info Page

## Understanding the Recently Viewed Purge Process

When a user views the profile of any person (on either the mobile or desktop version of Company Directory), the user is added to a recently viewed list. As the user views profiles, the system records each profile viewed in a database table. The rows in this table continue to grow as users view profiles. The Recently Viewed Purge Process enables you to remove unwanted rows of data from this table.

When you run the purge batch process, only the most recent 20 rows are retained for each user in the recently viewed list. The purge process will also eliminate any person or node that is no longer present in the Company Directory tree, as determined by the tree name and effective date assigned to the Company Directory folder (Folder Name = HC_COMPANY_DIRECTORY).

### Related Links

(Tablet) Recently Viewed Page and (Smartphone) Recents Page

## Pages Used for Mobile Company Directory

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Install Mobile Applications | HRCD_MO_APP_LAUNCH | Self Service, Install Mobile Applications, Install Mobile Applications | Add the Company Directory application to the home screen of your tablet or phone. |
| Recently Viewed Purge Process | HRCD_RECNT_RUNCNTL | Set Up HCM, Common Definitions, Org Chart Viewer, Recently Viewed Purge Process, Recently Viewed Purge Process | Purge all but the last 20 rows viewed by each user in the Company Directory as well as data no longer associated with the Company Directory tree. |

## Install Mobile Applications Page

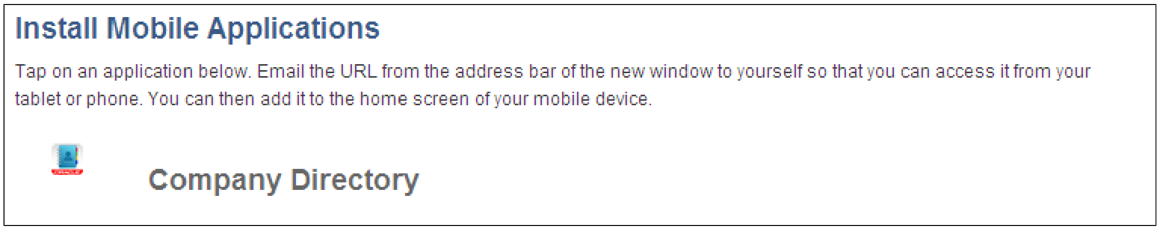
Use the Install Mobile Applications page (HRCD_MO_APP_LAUNCH) to add the Company Directory application to the home screen of your tablet or phone.

**Navigation**

Self Service, Install Mobile Applications, Install Mobile Applications

**Image: Install Mobile Applications page**

This example illustrates the fields and controls on the Install Mobile Applications page. You can find definitions for the fields and controls later on this page.




Select Company Directory to obtain the URL address you should use to add and access the PeopleSoft Company Directory from your mobile device.

To add the Company Directory application to your mobile devise (tablet or smartphone), perform the following steps:

1. Double-click the Company Directory icon from your desktop or laptop. The application will open in another browser.
2. Copy the URL from the address bar and email it to your mobile device.
3. Open the email from your device.
4. Access the URL to open the application in the browser of your device.
5. You will be prompted to add this application to the homepage of your device.
6. Select the icon in the navigation bar of your device and select the option Add to Home Screen.

## (Tablet) Search Results Page or (Smartphone) Search Page

Use the Search fields to locate an individual within the company directory.

### Navigation

Perform the following based on your mobile device:

- Tablet - Access the home page or select the Search button at the top of the profile detail pages to display the Search field. Initiate the search to display the Search Results page.
- Smartphone – Access the home page and tap the Search tile in the footer to open the Search page, or select the Search button at the top of the profile Detail page of an employee to display the Search field. Initiate the search to display the Search page.

### Image: Search Results page using a tablet

This example illustrates searching using a tablet.

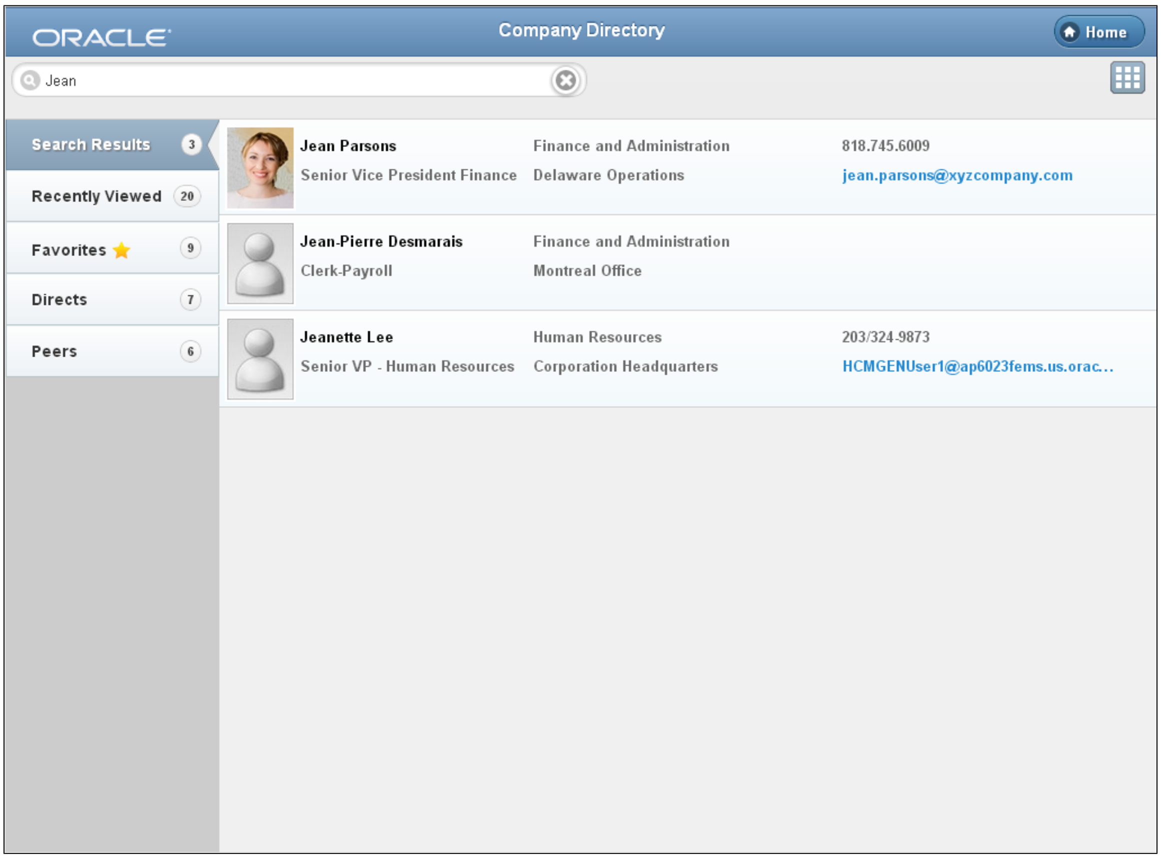
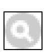


**Image: Search page using a smart phone**

This example illustrates searching using a smartphone.

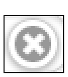
Tap the Search field to engage the keypad and enter your criteria. Tap again to retract the keypad.

Enter a person's name, job title, department, or email address in the search field then tap Search on the keypad to initiate the search.

---

**Note:** The application searches for those individuals whose information *begins with* the criteria you entered. For example, if you enter *doug* as your search criteria, the results will display individuals whose first name, last name, department, job, or email begins with *Doug*. However, someone with the name of McDouglas would not appear in the results list.

---



Tap to clear the text in the Search field.

**Search Results**

The Search Results (tablet) or Search (smartphone) category appears after you perform a search and will remain in the category list throughout the current session, reflecting the last search you performed.

The number of matches that meet that search criteria appears to the right of the Search Results category label in the tablet. Those individuals that match the criteria appear in the content list, if any exist. Search results are sorted by display name.

---

**Note:** Search results will retrieve and display up to 100 matches. When your search results exceed 100 matches, the page will display the first 100 matches and text at the bottom of the page will direct you to narrow your search.

---

Tap the person's row or tile to open the profile pages and view additional details about this person.

---

**Note:** When using the tablet, if a person has multiple jobs, the Search Results page will display one row or tile for each job that person holds.

---

In the list view, you can initiate an email by tapping the email address, if applicable.

## (Smartphone) Detail Page

Use the Detail page to view personal can company details about a person.

### Navigation

Tap a person's name or photo from any of the pages.

### Image: Detail page (1 or 3)

This example illustrates the fields and controls on the Detail page (1 of 3). You can find definitions for the fields and controls later on this page.

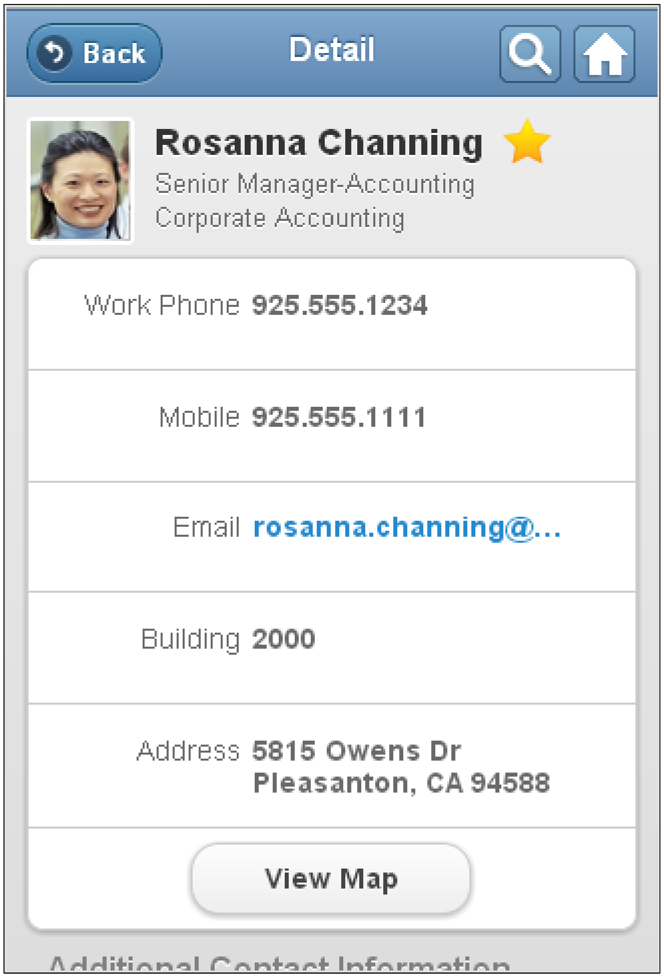


**Image: Detail page (2 or 3)**

This example illustrates the fields and controls on the Detail page (2 of 3). You can find definitions for the fields and controls later on this page.

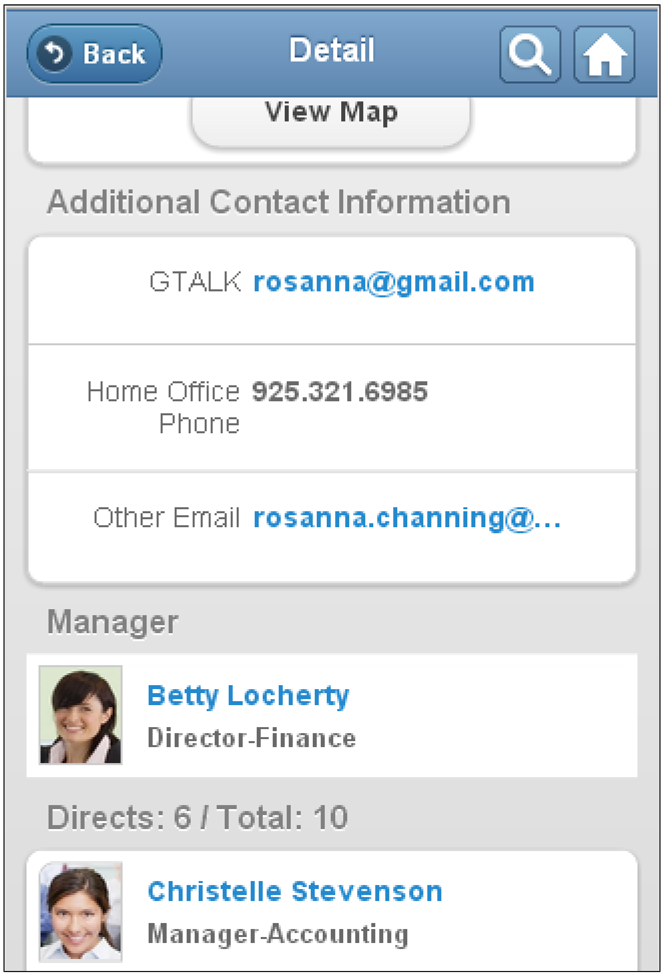
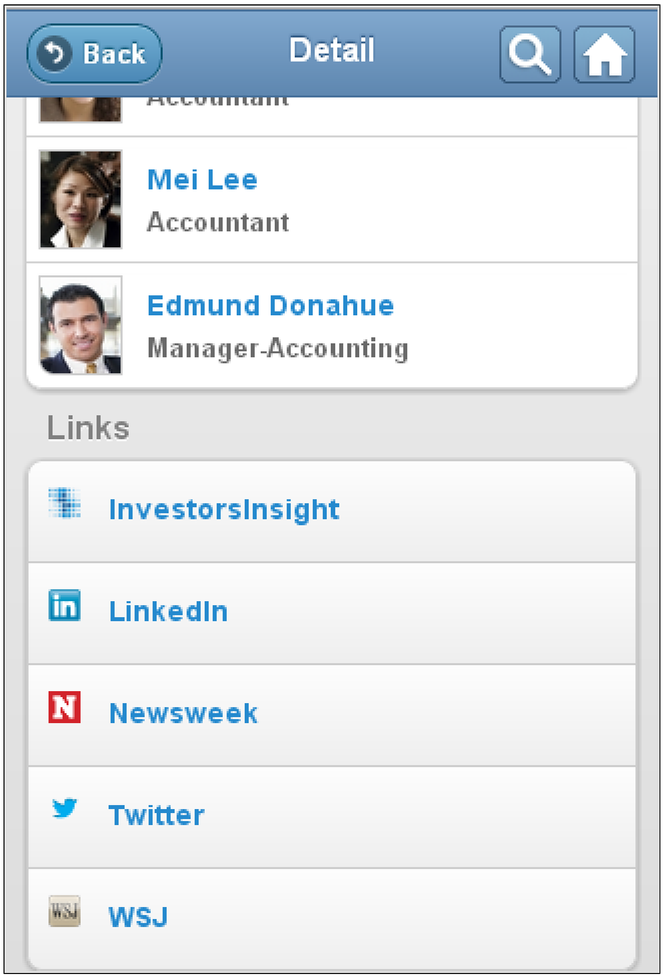


**Image: Detail page (3 or 3)**

This example illustrates the fields and controls on the Detail page (3 of 3). You can find definitions for the fields and controls later on this page.




The Detail page on the smartphone displays fields and sections based on the setup configuration, the employee's reporting structure, and personal information added by the person in the desktop version of the Company Directory. Not all sections may be visible.

The page displays the fields defined on the Chart and Profile Settings - Profile Content setup page for the *Company Directory – Phone* org view type first on the page, under the header. The page will display the View Map button after the administrator defined fields when the address is available, even if the address field is not the last element in the configuration.

See Chart and Profile Settings - Profile Content Page

Tap an email address to initiate an email or phone number to initiate a call to the person.

Additional content on this page may include the following sections, if applicable:

| | |
|---|---|
| **Additional Contact Information** | Displays when the person you are viewing has added information in the Additional Contact group box using the desktop version of the Company Directory. For more |

| | |
|---|---|
| | information on adding additional information to your profile, see Edit Additional Contacts Page. |
| **Manager** | Displays this section when the person you are viewing reports to a manager. Tap the manager row to access the Detail page for the person’s manager. |
| **Directs** | Displays this section when the person you are viewing is a manager and has direct reports. Tap another person to access the Detail page for that individual. |
| **Links** | Displays when the person you are viewing has added information in the Links group box using the desktop version of the Company Directory. Tap a link to open the web site in another browser. For more information on adding links to your profile, see Edit My Profile Links Page. |

## (Tablet) Contact Information Page

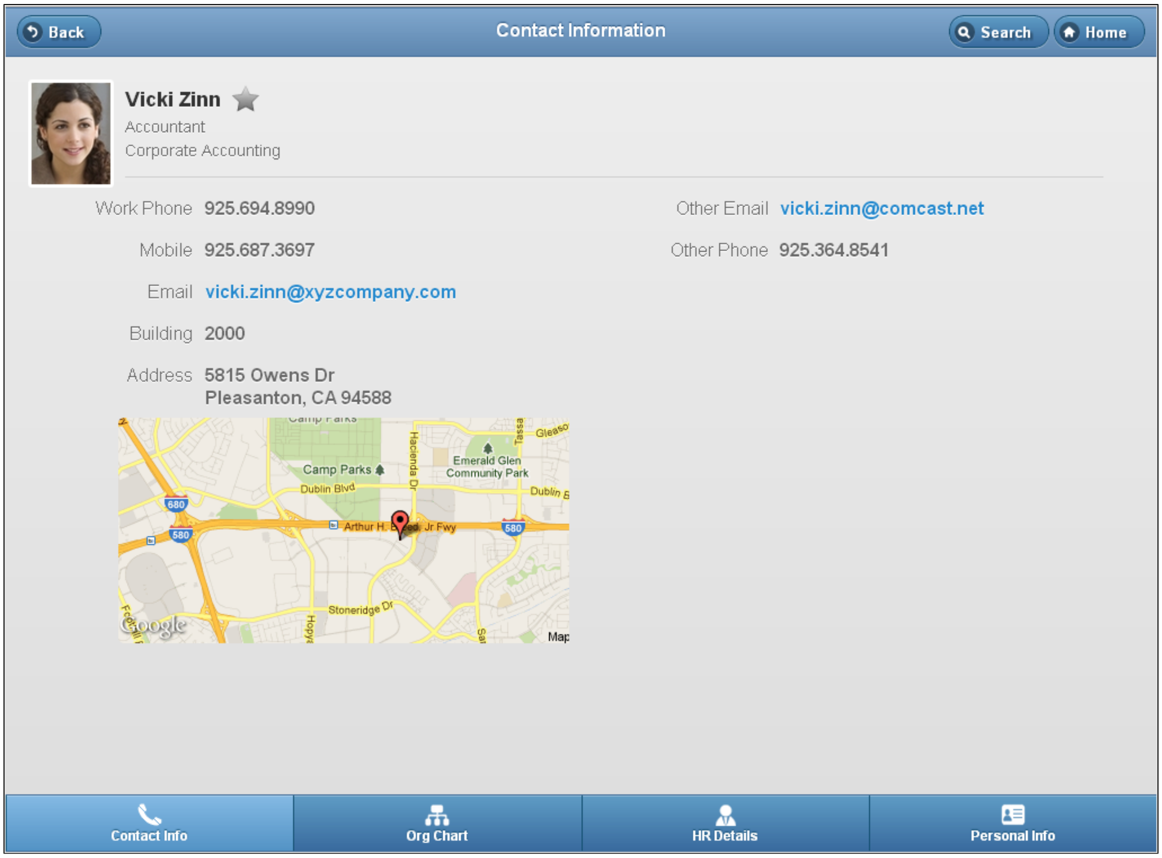
Use the Contact Information page to view information such as phone numbers, emails, and location details

### Navigation

Tap a person's name or photo, or select the Contact Info tile in the footer of the profile pages.

### Image: Contact Information page in landscape mode

This example illustrates the fields and controls on the Contact Information page in landscape mode. You can find definitions for the fields and controls later on this page.




The Contact Information page is the default page when you select a person in the tablet.

---

**Note:** The data that appears for a person with multiple jobs is contextual. The various profile pages will display job specific data related to the row you selected from the search results or name list.

---

This page displays a two column layout in landscape mode and a one column layout in portrait mode. Tap any email address to open the email client and initiate an email to the person.

## In Landscape Mode

The fields in the left column are defined on the Chart and Profile Settings - Profile Content setup page for the *Company Directory – Tablet* org view type. The page will display the map as the last element in the left column when the address field is included in the setup, even if the administrator has not set up the address field as the last element in the configuration. See Chart and Profile Settings - Profile Content Page.

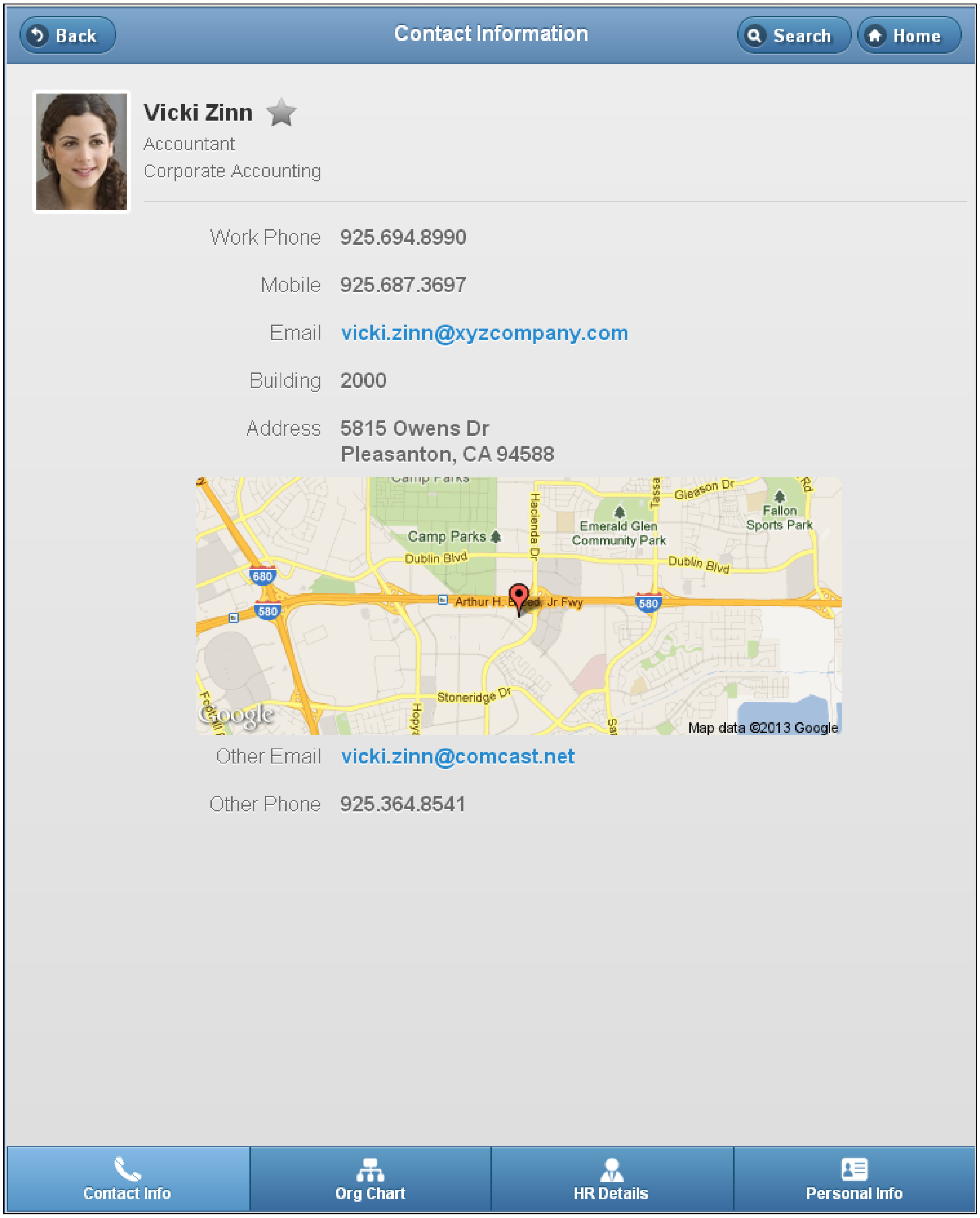
The right column will display additional contact information added by the person in the Additional Contact group box through the desktop version of the Company Directory.

### In Portrait Mode

**Image: Mobile Company Directory - Contact Information page for the tablet in portrait mode**

This example illustrates the fields and controls on the Contact Information page in portrait mode. You can find definitions for the fields and controls later on this page.




The page displays the fields defined on the Chart and Profile Settings - Profile Content setup page for the *Company Directory – Tablet* org view type first. The page will display the map after the fields defined by the administrator when the address field is included in the setup, even if the address field is not the last element in the configuration. See Chart and Profile Settings - Profile Content Page.

The fields below the administrator defined field, if any, come from the additional contact information added by the person in the Additional Contact group box through the desktop version of Company Directory.

## (Tablet) Org Chart Page

Use the Org Chart page to view the hierarchical reporting structure of the person.

**Navigation**

Selecting the Org Chart tile in the footer of the profile pages.

**Image: Org Chart page for the tablet**

This example illustrates the fields and controls on the Org Chart page. You can find definitions for the fields and controls later on this page.


The person you selected shows in the focus node of the three-tiered org chart. The focus node is a larger node, presented in a different color. It is typically in the middle, or second tier, unless the person you are viewing is at the top level in the company hierarchy. If set up to show peers, the peers of this focus person will appear in the second tier alongside the focus node.

The first level displays the manager of the person you are viewing; the third level displays the direct reports of the person you are viewing. If there are no direct reports for this person, the third level will be blank.

The nodes on each tier are sorted by display name. To view all peers or direct reports of a person, scroll to the right or left in the second or third level.

---

**Note:** Although the direct reports appear in the level below the focus person, when you scroll to where the focus person does not show on the screen, the direct reports will fade. If you stop scrolling with the focus person no longer visible, the lower tier will not display the direct reports. Direct reports will reappear when the focus node is again visible on the screen.

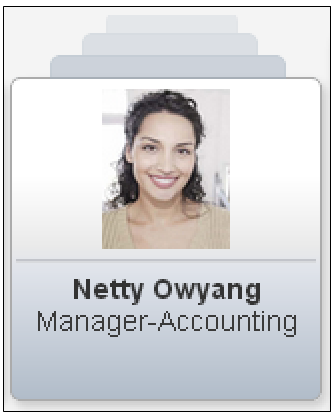
---

### Identifying Manager versus Non-Manager Nodes

Nodes that display a stepped visual at the top indicate that the person within the node is a manager. This node can appear within the second or third levels of the org chart.

**Image: Manager node (represented by a stepped visual)**

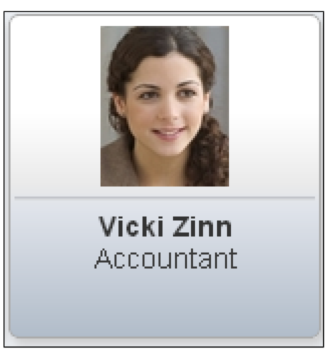
This example illustrates a manager node represented by a stepped visual.




Non-manager nodes do not have a stepped visual and appear in the second or third levels of the chart.

**Image: Non-manager node (without a stepped visual)**

This example illustrates a non-manager node represented by a stepped visual.




### Changing the Focus Node

To change the focus node, tap another node in the org chart. The direct reports for that person will now appear in the level below that person.

Bringing a person into the focus node in the org chart does not add the person to the Recently Viewed list. You must access the person's profile data to add them to the Recently Viewed list.

### Accessing Contact Information from the Org Chart

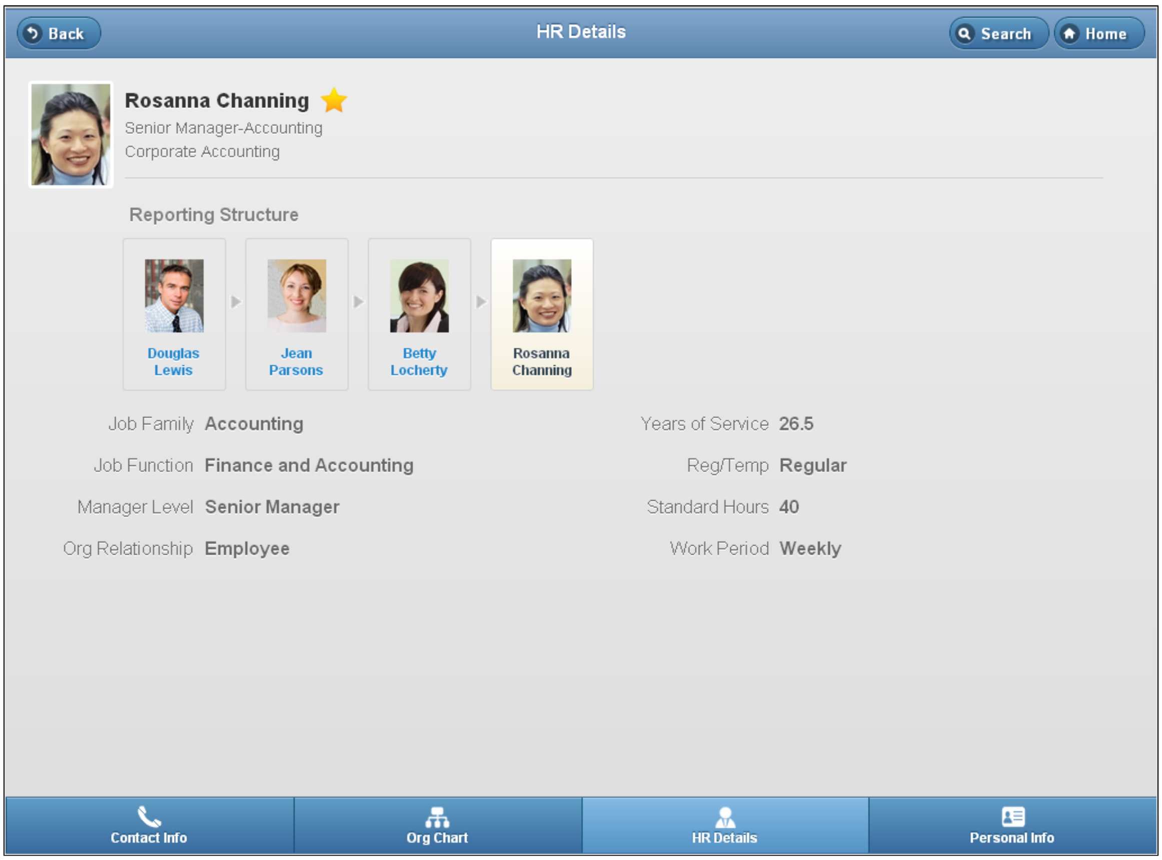
To view a person's contact information, make sure the person is in the focus node, then tap the name of the person in the focus node, or tap the Contact Info tile in the footer of the Org Chart page. The Contact Information page will open for the person in the focus node. Tapping the name of a person that is not in the focus node will only change the focus of the org chart to that person.

## (Tablet) HR Details Page

Access the HR Details page by selecting the HR Details tile in the footer of the profile pages.

**Image: HR Details page**

This example illustrates the fields and controls on the HR Details page.




Use this page to view the reporting structure of the person in a pictorial view in a horizontal format, with the first person to the left being the top most person in the organizational hierarchy and the last person being the person that you are currently viewing. Scroll to the right or left to view the full hierarchical structure.

Tap a box for any person in the reporting structure, with the exception of the last person whose record you are already viewing, to open the Contact Information page for that person. This person will be added to Recently Viewed category.

You can also view other HR details about this person below the reporting structure. The available fields are defined by the administrator on the Chart and Profile Settings - Profile Content setup page in the HR Details group box.

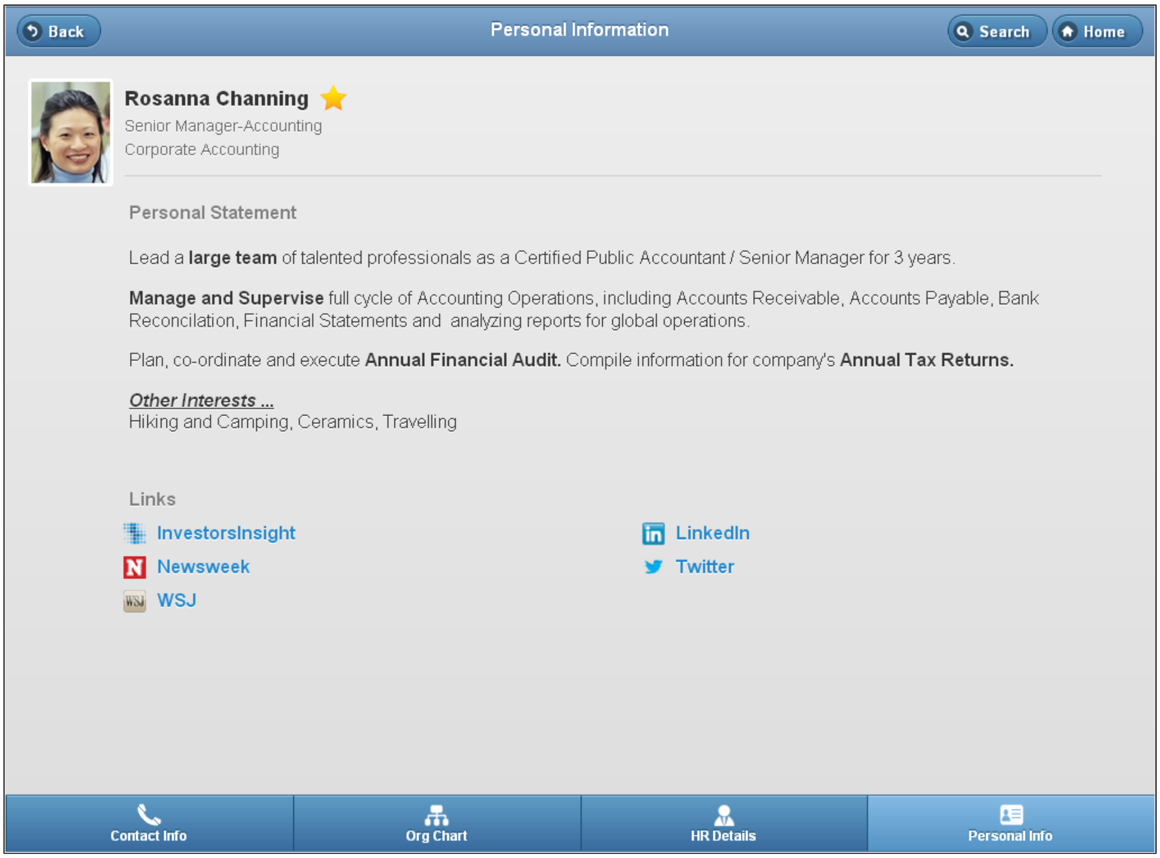
 

## (Tablet) Personal Info Page

Access the Personal Information page by selecting the Personal Info tile in the footer of the profile pages.

**Image: Personal Information page**

This example illustrates the fields and controls on the Personal Information page.




Use this page to view the content the individual has manually entered in the Personal Statement or Links group boxes on the Profile tab in the desktop version of the application. Tap a link to open the website in another browser.

---

**Note:** The Personal Info tile and page is available only when the person in focus has data stored information in the Personal Statement or Links group boxes in the desktop version of the Company Directory.

---

## (Tablet) Recently Viewed Page and (Smartphone) Recents Page

Use the Recently Viewed or Recents page to see the last several people you have accessed (up to 20 people).

### Navigation

Select the Recently Viewed category from the category list (tablet) or Recents tile at the bottom of the page (smartphone).

### Image: Recently Viewed page for the tablet

This example illustrates the fields and controls on the Recently Viewed page using a tablet. You can find definitions for the fields and controls later on this page.

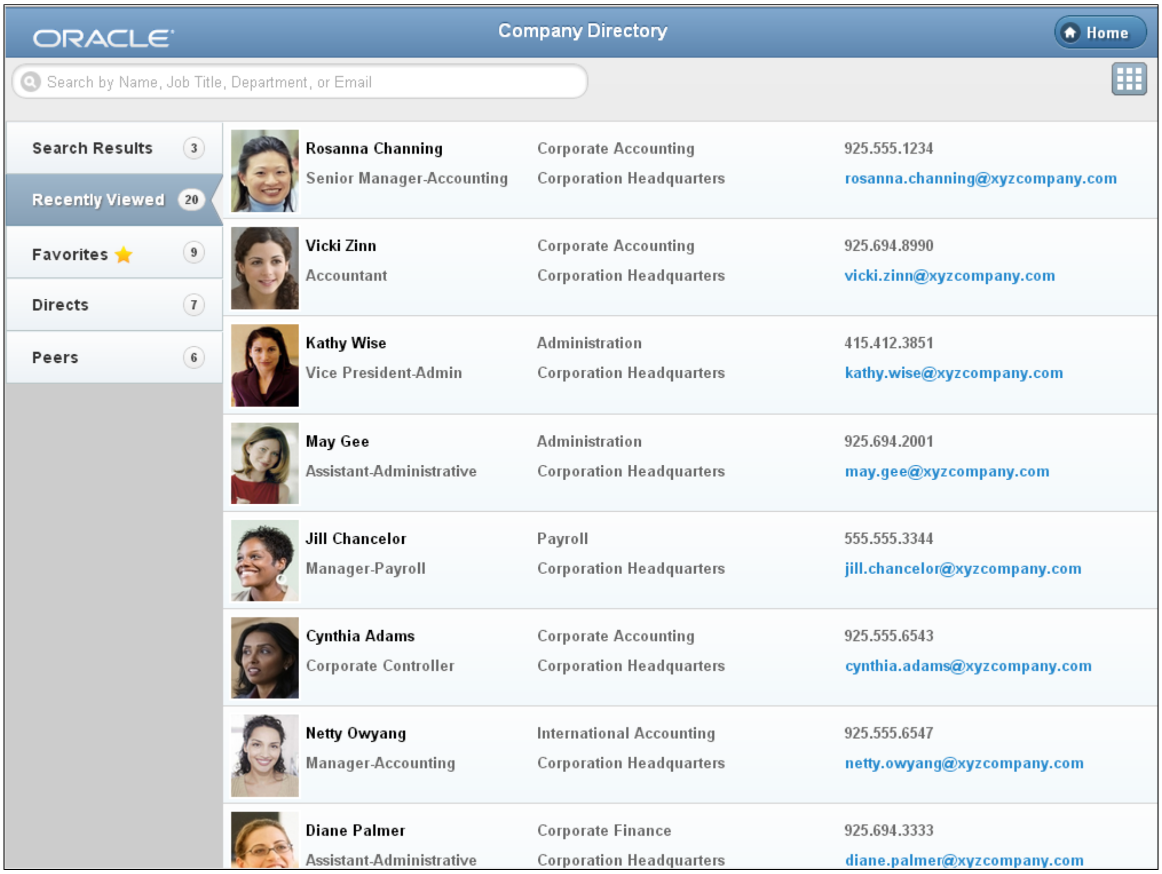
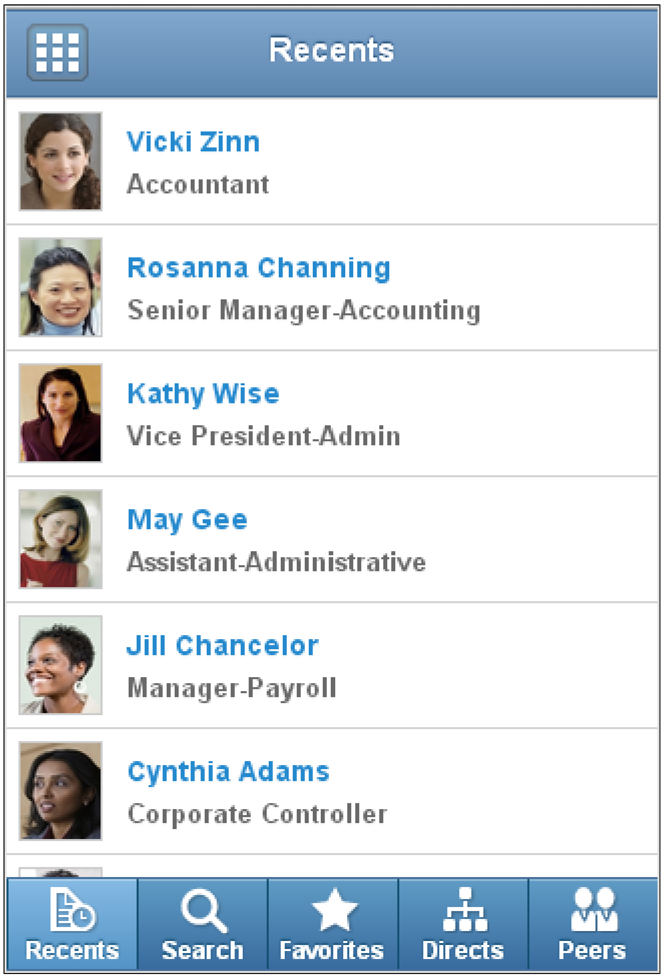


**Image: Recents page for the smartphone**

This example illustrates the fields and controls on the Recents page using a smartphone. You can find definitions for the fields and controls later on this page.




The recently viewed list will display the last 20 people for which you have viewed profile data. A person whose Profile tab is viewed on the desktop version of the Company Directory will also appear in this list. The number of individuals you have recently viewed appears to the right of the Recently Viewed label in the tablet.

The PeopleSoft application also enables the administrator to run a batch process to purge excess records of recently viewed profiles. See Understanding the Recently Viewed Purge Process.

This is the first page that will show when you log into the mobile Company Directory. The application sorts the employees by the date and time at which you viewed them, with the most recent viewings listed first.

## Favorites Page

Use the Favorites page by selecting the Favorites category or tile from the Home page. Use this page to view and select the individuals that you have added as a favorite.

**Navigation**

Select the Favorites category from the category list (tablet) or the Favorites tile at the bottom of the page (smartphone).

Favorites are sorted by display name. There is no limit to the number of favorites you can have. The number of individuals you have added as favorites appears to the right of the label in the tablet.

To add a person to the Favorites list, tap the Favorites (gray star) icon next to the person's name at the top of the profile detail pages. To remove a person from your Favorites list, tap the Favorites (gold star) icon next to the person's name.

**Note:** When you add a person with multiple jobs to your favorites list, you add that person / job combination as a row to the list. This means, you can add a row for each person / job combination, in which case you will see the person in you favorites list multiple times but with different job details.

### Related Links

Understanding the Profile Pages

## Directs Page

Use the Directs page to view your direct reports in the content area, sorted by display name.

**Note:** If you do not have direct reports, the application will *not* display this category.

**Navigation**

Select the Directs category from the category list (tablet) or Directs tile at the bottom of the page (smartphone).

The total number of direct reports appears to the right of the Directs label in the tablet. Tap a person to view profile details about a person.

Direct reports are derived using the Company Directory tree. For more information, see Understanding Hierarchical Reporting Structures and Tree Builder Run Control Page.

## Peers Page

Use the Peers page to view your peers in the content area, sorted by display name.

**Note:** If you do not have peers, the application will *not* display this category.

**Navigation**

Select the Peers category from the category list (tablet) or Peers tile at the bottom of the page (smartphone).

The total number of peers appears to the right of the Peers label in the tablet. Tap a person to view profile details about a person.

Peers are derived using the Company Directory tree. For more information, see Understanding Hierarchical Reporting Structures and Tree Builder Run Control Page.

# Viewing Worker Job History

Viewing worker job history provides a quick summary of important job details of current and historic work records.

These topics discuss how to:

- View worker job history.
- View compensation information.

## Pages Used to View Employee Job History

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Workforce Job Summary | WF_JOB_SUMMARY | Workforce Administration, Job Information, Review Job Information, Workforce Job Summary, Workforce Job Summary | View an employee's job history. |
| Job Summary JPN | JOB_SUMMARY_JPN | Workforce Administration, Job Information, Review Job Information, Job Summary JPN, Job Summary JPN | View a Japanese employee's job history. |
| Salary Components | COMP_JOB_SUMM_SEC | Click the Components link on the Compensation tab of the Workforce Job Summary page. | View compensation information. |
| Rate Code | WCS_RTCD_DETAILS | Click the Details link on the Controls tab of the on the Salary Components page. | Review the description, compensation rate type, and rate code class associated with the rate code. |

## Workforce Job Summary Page

Use the Workforce Job Summary page (WF_JOB_SUMMARY) to view an employee's job history.

**Navigation**

Workforce Administration, Job Information, Review Job Information, Workforce Job Summary, Workforce Job Summary

**Image: Workforce Job Summary page: General tab**

This example illustrates the fields and controls on the Workforce Job Summary page: General tab. You can find definitions for the fields and controls later on this page.

Workforce Job Summary

Antonio Santos EMP Empl ID KU0010

Go To Job Data

Job Information Personalize | Find | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | Compensation

| Organizational Relationship | Empl Record | Effective Date | Seq | Action | Action Reason | Key Person |
|---|---|---|---|---|---|---|
| EMP | 0 | 11/10/2008 | 0 | Pay Rt Chg | | |
| EMP | 0 | 07/01/1998 | 1 | Pay Rt Chg | | |
| EMP | 0 | 07/01/1998 | 0 | Compl Prob | Prob Comp | |
| EMP | 0 | 04/04/1998 | 0 | Return-LOA | Retrn Lv | |
| EMP | 0 | 02/27/1998 | 0 | Paid LOA | Short-Term | |
| EMP | 0 | 09/12/1997 | 0 | Hire | | |

The Job Summary page displays the person's name, organizational relationship, and ID.

## Common Page Information

**Effective Date and Seq (sequence)**
Displays the effective date and effective date sequence, if any, for each personnel action. The sequence tracks actions that occur on the same day.

**Org Relation (organizational relationship)**
Indicates the type of organizational relationship, *EMP* ( employee), *CWR* (contingent worker), or *POI* (person of interest).

**Empl Record (employment record)**
The sequential number of the employment instance for the same ID.

## General Tab

Select the General tab.

**Action andAction Reason**
Displays the action taken and reason for the row's existence.

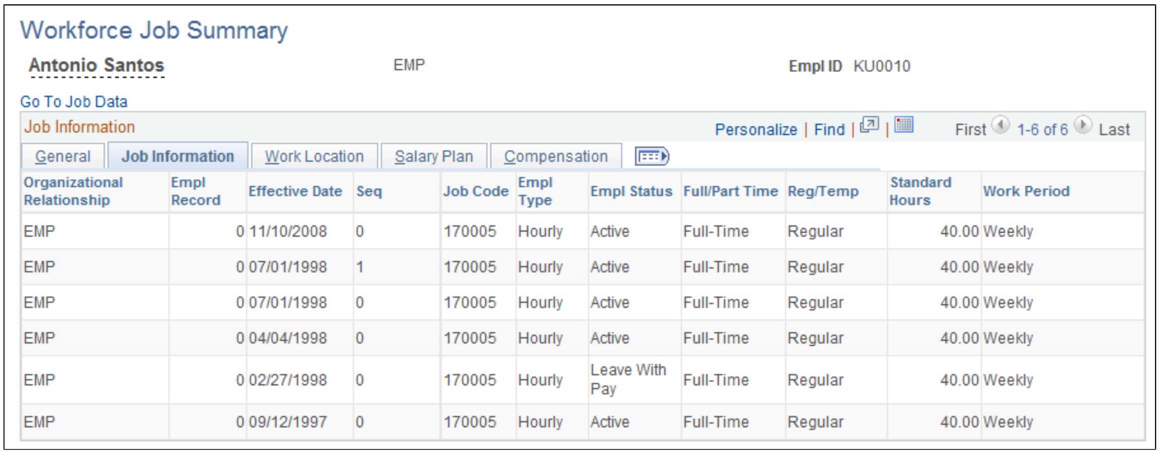
**Job Data**
Click this link to display the Job Data component. The system initially displays the current row, regardless of which row's link you click. To access a specific row after you access the Job Data component, use the Go To Row button on the Work Location page.

## Job Information Tab

Select the Job Information tab.

**Image: Workforce Job Summary page: Job Information tab**

This example illustrates the fields and controls on the Workforce Job Summary page: Job Information tab. You can find definitions for the fields and controls later on this page.




| Organizational Relationship | Empl Record | Effective Date | Seq | Job Code | Empl Type | Empl Status | Full/Part Time | Reg/Temp | Standard Hours | Work Period |
|---|---|---|---|---|---|---|---|---|---|---|
| EMP | 0 | 11/10/2008 | 0 | 170005 | Hourly | Active | Full-Time | Regular | 40.00 | Weekly |
| EMP | 0 | 07/01/1998 | 1 | 170005 | Hourly | Active | Full-Time | Regular | 40.00 | Weekly |
| EMP | 0 | 07/01/1998 | 0 | 170005 | Hourly | Active | Full-Time | Regular | 40.00 | Weekly |
| EMP | 0 | 04/04/1998 | 0 | 170005 | Hourly | Active | Full-Time | Regular | 40.00 | Weekly |
| EMP | 0 | 02/27/1998 | 0 | 170005 | Hourly | Leave With Pay | Full-Time | Regular | 40.00 | Weekly |
| EMP | 0 | 09/12/1997 | 0 | 170005 | Hourly | Active | Full-Time | Regular | 40.00 | Weekly |

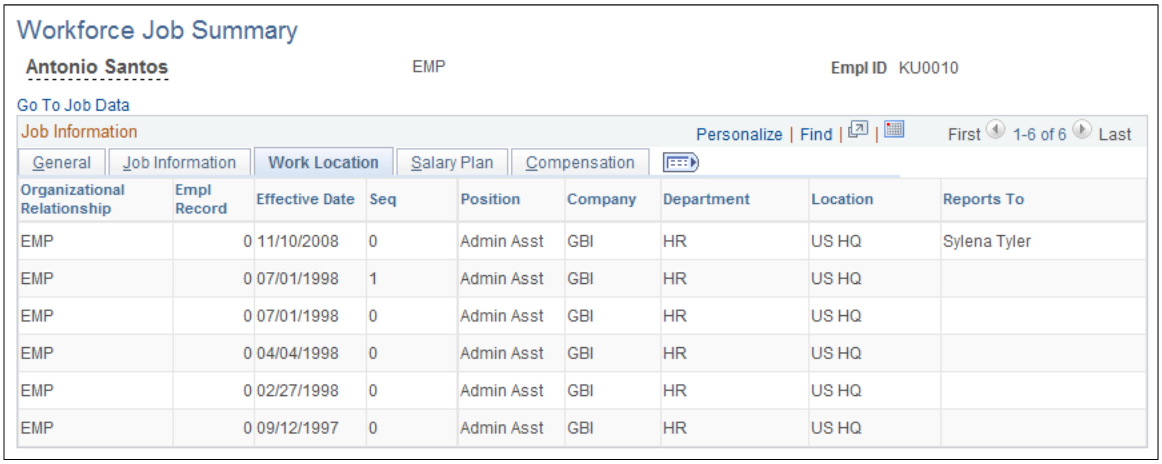
| | |
|---|---|
| **Job Code** | Displays the job code information for this worker after each personnel action. |
| **Empl Type (employee type)** | Displays the worker type after each personnel action. |
| **Empl Status (employee status)** | Displays the worker's status after each personnel action. |
| **Full/Part Time** | Indicates whether the worker is full or part time after each personnel action. |
| **Reg/Temp** | Indicates whether the worker is regular or temporary after each personnel action. |
| **Standard Hours** | Displays the standard hours per work period after each personnel action. |
| **Work Period** | Displays the work period after each personnel action. |

## Work Location Tab

Select the Work Location tab.

**Image: Workforce Job Summary page: Work Location tab**

This example illustrates the fields and controls on the Workforce Job Summary page: Work Location tab. You can find definitions for the fields and controls later on this page.


Workforce Job Summary

Antonio Santos EMP Empl ID KU0010

Go To Job Data

Job Information Personalize | Find | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | Compensation

| Organizational Relationship | Empl Record | Effective Date | Seq | Position | Company | Department | Location | Reports To |
|---|---|---|---|---|---|---|---|---|
| EMP | 0 | 11/10/2008 | 0 | Admin Asst | GBI | HR | US HQ | Sylena Tyler |
| EMP | 0 | 07/01/1998 | 1 | Admin Asst | GBI | HR | US HQ | |
| EMP | 0 | 07/01/1998 | 0 | Admin Asst | GBI | HR | US HQ | |
| EMP | 0 | 04/04/1998 | 0 | Admin Asst | GBI | HR | US HQ | |
| EMP | 0 | 02/27/1998 | 0 | Admin Asst | GBI | HR | US HQ | |
| EMP | 0 | 09/12/1997 | 0 | Admin Asst | GBI | HR | US HQ | |

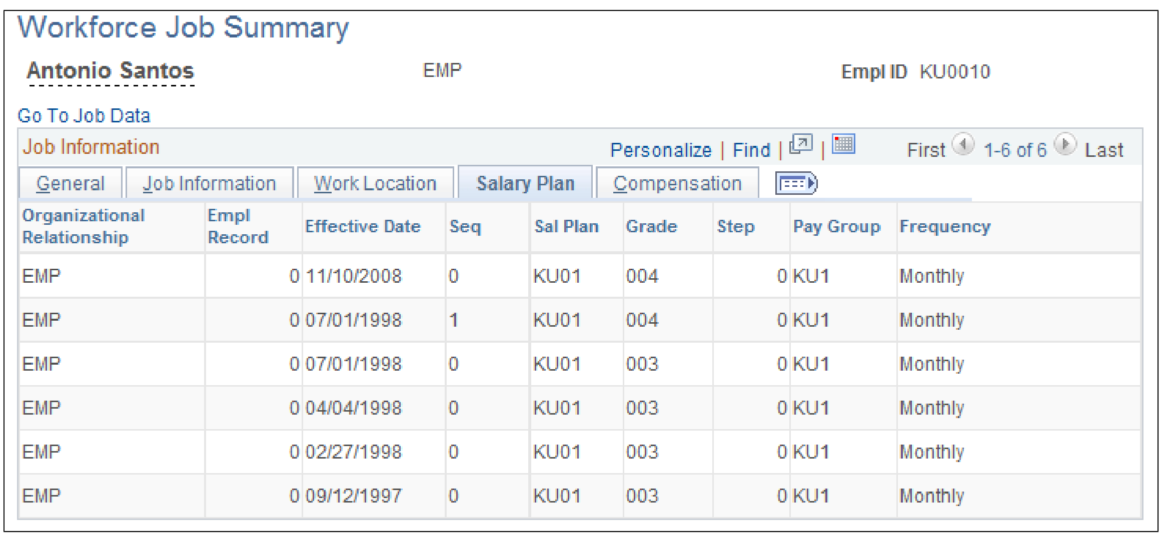
**Position, Agency, Department, Location, and Reports To** The workers position, company code, department, location, and supervisor after each personnel action.

## Salary Plan Tab

Select the Salary Plan tab.

**Image: Workforce Job Summary page: Salary plan tab**

This example illustrates the fields and controls on the Workforce Job Summary page: Salary plan tab. You can find definitions for the fields and controls later on this page.


Workforce Job Summary

Antonio Santos EMP Empl ID KU0010

Go To Job Data

Job Information Personalize | Find | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | Compensation

| Organizational Relationship | Empl Record | Effective Date | Seq | Sal Plan | Grade | Step | Pay Group | Frequency |
|---|---|---|---|---|---|---|---|---|
| EMP | 0 | 11/10/2008 | 0 | KU01 | 004 | 0 | KU1 | Monthly |
| EMP | 0 | 07/01/1998 | 1 | KU01 | 004 | 0 | KU1 | Monthly |
| EMP | 0 | 07/01/1998 | 0 | KU01 | 003 | 0 | KU1 | Monthly |
| EMP | 0 | 04/04/1998 | 0 | KU01 | 003 | 0 | KU1 | Monthly |
| EMP | 0 | 02/27/1998 | 0 | KU01 | 003 | 0 | KU1 | Monthly |
| EMP | 0 | 09/12/1997 | 0 | KU01 | 003 | 0 | KU1 | Monthly |

**Sal Plan (salary plan), Grade, Step, Pay Group, and Frequency** Displays the worker's salary plan, grade, step, pay group, and payment frequency after each personnel action.

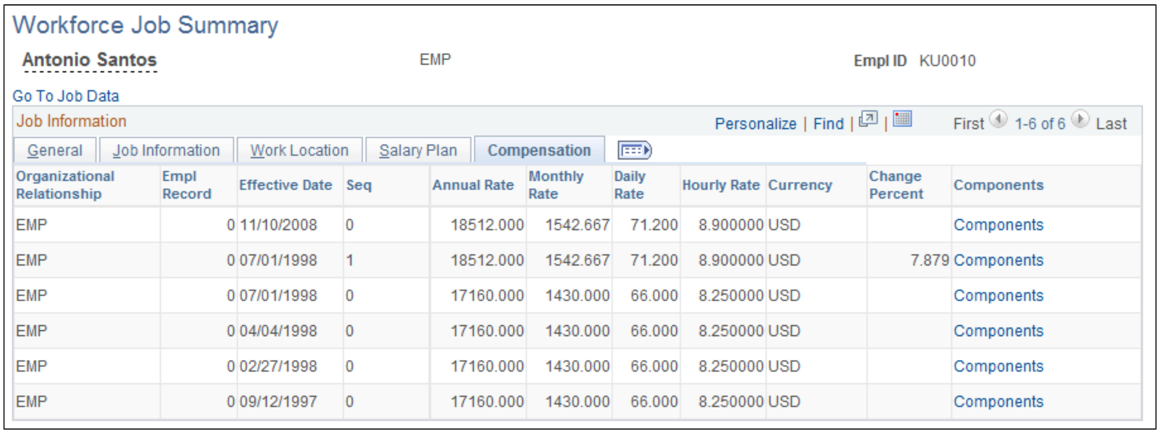
 

## Compensation Tab

Select the Compensation tab.

**Image: Workforce Job Summary page: Compensation tab**

This example illustrates the fields and controls on the Workforce Job Summary page: Compensation tab. You can find definitions for the fields and controls later on this page.



Workforce Job Summary

Antonio Santos EMP Empl ID KU0010

Go To Job Data

Job Information Personalize | Find | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | Compensation

| Organizational Relationship | Empl Record | Effective Date | Seq | Annual Rate | Monthly Rate | Daily Rate | Hourly Rate | Currency | Change Percent | Components |
|---|---|---|---|---|---|---|---|---|---|---|
| EMP | 0 | 11/10/2008 | 0 | 18512.000 | 1542.667 | 71.200 | 8.900000 | USD | | Components |
| EMP | 0 | 07/01/1998 | 1 | 18512.000 | 1542.667 | 71.200 | 8.900000 | USD | 7.879 | Components |
| EMP | 0 | 07/01/1998 | 0 | 17160.000 | 1430.000 | 66.000 | 8.250000 | USD | | Components |
| EMP | 0 | 04/04/1998 | 0 | 17160.000 | 1430.000 | 66.000 | 8.250000 | USD | | Components |
| EMP | 0 | 02/27/1998 | 0 | 17160.000 | 1430.000 | 66.000 | 8.250000 | USD | | Components |
| EMP | 0 | 09/12/1997 | 0 | 17160.000 | 1430.000 | 66.000 | 8.250000 | USD | | Components |

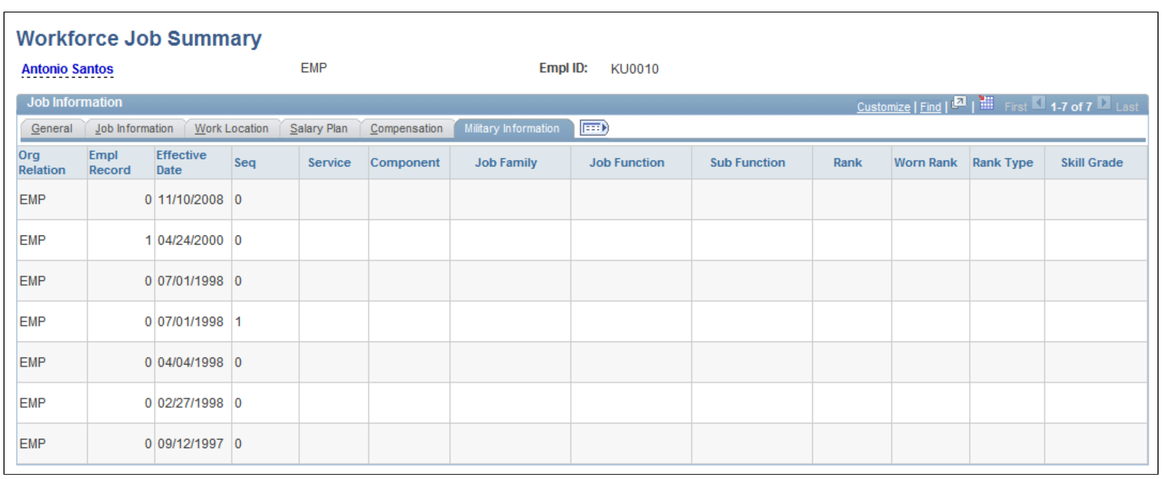
| | |
|---|---|
| **Annual Rt (annual rate), Monthly Rt (monthly rate), Daily Rt (daily rate), Hrly Rate (hourly rate), Currency, and Change Percent** | Displays the worker's compensation rate in annual, monthly, daily, or hourly terms in the given currency. When there has been a change in the compensation rate for this employee, the system displays the percentage of change from the previous row. |
| **Components** | Click the link to access the Salary Components page. |

## Military Information Tab

Select the Military Information tab.

**Image: Workforce Job Summary page: Military Information tab**

This example illustrates the fields and controls on the Workforce Job Summary page: Military Information tab. You can find definitions for the fields and controls later on this page.



Workforce Job Summary

Antonio Santos EMP Empl ID: KU0010

Job Information Customize | Find | First 1-7 of 7 Last

General | Job Information | Work Location | Salary Plan | Compensation | Military Information

| Org Relation | Empl Record | Effective Date | Seq | Service | Component | Job Family | Job Function | Sub Function | Rank | Worn Rank | Rank Type | Skill Grade |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EMP | 0 | 11/10/2008 | 0 | | | | | | | | | |
| EMP | 1 | 04/24/2000 | 0 | | | | | | | | | |
| EMP | 0 | 07/01/1998 | 0 | | | | | | | | | |
| EMP | 0 | 07/01/1998 | 1 | | | | | | | | | |
| EMP | 0 | 04/04/1998 | 0 | | | | | | | | | |
| EMP | 0 | 02/27/1998 | 0 | | | | | | | | | |
| EMP | 0 | 09/12/1997 | 0 | | | | | | | | | |

**Service** — The specific branch of armed forces (for example, Army, Navy, Air Force, Marines, and so forth)

**Component** — The type of service (for example, Regular, Active Reserve, Inactive Reserve, Emergency Reserve, or Guard).

**Job Family** — The job classification associated with the job code (for example, Intelligence, Ammunitions, Medical, Aviation).

**Job Function** — The function associated with the job code (for example, Cryptography, Doctor, Nurse, Pilot).

**Subfunction** — The subfunction associated with the job code (for example, Surgeon, Pathology, Radiology, Light-wing pilot).

**Rank** — Rank held permanently, as opposed to while serving in a particular post. When relieved of command, a holder of substantive rank remains at that rank.

**Worn Rank** — Actual or temporary rank held while serving in a particular post.

**Rank Type** — The rank category (for example, Substantive, Temporary, Frocked, Acting, Acting Lacking, Honorary, Provisional, Probationary).

**Skill Grade** — The overall evaluated grade level for the individual after the personnel action.

## Salary Components Page

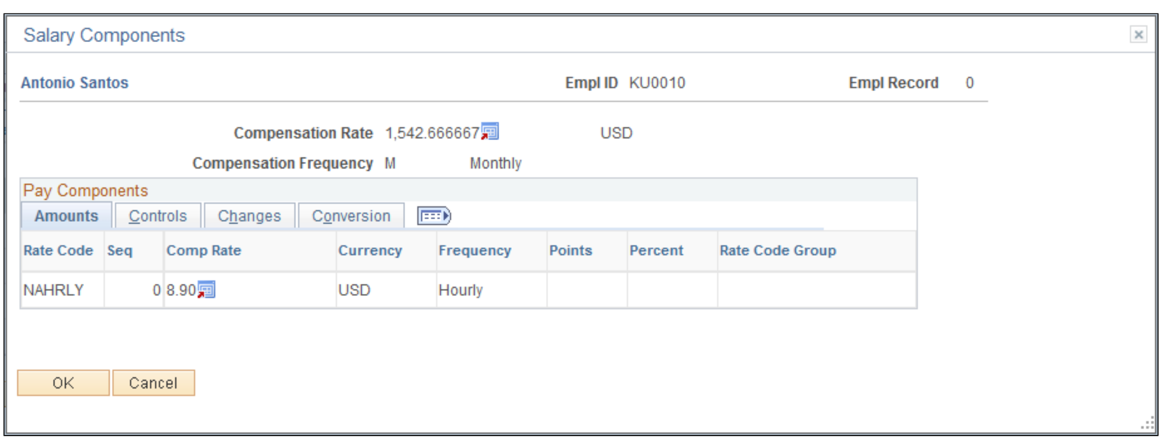
Use the Salary Components page (COMP_JOB_SUMM_SEC) to view compensation information.

**Navigation**

Click the Components link on the Compensation tab of the Workforce Job Summary page.

**Image: Salary Components page**

This example illustrates the fields and controls on the Salary Components page. You can find definitions for the fields and controls later on this page.



## Common Page Elements

**Rate Code**

Rate codes are IDs for pay components. The system displays compensation information associated with this rate code in the compensation grid.

**Seq (sequence)**

Indicates multiple occurrences of the same rate code.

## Amounts Tab

Select the Amounts tab.

**Comp Rate (compensation rate) and Currency**

Displays the compensation rate for the pay component rate codes and the currency.

**Frequency**

Displays the compensation frequency for the pay component's rate.

**Points**

Displays the salary points associated with this rate code, if there are any.

**Percent**

If the rate type for this rate code is percent, the system displays the percent to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

**Rate Code Group**

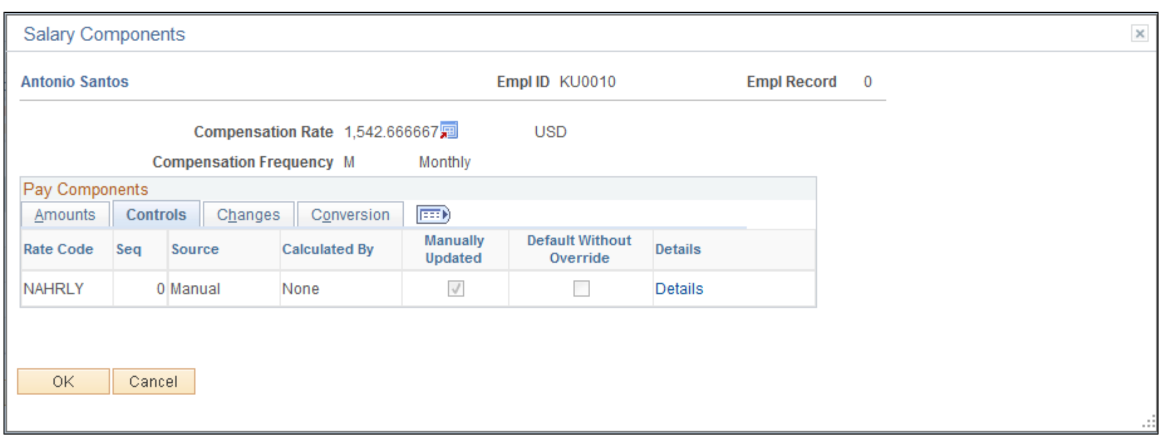
A rate code group enables you to be more specific when calculating percentage-based components as part of your worker compensation package.

## Controls Tab

Select the Controls tab.

**Image: Salary Components page: Controls tab**

This example illustrates the fields and controls on the Salary Components page: Controls tab. You can find definitions for the fields and controls later on this page.




**Source**

Indicates how the pay component was assigned to the Compensation grid. *Manual* indicates that the pay component was added manually; *Salary Step* indicates that the pay component defaulted from the Salary Step; *Job Code* indicates that the pay component defaulted from the job code definition, and so on.

**Calculated by**

Values are:

- *None:* The rate value is assigned by the Rate Code definition or manually entered.
- *Rate Matrix:* The rate value is determined by a rate code matrix.
- *Extended:* Not used.

**Manually Updated**

Indicates whether the pay component's value was manually entered or the pay rate contains only defaulted values.

**Default Without Override**

Indicates whether the default rate value of the pay component can be overridden.

**Details**

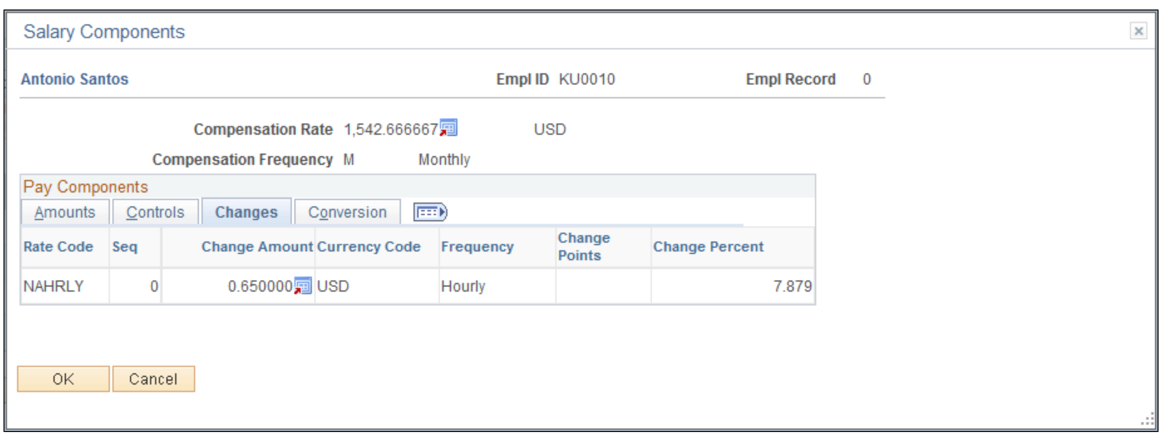
Click to access the Comp Rate Code page and review the description, compensation rate type, and rate code class associated with the rate code.

## Changes Tab

Select the Changes tab.

**Image: Salary Components page: Changes tab**

This example illustrates the fields and controls on the Salary Components page: Changes tab. You can find definitions for the fields and controls later on this page.




**Change Amount**

Displays the overall change amount in this pay component rate relative to the previous Job Data row.

**Change Points**

Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.

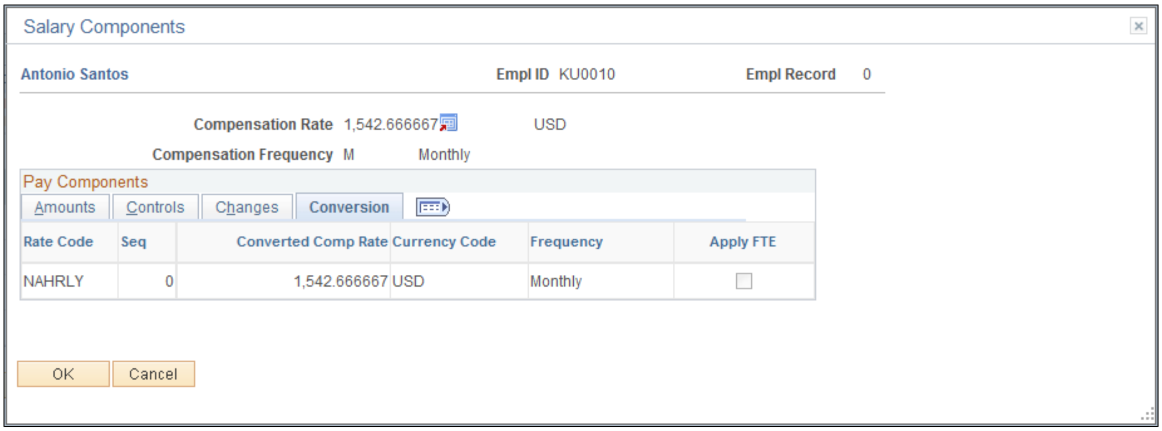
**Change Percent** Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

### Conversion Tab

Select the Conversion tab.

**Image: Salary Components page: Conversion tab**

This example illustrates the fields and controls on the Salary Components page: Conversion tab. You can find definitions for the fields and controls later on this page.




**Converted Comp Rate (converted compensation rate)** Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency specified.

**Apply FTE (apply full time equivalent)** Indicates that the value associated with the rate code is to be multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't applicable for rate codes of type percent.

## (USF) Viewing Employee Personal and Job Data

Use the Personal Data inquiry component to view employee personal and job data.

These topics discuss how to:

- View employee personal data.
- View employee job data.
- View employee benefit programs.

## Pages Used to View Personal and Job Data

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Personal Data | GVT_PERS_INQ | Workforce Administration, Job Information, Review Job Information, Personal Data USF, Personal Data | View employee personal data. |
| Mailing Address | GVT_MAILADDR_SEC | Click the Mailing Address link on the Personal Data page. | View the employee's mailing address. |
| Veterans Info (veterans information) | GVT_VETINF_INQ_SEC | Click the Veterans Info link on the Personal Data page. | View veteran's information for this employee. |
| Job Data1 | GVT_JOB_INQ | Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data1 | View employee job data. |
| Benefits/Retirement Data | GVT_BENDAT_INQ_SEC | Click the Benefits/FEHB Data link on the Job Data1 page. | View the benefit program in which the employee is enrolled for benefits in PeopleSoft Human Resources or in PeopleSoft Benefits Administration. |
| Job Data2 | GVT_JOB_INQ2 | Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data2 | View additional job data, including quoted pay and expected pay information. |
| Employment Data | GVT_EMPLOY_INQ | Workforce Administration, Job Information, Review Job Information, Personal Data USF, Employment Data | View employment data. |

## Personal Data USF - Personal Data page

Use the Personal Data page (GVT_PERS_INQ) to view employee personal data.

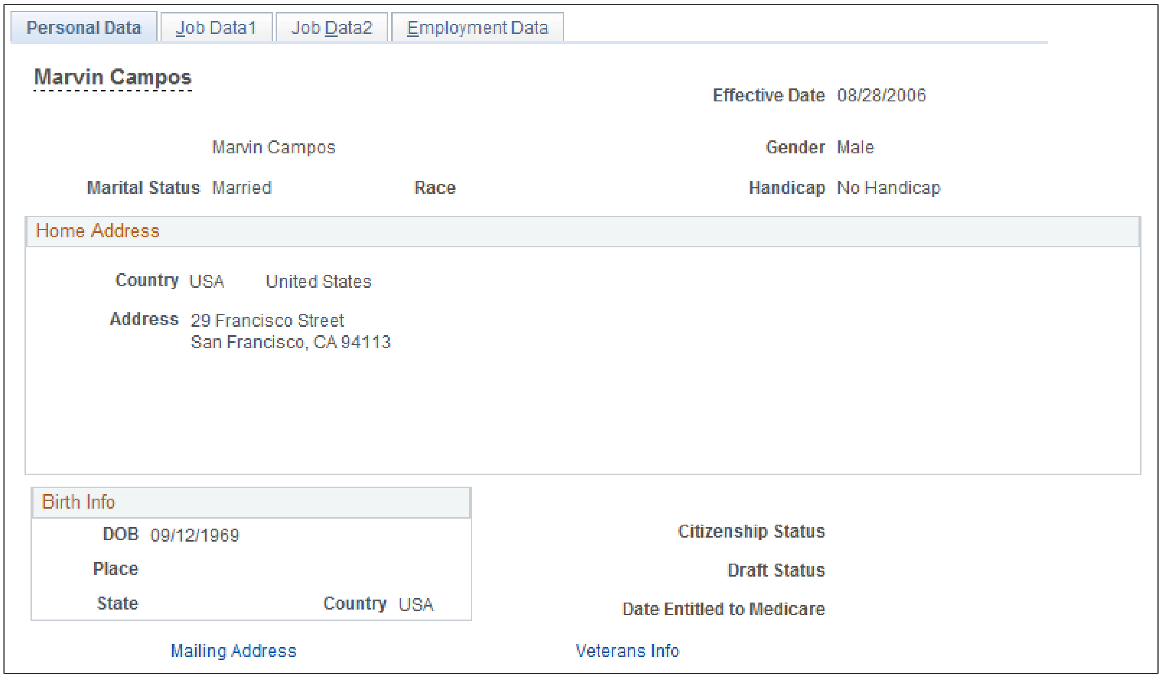
 

### Navigation

Workforce Administration, Job Information, Review Job Information, Personal Data USF, Personal Data

### Image: Personal Data page

This example illustrates the fields and controls on the Personal Data page. You can find definitions for the fields and controls later on this page.




The Personal Data page displays information on employee hire date, birth date, home address, marital status, birth information, citizenship, draft status, Medicare entitlement, race, and handicaps. Click the Mailing Address link to view the employee's mailing address. Click the Veterans Info link to view veteran's information for this employee.

## Job Data1 Page

Use the Job Data1 page (GVT_JOB_INQ) to view employee job data.

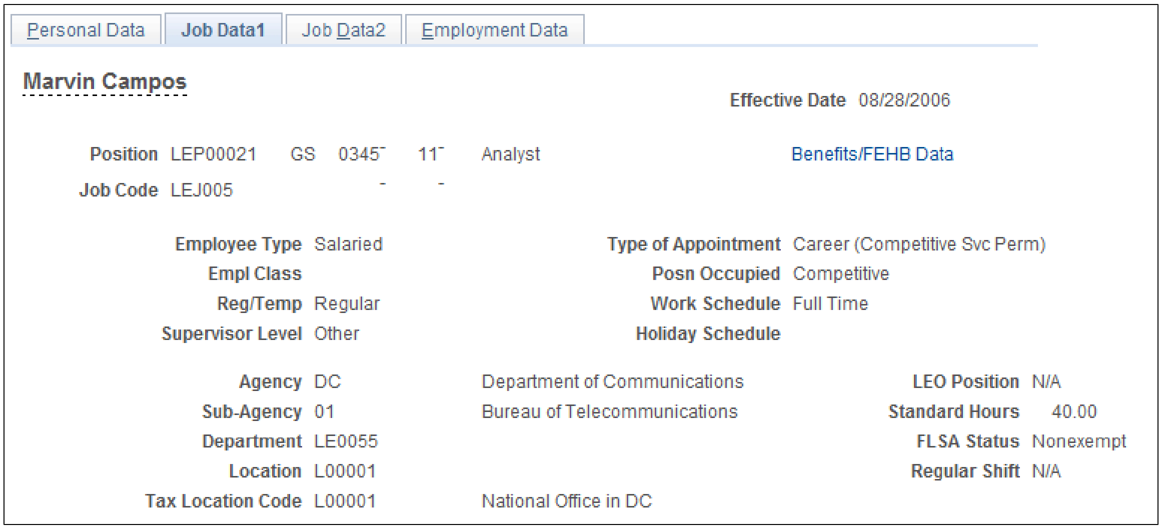
 

### Navigation

Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data1

**Image: Personal Data - Job Data1 page**

This example illustrates the fields and controls on the Personal Data - Job Data1 page. You can find definitions for the fields and controls later on this page.




This page displays the employee's position number, job code, employee type, class, type of appointment, position occupied, work schedule, agency, subagency, department, location, tax location, LEO position, FLSA status, and other job-related information.

Click the Benefits/FEHB Data link to view information on this employee's benefits and retirement data.

## Benefits/Retirement Data Page

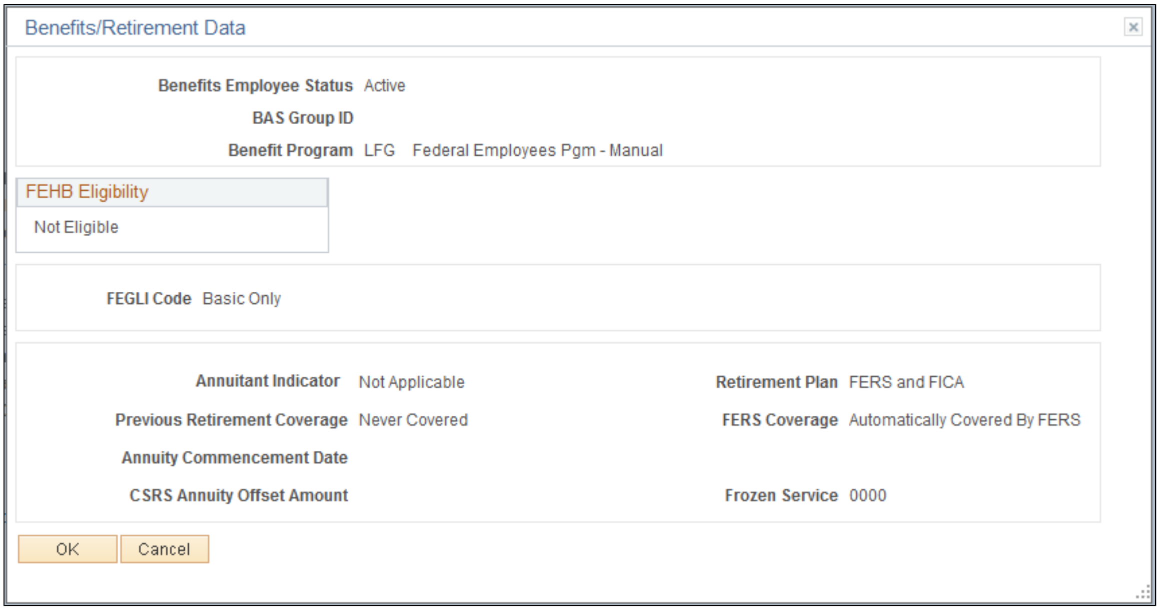
Use the Benefits/Retirement Data page ( GVT_BENDAT_INQ_SEC) to view the benefit program in which the employee is enrolled for benefits in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.

### Navigation

Click the Benefits/FEHB Data link on the Job Data1 page.

**Image: Personal Data - Job Data1: Benefits/Retirement Data page**

This example illustrates the fields and controls on the Personal Data - Job Data1: Benefits/Retirement Data page. You can find definitions for the fields and controls later on this page.




## Related Links

"Understanding the Core Tables for PeopleSoft Manage Base Benefits *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

"Reviewing Employee Eligibility *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

"Enrolling Participants in Benefit Programs and Plans *(PeopleSoft HCM 9.2: Human Resources Manage Base Benefits)*"

# Viewing Other Summary Pages in PeopleSoft Human Resources

Several other display-only pages summarizing employee data are available for you to review in PeopleSoft Human Resources. Most of them derive information that you enter in other PeopleSoft Human Resources business processes, such as Planning Compensation, Track Global Assignments, and Administering Training. However, you'll also find them useful for planning and analysis when you work in the Workforce Administration menu.

Following are some of the summary pages:

- Employee Data Summary: Displays information on employee current status, hire date, birth date, marital status, standard work hours, pay group, job code, and other job- and compensation-related information (Benefits, Employee/Dependant Information, Review HR/Job/Payroll Data).
- Organizational Summary: Displays a summary of all the organizational relationships for a person. (Workforce Administration, Personal Information, Person Organizational Summary).

- Career Assignment Summary: Displays the actual job path the employee has followed in the organization. By tracking employee movements through salary structures and manager levels, you'll get a feel for where the employee has been in your organization so far (Workforce Development, Career Planning, Review Career Summaries, Career Assignments).
- Compensation History: Displays the history of all pay rate changes the employee has received, which is particularly useful when you are planning new increases (Compensation, Base Compensation, Review Salary Information, Employee Compensation History). The Compensation History page is also in Workforce Development, Career Planning, Review Career Summaries.
- Immediate Family Summary: Lists all dependents that are a part of the employee's immediate family. Immediate family is defined as dependents that are the employee's spouse, son, or daughter. You'll find this page helpful for determining eligibility for various types of benefits your organization offers to employees, their spouses, and children (Benefits, Employee/Dependant Information, Review Dep/Ben Summary).
- Training Summary: Displays student training history, which is helpful when determining whether students are receiving adequate training to perform their current jobs, to see if they've taken all course prerequisites, and for career and succession planning (Administer Training, Result Tracking, Review Training Summary).
- Injury Summary: Provides an overview of the health and safety incidents in which this individual has been involved, including injuries and illnesses and the nature of the incidents (Workforce Monitoring, Health and Safety, Obtain Incident Information, Review Employee Injury Summary).

## Chapter 18

# (USF) Administering Personnel Action Requests

## Understanding the Administering PAR System

The administering PAR system provides you with the power to process action requests quickly and easily. The system automatically routes a wide variety of requests directly to reviewing officials, and on to human resources, in the path your agency designates.

If anyone needs further information, the system automatically routes that inquiry back to the originator. All involved are included in the communication loop and always know that their requests are moving through a well-mapped review, authorization, and approval cycle.

**Note:** Keep in mind that the description and samples described throughout this book are illustrative, flexible models that you can adapt for your agency's personnel administration system. Your agency can set up the Administer Workforce system routing, security, accessing, processing, and many other features to meet your individual agency needs and requirements.

Using a streamlined menu structure, you can navigate quickly and easily through the whole process. Using PeopleSoft workflow, you indicate the level of authorization and the system routes the request through the process for you.

Significant features of the PAR system include:

- Flexible work-in-progress processing.
- Cancellation and correction functionality.
- Reviewed flag processing for retroactive personnel actions.
- Enhanced navigation with pages.
- Issuing awards and bonuses.
- Detail assignment processing.
- Support for the personnel office identifier (POI) signature requirement.

### Common Elements Used to Administer Personnel Action Requests

**PAR Status** — The PAR status code automatically defaults to *Requested* for new actions. Leave this as a work-in-progress request with that status until you have complete data. After you have completed all the necessary information, keep the PAR status as *Requested* to send it on to human resources officials for approval and processing.

If you aren't ready to submit the request, change the status to *Initiated,* and keep working on it until you're done. Change the status to *Requested* to submit it.

After completing the HR Request pages and reviewing the data, assign a status of *Processed by HR* to approve and finalize this request.

Once you assign the status of *Processed by HR,* the request becomes an actual event and is posted in the system to interface with PeopleSoft Payroll, Manage Base Benefits, or other related areas.

If the request is invalid or needs further information, assign a status of *Disapproved* or *Return to Sender.*

## Prerequisites

Begin every personnel action request on the Data Control page. The first time you open the page, the most recent personnel action request appears automatically. Before creating a new request, you must insert a new row for all actions or changes.

In order to save time, the system assumes you want to continue viewing and updating information on the same employee, so when you move to a new page in the component, information for that same employee appears automatically.

### Related Links

"Setting Up Federal HCM Control Tables *(PeopleSoft HCM 9.2: Application Fundamentals)*"

"Understanding WIP Management System Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Add Employment Instance USF - Data Control Page

## Understanding Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve multiple steps and several people in your organization working together. PeopleSoft workflow tools help you build the larger process into your PeopleSoft Human Resources system, automating vital business tasks. You can tie together the individual steps so that PeopleSoft can help coordinate the activities. Because the system has the big picture and knows what you are trying to accomplish, it can automatically start the next step in the workflow, following your organization's business rules.

Using workflow capabilities for administering personnel actions, the PAR status indicates the steps in routing and provides employees, supervisors, and human resources professionals easy access, surveillance, and security in the request management process. Workflow routes requests by sending personnel actions through a cycle to initiate, request, authorize, and approve requests, and provides options along the way for more time, further information, or returning to sender. Workflow then sends requests on to human resources for final processing. The automated workflow process ensures that the action request goes through all the reviews your agency needs until it becomes an actual event.

### Related Links

"General Workflow Information *(PeopleSoft HCM 9.2: Application Fundamentals)*"

# Tracking and Routing a PAR Through Reviews and Completion

The Employee Request, Supervisor Request, and HR Request components are identical. The only difference is in the type of data that is accessible to each group, according to security options and allowable actions.

**Note:** The information you need to track and route a PAR is the same type of information you enter to hire employees. Use the same pages for both.

Your agency determines the actions and data available to employees, supervisors, and human resources officials. Actions may include creating requests, issuing approvals and authorizations, and finalizing actions. Actions also include returning an action to the originator; asking for more information; or withdrawing, canceling, or correcting an action. Decisions on these issues are implemented using the Approval Flow component (GVT_WIP_ACTIVITY).

Employees may request only their allowable actions; therefore, a user sees only certain options, such as Family/Benefits Change or Retirement. Supervisors may request, approve, and authorize those and other specific actions. When a supervisor opens the pages, their list reflects whatever your agency designates, such as promotion, demotion, detail assignment, reassignment, bonuses and awards, and others. They may also return an action to the originator for more information, or disapprove a request and render it inactive.

Human resources officials have the authority to initiate, approve, and finalize all possible actions. Therefore, human resources officials, along with hiring, tenure changes, and other actions that an employee or supervisor wouldn't usually initiate, can access *all* of the personnel actions in any phase of the cycle. For *finalized* actions that have already completed the processing cycle, human resources has the exclusive right to cancel and correct.

The PAR processes provide both flexibility and modification capacity. You can process new personnel actions that are effective-dated prior to existing personnel actions and define the codes for requests in a truly user-defined environment.

### Related Links

Adding an Employment Instance

## Adding and Updating Data

For U.S. Federal Government customers, to add, update, or change any employee data, you create a PAR. To submit and route and track a PAR automatically through the approval process, assign a PAR work-in-progress status code that indicates its position in the request cycle and determines where to send it.

### Automatically Routing the PAR

By changing the request status and saving the page, reviewers acknowledge receipt and approval, and send a PAR forward through workflow. Each review level serves as verification that the information is complete and that the necessary documents are attached. The reviewers may also enter their own comments. Your agency can set up and route request cycles for each type of request from creation through various reviews, including as many or few reviews as desired, and on to final Human Resources completion.

## Selecting a PAR Status

If you want to open a request, fill in partial data and then complete it later, open a request and assign a PAR status of *Initiated.* While you gather additional information, the request stays within your own domain and control. You can revisit it as often as needed until you are ready to submit it for review.

When your request data is complete and you want to proceed with the automatic routing review cycle, submit the request by assigning a PAR status of *Requested.* By doing so, you make the request official. Once the originator submits a *Requested* action, workflow retrieves it and automatically routes it to others who are involved in the processing, and the authorizing and approving officials review its merits. It may go through a review cycle that includes *1st Authorized* and *2nd Authorized* by specific supervisors and managers, *Approved/Signed* by second-level managers, and finally to the status of *Processed* (processed by HR), according to your agency's requirements.

If clarification or additional information is needed, a reviewer can choose the status of *Returned for More Information.* Returning it to the originator restarts the process. A reviewer can also disapprove a request by assigning the *Disapproved* status, which stops the process altogether. During the review cycle, the originator can also withdraw a request while it is still in a work-in-progress state.

Only the originator can cancel or change and resubmit a request that is in progress. Because other supervisors, managers, and human resources officials don't have the ability to change request data, if a request needs to be *Canceled,* you must return it to the originator.

When a user chooses a work-in-progress status and assigns a PAR status code, this code indicates the request's status and position and enables workflow to route and monitor it through the approval cycle.

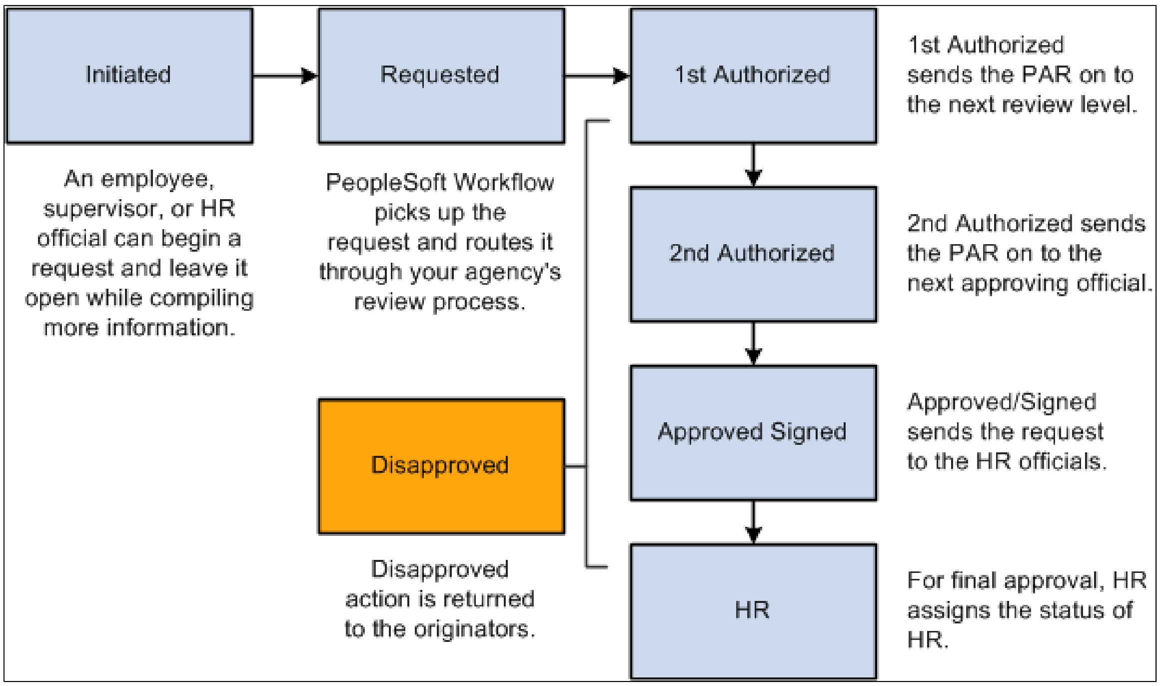
We provide a general example of the review cycle, though your agency can set it up differently if necessary.

## An Overview of PAR

**Image: An example of the process of initiating, requesting, and approving a PAR**

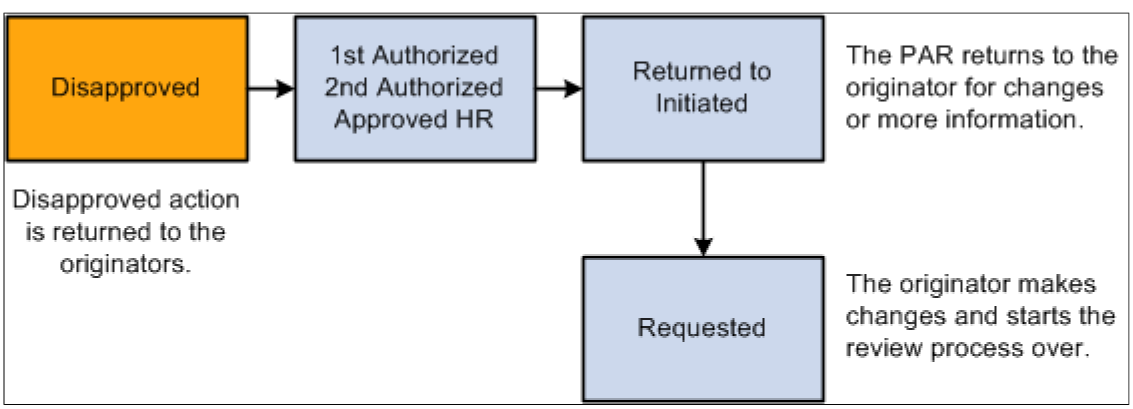
This illustration shows an overview of a sample process. In this example, an employee, supervisor, or HR official initiates the PAR and submits it for approval. The PAR then goes through multiple levels of authorization before it is either approved or denied:




## Disapproving or Returning a Request

**Image: Example of return or disapproval of a PAR before completion**

This illustration provides an example of a business process when a request is disapproved. In this example, the request is put back in the Initiated state so that the originator can modify it as necessary and resubmit it. The resubmitted request then goes through the standard approval cycle again:




**Note:** Although a status of Returned/Disapproved is delivered, workflow isn't part of this feature.

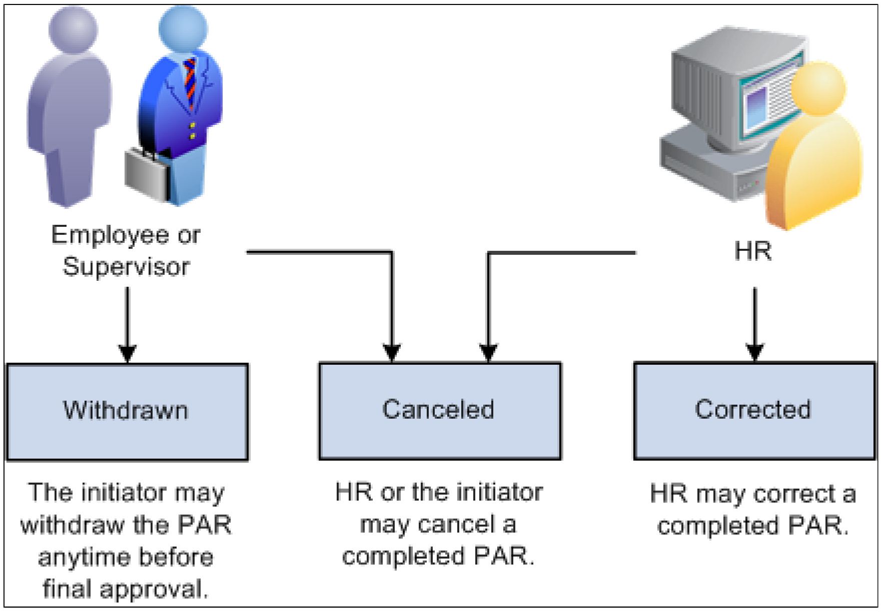
## Cancellation, Correction, or Withdrawal of a Request

Requests can be cancelled, withdrawn, or corrected only in specific situations:

- Any time before final approval, the initiator can withdraw the request.
- Once the request is approved, either the initiator or HR can cancel the requests, but only HR can correct the completed request.

**Image: Example of cancellation, correction, or withdrawal of a PAR**

The following diagram shows who can cancel, correct, or withdraw a request:




## Identifying PAR Status Codes

Following are definitions for each work-in-progress status and PAR status code that are set up in the sample data delivered with your system:

| ***Work-In- Progress Status*** | ***PAR Status Code*** | ***Definition*** |
|---|---|---|
| Initiated | INI | Indicates an action is open, but not yet submitted as a request. For various reasons, originators may begin a request and then find they need additional time or data before completing their work on that action. By assigning a status of *Initiated,* originators can leave the request open until it is ready to submit.<br><br>Supervisors may need extra time to develop supporting documentation, such as job codes, and can assign a status of *Initiated* to designate that their work is in progress. |

| ***Work-In- Progress Status*** | ***PAR Status Code*** | ***Definition*** |
|---|---|---|
| Requested | REQ | To submit a request, assign a status of *Requested.*<br><br>Most requests then go automatically to the first-level supervisor for approval.<br><br>An exception is the request for family/benefits change; you may want to set the system up to send this type directly to a human resources (HR) official to be processed. Or when a request originates in the HR department, it may go directly to an HR official to be processed. |
| 1st Authorized | 1st | The first-level reviewer assigns a status of *1st Authorized* to send a request forward to the next review level. |
| 2nd Authorized | 2nd | A first-level reviewer sends a request forward to the next review level by assigning a status of *2nd Authorized.* |
| Approved/Signed | SIG | A second-level reviewer sends a request forward to an HR official to be processed by assigning a status of *Approved/Signed.* |
| Processed By Human Resources | PRO | Only human resources officials can assign the status of *Processed By Human Resources.* They first review and complete the request and may add the appropriate nature-of-action code, legal authorities, and remarks. They indicate final approval by assigning the status of PRO. The request then becomes an actual event.<br><br>A status of PRO is final and can't be changed by anyone. Once a request becomes an actual event, it is then available for further consideration and processing by payroll, benefits, interface reports, and other areas. |

| ***Work-In- Progress Status*** | ***PAR Status Code*** | ***Definition*** |
|---|---|---|
| Return for More Information | RET | Anywhere in the process, a reviewer can request more information or clarification by assigning a status of *Returned for More Information* and can include a comment such as, "I need further information." The request goes back to the originator.<br><br>When originators get the returned request, they add the information, reassign a status of *Requested,* and the process begins again. |
| Withdrawn | WTH | The original creators of the request may withdraw a request if it is sent back to them for any reason. Human resources may withdraw a request when it is proven invalid or for some reason no longer is needed.<br><br>**Note:** A request cannot be withdrawn after it has been either processed or disapproved. |
| Disapproved | DIS | At any point in the process, a reviewer can disapprove a request by assigning a status of *Disapproved* and entering the reason in the Comments field. This causes the request to be sent back to the originator either for cancellation or for the originator to change and resubmit it. |
| Corrected | COR | Only a human resources official has the authority to perform a correction after a request has completed the approval cycle and been finalized. |
| Canceled | CAN | A human resources official has the authority to perform a cancellation after a request has completed the approval cycle and been finalized. The *Canceled* status removes the request from the active request system, leaving only the tracking record history.<br><br>Or if the originator receives a returned request, the originator may assign a status of *Canceled.* |

### Related Links

"General Workflow Information *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Processing of PAR Actions

The PeopleSoft Human Resources USF functionality has separate tables for managing PAR, and these tables hold data until each action has been approved and completed by human resources. Any records held in the separate tables haven't completed the PAR process and don't exist to the rest of the system. After completion, the data is automatically updated to system tables to enable other processes, such as those in PeopleSoft Payroll, Benefits Administration, and Time and Labor.

To support the PAR processing concept, all of these records have been effective-dated and have been tied together with common keys. Because the three records (GVT_JOB, GVT_PERS_DATA, and GVT_EMPLOYMENT) work as one, a row is inserted into all three records when a user inserts a row on the Data Control page.

Once a PAR has successfully worked its way through the approval process, is processed by human resources as completed, and has become an actual event, it is ready to be copied into the three counterpart records (JOB, PERS_DATA_EFFDT, and EMPLOYMENT). The process is accomplished instantly, and the user is unaware of the updates to the other tables.

However, if the PAR action has an effective date that is later then the system date, only JOB is updated when the action is saved. PERSONAL_DATA and EMPLOYMENT are updated only when the date of the action is equal to the system date. This is because the counterpart to GVT_JOB, which is JOB, is effective-dated. Therefore, it receives the future effective-dated action and ignores it until that date.

# Initiating and Requesting Personnel Actions

Most of the various PARs are created in a similar way. A good representative example is a family/benefits change request, which is reviewed in this topic. Other topics of this book cover other examples of the most highly used requests, such as hiring, awards and bonuses, leave with or without pay, data changes, and termination.

The only significant differences between submitting the various requests are the action and reason codes that you assign and the data that is entered. Most of the requests involve similar steps: You begin on the Data Control page, insert a new row and indicate the desired action, and then tab to another data page in the same group to enter further information, if necessary.

For example, when you initiate a request for changing benefit choices, enter data on the Data Control page and then move to the Personal Data page. For some requests, such as a leave without pay action, however, you enter data *only* on the Data Control page.

You can always view data on other pages, and view summary pages, for decision-support purposes.

### Related Links

Adding an Employment Instance

Understanding PARs

# Authorizing and Approving Personnel Actions

Once a request has been submitted, the PeopleSoft workflow system automatically routes the request to designated supervisors and managers for authorizations and approvals.

Supervisors and human resources officials can approve and authorize requests that cover many possible actions involving hire, return to duty, leave with or without pay, suspension, promotion, bonus, award, change in pay, and others. They can also return a request and ask for more data or disapprove it so that it is returned to the originator and its cycle ended.

If you are a designated reviewer, you see the request item in your worklist if you are using the PeopleSoft Navigator display. To authorize or approve a request, click Work It!, and the system automatically transfers you to the 1st Rqst Authorization, 2nd Rqst Authorization, or Approve Request component. You can also access the request from the Workforce Administration, Job Information menu.

You see the same page on which the initiator entered data, beginning with the Data Control page. However, the information you see is display only and unavailable for entry. Review the data on the Data Control page, including the PAR Remarks and Tracking Data, as well as data on any other page that is relevant to the request. To approve the request, change the PAR Status code on the Data Control page to the appropriate choice, such as *1st Authorized, 2nd Authorized,* or *Approved/Signed.* The request is then routed to human resources officials for completion and processing.

If you need more information or want to disapprove the request, change the PAR Status code to *Return for More Information* or *Disapproved.*

The authorization process works exactly the same way regardless of what the request is, such as data change, award, bonus, or recruitment. Once the authorizing officials have completed their work and entered a new PAR status code, the request goes automatically to the next level in the process.

# Processing Human Resources Personnel Actions

Once a Personnel Action request (PAR) has been through the initiation and request process and has passed the authorization and approval processes, it goes to the human resources office for final processing. A human resources official can submit human resources-specific actions and review and finalize personnel actions that have already been requested, authorized, approved, and are ready to become actual events.

The HR Processing pages are reserved specifically for the human resources officials and as a result contain overviews, controls, and additional navigational capacity. The HR Processing pages enable you to *access* personnel actions, *view* data, *finalize* actions, and *print* reports.

The HR Processing (USF) component is similar to the Supervisor Request, 1st Rqst Authorization, and 2nd Rqst Authorization components, however the HR Processing (USF) component contains additional PAR Status options.

# Canceling or Correcting a Personnel Action Request

Once a request has the PAR status *Processed by HR,* it remains as a record in the system. However, it is possible to correct or cancel it by, essentially, creating a new action that references the initial request and gives it a new status. Only human resources officials may perform a correction or cancellation.

Only processed rows are available for correction or cancellation. If an employee has an unprocessed transaction, you will be unable to correct or cancel a previous transaction until all of the employee's unprocessed rows have been successfully processed.

To access a processed request that you want to correct:

1. Open a new request in the Data Control page of the Correct Personnel Action USF component.
2. Click the Insert Row button to insert a new row, and enter the correct data.

   The system automatically enters a PAR Status of *COR*.
3. If you insert a row and a more current transaction exists, the Reviewed check box is displayed and is highlighted in blue. This check box serves to alert you to review the additional transaction for errors and to select the check box after you review or change it. An error message is displayed if you try to save the page without first selecting the Reviewed check box.

   **Note:** The Reviewed check box is also displayed on the Data Control page of the HR Processing USF component.

**Note:** Be careful when updating data using correction mode, particularly on processed personnel actions. Federal business process specifies that if corrections are made to existing data rows, a Correction SF50 is required. In this case, do not use HR Processing USF component, but rather the Correct Personnel Action USF component.

To access a processed request that you want to cancel:

1. Open a new request in the Data Control page of the Cancel Personnel Action USF component.
2. Click the Insert Row button or click F7 to insert a new row.

   The system automatically enters a PAR Status of *CAN*.

### Related Links

Adding an Employment Instance

# Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports

Employees and supervisors can print an action request (SF-52) anytime. Human resources officials can also review a personnel action request report (SF-50) that summarizes various aspects of employee and job request data in printed form.

These topics discuss how to:

- Print an action request (SF-52).
- Run the Personnel Action Report.

## Pages Used to Print a Request for Personnel Action/Notice of Personnel Action

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Data Control | GVT_JOB0 | • Workforce Administration, Job Information, Add Employment Instance USF<br><br>On the Add Employment Instance USF page, enter a Person ID and click the Add button.<br><br>• Workforce Administration, Job Information, Employee Request USF, Data Control<br><br>• Workforce Administration, Job Information, Supervisor Request USF, Data Control<br><br>• Workforce Administration, Job Information, HR Processing USF, Data Control<br><br>• Workforce Administration, Job Information, Correct Personnel Action USF, Data Control<br><br>• Workforce Administration, Job Information, Cancel Personnel Action USF, Data Control | Print an action request ( SF-52). |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Notice of Personnel Action USF - Parameters | RUNCTL_PAR | • Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters<br>• Workforce Administration, Job Information, Reports, Request Personnel Action USF, Parameters | Print the official Notification of Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred. |
| Notice of Personnel Action USF - Select Data | RUNCTL_PAR2 | • Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Select Data<br>• Workforce Administration, Job Information, Reports, Request Personnel Action USF, Select Data | Use the Select Data page to select employee data for printing PARs, after filtering the data with the parameters defined on the Parameters page, |

## Add Employment Instance USF - Data Control Page

Use the Data Control page (GVT_JOB0 ) to print an action request (SF-52).

**Navigation**

- Workforce Administration, Job Information, Add Employment Instance USF

  On the Add Employment Instance USF page, enter a Person ID and click the Add button.
- Workforce Administration, Job Information, Employee Request USF, Data Control
- Workforce Administration, Job Information, Supervisor Request USF, Data Control
- Workforce Administration, Job Information, HR Processing USF, Data Control
- Workforce Administration, Job Information, Correct Personnel Action USF, Data Control
- Workforce Administration, Job Information, Cancel Personnel Action USF, Data Control

To produce a printed Request for Personnel Action form (SF-52), click the Print SF-52 button. The system asks whether to print the SF-52 to the Web or to a file. If you choose File, you must specify the file location.

Before saving and printing this request, ensure that the employee ID is the one you want to appear on the form. An assistant processing an action on an authorized official's behalf, who wants that official's information to appear on the SF-52 and become part of the official audit trail for this action, should select the Override Opr EmplID check box and enter the employee ID and employee record number of the official for the action on the Job Tracking Information page.

If you want to print to a file, specify the name of the output file (including the drive and directory names). Once you enter these parameters, the system runs a Structured Query Report (SQR) to create the SF-52 for you. You can print an SF-50 only when the action has a status of *Processed by HR*.

## Parameters Page

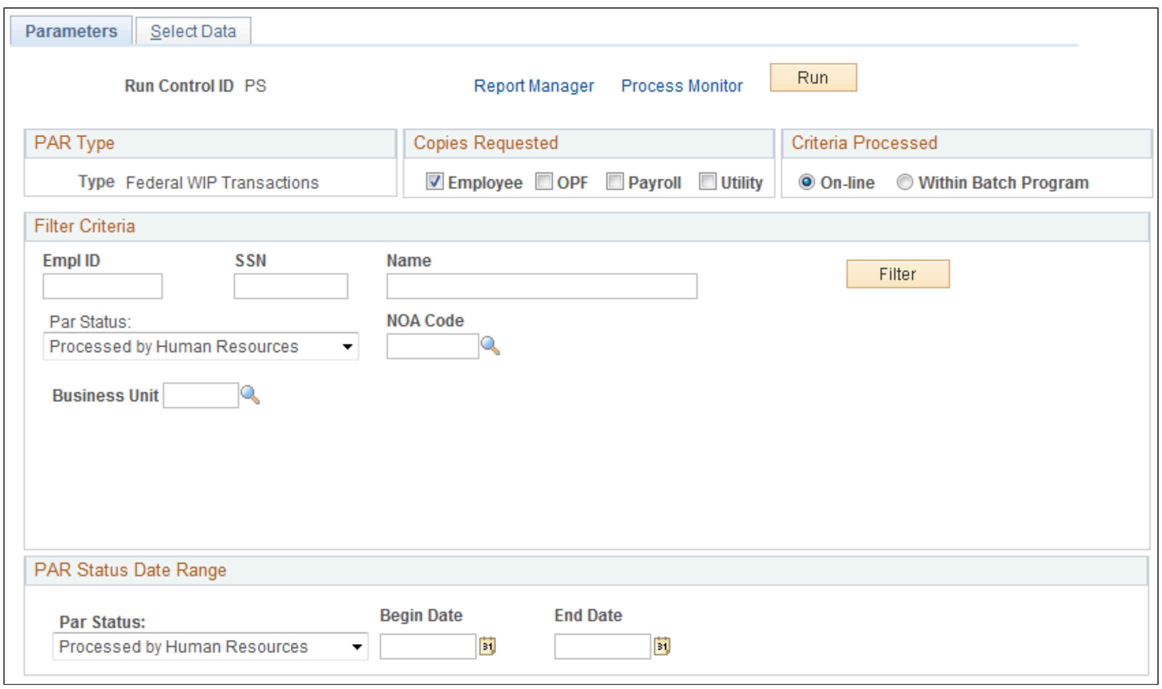
Use the Parameters page (RUNCTL_PAR) to print the official Notification of Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.

**Navigation**

- Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters
- Workforce Administration, Job Information, Reports, Request Personnel Action USF, Parameters

**Image: Parameters page**

This example illustrates the fields and controls on the Parameters page. You can find definitions for the fields and controls later on this page.




**PAR Type (personnel action request)** This field is available for entry only if you selected the Request for Personnel Action menu item. Select the type of PAR that you want to print.

**Copies Requested** This group box is available for entry only if you selected the Notification of Personnel Action menu item. Select the copies that you want to print. Available values are Employee, OPF, Payroll, and Utility.

**On-line** Select if you want to immediately print the PARs you select.

**Within Batch Program** Select if you want to save your filtering criteria for later processing.

**EmplID (employee ID), SSN (social security number), Name, PAR Status, NOA Code (nature of action), and Business Unit** Filter actions by employee ID, employee social security number, PAR status, NOA code, or business unit.

**PAR Status** To filter by PAR status, select a status. The Begin Date and End Date fields become available when you select a PAR status.

**Filter** When you click this button, the system selects the records that match your filter criteria and displays them on the Select Data page.

## Select Data Page

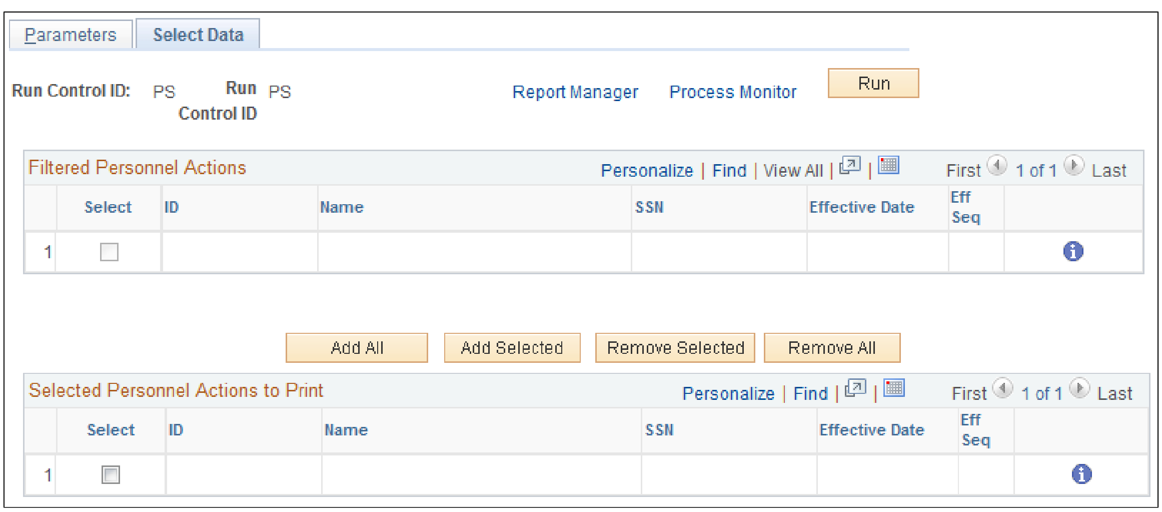
Use the Select Data page (RUNCTL_PAR2) to select employee data for printing PARs, after filtering the data with the parameters defined on the Parameters page.

**Navigation**

- Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Select Data
- Workforce Administration, Job Information, Reports, Request Personnel Action USF, Select Data

**Image: Select Data page**

This example illustrates the fields and controls on the Select Data page. You can find definitions for the fields and controls later on this page.




The system displays information about the PARs that it filtered based on the parameters you specified on the Parameters page. Use the check box at the beginning of each data row to select individual PARs and add them to the list in the Selected Personnel Actions to Print group box when you click the Add Selected button. Click the Add All button to add all of the PARs to the list without selecting any check boxes. These PARs print when you run the report.

If you want to remove any of the PARs in the Selected Personnel Actions to Print group box, select the check box at the beginning of each data row and click the Remove Selected button. Click the Remove All button to remove all PARs without selecting the check box on any row.

| | |
|---|---|
|  | Click this button to view the values of all of the filter criteria for this PAR. |
| **Add All** | Click this button to add all PARs that are in the Filtered Personnel Actions group box to the Selected Personnel Actions to Print group box. |
| **Add Selected** | Click this button to add the selected PARs from the Filtered Personnel Actions group box to the Selected Personnel Actions to Print group box. |
| **Remove Selected** | Click this button to remove selected PARs from the Selected Personnel Actions to Print group box. |
| **Remove All** | Click this button to remove all PARs from the Selected Personnel Actions to Print group box. |

## Viewing Summary Pages

To view a summary of employee data, use the dynamic inquiry pages and display-only pages that summarize data entered in other pages throughout the system, including Job Summary, Personal Data, Job Data 1 and 2, and Employment Data pages.

### Related Links

Using the Org Chart Viewer
Viewing Worker Job History
(USF) Viewing Employee Personal and Job Data
Viewing Other Summary Pages in PeopleSoft Human Resources

## Generating a Personnel Action History Report

This topic discusses how to generate the Personnel Actions History report.

The Personnel Actions History report (FGHR017) lists all employees affected by each of the job actions you enter on the Run Control page. It prints the following information:

- Employee name.
- Department.
- Effective date.
- Reason for the action.

For each employee the report lists:

- Original hire date.
- Total years of service.
- Employee type.
- Regular/temporary.
- Full/part-time.
- Job code and title.
- Salary grade.
- Compensation rate associated with the action.
- Supervisor's name.

## Page Used to Run the Personnel Actions History Report

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Personnel Actions History USF | RUNCTL_FGHR017 | Workforce Administration, Job Information, Reports, Personnel Actions History USF, Personnel Actions History USF | Run the Personnel Actions History report (FGHR017). |

# Generating a Wage and Separation Report

Periodically, Federal agencies are required to generate a Form ES-931 report (Request for Wage and Separation Information). State agencies use the information in this report to determine benefit eligibility for each claimant filing claims for Unemployment Compensation for Federal Employees (UCFE).

The generation of the ES-931 report is a two-part process.

1. Use the Setup Wage/Separation USF component to enter setup information.
2. Use the Print Wage/Separation USF component to generate the actual report.

These topics discuss how to:

- Enter ES-931 employee identification information.
- Enter ES-931 annual leave information.
- Enter ES-931 severance pay information.
- Generate the ES-931 report.

## Pages Used to Set Up and Run the ES-931 Wage and Separation Report

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Setup Wage/Separation USF - Identification | GVT_UCFE_PG | Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Identification | Enter ES-931 identification information for the wage and separation report.<br><br>The pages in the Setup Wage/Separation USF component pre-populate the fields for which data is already available and those pre-populated fields are inaccessible. Enter data for the remaining fields since data is required in all of the fields. |
| Setup Wage/Separation USF - Annual Leave | GVT_UCFE_PAY_PG | Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Annual Leave | Enter ES-931 annual leave information for the wage and separation report. |
| Setup Wage/Separation USF - Severance Pay | GVT_UCFE_SEV_PG | Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Severance Pay | Enter ES-931 severance pay information for the wage and separation report. |
| Print Wage/Separation USF | GVT_PRINT_ES931 | Workforce Administration, Job Information, Reports, Print Wage/Separation USF, Print Wage/Separation USF | Run the Print Wage/ Separation report (ES931). |

## Setup Wage/Separation USF - Identification Page

Use the Setup Wage/Separation USF - Identification page (GVT_UCFE_PG) to enter ES-931 identification information for the wage and separation report.

The pages in the Setup Wage/Separation USF component pre-populate the fields for which data is already available and those pre-populated fields are inaccessible. Enter data for the remaining fields since data is required in all of the fields.

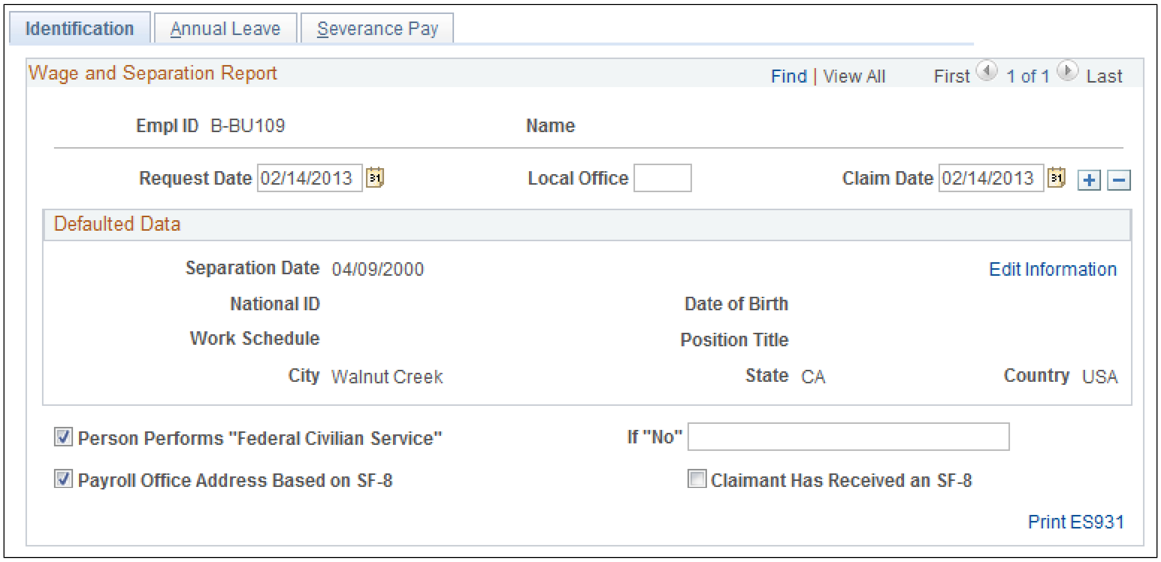
 

**Navigation**

Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Identification

**Image: Setup Wage/Separation USF - Identification page**

This example illustrates the fields and controls on the Setup Wage/Separation USF - Identification page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Request Date** | Enter the date the information was transmitted. |
| **Local Office** | Enter the numerical ID of the requesting/record holding office. |
| **Claim Date** | Enter the effective date of the claim. |
| **Print ES931** | Click to access the Print Wage and Separation component. |
| **Does this person perform "Federal Civilian Service?"** | Select if the employee performs Federal Civilian Service. |
| **If No** | If the employee does not perform Federal Civilian Service, enter an explanation. |
| **Is payroll office address based on SF-8?** | Select if the payroll office is based on an SF-8. |
| **If No, has claimant received an SF-8?** | Select if the payroll office is not based on an SF-8. |

## Defaulted Data

The information in this group box is pre-populated from existing data, if that data exists. If you need to change a value in a field that was pre-populated, you can click the Edit Information link to make the fields accessible for edit.

## Setup Wage/Separation USF - Annual Leave Page

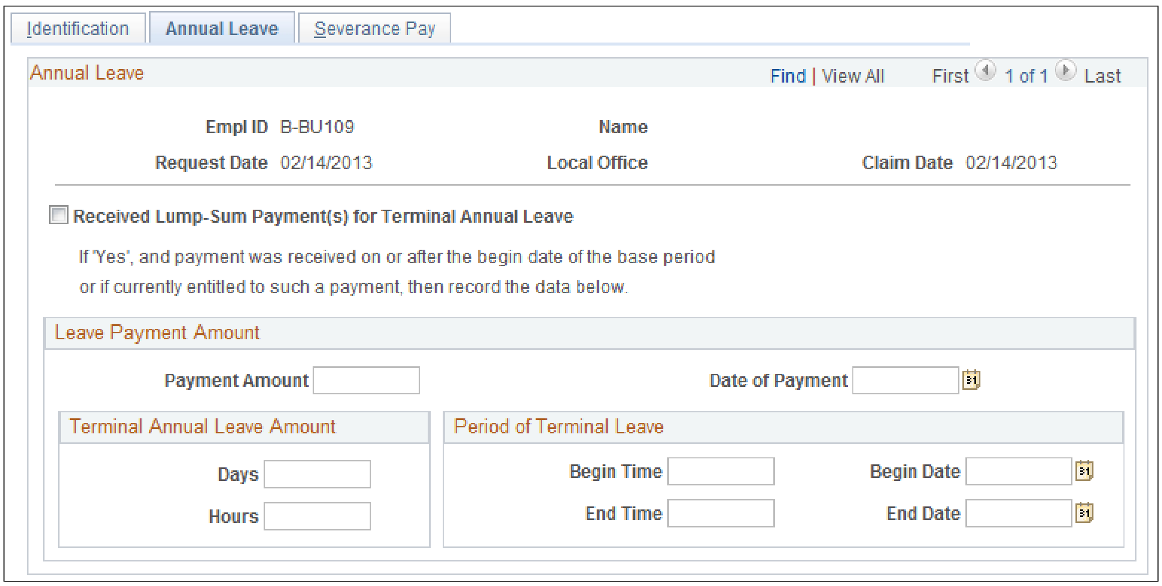
Use the Setup Wage/Separation USF - Annual Leave page (GVT_UCFE_PAY_PG) to enter ES-931 annual leave information for the wage and separation report.

**Navigation**

Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Annual Leave

**Image: Setup Wage/Separation USF - Annual Leave page**

This example illustrates the fields and controls on the Setup Wage/Separation USF - Annual Leave page. You can find definitions for the fields and controls later on this page.




If the employee received a lump-sum payment for terminal annual leave, select *Received a lump-sum payment(s) for terminal annual leave?*. If selected, and the payment was received on or after the beginning date of the base period, or if the employee is currently entitled to such a payment, enter the related data in the Leave Payment Amount group box.

## Setup Wage/Separation USF - Severance Pay Page

Use the Setup Wage/Separation USF - Severance Pay page (GVT_UCFE_SEV_PG) to enter ES-931 severance pay information for the wage and separation report.

**Navigation**

Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Severance Pay

**Image: Setup Wage/Separation USF - Severance Pay page**

This example illustrates the fields and controls on the Setup Wage/Separation USF - Severance Pay page. You can find definitions for the fields and controls later on this page.


If the employee has received or is entitled to receive severance pay, select *Received or is entitled to receive severance pay by any Federal law or agency-employee agreement.* If selected, enter the related data in the Severance Pay Information group box.

## Print Wage/Separation USF Page

Use the Print Wage/Separation USF page (GVT_PRINT_ES931) to run the Print Wage/Separation report (ES931).

**Navigation**

Workforce Administration, Job Information, Reports, Print Wage/Separation USF, Print Wage/Separation USF

Once you have completed the necessary setup, run the Print Wage and Separation report (ES931). This prints an ES-931 Request for Wage and Separation Information report.

## Chapter 19

# (USF) Processing Personnel Action Requests

## Understanding PARs

These topics discuss:

- PARs.
- Sample setup of pages used by employees and supervisors.
- Personnel actions and employee status.
- The importance of effective dates.
- Multiple actions with the same effective date.

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**Note:** PeopleSoft delivers a database providing a sample setup of PAR data. All discussions, overviews, and examples in this documentation are based on the sample setup. Your agency may choose a similar setup or vary the processes to reflect its own system and operational procedures.

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### Personnel Action Requests

An employee's history with an agency usually involves many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employee job data, your employees, supervisors, and human resources officials will regularly submit PARs for these changes in PeopleSoft Human Resources. (Before requesting personnel actions, verify that you've selected the Multiple Jobs Allowed check box on the Installation Table - Product Specific page.)

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**Note:** The information you need to maintain your employees' career histories is the same type of information you enter to hire employees. Use the same pages for both.

---

Requests for updates that you want to make to employee job data begin in the Workforce Administration, Job Information menu. Depending on whether you are an employee requesting a change for yourself, a supervisor requesting a change on behalf of someone in your department, or a human resources official, you must choose Employee Request USF, Supervisor Request USF, or HR Request USF, where the system prompts you for an employee ID. Go to the Data Control page to begin the request for a new action, and then go to other pages to enter additional information for the personnel action that you're requesting.

The differences between employee, supervisor, and human resources requests are the types of requests available and the workflow routing of the requests after being submitted. Human resources officials may request any of the actions.

 

### Related Links

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

Understanding U.S. Federal Hiring

## Sample Setup of Pages Used by Employees and Supervisors

The following table lists a sample setup of the pages employees and supervisors can use to enter requests and where those requests can be routed.

| ***Request Type*** | ***Page*** | ***Submitted By*** | ***Routed To*** |
|---|---|---|---|
| Accounting information | Compensation | Supervisors | Authorization |
| Agency transfer | Job | Supervisors | Authorization |
| Agency/subagency | Job | Supervisors | Authorization |
| Appointment/expiration data | Employment 1 | Supervisors | Authorization |
| Awards | Data Control | Supervisors | Authorization |
| Benefits/retirement | Job | Supervisors | Authorization |
| Department reassignment | Job | Supervisors | Authorization |
| Departmental hierarchy (view only) | Job | Supervisors | Authorization |
| Draft status | Personal Data | Employees/Supervisors | HR department |
| Earnings | Compensation | Supervisors | Authorization |
| Employee type | Position | Supervisors | Authorization |
| Expected pay (view only) | Compensation | Supervisors | Authorization |
| FLSA status | Position | Supervisors | Authorization |
| Holiday schedule | Position | Supervisors | Authorization |
| Job code # | Job | Supervisors | Authorization |
| LEO position | Position | Supervisors | Authorization |
| Locality/LEO adjustment | Compensation | Supervisors | Authorization |
| Location | Job | Supervisors | Authorization |
| Marital status | Personal Data | Employees/supervisors | HR department |
| Medicare entitlement date | Personal Data | Employees/supervisors | Authorization |
| Military status | Personal Data | Employees/supervisors | Authorization |

 

| ***Request Type*** | ***Page*** | ***Submitted By*** | ***Routed To*** |
|---|---|---|---|
| Name/address/birth/phone | Personal Data | Employees/supervisors | Authorization |
| Nonpay data | Employment 2 | Supervisors | Authorization |
| Other pay information | Compensation | Supervisors | Authorization |
| PAR remarks | Data Control | Supervisors | Authorization |
| Pay group/frequency | Position | Supervisors | Authorization |
| Pay plan/table/grade/step | Compensation | Supervisors | Authorization |
| Permanent/RIF/tenure | Employment 2 | Supervisors | Authorization |
| POI | Position | Supervisors | Authorization |
| Position # | Job | Supervisors | Authorization |
| Probation dates | Employment 2 | Supervisors | Authorization |
| Quoted pay data | Compensation | Supervisors | Authorization |
| Reports to position | Job | Supervisors | Authorization |
| Retained grade | Employment 2 | Supervisors | Authorization |
| Review date | Employment 1 | Supervisors | Authorization |
| Service computation dates | Employment 1 | Supervisors | Authorization |
| Service conversion dates | Employment 1 | Supervisors | Authorization |
| SF-50/SF-52 | Data Control | Supervisors | Prints reports |
| SF-113G ceiling | Position | Supervisors | Authorization |
| Shift details | Position | Supervisors | Authorization |
| Tax location | Job | Supervisors | Authorization |
| Tracking (job) data | Data Control | Supervisors | Authorization |
| Union information | Employment 2 | Supervisors | Authorization |
| Veteran's Info | Personal Data | Employees/supervisors | Authorization |
| Within-grade-increase data | Employment 1 | Supervisors | Authorization |
| Work schedule | Position | Supervisors | Authorization |

## Personnel Actions and Employee Status

When you request a personnel action to make changes to employee job data, the employee status often changes. For example, when you select *Retirement,* the employee status changes from *Active* to *Retired.* Similarly, if you terminate an employee due to death, the employee status changes from *Active* to *Deceased.* The employee status is based on either the personnel action, or in a few cases, the reason for the action, such as death. The system sets employee status as follows.

| ***When you select the personnel action*** | ***The system sets the employee status to*** |
|---|---|
| Hire.<br><br>Applicant hire.<br><br>Rehire.<br><br>Concurrent appointment.<br><br>Detail assignment.<br><br>End of detail.<br><br>Terminate detail assignment.<br><br>Return from LWOP.<br><br>Return from disability (LWP).<br><br>Recall from suspension/furlough.<br><br>Intnl assignment. | *Active* |
| Leave with pay.<br><br>Short-term disability.<br><br>Long-term disability. | *Leave of Absence* |
| Paid leave of absence.<br><br>Short-term disability with pay.<br><br>Long-term disability with pay. | *Leave with Pay* |
| Retirement with pay. | *Retired with Pay* |
| Terminated with benefits.<br><br>Terminated with pay. | *Terminated with Pay* |
| Furlough.<br><br>Suspension. | *Suspended* |
| Retirement. | *Retired* |
| Intl assignment completion.<br><br>Termination. | *Terminated* |

| ***When you select the personnel action*** | ***The system sets the employee status to*** |
|---|---|
| Termination (reason of death). | *Deceased* |
| Pay rate change.<br><br>Change to lower grade.<br><br>Data change.<br><br>Earnings distribution change.<br><br>Job reclassification.<br><br>Position change.<br><br>Probation.<br><br>Completion of probation.<br><br>Promotion Extension of NTE date.<br><br>Award-monetary.<br><br>Award-nonmonetary.<br><br>Bonus.<br><br>Reassignment/conversion.<br><br>Family benefits change. | The system sets the employee status to the same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.* |

When an employee status is set to *Active, Leave with Pay, Retired with Pay,* or *Terminated with Pay,* the system triggers payroll processing in PeopleSoft Payroll and PeopleSoft Payroll Interface.

If your agency uses PeopleSoft Payroll for North America, payroll paysheets aren't generated for employees whose status is *Retired* or *Terminated.* You may need to pay employees for a partial pay period or for a time after they leave the agency, however, so use either the personnel action *Retired with Pay* or *Terminated with Pay* to ensure that this occurs.

A change in employee status can affect PeopleSoft Human Resources Manage Base Benefits, PeopleSoft Benefit Administration, and PeopleSoft Payroll processing. Specifically for benefits, you may need to suspend coverage during a leave of absence or a suspension. In addition, a promotion or a job reclassification might affect an employee's benefit coverage.

Changes in an employee's status can also impact pension administration.

## Importance of Effective Dates

You usually update employee job data in PeopleSoft Human Resources for U.S. Federal Government by adding effective-dated data rows to the employee records. When you insert a new row on the Data Control page, the system copies the contents of the previous row into the new row so that you don't have to retype the information that stays the same. (So before you insert a new row, ensure that you're on the data row that you want to copy.) The only new information you see is the effective date, which defaults to the system date, usually today's date, which you can change.

 

If you want to work on the Employment Data 1 or 2 pages, for example, first insert a new data row on the Data Control page, and then access the appropriate Employment page to enter changes.

Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With all this information at your fingertips, you can roll back your system to a particular time to analyze position data or employee records. Or you can roll forward and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables list only the data that is valid as of the effective date of the page where you are working. For example, let's say you create a new department code with an effective date of May 1, 1997. If, on the Job Data pages, you enter a new data row for an employee or update an existing row that has an effective date *before* May 1, 1997, then when you select a department, you won't see the new code as a valid choice because it isn't in effect yet.

### Related Links

"Setting Up Federal HCM Control Tables *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding WIP Management System Setup *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is particularly common when you need to track annual pay adjustments and career promotions that take effect on the same day. Use effective sequence numbers to combine multiple actions and specify which one to process first. On the Data Control page, enter an actual effective date and assign the action, and the system automatically assigns a transaction number/sequence for each personnel action: The first on that date as *1/1* and the second as *2/1*.

For example, an employee received a pay rate change and a promotion on the same day. As a result of this pay rate change, that employee's salary was raised by about 2.5 percent. A promotion from a GS-07 position to a GS-09 position produced an additional 7.9 percent increase in salary.

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**Note:** The sequence number for a request is always *1* unless you are canceling or correcting a request that has already been completed and processed. In this case, the system would assign a sequence number of *2* for that action.

---

To enter multiple personnel actions with the same effective date:

1. Open the Data Control page for the employee whose data you're requesting to update.
2. For the first personnel action, insert a new data row.
3. Enter a new actual effective date.

   Because it is the first action processed for this actual effective date, the Transaction Nbr / Seq field is *1/1*.
4. Enter any other information required to implement the action, either here or in other pages in the component.
5. Change the PAR Status on the Data Control page to *Requested* so that you can continue on to enter the next action.

 

6. To enter the second action, such as *Promotion,* insert another data row.
7. Enter the same actual effective date as the first action.

   The system enters a Transaction Nbr / Seq of *2/1.*
8. Continue the same steps required for the first action, entering a new action each time.

---

**Note:** If two name changes are submitted for the same person on the same day and a Personnelist logs on and navigates to Worklists, two entries are displayed (one for each name change request), but both link to the most recent request on the PAR pages. If the Personnelist approves and processes the second one but leaves the first one in REQ status, a warning message is displayed that indicates that the Reviewed check box should be selected before processing the request. This warning message alerts the Personnelist to review the possible impact of processing one request before others that are scheduled to take effect on the same day or in the future.

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### Employee Data Security Considerations

When you reassign employees from one department to another using a data row containing an effective-date sequence number, the system currently allows users with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would adversely affect online response time.

For example, when you reassign an employee from department one to department two and give the employee a promotion on the same day, because an effective-date sequence number is in the reassignment data row, users with access to either department one or two have access to the employee data.

If you want to modify the system to prevent this, change the security views for the PeopleSoft applications you use. Bear in mind, however, that making the change affects system performance.

### Related Links

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Understanding Data Permission Security for HCM *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Performing Common Personnel Actions

These topics discuss how to:

- Grant performance awards.
- Enter promotional information.
- Request departmental reassignments.
- Request a leave of absence.
- Enter terminations and retirement requests.
- Request a supplemental or correction individual retirement record.
- Request terminations due to death.

- Request to rehire an employee.

## Pages Used to Perform Common Personnel Actions

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Supervisor Request USF-Data Control | GVT_JOB0 | Workforce Administration, Job Information, Supervisor Request USF, Data Control | Enter information for the employee for whom you want to enter a personnel action. |
| Supervisor Request USF-Award Data | GVT_AWD_DATA | Click the Award Data link on the Supervisor Request - Data Control page.<br><br>This link is available only when the Action field is *AWD* (award - monetary) or*BON* ( bonus), and the Reason Code field is populated. | Assign an award to a federal employee and enter award, informational, and payroll details. |

## Award Data Page

Use the Award Data page (GVT_AWD_DATA) to assign an award to a federal employee and enter award, informational, and payroll details.

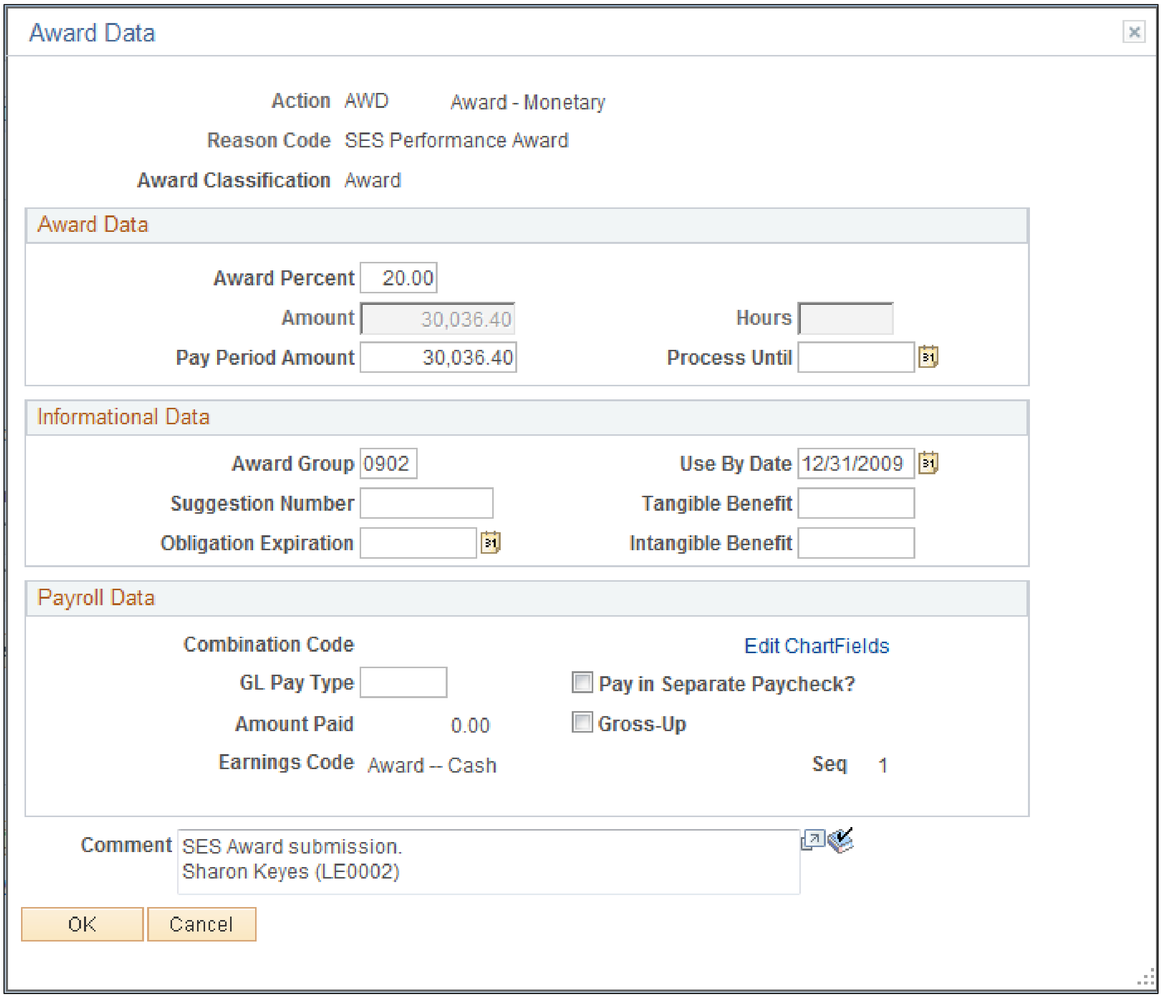
### Navigation

Click the Award Data link on the Supervisor Request USF- Data Control page.

This link is available only when the Action  field is *AWD* (award - monetary) or*BON* (bonus), and the Reason Code field is populated.

### Image: Award Data page

This example illustrates the fields and controls on the Award Data page. You can find definitions for the fields and controls later on this page.




Recognizing and rewarding employee performance is a critical component of attracting and keeping top talent. PeopleSoft Human Resources handles the complexity of this human resource area by making it easy to establish, record, track, and grant employee awards and bonuses.

Begin the process to grant an award by submitting a request to issue a bonus or award. The data is automatically sent through the approval process, tracked, approved, recorded, and issued to the employee.

To issue an award:

1. Set up the Award Actions page (Set Up HCM,  Product Related,  Workforce Administration,  Workforce Data USF,  Award Actions,  Award Actions) to define monetary and nonmonetary award types.

2. Request an award or bonus for your employee on the Supervisor Request - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control).

   Submit your request the same as you would for other personnel actions.

3. Define the award setup using the Award Data page (click the Award Data link on the Supervisor Request - Data Control page).

### Award Data

| | |
|---|---|
| **Award Percent** | Percent of pay to be paid as an award. |
| **Award Code** | NFC award code defaults from the Award Action definition. |
| **Amount** | Award amount granted. |
| **Hours** | Hours granted as an award. |
| **Pay Period Amount and Process Until** | Award amount paid each pay period until a specified date. |

### Informational Data

| | |
|---|---|
| **From Date** | Award begin date (NFC only). |
| **To Date** | Award end date (NFC only). |

### Payroll Data

| | |
|---|---|
| **Combination Code, GL Pay Type, Amount Paid, Earnings Code, Pay In Separate Paycheck, and Gross Up** | The information in these fields defaults from the Award Action definition. |
| **Sub Agency Charged** | The accounting station charged for cash award if not the employee's accounting station (NFC Only). |
| **Check Mail Address Indicator** | Specify where NFC should mail an award check. For example, the award may not get mailed to the employee's address, but instead to an office for a ceremony (NFC Only). |
| **Generate Payment** | Select to generate the award payment (NFC Only). |

---

**Note:** When you save this page, payroll data is written to the Additional Pay table for Payroll for North America customers only.

---

## Entering Promotional Information

When an employee changes pay grades or moves to a new job, salary changes are typically part of that personnel action.

To enter promotional information:

1. Insert a new data row on the Supervisor Request - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) and complete all fields.

2. When you are ready to submit the request, ensure that the PAR Status is *REQ.*

   The workflow system then picks up this information and routes it through the process. After that, you can still change, withdraw, or deny the information up until the point that the action has been finalized and has a status of *Processed.* To correct or cancel the request after it has been completed and has a status of *HR Processed,* go to the Cancellation or Correction pages.

   The information you change on the Supervisor Request - Data Control page and other pages varies according to the data for the former job and the new job. You usually select a new job code or a new position number by moving to the Supervisor Request - Job Data page. But all of the other entries on this page could also conceivably change in the event of a promotion.

   Again, the information you change on the Supervisor Request - Job Data page may vary, but you usually select a new pay plan, table, grade, or step and enter (or generate) a new base pay.

3. Once you've completed all the changes caused by the promotion, if necessary, access other pages to enter relevant information.

   For example, access the Personal Data page to enter new business phone numbers. Or access the Position Data page to change the pay group or employee type, or to enter other relevant position details.

4. Change the position as necessary on the Supervisor Request - Job page (Workforce Administration, Job Information, Supervisor Request USF, Job Data).

5. Select a pay rate determinant on the Supervisor Request - Compensation Data page (Workforce Administration, Job Information, Supervisor Request USF, Compensation Data).

6. Set the options in the Within-Grade Increase Data group box on the Supervisor Request - Employment Data 1 page (Workforce Administration, Job Information, Supervisor Request USF, Employment Data 1) as follows:

| ***Actions*** | ***Impact*** |
|---|---|
| Promotion (nature of action 702)<br><br>WIGI (NOA 893)<br><br>GM WIGI (NOA 891) | Sets the WIGI status to *waiting.*<br><br>Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period.<br><br>Sets the LEI date and last increase date to the effective date of the action. |
| Quality step increase (QSI) (NOA 892) | Sets the WIGI status to *waiting.*<br><br>Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. The WIGI due date is based on the last equivalent increase date, not the effective date of the action.<br><br>Sets the last increase date to the effective date of the action.<br><br>(Has no effect on the LEI Date.) |

| ***Actions*** | ***Impact*** |
| --- | --- |
| Change to lower grade (NOA 713) | Issues a warning message "Warning -- Change to Lower Grade Personnel Action may have an impact on WGI Due Date -- Adjust accordingly."<br><br>Always review current or future-dated records and make manual adjustments that may be required for any change to lower grade action. |
| Temporary promotion (NOA 703) | Sets the WIGI status to *NA.*<br><br>Sets the WIGI due date to *Blank.* |

## Requesting Departmental Reassignments

The description given here is for reassigning employees among departments. Agency-to-agency transfers are processed as hires and terminations.

To enter a reassignment request when a person is assigned to a new department without changing job codes:

1. Access the Supervisor Request USF - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) to enter reassignment requests.

   Reassignments usually imply that there is no change in pay grade or compensation.

2. If this action is to occur on the same day as another action, insert that action's values in theTransaction Nbr and Sequencefields.

3. Enter the action of *Reassignment/Conversion.*

4. Enter the reason code, such as *Employee Request* or *Manager Request.*

5. Complete all other necessary changes, such as NOA Code and Authority (1) and (2).

6. Access the Supervisor Request USF - Job Data page (Workforce Administration, Job Information, Supervisor Request USF, Job Data) to enter additional changes for the employee being reassigned.

   Change the position number, job code, agency, and any other details that will change with the employee reassignment. When you select a new department for the employee, the system automatically enters a new location and tax location if you've associated a location with the department in the Department table.

7. Access other pages in the Supervisor Request USF component to enter any other employment or job information applicable to the reassignment.

   For example, you may need to go to the Supervisor Request USF - Personal Data page to enter a new phone number. On the Personal Data page, click the Personal Phone Numbers button, and on the Personal Phone Numbers page, enter a new business phone number. On Employment 2, change the supervisor ID to the manager of the new department. Access other pages, such as the Position Data page to change the pay group, employee type, or other relevant position details.

### Security Considerations

PeopleSoft Human Resources enables users to assign employees into departments that they can't access for updates. If you want to prevent users from reassigning an employee into a department for which they don't have access, PeopleSoft Human Resources contains a view (DEPT_TBL_ACCESS) that displays only those department IDs that users can access based on their user security profiles.

If you choose to use this view, you must create a class of users who have access to all departments so that they can perform reassignments.

### Related Links

Understanding Job Data

"Understanding PeopleSoft Security *(PeopleSoft HCM 9.2: Application Fundamentals)*"

## Requesting Leave of Absence

At some point in their careers, many employees take leaves of absence. For example, when an employee has a baby, the new parent may request a maternity or paternity leave.

To enter a leave of absence:

1. Access the Supervisor Request USF - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) to submit a request for the employee who is temporarily leaving the agency.
2. Access the Non - Pay Data page (Workforce Administration, Job Information, Supervisor Request USF, Employment Data 2 and click the Non Pay Data link) to enter leave of absence data for an employee.

   In the Last Date Worked field, enter the last date the employee worked. When you process the PAR to return the employee to pay status, you must update the other fields (SCD Hours, Probation Hours, and Career Tenure Hours), as appropriate.
3. When an employee returned from leave, return to the Supervisor Request USF - Data Control page to change that employee's status to *active.*

   a. In the Action field, select *RFL* (return from leave without pay).

   b. In the Reason Code field, select*RFL* (return from leave).

   c. In the PAR Status field, select*Requested* or leave it as *Initiated* in case the return date changes for any reason.

   d. Access any other pages to make needed changes.

For more information, see the product documentation for *PeopleTools: PeopleSoft Process Scheduler*

## Entering Terminations and Retirement Requests

When employees leave the agency permanently, you render their records and their statuses inactive by registering them as *Terminated* or *Retired.* The processes for entering terminations and retirements are almost identical; the primary difference is the action you select on the Data Control page.

To enter termination and retirement requests:

1. Request a termination for an employee who has left the agency using the Supervisor Request USF - Data Control page Workforce Administration, Job Information, Supervisor Request USF, Data Control).

   The Actual Effective Date field defaults to the system date, usually today's date, which you can change.

   Normally, the system uses the effective date to represent the *beginning* of an action; however, when an employee terminates or retires, the system treats the effective date you enter as the close of business of the day of the termination.

   For example, if an employee's last day of employment is September 1, the effective date is September 1 because the termination is effective at the close of business that day.

2. In the Action field, select one of the following: *Termination, Terminated with Pay, Terminated with Benefits,* or *Retirement,* and then select a reason code for the departure, if applicable.

   Depending on the action you selected, the system changes the employee status from *Active* to *Terminated, Terminated with Benefits or Pay,* or *Retired.*

3. If the employee is suitable for rehire, save this page.

   When you request a termination or retirement, the system generates an individual retirement record (IRR) control record for this employee.

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**Note:** The IRR process is used by agencies using PeopleSoft Payroll. Payroll detail earnings and deductions for the fiscal history are used in the IRR process.

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### Related Links

"Understanding the IRR Process *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Requesting a Supplemental or Correction Individual Retirement Record

After you process an employee's IRR, you may find that you need to supplement or make corrections to that IRR. This requires that you create another PAR using the Workforce Administration, Job Information, Supplement to IRR or Correct IRR Supplement menu.

When you create the new PAR, the system creates an IRR control record with an IRR type of *C* (correction) or *S* (supplemental).

### Related Links

"Generating Supplemental or Correction IRRs *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Requesting Terminations Due to Death

To request termination due to death:

1. Open the Supervisor Request USF - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) for the deceased employee.

2. In the Action field, indicate that the employee is *Terminated.*
3. In the Reason Code field, select *Death* as the reason for termination.

   The system automatically changes the Employee Status field from *Active* to *Deceased.*

## Requesting to Rehire an Employee

When you request to hire an employee who worked for your agency in the past, enter a *Rehire* action. Information on a rehired employee is already in PeopleSoft Human Resources unless the employee data was deleted or archived. If employee records aren't in the system, follow the new hire process described in "Hiring Your Workforce."

You can rehire only employees whose employee status is *Terminated, Terminated with Pay, Terminated with Benefits, Retired,* or *Retired with Pay.* If you rehire an employee whose records already exist in the system, you may want to ensure that the personal, employment, and job data for that person is current.

If you want to rehire an employee whose previous job was in a department (organizational entity) for which you don't have security access, give at least one user performing rehires security access to all departments.

To request to rehire an employee into the system:

1. Open the Supervisor Request USF - Data Control page (Workforce Administration, Job Information, Supervisor Request USF, Data Control) for the employee and request a rehire.
2. Access the other employee data pages to enter additional information.

Chapter 20

# (USF) Processing Automatic Actions for Probation, Tenure, and WGIs

## Understanding Automatic Action Processing

This topic lists prerequisites and provides an overview of processing automatic actions.

### Prerequisites

For the Automatic Actions process to work as described, you must first activate workflow and set up supervisors in the workflow process. Consult your system administrator for information.

Before you can administer automatic actions for your employees, you must have already entered them into the system using one of the components in Workforce Administration.

You should designate one or more employees, perhaps from your human resources or payroll office, to administer the Automatic Actions processes. As delivered, the system sends supervisor notifications to the employee's supervisor's worklist based on WGI, tenure, and probation information already in your system. This information, most of which you entered during the hire process, initiates the automatic action processes. Run the Automatic Action processes regularly, as determined by your organization's needs. If necessary, manually change employee records to process special cases.

Before implementing Automatic Actions, decide how often your agency should run each process. For example, within-grade increases generally take effect on the first day of a pay period, so you might choose to process step increases only once per pay period. On the other hand, if supervisors review notices every Thursday morning, you should run 60-day notification processes weekly. Some agencies run the notification processes nightly to accommodate multiple supervisors and to allow for maximum time to verify upcoming employee record changes.

#### Related Links

"General Workflow Information *(PeopleSoft HCM 9.2: Application Fundamentals)*"

Adding an Employment Instance

### Processing Automatic Actions

Your agency's human resources personnel have many tasks to oversee: recruiting new employees, making hiring decisions, administering reviews, and tracking changes in employees' personal data, among others. Unfortunately, much of their time can be spent processing routine, tedious data. PeopleSoft HCM USF functionality automates some of these routine tasks, leaving your professionals free to spend time on other projects that require their professional insight and skills.

The PeopleSoft Human Resources Administer Workforce business process offers an Automatic Actions process to administer these routine tasks:

- Probation termination.
- Tenure conversion.
- WGIs.

If you activate workflow, PeopleSoft Human Resources alerts you of upcoming waiting period terminations or step increases and then automatically updates employee records without user intervention. After you assign supervisors to review automatic action notices, you won't forget these important dates.

The procedure is identical for all three automatic actions:

1. Run a process to identify employees with upcoming probation terminations, tenure conversions, or within-grade increases in the next 60 days.

   The system creates online notifications of upcoming changes and sends them to the worklist of designated supervisors.

2. Review online notifications and make any necessary changes to employee records.

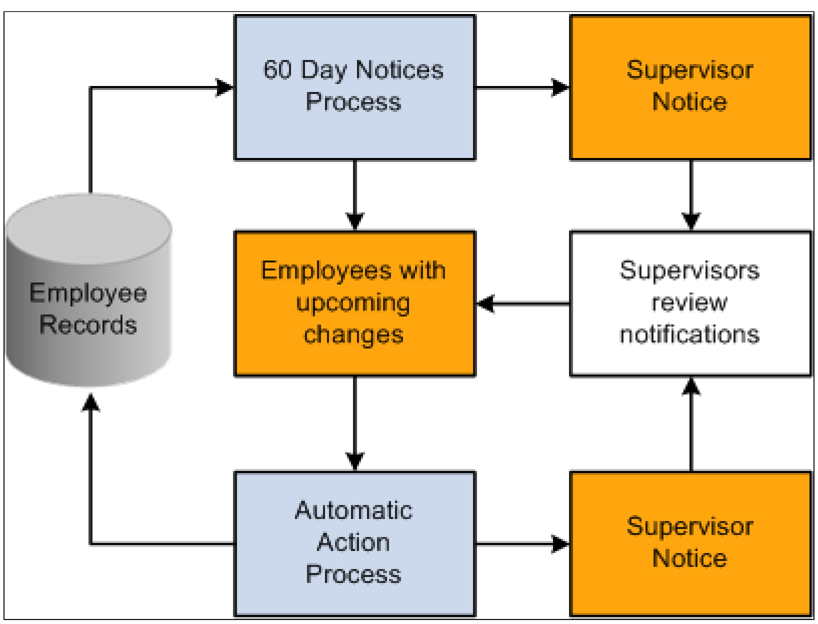
   Unless you change status or date fields in the employee's records to stop the update from occurring, the respective process updates the employee's records.

3. Run a process on the specified date to change employee records.

   This process also creates notices and sends them to supervisor worklists.

**Image: Processing automatic actions and generating supervisor notifications for the automatic actions**

The following diagram illustrates automatic action processing, including the creation of advance supervisor notification, the automated updates to employee data, and the supervisor notifications that the updates have been completed:



# Performing Automatic Actions

To set up Automatic Action messages, use the Automatic Action Msgs (GVT_AUTOACTNMSG_TB) component.

These topics provide an overview of the menus, list pages used for each Automatic Action process, and discuss how to:

- Process automatic actions.
- Run the Load Within Grade Increases process.

## Understanding the Menus and Pages Used for Each Automatic Action Process

The following table provides an overview of the menus and pages used for each automatic action process. However, this table does not include manual setup and verification. Run all of these processes from the Workforce Administration, Collective Processes menu.

| ***Step*** | ***Function*** | ***Navigation*** | ***Option to select in PeopleSoft Process Scheduler*** | ***Process Type and Name*** |
|---|---|---|---|---|
| 1 | Identify employees, create notices, and send notices to supervisor worklists. | Process Automated Actions USF | 60 Day Probation Term Notices | Application Engine FGHR003A |
| | | | *Or* 60 Day Tenure Notices | Application Engine FGHR004A |
| | | | *Or* 60 Day WGI Notices | Application Engine FGHR002A |
| 2 | Update employee records and send notices to supervisor worklists. | Process Automated Actions USF | Process Probation Terminations | Application Engine FGHR003B |
| | | | *Or* Process Tenure Conversions | Application Engine FGHR004B |
| | | *Or* Process WGI Auto Action USF | Load Within Grade Increases | Application Engine FGHR002B |

## Pages Used to Perform Automatic Actions

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Automatic Action Msgs | GVT_AUTOACTMSG_TBL | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Automatic Action Msgs, Automatic Action Msgs | Define Automatic Action messages. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Process Automated Actions USF | RUNCTL_AUTO_ACTNS | Workforce Administration, Collective Processes, Process Automated Actions USF, Process Automated Actions USF | Specify automatic action run control parameters for the probation termination and tenure conversion processes. |
| Process WGI Auto Action USF | RUN_FGHR002B | Workforce Administration, Collective Processes, Process WGI Auto Action USF, Process WGI Auto Action USF | Specify automatic action run control parameters for processing WGIs. |
| Probat Term-Supv Notif USF | GVT_PROB_END_NOTE | Workforce Administration, Collective Processes, Probat Term-Supv Notif USF, Probat Term-Supv Notif USF | View impending probationary period termination notifications online. |
| Tenure Conversion Notice USF | GVT_TEN_END_NOTICE | Workforce Administration, Collective Processes, Tenure Conversion Notice USF, Tenure Conversion Notice USF | View 60-day tenure notifications online. |
| Within Grade Incr Notice USF | GVT_WGI_NOTICE | Workforce Administration, Collective Processes, Within Grade Incr Notice USF, Within Grade Incr Notice USF | View impending WGI notifications online. |

## Process Automated Actions USF Page

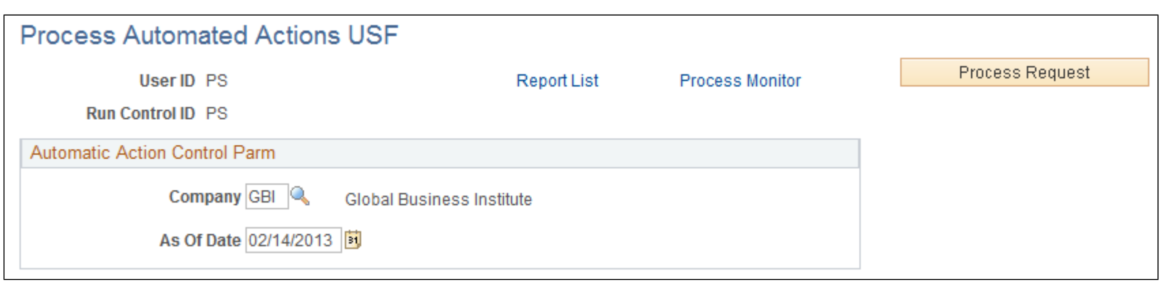
Use the Process Automated Actions USF page (RUNCTL_AUTO_ACTNS) to specify automatic action run control parameters for the probation termination and tenure conversion processes.

**Navigation**

Workforce Administration, Collective Processes, Process Automated Actions USF, Process Automated Actions USF

**Image: Process Automated Actions USF page**

This example illustrates the fields and controls on the Process Automated Actions USF page. You can find definitions for the fields and controls later on this page.



**Company** Enter the company for which you would like to identify employees and create notifications.

**As Of Date** The as of date is set by default to the system date. The process identifies all rows with a probation date within 60 days in the future from this date.

**Process Request** Click to run this request. PeopleSoft Process Scheduler runs the Automatic Actions process at user-defined intervals.

See the product documentation for

*PeopleTools: PeopleSoft Process Scheduler*

## Process WGI Auto Action USF Page

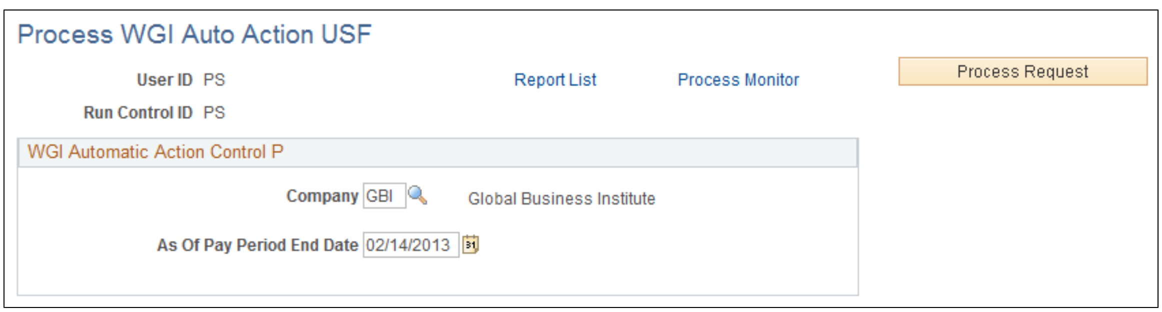
Use the Process WGI Auto Action USF page (RUN_FGHR002B) to specify automatic action run control parameters for processing WGIs.

**Navigation**

Workforce Administration, Collective Processes, Process WGI Auto Action USF, Process WGI Auto Action USF

**Image: Process WGI Auto Action USF**

This example illustrates the fields and controls on the Process WGI Auto Action USF. You can find definitions for the fields and controls later on this page.




**Company** Enter the company for which you would like to process WGIs.

**As Of Pay Period End Date** This field is set by default to the system date, but you must change it to a valid pay period end date for the pay calendar you have created. The system processes within-grade increases for employees with a WGI due date before this date, usually the begin date for the same pay period. However, the system also processes WGIs due before this pay period-retroactive WGIs.

# Administering Probation Termination Automatic Actions

When you first hire an employee, your agency usually imposes a probation period; most new regular federal employees have one-year probation periods. Supervisory or managerial employees and Senior Executive Service (SES) employees often have different probation periods, which you track separately.

The probation termination automatic action, like other automatic actions, identifies employees who will reach their probation termination date within 60 days. After you have activated workflow, the system sends messages to employee supervisors who are designated to process automatic actions. After the supervisors approve the probation termination, run the process to perform the actual changes to employee records, blanking out employee probation dates, indicating that they have met the probation period. Finally, you can send notices of completed probation periods to the designated supervisors' worklists.

This topic discusses how to run the probation termination automatic action.

## Running the Probation Termination Automatic Action

To run the probation termination automatic action:

1. Verify all of the data required for automatic probation termination processing.

   a. Verify the employee's probation waiting period (Probation Date) and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.

      If the employee has multiple data rows, verify only the current row.

   b. Verify accumulated non-pay hours that affect the employee's probation termination date on the Non - Pay Data page.

2. Run the 60 Day Probation Term Notices process from the Process Automated Actions USF page.

   During this process, the system performs the following functions:

   - Identifies employees who have a probation termination within the next 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the probation termination date to request an extension of the probation period. The system processes the probation termination if the supervisor doesn't respond in time.

   - Adds a row to the automatic action control table (GVT_AUTO_ACTN), which records the employee ID, employee record number, automatic action type, and automatic action date.

     The system differentiates among the three probation termination types: standard, supervisor, and SES. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

3. Run the Process Probation Terminations process from the Process Automated Actions USF page.

   The automatic action process updates the records of all employees previously identified in the 60 Day Probation Term Notices process unless the supervisor has extended their probation periods. The probation termination automatic action performs the following functions on the probation termination date:

- Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the probation termination was processed.

  This row was created during the 60-Day Probation Term Notices process.

- deselects the probation date on the employee's current Employment 2 page.
- Creates a supervisor notice indicating that the probation termination was processed.

4. View notices of upcoming probation terminations on the 60 Day Prob Term page.

   Supervisors and human resources officials can view 60-day notifications online. After viewing these online messages of impending probationary period termination, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the probation period, the supervisor should request a personnel action to change the probation date on the employee's Employment 2 page. If the employee's probation date isn't changed, the probation termination will occur on the date indicated.

### Related Links

Assigning Employees to Positions
Adding an Employment Instance

# Administering Tenure Conversion Automatic Actions

Most of your conditional and career-conditional new hires are subject to tenure conversion waiting periods. If you specify this period when you first hire the employee, the tenure conversion automatic action alerts you of upcoming tenure conversion dates and changes employee records to reflect the tenure conversion.

The tenure conversion automatic action, like other automatic actions, identifies employees who will reach their tenure conversion dates within 60 days. After you activate workflow, the system sends messages to the supervisors you have designated to process automatic actions. After the supervisors approve the tenure conversion, run the process to perform the actual changes to employee records—clearing tenure conversion dates and changing tenure types. Finally, you can send notices of tenure conversions to the designated supervisors' worklists.

This topic discusses:

- Running the tenure conversion automatic action.
- Changes made to employee records during tenure conversion.

## Running the Tenure Conversion Automatic Action

To run the tenure conversion automatic action:

1. Verify all of the data required for automatic tenure conversion processing.

a. Verify the employee's service conversion dates, tenure status, and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.

b. Verify accumulated non-pay hours that may affect tenure conversion waiting periods on the Non - Pay Data page.

2. Run the 60 Day Tenure Notices process from the Process Automated Actions USF page.

   During this process, the system:

   - Identifies employees who will reach their tenure conversion date within 60 days, and then creates supervisor notifications.

     After the notices are created, the supervisor has until the tenure conversion date to request an extension of the waiting period. The system processes the tenure conversion if the supervisor doesn't respond.

   - Adds a row to the automatic action control table (GVT_AUTO_ACTN).

     This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. The system differentiates between the two types of tenure conversions, career and career-conditional. This row also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

3. Run the Process Tenure Conversions process from the Process Automated Actions USF page.

   In this process, the system updates records of employees previously identified in the 60 Day Tenure Notices process, unless the supervisor extended the tenure conversion date. The tenure conversion automatic action performs the following functions on the tenure conversion date:

   - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the tenure conversion was processed.

     This row was created during the 60-Day Tenure Notices process.

   - Inserts an employee data row with updated or deleted tenure conversion dates and changed tenure type.

   - Creates a supervisor notice indicating that the tenure conversion was processed.

4. View notices of upcoming tenure conversions on the 60 Day Ten Conv page (60 day tenure conversion page).

   Supervisors and Human Resources officials can view 60-day notifications online. After viewing online messages of impending tenure conversion, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the tenure conversion period, the supervisor should request a personnel action to change the date on the employee's Employment 1 page, as described previously. If they don't change the employee's tenure conversion date, the tenure conversion will occur on the date indicated.

### Related Links

Assigning Employees to Positions

Adding an Employment Instance

## Understanding Changes Made to Employee Records During Tenure Conversion

To understand the changes made to employee records during the Tenure Conversion process, let's look at an example of an employee's data rows.

| ***Effective Date*** | ***NOA*** | ***Conv Begin Date*** | ***Career Conv Date*** | ***Career-Cond Conv Date*** | ***Tenure*** |
|---|---|---|---|---|---|
| January 1, 1999 = old Career Conv Date | 880 = Change in Tenure Status | | | | Permanent |
| January 1, 1996 = old Career-Cond Conv Date | 880 = Change in Tenure Status | January 1, 1996 = current effective date | January 1, 1999 = Conv Begin Date + 3 years | | Conditional |
| January 1, 1994 | 101 = Career Conditional Appointment | January 1, 1994 | | January 1, 1996 | None |

As the table demonstrates, the system inserts a row with an effective date equivalent to the career conversion date or career-conditional conversion date and a nature of action code *880.*

For career-conditional conversions, the system performs the following actions on the new row:

- Blanks out the career-conditional conversion date.
- Changes the conversion begin date to the effective date of the current row.
- Inserts a career conversion date three years in the future.

  You can change this date.
- Changes the tenure type from *None* to *Conditional.*

For career conversions, the system performs these actions on the new row:

- Blanks out the career conversion date.
- Blanks out the conversion begin date.
- Changes the tenure type from *Conditional* to *Permanent.*

# Administering WGIs

Keeping track of WGIs for all of your agency's employees can be a time-consuming, labor-intensive process. Using workflow, which you activate and set up, PeopleSoft Human Resources automates the entire process, from identifying upcoming step increases to updating employee records after the increase has occurred. All employees who meet minimum performance standards will receive the proper step increase and concurrent pay raise at the end of the step waiting period.

These topics provide an overview of 60 day WGI notices and of the load within grade increases process and discuss:

- Running the WGI automatic action.
- Entering data that affects WGI automatic actions.

## Understanding the 60 Day WGI Notices

The system identifies and differentiates among employees who have a WGI Status of *Waiting* or *Approved* and a WGI Due Date up to 60 days in the future, but do not meet all automatic WGI criteria. Employees are classified into four different WGI automatic action types.

| ***Automatic Action Type*** | ***Explanation*** |
|---|---|
| Within Grade Increase | These employees receive an automatic WGI within 60 days. |
| Manual WGI | You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing. |
| Retroactive WGI | These employees have a WGI status of *Waiting,* but were due a WGI in a previous pay period. |
| WGI W/O Min. Performance | These employees have an overall review rating below *Satisfactory* or do not have a review within the last fifteen months. |

Different supervisor notifications are sent for each of these types. However, the system processes WGIs automatically for only the first and third types listed previously, Within Grade Increase and Retroactive WGI.

## Understanding the Load Within Grade Increases Process

To understand the within-grade increase automatic action, consider what happens to an employee with this current row:

| ***Effective Date*** | ***NOA*** | ***Step*** | ***WGI Due Date*** | ***WGI Status*** | ***Last Increase Date*** | ***LEI Date*** |
|---|---|---|---|---|---|---|
| January 1, 2001 | Any | 1 | May 18, 2001 | Waiting | | |

In March, the notification process identified this employee's upcoming WGI, after which you sent a notification to the supervisor. The supervisor approved the increase and didn't need to change any data.

On May 18, 2001, the WGI due date, the system processes this employee's within-grade increase. It changes the WGI Status in the old row and inserts a new row as follows:

| ***Effective Date*** | ***NOA*** | ***Step*** | ***WGI Due Date*** | ***WGI Status*** | ***Last Increase Date*** | ***LEI Date*** |
|---|---|---|---|---|---|---|
| May 18, 2001 = old WGI due date | 893 = WGI | 2 | Pay period begin date after Step 2 waiting period | Waiting | May 18, 2001 =old WGI due date | May 18, 2001 =old WGI due date |
| January 1, 2001 | Any | 1 | May 18, 2001 | Created | | |

As you can see, the system performs six actions during the within-grade increase process:

- Changes the WGI Status to *Created* in the row that was current when the WGI process occurred.

  If the employee has multiple rows with the same WGI due date, the system changes the status of all the rows to *Created.* Only the system enters a status of *Created.*

- Inserts a new row with nature of action code *893* and effective date equal to the old WGI due date.

- Increments the step by one in the new row, and updates step-dependent pay information.

- Calculates the WGI due date for the new row.

  This date corresponds to the beginning of the pay period following the waiting period for the new step.

- Sets the WGI status on the new row to *Waiting.*

- Sets both the last increase date and LEI date on the new row to the old WGI due date.

WGI increases take effect only at the beginning of a pay period. If the WGI due date is the beginning of a pay period, the pay increase occurs on that date—the employee receives the increased pay for the entire period. However, if the WGI due date falls between the beginning and ending dates of a pay period, the pay increase takes effect at the beginning of the following pay period.

In addition to changing employee records, the system edits the applicable row in the Automatic Action Control table (GVT_AUTO_ACTN) to indicate that the WGI was processed. It also creates a notice indicating that the WGI was processed.

## Running the WGI Automatic Action

To process automatic within-grade increases:

1. Verify all of the data required for automatic WGI processing.

   To enable the system to run WGI automatic actions, you must first set up required position and employee data. You may have already entered the necessary information when hiring the employee. Now, verify information throughout your PeopleSoft Human Resources system, at both the table level and the employee level. If the employee has multiple data rows, you only need to verify the current row. All of the following conditions must be met for the system to process an automatic within-grade increase:

   a. Selected the Pay Plan is Eligible for Auto Within Grade Increase check box on the Pay Plan Table page.

b. Defined pay calendars for the current year plus the next three years on the Pay Calendar Table page.

c. Ensured each step has a next step increment value in the Weeks column on the Salary Step Table page.

d. Set the overall review rating to *Satisfactory* or better within last 15 months on the Employee Appraisal 1 page.

e. Selected a work schedule of *Full Time, Baylor Plan,* or *Part Time* on the Position Data page.

f. Set WGI status to *Waiting* or*Approved* on the Employment 1 page.

g. Ensured that the Reports To Position field contains a valid entry on the Employment 2 page.

h. Verified that the step isn't the highest in grade on the Compensation Data page.

---

**Note:** If you are using the Manage Positions business process, the Report To Position field on the Employment 2 page is unavailable for data entry. To edit the field, select the Position Override check box on the Position Data page and change the position this employee reports to. You can also identify the reports to position on the Position Data – Description page. To do this, select Organizational Development, Position Management, Maintain Positions/Budgets, Update Position Info.

---

2. Run the 60 Day WGI Notices process from the Process Automated Actions USF page.

   This process identifies employees with a WGI due date within the next 60 days and a WGI status of *Waiting* or *Approved.* The system:

   - Adds a row to the automatic action control table (GVT_AUTO_ACTN).

     This table records the employee ID, employee record number, automatic action type, and automatic action date. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

   - Identifies employees who will receive a within-grade increase within 60 days and creates supervisor notifications.

     After the notices are created, the supervisor has until the WGI due date to deny or postpone the increase. If the supervisor doesn't respond, the system processes the step increase. To prevent the automatic within-grade increase from occurring, the supervisor must change the WGI status to *Denied, Postponed,* or *N/A* on the current row and insert a new row with the new WGI due date and WGI status of *Waiting* or *Approved.* The system also creates notices for employees who have a condition preventing automatic WGI processing.

   - Changes the WGI status on the employees' current Employment 1 pages to *Approved,* if the employees meet all of the WGI criteria.

   - Sends upcoming WGI notices to supervisor worklists.

3. Run the Load Within Grade Increases process from the Process WGI Auto Action USF page.

In this process, the system updates records of employees previously identified in the 60-Day WGI Notices process, unless you have denied or postponed their increases.

4. View notices of upcoming WGIs on the Within Grade Incr Notice USF page.

   After viewing these online messages of impending WGI due dates, verify that the employee will fulfill all of your agency's requirements by the specified date. To prevent the WGI from occurring, you must change the employee's WGI status to *Denied, Postponed,* or *N/A* on the current Employment 1 page. Also, insert a new row with an updated WGI due date and WGI status of *Waiting.* You can also view notices for employees who do not receive automatic WGIs or for whom you must manually process a WGI.

### Related Links

"Establishing Pay Plans *(PeopleSoft HCM 9.2: Payroll for North America)*"
"Creating Pay Calendars and FLSA Calendars *(PeopleSoft HCM 9.2: Application Fundamentals)*"
"Setting Up Salary Plans, Grades, and Steps *(PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)*"
Understanding U.S. Federal Hiring

## Entering Data That Affects WGI Automatic Actions

Because the automatic WGI process obtains information from many pages, be aware of entering information that might affect some of the data the system uses.

- Creating a PAR for a Change to a Lower Grade.

  When you create a PAR with nature of action code *713,* the system updates the WGI due date to reflect the change. However, the change may affect the WGI due date and status in many ways. You need to verify that the information entered is correct for your specific circumstances. To remind you, the system displays a warning message.

- Changing the WGI due date.

  When you change the WGI due date, the system checks that the date you entered is the beginning of a pay period. If it isn't, it issues a warning message.

- Based on the WGI due date you entered, the system suggests the beginning of the pay period in which your date falls and the beginning of the next pay period.

  You can enter one of these or keep your original date. If you decide to keep the date you've entered, the WGI process still identifies this employee as eligible for a step increase. However, if you enter a WGI due date in the middle of a pay period, the pay increase takes effect only at the beginning of the following pay period.

- Adding historical rows.

  When you insert a row with an effective date earlier than an automatic WGI that has already occurred, the system assigns a WGI status of *Waiting.* You probably do not want the system to process this row in an automatic WGI and should change the WGI status to *N/A.* Depending on the nature of action, you might need to check other information, for example step, on this and subsequent pages.

- Inserting a row with an effective date equivalent to the current WGI due date.

The system processes the WGI after all other actions with the same effective date. It increments the sequence number of the WGI row it adds.

- If a user creates a manual WGI (NOA = 893) PAR row, any preceding rows that have a WGI status of *Waiting* or *Approved* are updated to a status of *Manual* to indicate that a manual WGI has been inserted.

## Chapter 21

# (USF) Managing Leave

## Understanding Leave Administration

These topics list prerequisites and discuss:

- Automatic leave enrollment administration.
- Leave transfer management.

### Prerequisites

Set up Earnings codes and Earnings Accrual Classes.

#### Related Links

"Understanding Earnings Tables *(PeopleSoft HCM 9.2: Payroll for North America)*"

### Automatic Leave Enrollment Administration

Use automatic leave enrollment functionality to enroll an employee automatically in an earnings accrual class with personnel action request (PAR) activity or approval to participate in a leave program. The system automatically populates the employee's leave enrollment record with default enrollment values based on the leave class rules you set up. You can manually override the defaults.

Here are the steps in administering automatic leave enrollment:

1. Set up the Leave Class Rules template (one-time set up).
2. Set up Leave Class Rule criteria (one-time set up).
3. Process PAR activity or approval to participate in a leave program.
4. Run the Auto Leave Enrollment process.
5. Review the results of the Auto Leave Enrollment process.
6. Adjust enrollments as necessary.

### Leave Transfer Management

Each Federal Government agency may establish and administer procedures to permit the voluntary transfer of annual leave between Federal Government employees in a time of crisis. A crisis can be a personal medical emergency or a situation deemed as an emergency of the agency.

There are three types of programs in which employees may donate or receive annual leave hours. These programs have similar but slightly different eligibility or usage rules. Employees may participate in more than one program.

| | |
|---|---|
| **Voluntary Leave Transfer Program (VLTP)** | Employees donate and receive annual leave hours directly from each other. |
| **Emergency Leave Transfer Program (ELTP)** | Employees donate and receive hours through an agency-managed emergency bank that has been created to deal with a specific emergency. |
| **Leave Bank** | Employees donate and receive hours through an agency-managed leave bank. |

# Administering Automatic Leave Enrollment

To set up leave class rules, use the Leave Class Rules Criteria USF (GVT_LVCLSRUL_TMPLT) and Leave Class Rules USF (GVT_LV_CLS_RULES) components.

These topics discuss how to:

- Set up the leave class rules template.
- Set up leave class rules criteria.
- Process automatic leave enrollment.
- Review automatic leave enrollment.
- Manually enter or adjust leave enrollment.

## Pages Used to Administer Automatic Leave Enrollment

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Leave Class Rules Criteria USF | GVT_LVCLSRUL_TMPLT | Set Up HCM, Product Related, Workforce Administration, Absence, Leave Class Rules Criteria USF, Leave Class Rules Criteria USF | Rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule. |
| Leave Class Rules USF | GVT_LV_CLS_RULES | Set Up HCM, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules USF | Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class. |

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Automatic Leave Enrollment | RUNCTL_FGASOFDT | Workforce Administration, Leave Administration USF, Manage Leave Information, Request Auto Leave Enrollment, Automatic Leave Enrollment | Run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules. |
| Track Auto Leave Enrollment | GVT_LVCLS_TRGR | Workforce Administration, Leave Administration USF, Manage Leave Information, Track Auto Leave Enrollment, Track Auto Leave Enrollment | Review the results of the Leave Class Auto Enrollment process. |
| Employee Accruals Enrollment | GVT_ACCR_PLAN | Workforce Administration, Leave Administration USF, Manage Leave Information, Employee Accruals Enrollment, Employee Accruals Enrollment | Adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment. If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes. |

## Leave Class Rules Criteria USF Page

Use the Leave Class Rules Criteria USF page (GVT_LVCLSRUL_TMPLT) to rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule.

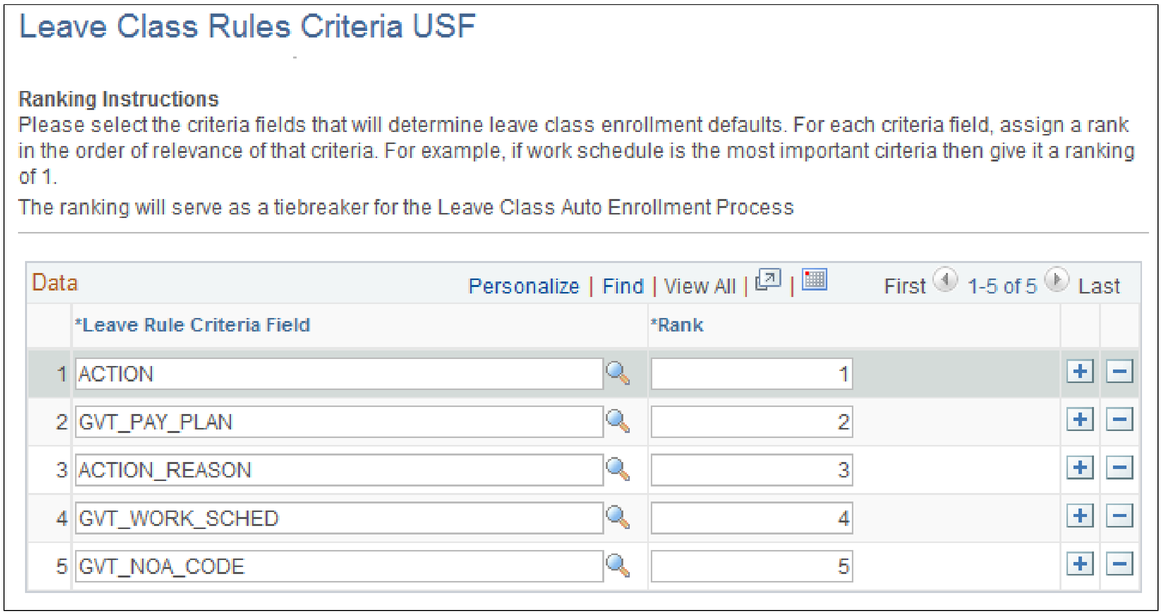
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Absence, Leave Class Rules Criteria USF, Leave Class Rules Criteria USF

**Image: Leave Class Rules Criteria USF page**

This example illustrates the fields and controls on the Leave Class Rules Criteria USF page. You can find definitions for the fields and controls later on this page.




Set up the Leave Class Rules template only once.

**Leave Rule Criteria Field**

Select the PAR criteria and rank them on this page. These criteria correspond to the PAR Criteria fields on the GVT Leave Class Rules page, where you select values for each criterion. The criteria that you select and rank are:

*ACTION:* action

*ACTION_REASON*: action/reason.

*GVT_NOA_CODE*: nature of action code.

*GVT_PAY_PLAN*: pay plan.

*GVT_TYPE_OF_APPT*: type of appointment.

*GVT_WORK_SCHED*: work schedule.

**Rank**

Rank each criterion in order from 1 to 5, with 1 being the highest rank. The single rule where the employee transaction meets the highest-ranking criteria is the rule the system uses as a tiebreaker if an employee qualifies under more than one rule.

### Example of Tie Breaking

The following example illustrates how the system uses ranking to resolve situations where the employee qualifies under two different Leave Class Criteria rules.

| ***Rule 1 Definitions*** | ***Rule 2 Definitions*** |
|---|---|
| PAR Criteria:<br><br>Action: HIR<br><br>Work Schedule: Full-time<br><br>Pay Plan: GS | PAR Criteria:<br><br>Action: HIR<br><br>Work Schedule: Full-time<br><br>NOA code: 170 |
| Default Enrollments:<br><br>Annual Leave<br><br>Sick Leave | Default Enrollments:<br><br>Annual Leave<br><br>Sick Leave<br><br>Home Leave |

The employee meets all criteria for both rules. The Action and Work Schedule criteria are the same in both rules.

- If pay plan is ranked higher than NOA code on the Leave Class Rules template, the system uses the first rule to enroll the employee in leave classes.
- If NOA code is ranked higher than pay plan on the Leave Class Rules template, the system uses the second rule to enroll the employee in leave classes.

## Leave Class Rules USF Page

Use the Leave Class Rules USF page (GVT_LV_CLS_RULES) to define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.

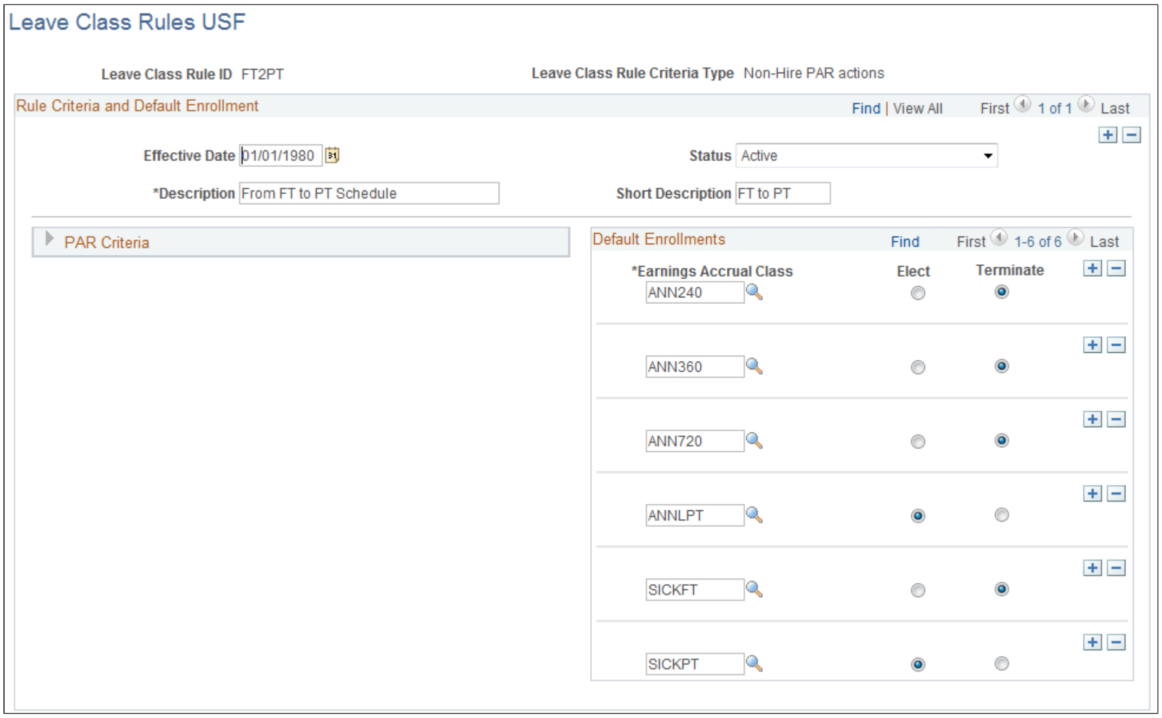
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules USF

**Image: Leave Class Rules USF page**

This example illustrates the fields and controls on the Leave Class Rules USF page. You can find definitions for the fields and controls later on this page.

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**Note:** You do not need to set up a Leave Class Rule for terminating employees. The PeopleSoft Payroll for North America Final Check Process requires that the employee stay enrolled to determine how much pay they are eligible for upon their separation. Once an employee has *Terminated* status, normal payroll calculations in PeopleSoft Payroll for North America no longer process that employee.

---

| | |
|---|---|
| **Leave Class Rule ID** | Identify each leave class rule you create. |
| **Leave Class Rule Criteria Type** | Assign a type to each new rule when you first enter the page. This value determines which additional fields are available on the page. Values are:<br><br>*Hire/Rehire:* for rules associated with hire or rehire actions.<br><br>*Leave Program Status:* for rules associated with leave bank and transfer processing.<br><br>*Non-Hire PAR actions:* for rules associated with PAR actions that are not hire or rehire. |

The value you select in the Leave Class Rule Criteria Type field affects which group boxes appear on the page.

| ***Leave Class Rule Criteria Type*** | ***Group Boxes*** |
|---|---|
| *Hire/Rehire* or<br>*Non-Hire PAR actions* | PAR Criteria<br>Default Enrollments |
| *Leave Program Status* | Leave Program<br>Default Enrollments |

### PAR Criteria

Only the criteria you selected and ranked on the Leave Class template appear in this group box. Select a value for a criterion if you want to process leave enrollment based on a designated value for that criterion under this rule. The system processes enrollments based on the value of this field in the employee's PAR transaction.

### Default Enrollments

**Earnings Accrual Class** Select the earnings accrual classes that apply to this rule.

**Elect** Select to enroll employees in the earnings accrual class by this rule's criteria.

**Terminate** Select to terminate employees from the earnings accrual class by this rule's criteria.

### Leave Program

**Leave Program Type** If an employee has been approved as a recipient of one of the leave transfer programs, you can define which accruals to enroll or terminate. Select the type of leave transfer program *Bank, Emergency,* or *Voluntary.*

### Related Links

"Defining Earnings Accrual Classes *(PeopleSoft HCM 9.2: Payroll for North America)*"

Administering Leave Donations

## Processing Auto Leave Enrollment

Use the Automatic Leave Enrollment page (RUNCTL_FGASOFDT) to run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules.

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, Request Auto Leave Enrollment, Automatic Leave Enrollment

After you set up the Leave Class Rules template and the Leave Class Rule Criteria, you process any hire, PAR transaction, or leave program approval as you normally would through the Workforce Administration, Job Information menu.

When you are ready to enroll employees in earnings accrual classes, access the Automatic Leave Enrollment page. The *As Of Date* is the run parameter. The Leave Class Auto Enrollment process (FGHR036) compares the PAR transactions and leave program approval against the leave class rule criteria and enrolls employees in the appropriate earnings accrual classes. You can set this process to run automatically or on demand.

## Track Auto Leave Enrollment Page

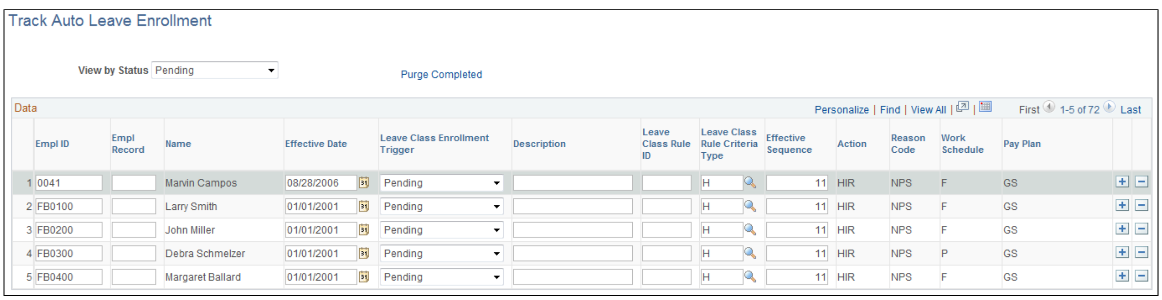
Use the Track Auto Leave Enrollment page (GVT_LVCLS_TRGR) to review the results of the Leave Class Auto Enrollment process.

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, Track Auto Leave Enrollment, Track Auto Leave Enrollment

**Image: Track Auto Leave Enrollment page**

This example illustrates the fields and controls on the Track Auto Leave Enrollment page. You can find definitions for the fields and controls later on this page.




**Note:** Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Use this page to view the outcome of each transaction that was processed by the Leave Class Auto Enrollment process.

**View by Status**

Select a value to sort the data by status (Leave Class Enrollment Trigger). Values are: *Completed, Error,* or *Pending.*

The system records employees on this table with the status of *Pending* as soon as a PAR action is completed or the employee is approved into a leave program.

The status changes to *Completed* when the auto enrollment process is complete.

**Purge Completed**

Click to delete all data rows with the status (Leave Class Enrollment Trigger) of *Completed.*

## Employee Accruals Enrollment Page

Use the Employee Accruals Enrollment page (GVT_ACCR_PLAN) to adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment.

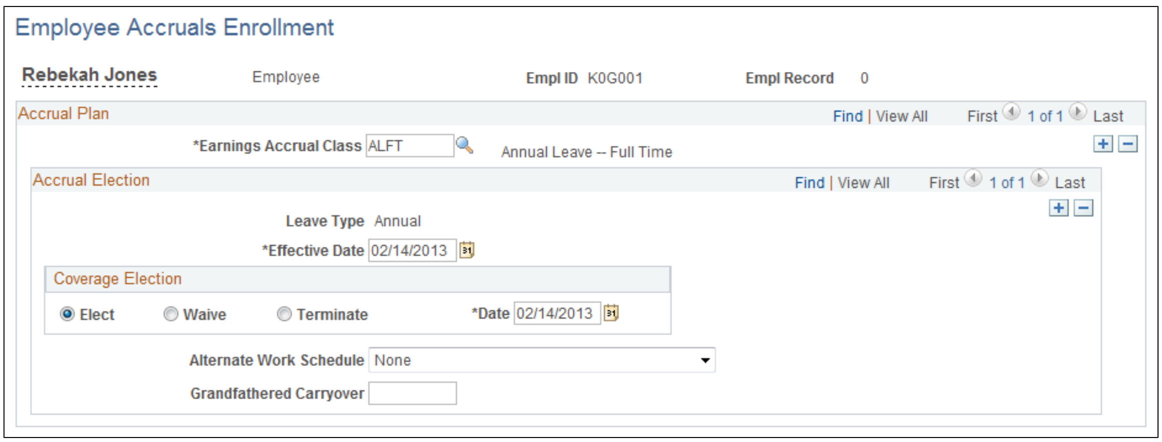
If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes.

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, Employee Accruals Enrollment, Employee Accruals Enrollment

**Image: Employee Accruals Enrollment page**

This example illustrates the fields and controls on the Employee Accruals Enrollment page. You can find definitions for the fields and controls later on this page.




### Accrual Plan

| | |
|---|---|
| **Earnings Accrual Class** | Select an earnings accruals class. The classes you created on the Earnings Accruals Class table are displayed. |

### Accrual Election

| | |
|---|---|
| **Leave Type** | The leave type defaults from the accrual calculation box on the Earnings Accruals – Class Page. |
| **Election** | Select the enrollment status.<br>Select *Elect* to enroll the employee in a class.<br>Select *Waive* to waive a leave just like a regular benefit.<br>Select *Terminate* to end the employee's enrollment in a class. |
| **Elect Date** | Enter the date on which the accrual election change occurs. |

| | |
|---|---|
| **Effective Date** | Select a date to specify when this accrual election becomes effective and the employee will be in the new earnings accrual class. |
| **Alternate Work Schedule** | The purpose of the alternate work schedule is for those employees on the Credit Leave Accrual. When the employee's work schedule changes, the system creates an additional pay record for them to pay out their current balance. |
| **Grandfathered Carryover** | Enter the grandfathered carryover here, if applicable. A grandfathered carryover is when an employee has a balance greater than the new earnings accrual-ceiling amount. For example, an employee who carried an annual leave balance of 360 hours in a previous class can transfer to a new class that has a ceiling of 240 hours. The difference of 120 hours between the new ceiling amount and the current balance of 360 is called the *Grandfathered Carryover.* |

### Related Links

"Defining Earnings Accrual Classes *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Setting Up Leave Transfer Programs

To set up leave transfer programs, use the Leave Denial Codes USF (GVT_DENIAL_CD_TBL), Leave Program Type Table (GVT_LV_XFR_TYP_TBL), Leave Bank Details (GVT_LV_BANKMEM_SEC), and Emergency Leave Transfer Details (GVT_LV_DON_TGT_SEC) components.

To set up leave transfer programs, you must define the programs and the earnings codes and accrual classes used for processing.

These topics discuss how to:

- Set up denial codes and denial notification letter text.
- Set up leave transfer programs.
- Set up earnings codes for leave transfer.
- Set up earnings accrual classes for leave transfer.
- Set up leave class rules for leave transfer.

## Pages Used to Set Up Leave Transfers

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Leave Denial Codes USF | GVT_DENIAL_CD_TBL | Set Up HCM, Product Related, Workforce Administration, Absence, Leave Denial Codes USF, Leave Denial Codes USF | Set up denial reasons and specify the text to be printed in denial notifications. |
| Leave Program Type Table | GVT_LV_XFR_TYP_TBL | Set Up HCM, Product Related, Workforce Administration, Absence, Leave Program Type Table, Leave Program Type Table | Set up leave transfer programs, specify the program type, and indicate limits on donations and balances. |
| Leave Bank Details | GVT_LV_BANKMEM_SEC | Click the Leave Bank Details button on the Leave Program Type Table page | Enter Leave Bank board members. |
| Emergency Leave Transfer Details | GVT_LV_DON_TGT_SEC | Click the Emergency Leave Transfer Dtl (emergency leave transfer details) button on the Leave Program Type Table page | Enter the number of donation hours targeted. |
| Leave Class Rules USF | GVT_LV_CLS_RULES | Set Up HCM, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules USF | Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class. |

## Leave Denial Codes USF Page

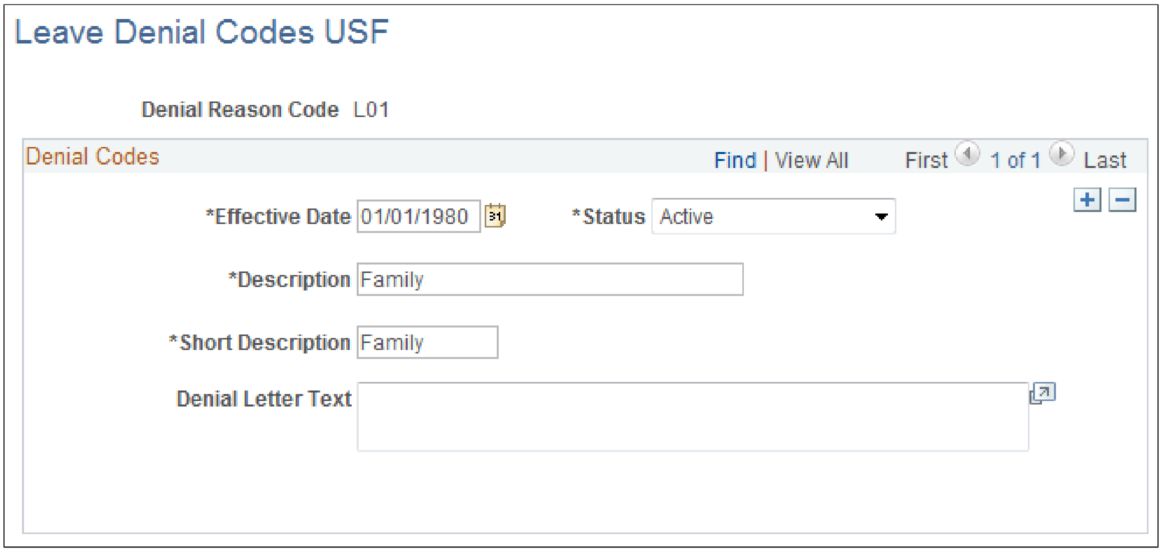
Use the Leave Denial Codes USF page (GVT_DENIAL_CD_TBL) to set up denial reasons and specify the text to be printed in denial notifications.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Absence, Leave Denial Codes USF, Leave Denial Codes USF

**Image: Leave Denial Codes USF page**

This example illustrates the fields and controls on the Leave Denial Codes USF page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Denial Letter Text** | Enter details of the reason for denial that you want to be printed on the Leave Denial Notifications report (FGPY031). |

## Leave Program Type Table Page

Use the Leave Program Type Table page (GVT_LV_XFR_TYP_TBL) to set up leave transfer programs, specify the program type, and indicate limits on donations and balances.

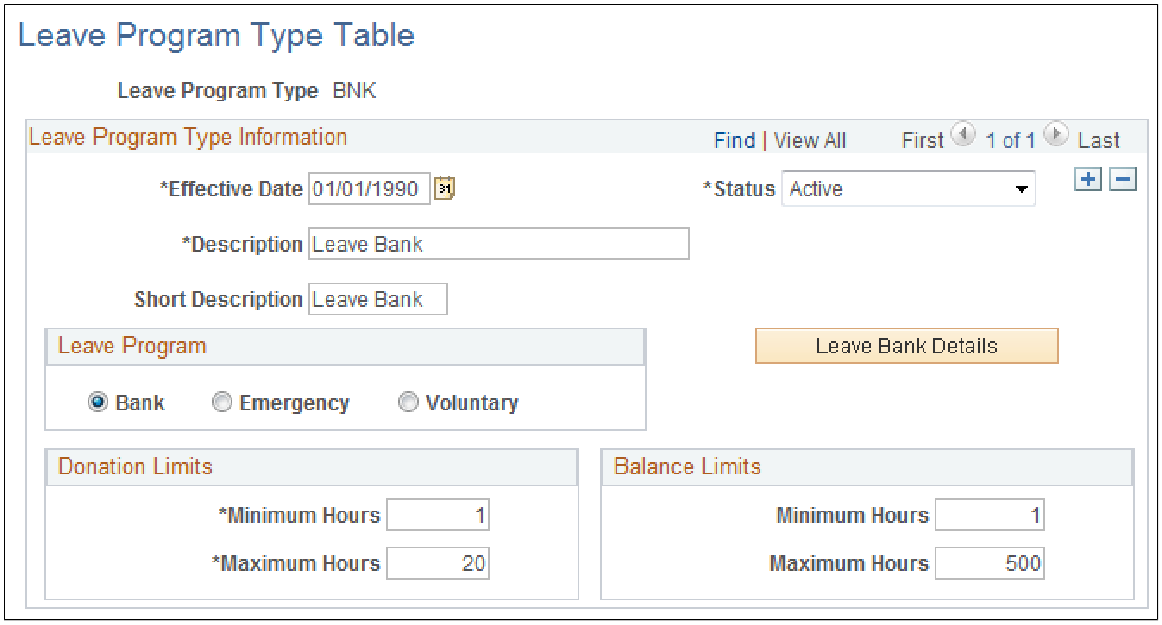
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Absence, Leave Program Type Table, Leave Program Type Table

**Image: Leave Program Type Table page**

This example illustrates the fields and controls on the Leave Program Type Table page. You can find definitions for the fields and controls later on this page.




## Leave Program Type Information

**Leave Program Type** Define your leave program codes.

**Leave Program** Select the type of leave transfer program (Bank, Emergency, Voluntary) to associate with this Leave Program Type code.

**Donation Limits and Balance Limits** Enter the Minimum Hours and Maximum Hours allowable for donations and balances.

**Leave Bank Details** Click to access the Leave Bank Details page and enter the Leave Bank board members and indicate those who are labor representatives. If you select *Bank* in the Leave Program group box, the system adds the Leave Bank Details button to the page when you save.

**Emergency Leave Transfer Dtl (emergency leave transfer details)** Click to access the Emergency Leave Transfer Details page and record the number of donation target hours. If the Leave Program Type is *Emergency,* the system adds the Emergency Leave Transfer Details button to the page when you save.

# Setting Up Earnings Codes for Leave Transfer

Set up three unique earnings codes for three distinct purposes:

- For donors to donate leave to transfer programs.
- For recipients to receive (accrue) leave from transfer programs.
- For recipients to use leave accrued from transfer programs.

## Leave Earning Type

PeopleSoft provides five Leave Earning Type codes as translate values. Associate these types with earnings codes that you set up for processing leave transfers. The type code you select defines the function of the earnings code within the leave bank and transfer program. The following table summarizes the processing that is triggered by these codes.

| ***Leave Earn Type*** | ***Leave Bank and Transfer Process*** | ***Earning Accrual Process*** |
|---|---|---|
| Donate to Bank | Updates the donor's Additional Pay page with the hours contributed to a Leave Bank Program.<br><br>Use the Leave Bank Application/Donate page to enter requests.<br><br>Updates Leave Bank Ledger inquiry page with hours contributed. | Donor's Annual:<br>• Increase Hours Taken YTD<br>• Reduce Balance YTD |
| Donate to Emergency | Updates the donor's Additional Pay page with the hours contributed to an Emergency Leave Transfer Program ( ELTP).<br><br>Use the Leave Bank Application/Donate page to enter requests.<br><br>Updates the Leave Bank Ledger with hours contributed. | Donor's Annual:<br>• Increase Hours Taken YTD<br>• Reduce Balance YTD |
| Donate to Recipient | Updates the donor's Additional Pay page with the hours contributed in the Voluntary Leave Transfer Program ( VLTP).<br><br>Use the Donor Contribution page to enter requests.<br><br>Updates the Track Leave Donation page. | Donor's Annual:<br>• Increase Hours Taken YTD<br>• Reduce Balance YTD |

| ***Leave Earn Type*** | ***Leave Bank and Transfer Process*** | ***Earning Accrual Process*** |
|---|---|---|
| Received from Bank | Updates the recipient's Additional Pay page with the hours received from the Bank or ELTP.<br><br>Use the Create Leave Recipient App page to enter requests.<br><br>Updates Leave Bank Ledgers with hours withdrawn. | Leave Program Recipient:<br><br>Increase Balance YTD |
| Received from Donor | Updates the recipient's Additional Pay page with the hours received through the VLTP.<br><br>Use the Create Leave Recipient App page to enter requests. | Leave Program Recipient:<br><br>Increase Balance YTD |

## Setting Up Earnings Codes for Donors and Recipient Accruals

Use the Earnings Table component to set up earnings codes for donors and recipient accruals. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only.* Leave transfer earnings codes process hours only; there are no earnings or deductions associated.
- Taxes page: There are no taxes taken. In the Earning Allocation group box, select *Maintain Earnings Balances.*
- Federal Additional Earnings page: In the Leave Bank and Transfer Type group box, select the appropriate Leave Earnings Type.
- Calculation Page: The Multiplication Factor must be 0.0000 to ensure no earnings.

## Setting Up an Earnings Code for Recipients to Use Transferred Leave

Use the Earnings Table component to set up earnings codes for recipients to use transferred leave. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only.*
- Taxes page: The earnings are fully taxable. In the Earning Allocation group box, select Add to Gross, Maintain Earnings Balances, and Hours Only.
- Calculation Page: The Multiplication Factor must be 1.0000 to ensure the earning is paid at the regular hourly rate.

## Related Links

"Understanding Earnings Tables *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Setting Up Earnings Accrual Classes for Leave Transfer

Set up earning accrual classes for the following purposes:

- Leave program recipient.

  Once an employee is approved as a recipient in either a Bank, ELTP, or VLTP, they must be enrolled into an Earning Accrual Class to track hours received and used during their program participation.

- Deferred Annual/Sick Leave.

  When an employee is participating in either an Agency Bank or VLTP, they must terminate their enrollment from regular annual and sick leave plans and enroll into the deferred annual and sick earning accrual classes. The deferred programs will track service hours and entitlement to a defined maximum accrual. For example, full time employees may accrue to the maximum of 40 hours.

  Employees participating in an ELTP are not subject to the accrual limit and do not need to be enrolled into the deferred programs.

- Annual Leave.

  All donated hours are taken from the employee's annual leave accrual class. Update each of your annual accrual classes with the three donor earning codes defined with Donate to Bank, Donate to Emergency, and Donate to Recipient leave earning types.

### Setting Up Earnings Accrual Classes for Leave Program Recipients

Use the Earnings Accruals component to set up earnings accrual classes for leave program recipients. You must use the specified values for the following fields:

- Class page: In the Leave Type field, select *Leave Program.*

- Balance page: The values you enter depend upon the purpose of the earnings code you're adding to the class.

  For earnings codes used to accrue recipient leave transfer, select *Add to Hours Earned.*

  For earnings codes used when recipients use transferred leave, select *Add to Service Hours* and *Add to Hours Taken.*

### Setting Up Earnings Accrual Classes for Deferred Annual/Sick

Use the Earnings Accruals component to create a deferred earning accrual class for every annual and sick accrual class that has a different accrual maximum during an employee participation in the leave bank or transfer programs.

Deferred accrual classes need to mirror the accrual classes that they are replacing; the only difference in the two classes is the leave type and accrual ceiling.

For example, the Deferred Annual Accrual Class mirrors the Annual Accrual Class by having the same accrual calculation, carryover, expiration/termination, accrual rates, and balance earning codes. The only difference in the two classes is the Leave Type and Accrual Ceiling. In this example, enter the following information:

- Class page: In the Leave Type field, select *Deferred Annual.*

- Ceiling/Carryover page: Set up the accrual ceiling as desired for the deferred accrual class.

### Setting Up Annual Accrual Classes for Leave Transfer Processing

All donated hours to bank and transfer programs are withdrawn from the employee's Annual Leave Accrual Class. You must update all your Annual Accrual Class Balance tables with the three earning codes you set up with the leave earnings types of Donate to Bank, Donate to Emergency, and Donate to Recipient.

### Related Links

"Defining Earnings Accrual Classes *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Leave Class Rules USF Page

Use the Leave Class Rules USF page (GVT_LV_CLS_RULES) to define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.

You can define leave class rules to enroll an approved recipient automatically into the accrual class that you create to track leave program activity. Use this page to define the automatic enrollment rule for each leave program type you set up.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules USF

- Select *Leave Program Status* as the Leave Class Rules Criteria Type.
- Select the appropriate Leave Program Type.

### Related Links

Leave Class Rules USF Page

# Administering Leave Donations

Employees may donate hours to an agency Leave Bank, ELTP, or VTLP. The contribution process is the same for the Bank and ELTP programs, where hours are donated to a common pool. However, the contribution process is different for the VLTP, where the hours are donated directly to an employee.

These topics discuss how to:

- Enter employee requests to contribute leave to a Leave Bank or ELTP.
- Enter employee donations to the VLTP.
- Enter employee requests to donate to another agency's leave transfer program.
- Run the Leave Bank and Transfer process.

## Pages Used to Administer Leave Donations

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Leave Bank Application/ Donate | GVT_LV_BANK_APP | Workforce Administration, Leave Administration USF, Reports, Leave Bank Application/Donate, Leave Bank Application/Donate | Enter employee requests to contribute leave to a Leave Bank or ELTP. |
| Donor Contribution | GVT_LV_DON_CONTRIB | Workforce Administration, Leave Administration USF, Manage Leave Information, Voluntary Donations, Donor Contribution | Enter employee donations to the VLTP. |
| External Leave Donations | GVT_LV_DON_EXT | Workforce Administration, Leave Administration USF, Manage Leave Information, External Leave Donations, External Leave Donations | Enter employee requests to donate to another agency's leave transfer program. |
| Process Leave Bank/Transfers | RUNCTL_FGPY022 | Workforce Administration, Leave Administration USF, Manage Leave Information, Process Leave Bank/Transfers | Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers. |

## Leave Bank Application/Donate Page

Use the Leave Bank Application/Donate page (GVT_LV_BANK_APP) to enter employee requests to contribute leave to a Leave Bank or ELTP.

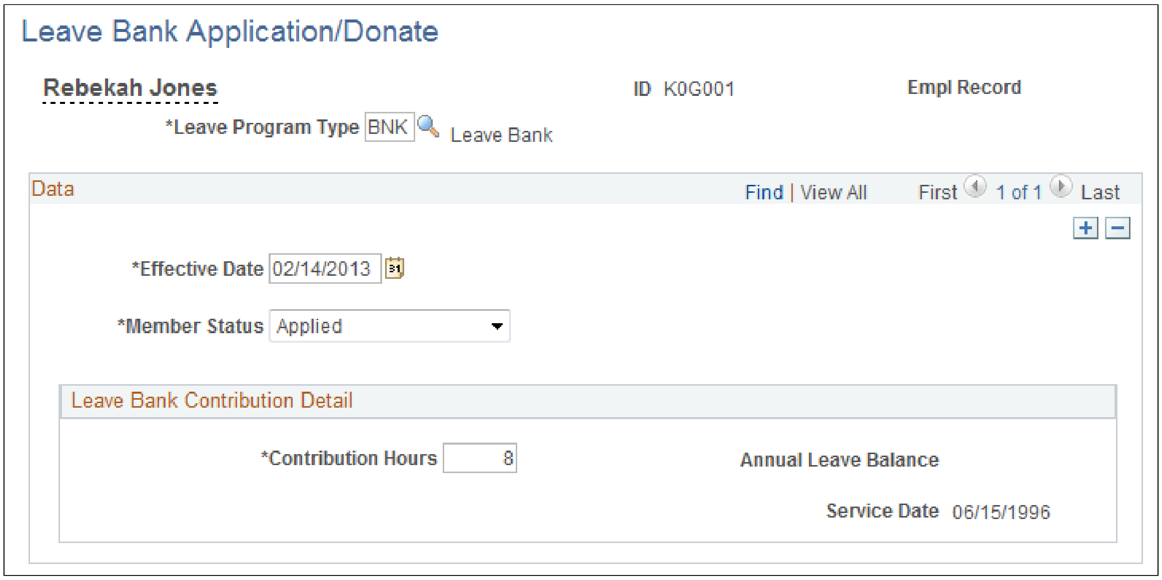
 

**Navigation**

Workforce Administration, Leave Administration USF, Reports, Leave Bank Application/Donate, Leave Bank Application/Donate

**Image: Leave Bank Application/Donate page**

This example illustrates the fields and controls on the Leave Bank Application/Donate page. You can find definitions for the fields and controls later on this page.




**Leave Program Type** Select the leave program type to which the employee is donating. Valid values are the Leave Program Types you set up for Bank and Emergency leave programs.

**Effective Date** The request date of the application.

**Member Status** Select or view the member status of the leave request. Values are:

*Applied:* The Leave Bank Board has not processed the request and no annual leave contributions have been taken from the employee's current Earnings Accrual Class balance.

*Approved:* The leave review board has approved the donor's leave request. The system processes only *Approved* requests.

*Contribute:* The system processes the hours during the next payroll cycle and updates the hours on the employee's additional pay to reduce the balance by the donation hours on the application. Only the system can update the applicant's request to *Contribute*; it issues an error message if you select this value.

*Cancelled:* Indicates any other reason that the request is terminated.

*Denied:* The Leave Bank Board has evaluated the request and denied the donor's leave request.

| | |
|---|---|
| **Denial Reason 1 and Denial Reason 2** | These fields appear if you select Denied as the Member Status. You must provide the applicant with at least one reason for denial. |
| **Contribution Hours** | Specify the number of hours the donor is contributing to the leave bank or ELTP. |
| **Annual Leave Balance** | Displays the number of hours of annual leave the employee has as of this request date (Effective Date). |
| **Service Date** | The basis for determining the length of service, on which the required contribution minimum is based. |

## Donor Contribution Page

Use the Donor Contribution page (GVT_LV_DON_CONTRIB) to enter employee donations to the VLTP.

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, Voluntary Donations, Donor Contribution

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**Note:** Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

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Recipient information is displayed at the top of the page.

| | |
|---|---|
| **Effective Date** | The date of the donation. |

### Donor Details

In this group box, enter the donor information. The system enters the pay period in which the donation was processed. Donations are not processed until the recipient's application is approved.

The Return to, Returned Processed, and Pay Period Return Date assist you in recording your manual leave donation return process. If an employee has donated leave, and it is not needed, it may be returned to the donor.

| | |
|---|---|
| **Return to** | Acknowledges the donor's choice for the disposition of where the leave should be returned in the case that any unused leave is returned. Valid values are *Donor* or *Bank.* This field is informational only and used to track the return of excess leave donation hours. |
| **Returned Processed** | When a leave recipient has excess leave when their emergency is over, select this check box when the leave amount to be returned is restored to the Donor. This field is informational only and used to track the return of excess leave donation hours. |
| **Pay Period Return Date** | Enter the date the leave is restored to the donor. The field is informational only and used to track the return of excess leave donation hours. |

## External Leave Donations Page

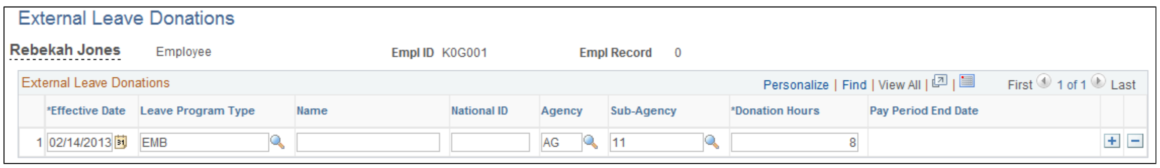
Use the External Leave Donations page (GVT_LV_DON_EXT) to enter employee requests to donate to another agency's leave transfer program.

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, External Leave Donations, External Leave Donations

**Image: External Leave Donations page**

This example illustrates the fields and controls on the External Leave Donations page. You can find definitions for the fields and controls later on this page.

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**Note:** Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

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Record the details of donations made by an employee in your agency to another agency's leave transfer program. The system updates the donor's accrual balances when you run the Leave Bank / Transfer process.

## Process Leave Bank / Transfer Page

Use the Process Leave Bank/Transfers page (RUNCTL_FGPY022) to run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers.

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, Process Leave Bank/Transfers

Run the Leave Bank and Transfer process (FGPY022) after employees have donated hours. The process loads the Additional Pay page and applies the donation amount to the Leave Bank Ledgers. The process can be run multiple times and should be run prior to your payroll cycle.

The system processes all employee leave bank applications with Member Status *Approved* and an effective date equal to or before the As of Date you enter on the run control page.

### Related Links

"Create Additional Pay Page *(PeopleSoft HCM 9.2: Payroll for North America)*"

Process Leave Bank/Transfer Page

# Administering Leave Recipients

Employees may receive hours from a Bank, ELTP or VTLP. The process to receive hours from all leave program types is the same.

These topics discuss how to:

1. Enter employee requests to receive hours from any of the leave program types.
2. Enroll recipients in the leave program accrual class.
3. Run the Leave Bank and Transfer process for approved recipients.
4. View and adjust the data entered by the Leave Bank and Transfer process.
5. View recipient accrual balances.

## Page Used to Administer Leave Recipients

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Create Leave Recipient App | GVT_LV_RECIP_INFO | Workforce Administration, Leave Administration USF, Manage Leave Information, Create Leave Recipient App, Create Leave Recipient App | Enter employee requests to receive hours from any of the leave program types. |

## Create Leave Recipient App Page

Use the Create Leave Recipient App page (GVT_LV_RECIP_INFO) to enter employee requests to receive hours from any of the leave program types.

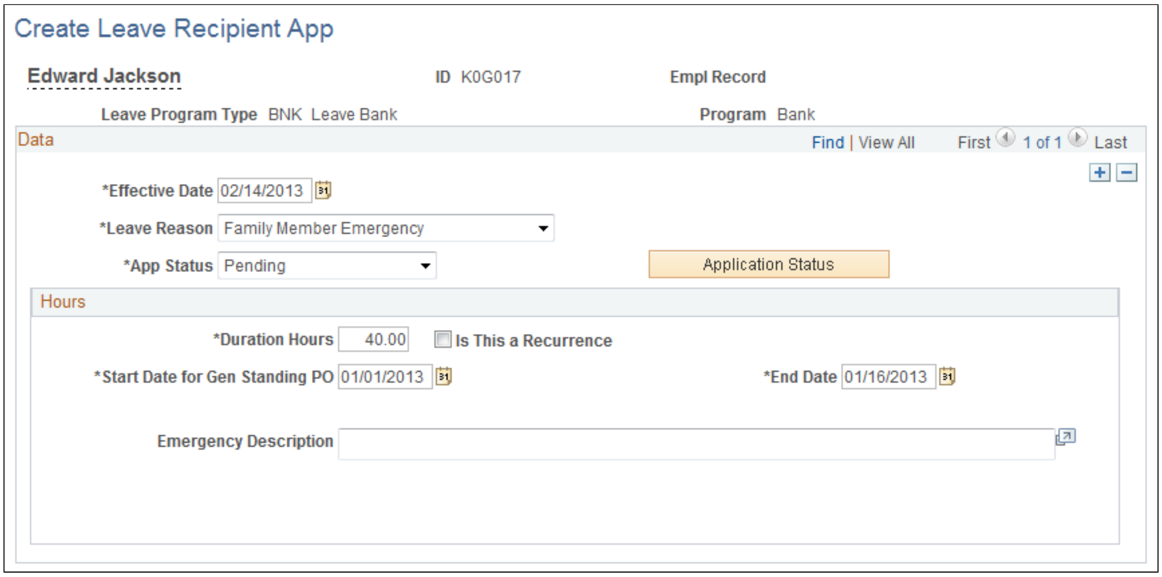
 

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, Create Leave Recipient App, Create Leave Recipient App

**Image: Create Leave Recipient App page**

This example illustrates the fields and controls on the Create Leave Recipient App page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Effective Date** | Enter the date that leave program participation was requested. |
| **Leave Reason** | Select the reason for the emergency leave requested. Values are *Employee, Family,* and *Agency.* |
| **App Status (application status)** | Select the status from the following values:<br>*Pending:* The leave review board has not processed the request.<br>*Approved:* The leave review board has approved the request.<br>*Denied:* The leave review board has denied the request.<br>*Separated:* The employee separated from Federal service before the originally requested end date.<br>*Cancelled:* Any other reason that the request is not active. |
| **Position Detail** | Click to view the position number, pay plan, grade, and step of the potential leave recipient as of the request date. Standard hours and tour of duty are used to validate the minimum number of absence hours. |
| **Application Status** | Click to identify the approver and the status Date. If the Leave Recipient Application has a status of Denied, then you may enter up to two. You must enter at least one denial reason. These |

| | |
|---|---|
| | codes are used later when generating Leave Recipient Denial letters. |

### Hours

| | |
|---|---|
| **Duration Hours** | Enter the number of hours requested (to the quarter-hour). |
| **Is This a Recurrence** | Select if the reason is a recurrence. |
| **Start Date for Gen Standing PO andEnd Date** | Enter the days on which the recipient requests the leave to begin and end. |
| **Emergency Description** | Detail the reasons for needing transferred leave, including a brief description of the nature and severity of the emergency. |

## Enrolling Recipients in the Leave Program Accrual Class

While receiving hours from a leave program, the recipient must be enrolled in the leave program accrual class to record hours donated and used.

If the program is either a Bank or VLTP, terminate enrollment from their regular and sick earnings accrual classes using the Employee Accruals Enrollment page. Then enroll the recipient into the deferred accrual classes to track accruals during the program participation and enforce the maximum entitlement.

If there is an auto enrollment leave class rule set up for the leave programs, then once the approved request is saved, the application opens the employee's Employee Accruals Enrollment page and inserts the earning accrual defined in the class rule. While in the page, you may terminate the annual and sick and enroll the employee in the deferred annual and sick accrual classes.

### Related Links

Employee Accruals Enrollment Page

## Process Leave Bank/Transfer Page

Access the Process Leave Bank/Transfer page.

The Leave Bank & Transfer process (FGPY022) processes *Approved* recipients.

If the employee is participating in a Bank or ELTP, the process:

- Updates the recipient's Additional Pay page with the earnings code defined on the Earnings Code Table with *Received from Bank* as the Leave Earning Type.
- Updates the Leave Bank Ledger with hours withdrawn.
- If the employee is participating in a VLTP, the process updates the recipient's Additional Pay page with earnings code defined on the Earnings Code Table with *Received from Donor* as the Leave Earning Type.

### Viewing the Data Entered by the Leave Bank and Transfer Process

See Review Leave Bank Ledger Page.

### Viewing Recipient Accrual Balances

See Viewing Donor and Recipient Accrual Summaries.

## Viewing Leave Transfer Data

After you run the Leave Bank / Transfer process, you can view leave transfer data.

These topics discuss how to:

- View leave donations to leave bank and emergency leave transfer programs.
- View leave donations to voluntary leave transfer programs.
- View donor and recipient accrual summaries.
- View donor contributions or hours received by recipients.
- View a summary of participation in a leave transfer program.

### Pages Used to View Leave Transfer Data

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Review Leave Bank Ledger | GVT_LV_BANK_LDGR | Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Bank Ledger, Review Leave Bank Ledger | View and adjust leave donations to leave bank and emergency leave transfer programs. |
| Track Leave Donation | GVT_LV_DON_TRACK | Workforce Administration, Leave Administration USF, Manage Leave Information, Track Leave Donation, Track Leave Donation | View leave donations to voluntary leave transfer programs. |
| Review Leave Program Summary | GVT_LV_PRGM_SUMM | Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Program Summary, Review Leave Program Summary | View a summary of participation in a leave transfer program. |

### Review Leave Bank Ledger Page

Use the Review Leave Bank Ledger page (GVT_LV_BANK_LDGR) to view and adjust leave donations to leave bank and emergency leave transfer programs.

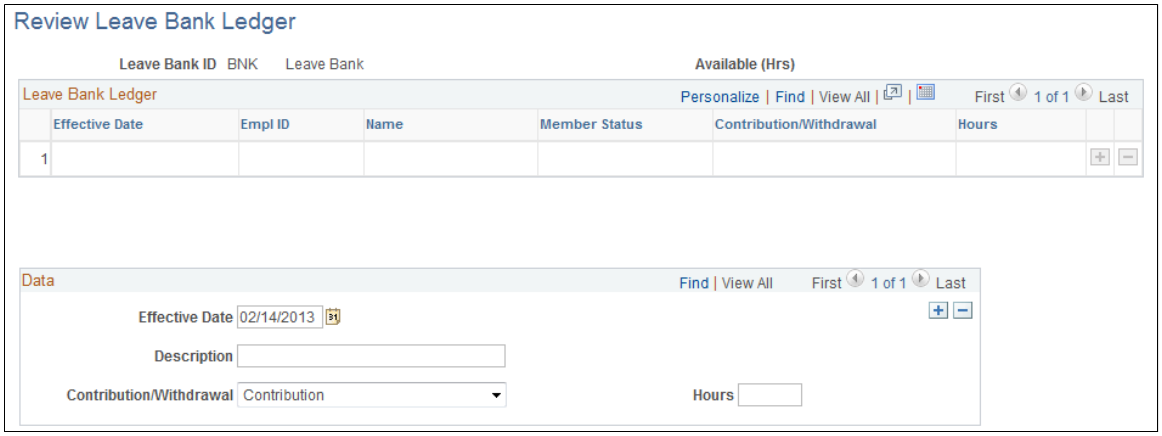
 

### Navigation

Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Bank Ledger, Review Leave Bank Ledger

### Image: Review Leave Bank Ledger page

This example illustrates the fields and controls on the Review Leave Bank Ledger page. You can find definitions for the fields and controls later on this page.




The Leave Bank Ledger tracks the activity within the Bank and ELTP leave programs. The Leave Bank and Transfer process updates the ledgers with the transactions it has processed.

| | |
|---|---|
| **Available (Hrs)** | Displays the total number of hours available in the bank or ELTP. The system updates this value when you adjust the Contribution/Withdrawal and Hours fields. |

## Leave Bank Ledger

| | |
|---|---|
| **Effective Date** | Displays the As Of Date on the Leave Bank / Transfer process run control page. |
| **EmplID and Name** | List of all the employees who have participated in the bank. |
| **Member Status** | Displays the member status for the transfer. |
| **Contribution/ Withdrawal** | Indicates whether each transaction is a contribution or a withdrawal. |
| **Hours** | Displays the number of hours contributed or withdrawn in each transaction. |

## Agency Ledger Adjustments

To adjust the hours, enter the effective date, the reason for the adjustment, and the hours to add or subtract. The system updates the Available Hours balance at the top of the page.

## Track Leave Donation Page

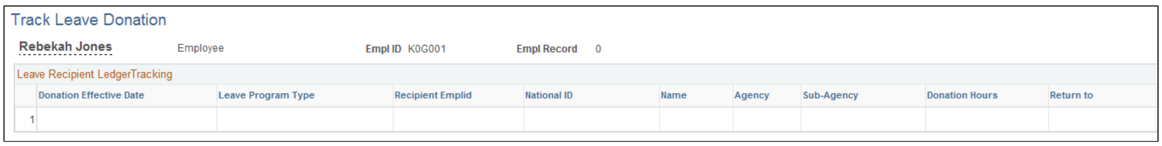
Use the Track Leave Donation page (GVT_LV_DON_TRACK) to view leave donations to voluntary leave transfer programs.

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, Track Leave Donation, Track Leave Donation

**Image: Track Leave Donation page**

This example illustrates the fields and controls on the Track Leave Donation page. You can find definitions for the fields and controls later on this page.

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**Note:** Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

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The Track Leave Donation page tracks the activity within the VLTP program. The Leave Bank & Transfer process updates this page with the transactions it has processed.

The page lists the donor's contributions by effective date and recipient.

## Viewing Donor and Recipient Accrual Summaries

View donor and recipient accrual balances on the Accrual Summary page after payroll is processed and leave accruals are run.

- Donors: The fields Hours Taken Year-to-Date and Hours Balance Year-to-Date are updated with the hours contributed.
- Recipients: Leave program earning accrual is updated with the hours received. When the recipient uses hours, the Hours Taken Year-to-Date and Service Hours YTD are updated.
- Recipients who terminate regular and sick accrual classes and enroll in deferred accrual classes: The deferred accrual class is updated with the pay period's Service Hours YTD, Hours Earned Year-to-Date, and Hours Balance Year-to-Date.

### Related Links

"(USF) Reviewing and Adjusting Leave Accrual Balances *(PeopleSoft HCM 9.2: Payroll for North America)*"

## Viewing Donor Contributions or Hours Received by Recipients

The Leave Bank and Transfer process inserts a row in the Additional Pay page for hours donated or received. The new row contains donor contribution or hours received information in the following fields.

**Earnings Code** — The earnings code associated with the appropriate Leave Earn Type.

**Effective Date** — The As Of Date on the Leave Bank / Transfer page.

**Earnings End Date** — The end date of the pay period in which the effective date falls.

**Hours** — The hours donated or received.

## Review Leave Program Summary Page

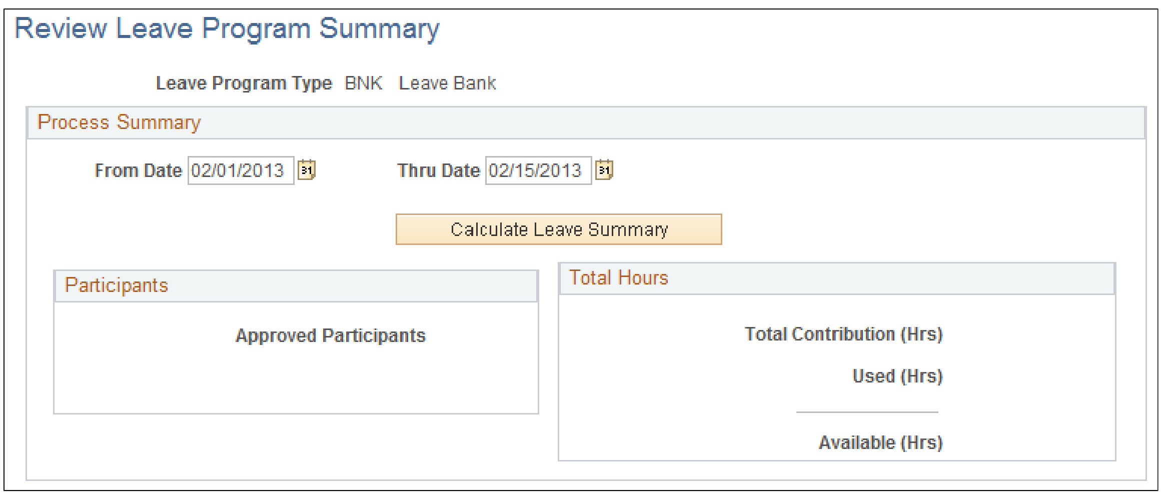
Use the Review Leave Program Summary page (GVT_LV_PRGM_SUMM) to view a summary of participation in a leave transfer program.

**Navigation**

Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Program Summary, Review Leave Program Summary

**Image: Review Leave Program Summary page**

This example illustrates the fields and controls on the Review Leave Program Summary page. You can find definitions for the fields and controls later on this page.




**From Date and Thru Date** — Define the time period for which you want to see a summary.

**Calculate Leave Summary** — Click after entering the date range. The system displays summary information.

**Participants** — The system displays the number of approved participants and denied participants.

**Total Hours** — The system displays the total number of hours contributed, the total number of hours used, and the number of hours available for use (derived from the contribution hours and used hours).

## Reporting on Leave Transfer Programs

PeopleSoft provides the following leave transfer reports:

- FGPY028 − Leave Acceptance Notifications.
- FGPY029 − Leave Bank Participants (required by OPM).
- FGPY030 − Leave Transfer Participants (required by OPM).
- FGPY031 − Leave Denial Notifications.

### Related Links

"PeopleSoft Payroll for North America Reports: A to Z *(PeopleSoft HCM 9.2: Payroll for North America)*"

Chapter 22

# (USF) National Finance Center Processing

## Understanding NFC Processing

The NFC processes payroll for the majority of U.S. civilian federal government employees. This population consists of approximately 600,000 individuals. Consequently, the NFC and its federal customers generate a high volume of human resources transactions each day. The NFC SINQ Import process enables you to upload the daily SINQ transaction file from NFC. Positions, job codes and personnel actions are identified and marked as SINQed (for example, failed). The last operator (OPRID) who updated the SINQ row is notified to correct transactions in the PeopleSoft Human Resources system.

Additionally, the NFC SINQ Import process:

- Automates the assignment of errors to human resources personnel in your agency.
- Enables human resource personnel to view and change transaction status.

## Common Elements Used in National Finance Center Processing

**National Finance Center (NFC)** — Part of the U.S. Department of Agriculture that provides payroll services to more than 600,000 federal employees.

**Personnel Action Processing System (PACT)** — NFC's online system for entering personnel actions into the payroll and personnel databases.

**Personnel Management System (PMSO)** — NFC's online system used for creating, editing, inactivating, reactivating or deleting individual (position) and master ( jobcode) data. Position data must be entered into PMSO before personnel data can be entered into PACT.

**Personnel Edit Subsytem (PINE)** — NFC's system that combines PACT and PMSO data and processes edits against the submitted personnel and position transactions. PACT and PMSO transactions must pass PINE edits before they are processed through NFC's Personnel Processing System (PEPL) to update the Payroll/Personnel System database (PPS). PINE processes Monday through Friday of each week, and the first Saturday of the pay period.

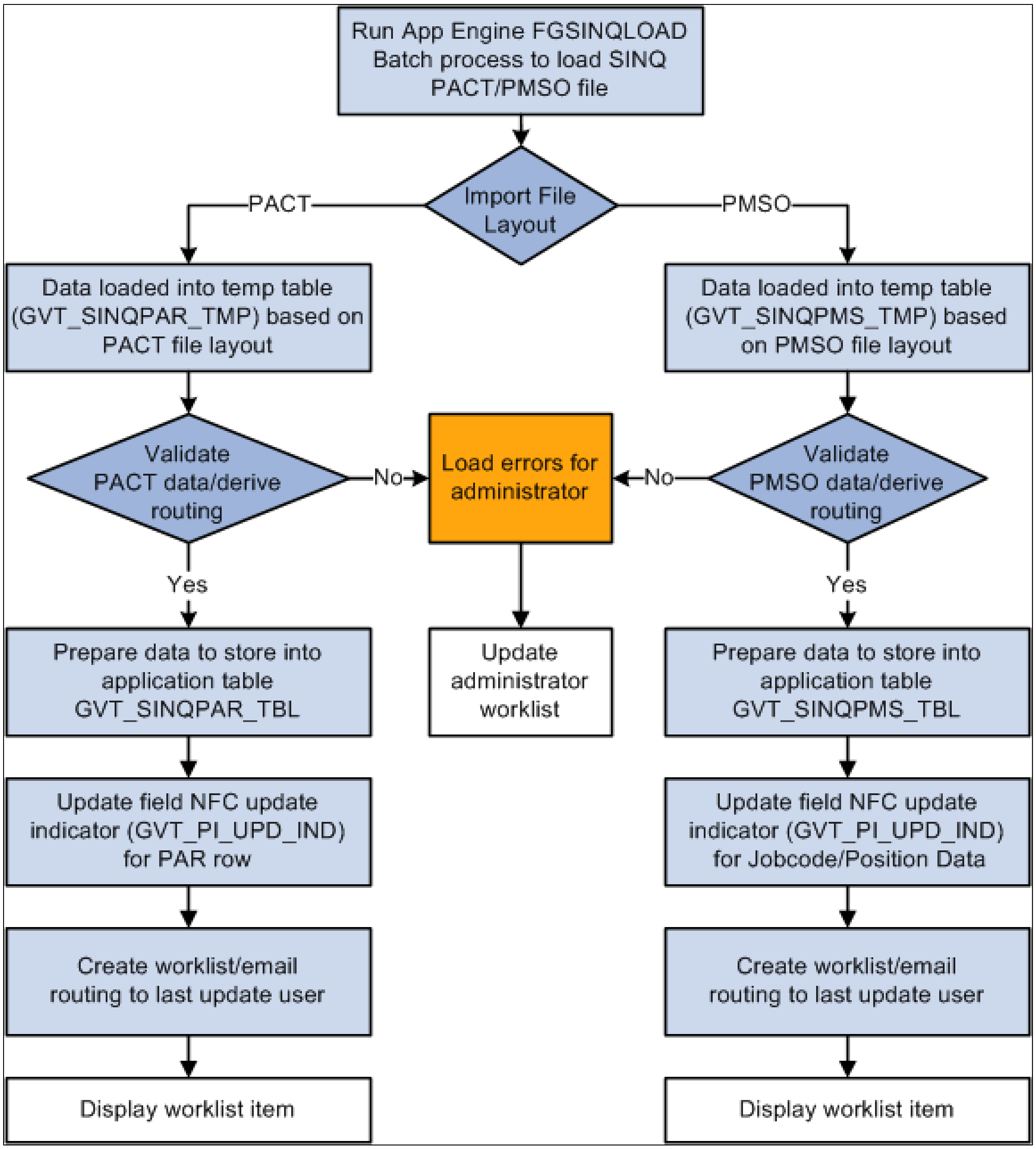
**Suspense Inquiry and Correction System (SINQ).** — Position (PMSO) and personnel (PACT) transactions that do not pass PINE edits are placed in the this system.

## Understanding the Process Flow for the SINQ Import Process

**Image: The SINQ import process populates application tables, updates the NFC update indicator, and generates notifications**

This diagram shows the process flow for the SINQ Import process. The process is similar for PACT and PMSO except that different tables are used. For both PACT and PMSO, the batch process loads data into a temporary table, validates the data, prepares to move the data into an application table, updates the NFC update indicator field, and notifies the last update user:




This table describes the NFC PACT import file layout supported by the SINQ import process. A sample import file, fgnfcpinesinq.dat, is delivered under your product data directory.

| **Field Name** | **Start Position** | **Length** | **Field Type** | **Description** |
|---|---|---|---|---|
| ERR_SSN_NO | 1 | 9 | Char | Employee SSN (no dashes) |
| ERR_SUBAGENCY | 10 | 2 | Char | NFC agency (sub) code (that is, 70, 71) |
| ERR_POI | 12 | 4 | Char | Agency Personnel Office Identifier |
| ERR_COMPANY | 16 | 2 | Char | Company Cd |
| ERR_DOC_TYPE | 18 | 3 | Char | NFC doc type (action) |
| ERR_PAY_PERIOD | 21 | 2 | Char | Pay period that action was processed in. |
| ERR_AUTH_DATE | 23 | 6 | Num | Date action was authorized |
| GVT_STATUS_TYPE | 29 | 3 | Char | NFC nature of action code ( denotes correction or cancellation of action) CAN = 001, COR = 002 |
| GVT_NOA_CODE | 32 | 3 | Char | NFC nature of action code (type of action) |
| ERR_EFFDT | 35 | 6 | Num | Date action was effective (month) |
| ERR_BATCH_NO | 41 | 4 | Char | NFC batch processing identifier |
| ERR_OPER_CODE | 45 | 7 | Char | HR specialist (id) submitting the action |
| ERR_CODE | 52 | 3 | Char | NFC error code |
| ERR_MSG | 55 | 50 | Char | NFC error message |

This table describes the NFC PMSO import file layout supported by the SINQ import process. A sample import file, fgnfcpmsosinq.dat, is delivered under your product data directory.

| **Field Name** | **Start Posn** | **Length** | **Field Type** | **Description** |
|---|---|---|---|---|
| SUSP_OPER_CD | 1 | 7 | Char | HR specialist (id) submitting the action |
| SUSP_MAST_INDV | 8 | 4 | Char | "MSTR" if job code action / "INDV" if position action |

| Field Name | Start Posn | Length | Field Type | Description |
|---|---|---|---|---|
| SUSP_FUNCTION_CD | 12 | 10 | Char | Type of action performed (for example, CHANGE, ADD, and so forth) |
| SUSP_COMPANY | 22 | 2 | Char | Company Cd |
| SUSP_SUBAGCY | 24 | 2 | Char | NFC agency (sub) code (for example, 70, 71, and so forth) |
| SUSP_POI | 26 | 4 | Char | Agency Personnel Office Identifier Example: POI 1536 for Smithsonian |
| SUSP_JOBCODE | 30 | 6 | Num | Jobcode |
| SUSP_GRADE | 36 | 2 | Num | Pay grade level of position/job code |
| SUSP_POSITION_NBR | 38 | 8 | Num | Position Number |
| SUSP_INCUM-SSN | 46 | 9 | Char | SSN of current or last employee holding position |
| SUSP_OBLIG-SSN | 55 | 9 | Char | SSN of new hire employee filling position |
| SUSP_PAY_PERIOD | 64 | 2 | Num | Pay period that action was processed in |
| SUSP_PASS_NUM | 66 | 2 | Num | NFC processing sequence within pay period (1, 2, 3, and so forth) |
| SUSP_ERR_CD | 68 | 3 | Num | NFC error code |
| SUSP_ERR_MSG | 71 | 50 | Char | NFC error message |
| SUSP_ELEM_NAME_NUM | 121 | 3 | Char | NFC element number (record field location) where error detected |
| SUSP_ELEM_NAME | 124 | 30 | Char | NFC element name ( record field location) where error detected |
| SUSP_DATA_FIELD | 154 | 8 | Char | NFC element content ( field value) where error detected |

## Supported Document Types

PeopleSoft delivers and supports four document types that correspond to the types of data imported during the SINQ Import process. The delivered document types are listed in this table:

| ***NFC Document Type*** | ***Description*** |
|---|---|
| 063 | Personnel Action |
| 110 | Award |
| 112 | Cash Award |
| 123 | Education |

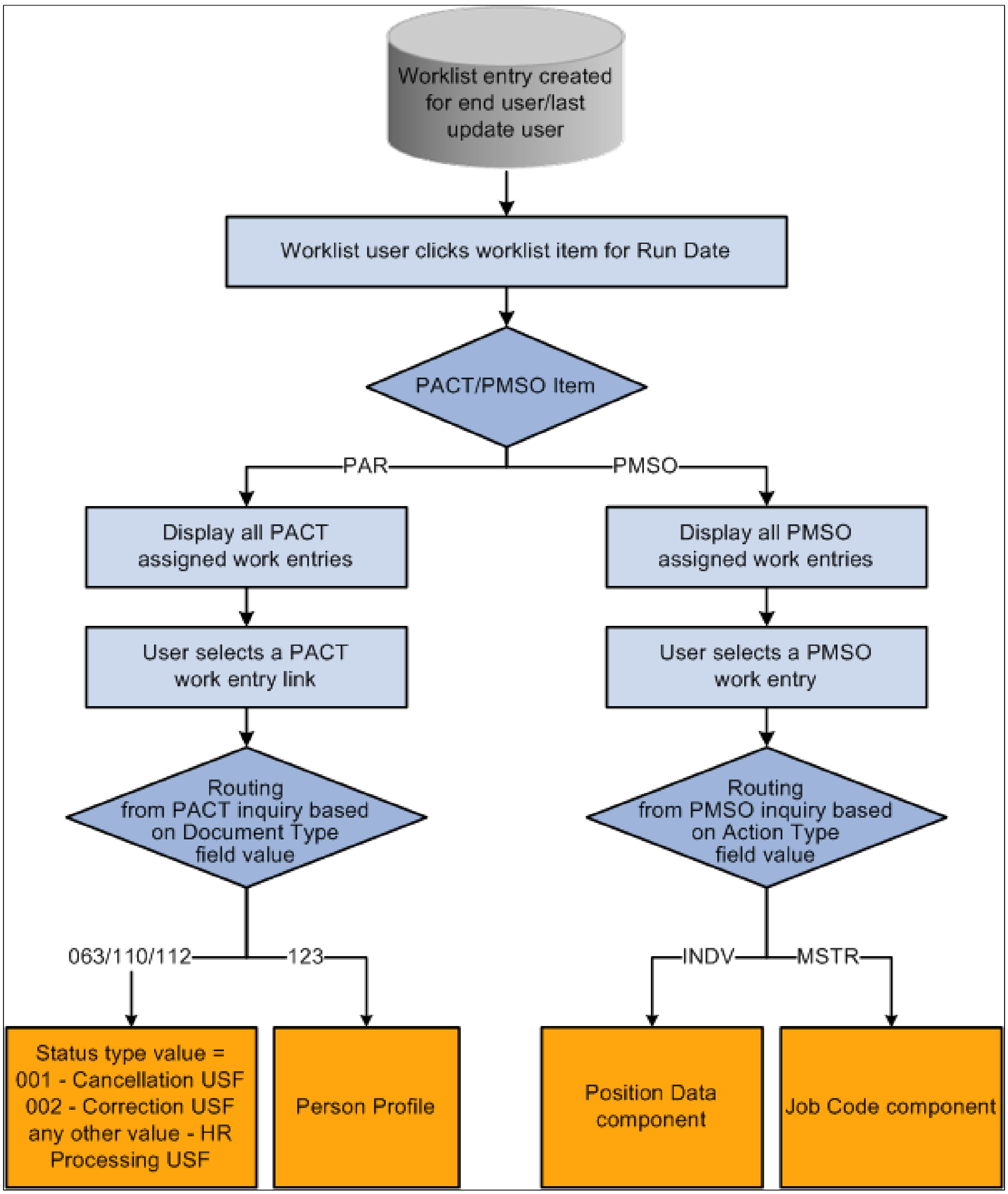
System administrators can filter any of these NFC document types when they run the SINQ Import process.

## Understanding the Process Flow for SINQ Transactions

The SINQ Import process generates a worklist entry and an email message. The recipient uses the worklist entry to access a list of all PACT or PMSO assigned work entries. Clicking a work entry routes the user to the component where the work is to be performed.

**Image: Using the SINQ transaction worklist to access components where work is to be performed**

The following diagram illustrates the process of using the worklist notification to access first the list of work entries and subsequently the components where the work is to be performed:



When a user selects an assigned work entry for a PACT SINQ row, the page that is displayed depends on the NFC document type and the status type values. If the NFC document type is 063 (Personnel action), 110 (Award action) or 112 (Education), the pages that are displayed are:

- If the Status type value equals 001, the Cancel Personnel Action USF (EE_CANCELLATION) component is displayed.
- If the Status type value equals 002, the Correct Personnel Action USF (EE_CORRECTION) component is displayed.
- If the Status type value equals blank or any other value, HR Processing USF (EE_HR_PROC) component is displayed.

See Understanding the Administering PAR System.

If the NFC document type is 123, the Person Profile component is displayed.

See "Person Profile Page *(PeopleSoft HCM 9.2: Human Resources Manage Profiles)*".

When a user select an assigned work entry for a PMSO SINQ row:

- If Action type field value is INDV, the Position Data component is displayed.
- If Action type field value is MSTR, the Job Code component is displayed.

See "Creating Positions *(PeopleSoft HCM 9.2: Human Resources Manage Positions)*", "Classifying Jobs *(PeopleSoft HCM 9.2: Application Fundamentals)*".

# Setting Up NFC Document Types

To set up NFC document types, use the NFC Import Document Types (GVT_NFC_DOC_TYPE) component.

This topic discusses how to set up NFC document types.

## Page Used to Set Up NFC Document Types

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| NFC Import Document Types | GVT_NFC_DOC_TYPE | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, NFC Import Document Types, NFC Import Document Types | Setup component for NFC document types. |

## NFC Import Document Types Page

Use the NFC Import Document Types page (GVT_NFC_DOC_TYPE) to setup component for NFC document types.

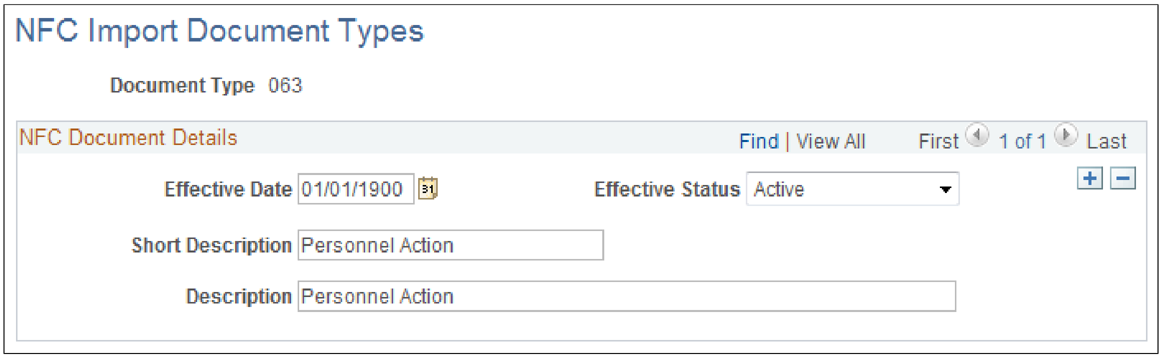
 

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, NFC Import Document Types, NFC Import Document Types

**Image: NFC Import Document Types page**

This example illustrates the fields and controls on the NFC Import Document Types page. You can find definitions for the fields and controls later on this page.




The four NFC document types that are supported by the SINQ import process are delivered by PeopleSoft. They are described in this table:

| ***NFC Document Type*** | ***Description*** |
|---|---|
| 063 | Personnel Action |
| 110 | Award |
| 112 | Cash Award |
| 123 | Education |

## Setting Up NFC SINQ Import Process Parameters

To define NFC SINQ import process parameters, use the NFC Import Process Parameters (GVT_NFC_DOC_LIST) component.

This topic discusses how to set up process parameter lists that are used by the NFC SINQ Import process run control page:

- Define SINQ Import Document lists.
- Define System User IDs that need special processing.

## Pages Used to Set Up NFC SINQ Import Process Parameters

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| NFC Import Document List | GVT_NFC_DOC_LIST | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC Import Document List | Set up NFC document types that will be processed by the PACT SINQ import. This field corresponds to ERR_ DOC_TYPE (position 18) on the PACT import file. |
| NFC System UserId List | GVT_NFC_OPR_LIST | Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC System UserId List | Enter UserIDs that the system will ignore during the SINQ Import process. The system uses *like* logic to make the comparison. This field corresponds to ERR_OPER _CODE (position 45) on the PACT import file. |

## NFC Import Document List Page

Use the NFC Import Document List page (GVT_NFC_DOC_LIST) to set up NFC document types that will be processed by the PACT SINQ import.

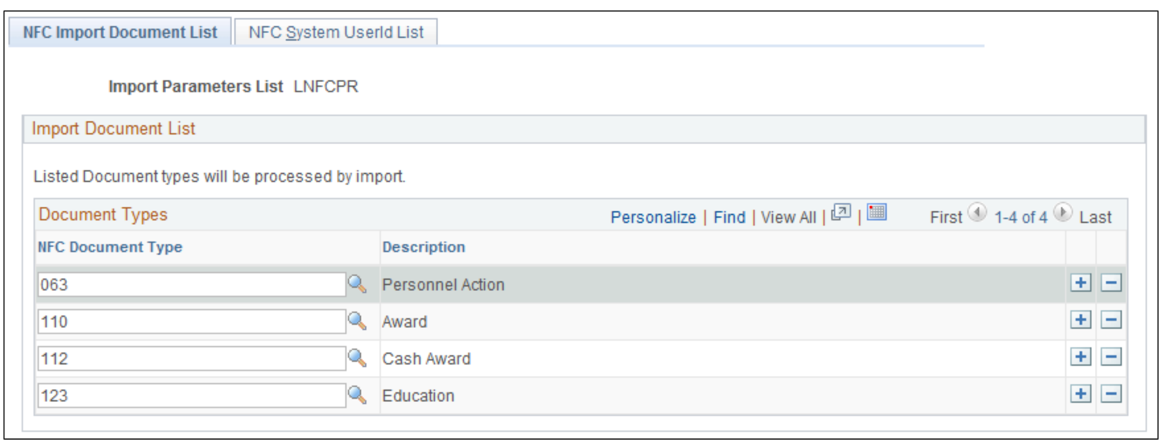
This field corresponds to ERR_DOC_TYPE (position 18) on the PACT import file.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC Import Document List

**Image: NFC Import Document List page**

This example illustrates the fields and controls on the NFC Import Document List page. You can find definitions for the fields and controls later on this page.




Use this page to create lists containing different NFC PACT transactions to import during the SINQ Import process.

**Note:** You can easily add and delete rows from an Import Document List for a single SINQ Import process run using the View Import Parameters List link on the Run SINQ Import Process page.

## NFC System UserId List Page

Use the NFC System UserId List page (GVT_NFC_OPR_LIST) to enter UserIDs that the system will ignore during the SINQ Import process.

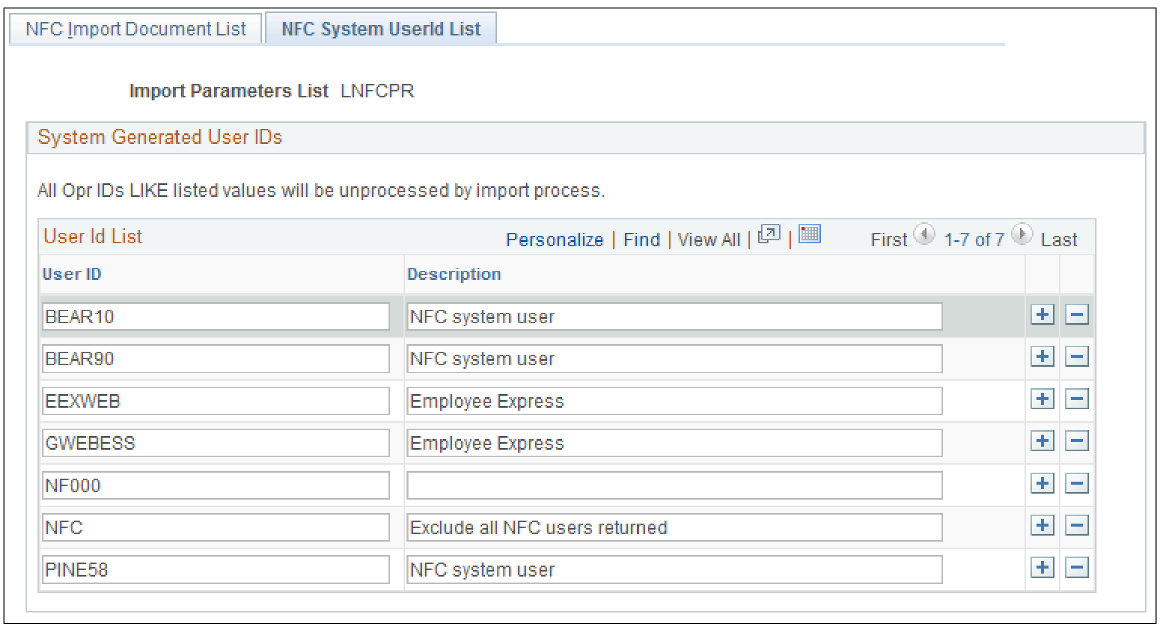
The system uses *like* logic to make the comparison. This field corresponds to ERR_OPER_CODE (position 45) on the PACT import file.

**Navigation**

Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC System UserId List

**Image: NFC System UserId List page**

This example illustrates the fields and controls on the NFC System UserId List page. You can find definitions for the fields and controls later on this page.




Enter User IDs that are from other systems that the SINQ Import process should ignore. The system performs the comparison based on *like* comparison logic.

# Running the NFC SINQ Import Process

This topic discusses how to run the NFC SINQ Import process.

## Page Used to Run the NFC SINQ Import Process

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Run SINQ Import Process | RUNCNTL_GVTSINQ | Workforce Administration, Collective Processes, NFC Import Process USF, Run SINQ Import Process, Run SINQ Import Process | Run the NFC SINQ Import process. |

## Run SINQ Import Process Page

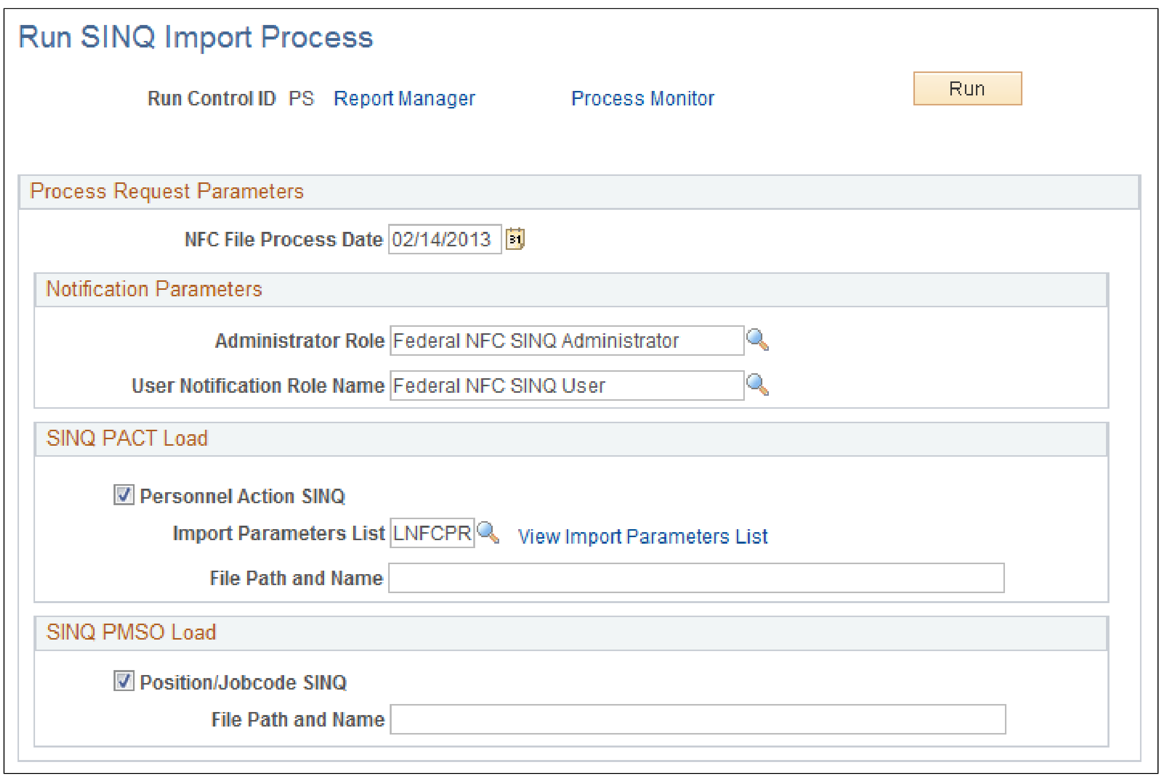
Use the Run SINQ Import Process page (RUNCNTL_GVTSINQ) to Run the NFC SINQ Import process.

**Navigation**

Workforce Administration, Collective Processes, NFC Import Process USF, Run SINQ Import Process, Run SINQ Import Process

**Image: Run SINQ Import Process page**

This example illustrates the fields and controls on the Run SINQ Import Process page. You can find definitions for the fields and controls later on this page.




This page enables you to load only SINQ PACT transactions or only SINQ PMSO transactions, or both by selecting the corresponding check boxes in the SINQ PACT Load or the SINQ PMSO Load group boxes.

**NFC File Process Date**

The date that is associated with all transactions that are imported during the SINQ Import process. System administrators can run the process only *once each day.*

| | |
|---|---|
| **Administrator Role** | Enter the role that is assigned to administrators for whom Worklist items and email notification will be generated for this day's SINQ Import process transactions. This role enables you to view all imported transactions and reassign individual transactions to specific users. |
| **User Notification Role Name** | Enter the role that is assigned to users who will work on transactions that they last updated or saved, or transactions that the administrator assigns to them. |
| **Personnel Action SINQ** | Select this check box to import PACT SINQ transactions. |
| **Import Parameters List** | Select the Import Parameters List that contains the NFC document types to process. |
| **View Import Parameters List** | Click this link to open the NFC Import Document List page for the selected Import Parameters List. Modify the document types listed and click OK to return to the Run SINQ Import Process page. |
| **File Path and Name** | Enter a share drive file location that is recognized by the process server. |
| **Position/Jobcode SINQ** | Select this check box to import PMSO SINQ transactions. |

# Administering SINQs

These topics discuss how to:

- Administer PACT SINQs.
- Administer PMSO SINQs.

## Pages Used to Administer SINQs

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Administer PACT SINQs - Assigned SINQs | GVT_SINQPACT_ADMIN | Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Assigned SINQs | Work with assigned PACT SINQs. |
| Administer PACT SINQs - Import Errors | GVT_SINQPACT_ERR | Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Import Errors | Review details about PACT transactions that were not imported. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Unprocessed Transactions | GVT_SINQPACT_UNPRO | Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Unprocessed Transactions | Review details and the reason why NFC transactions were not processed by the SINQ Import process. |
| Administer PMSO SINQs – Assigned SINQs | GVT_SINQPMSO_ADMIN | Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINQs, Assigned SINQs | Work with assigned PMSO SINQs. |
| Administer PMSO SINQs - Import Errors | GVT_SINQPMSO_ERR | Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINQs, Import Errors | Review details of PMSO error transactions. |

## Administer PACT SINQs - Assigned SINQs Page

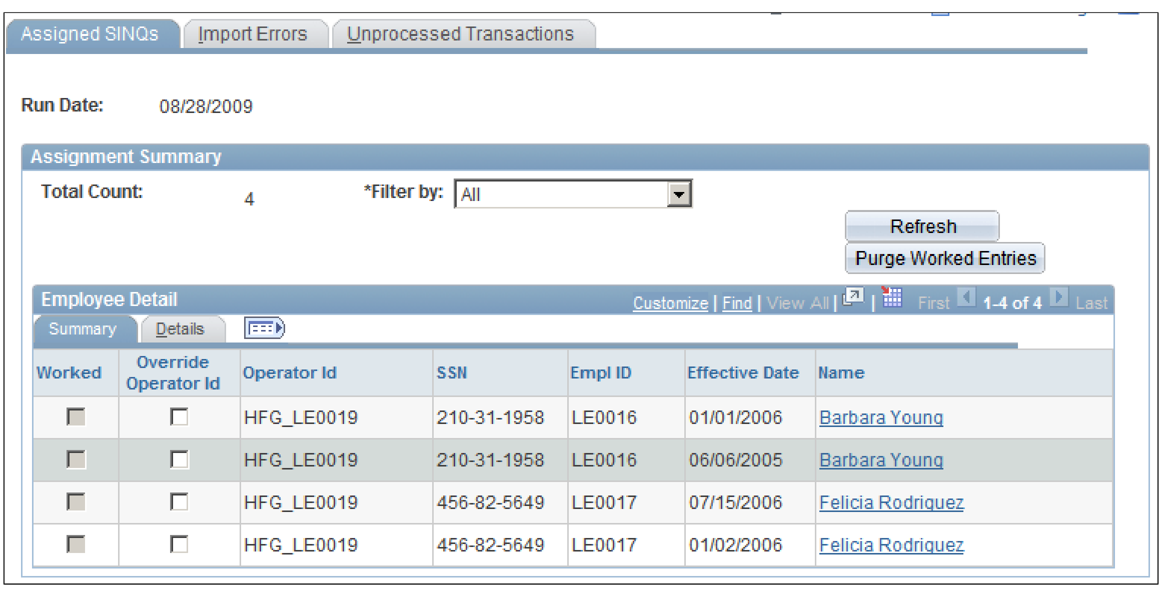
Use the Administer PACT SINQs - Assigned SINQs page (GVT_SINQPACT_ADMIN) to work with assigned PACT SINQs.

**Navigation**

Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Assigned SINQs

**Image: Administer PACT SINQs - Assigned SINQs page**

This example illustrates the fields and controls on the Administer PACT SINQs - Assigned SINQs page. You can find definitions for the fields and controls later on this page.




**Filter by** Select the criterion by which to filter the transactions listed in the Assignment Summary grid. All options use *like* comparison

| | |
|---|---|
| | logic, except *Effective Date* (date format) and *Pay Period* ( numeric format). |
| **Refresh** | Click this button after selecting a filter and a comparison value to refresh the list of transactions. |
| **Purge Worked Entries** | Click this button to remove from the grid updated transactions that have the check box selected in the Worked column. |
| **Override Operator Id** | Select this check box to override the current assignment. After you select it, the Operator ID field becomes available for reassignment. |
| **Name** | Click the link in this column to access the HR Processing component, Data Control page for that employee. |

## Administer PACT SINQs - Import Errors Page

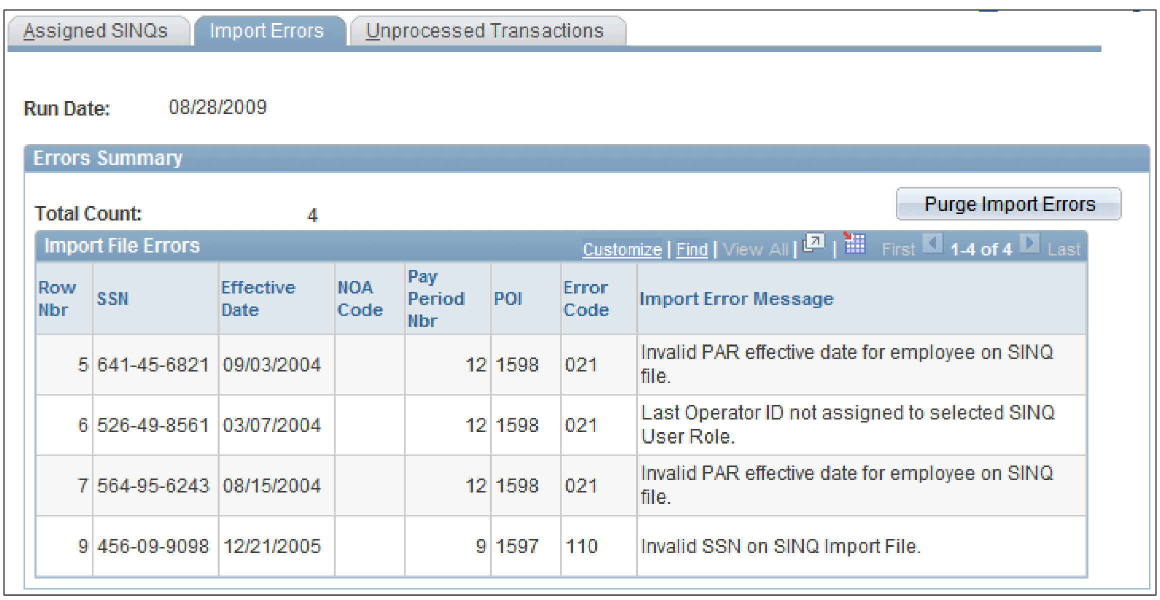
Use the Administer PACT SINQs - Import Errors page (GVT_SINQPACT_ERR) to review details about PACT transactions that were not imported.

**Navigation**

Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Import Errors

**Image: Administer PACT SINQs - Import Errors page**

This example illustrates the fields and controls on the Administer PACT SINQs - Import Errors page. You can find definitions for the fields and controls later on this page.


Assigned SINQs | Import Errors | Unprocessed Transactions

Run Date: 08/28/2009

Errors Summary

Total Count: 4

Purge Import Errors

Import File Errors — Customize | Find | View All | First 1-4 of 4 Last

| Row Nbr | SSN | Effective Date | NOA Code | Pay Period Nbr | POI | Error Code | Import Error Message |
|---|---|---|---|---|---|---|---|
| 5 | 641-45-6821 | 09/03/2004 | | 12 | 1598 | 021 | Invalid PAR effective date for employee on SINQ file. |
| 6 | 526-49-8561 | 03/07/2004 | | 12 | 1598 | 021 | Last Operator ID not assigned to selected SINQ User Role. |
| 7 | 564-95-6243 | 08/15/2004 | | 12 | 1598 | 021 | Invalid PAR effective date for employee on SINQ file. |
| 9 | 456-09-9098 | 12/21/2005 | | 9 | 1597 | 110 | Invalid SSN on SINQ Import File. |

| | |
|---|---|
| **Purge Import Errors** | Click this button to purge PACT error transactions from the import process. |

# Unprocessed Transactions Page

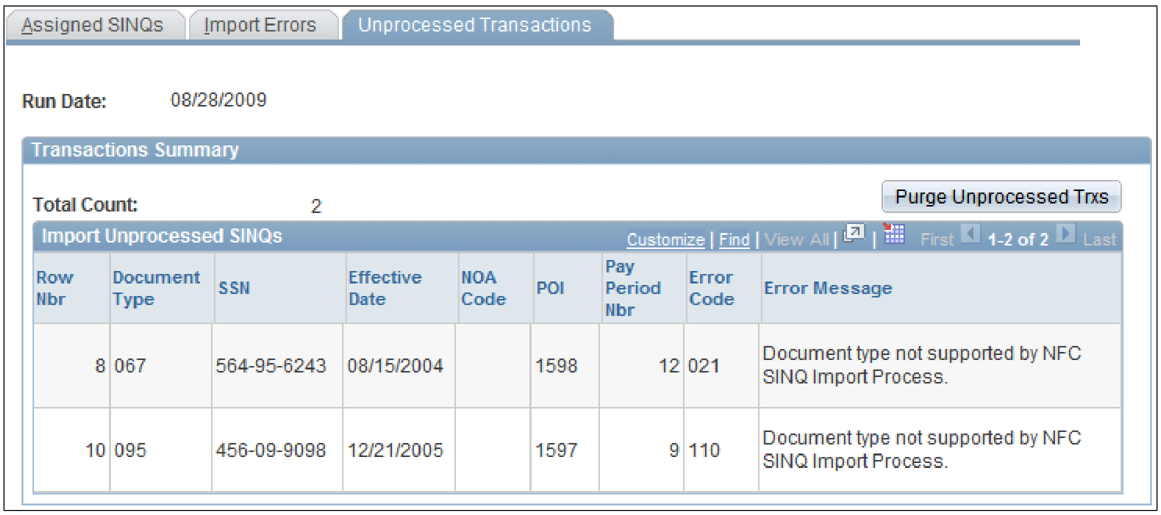
Use the Unprocessed Transactions page (GVT_SINQPACT_UNPRO) to review details and the reason why NFC transactions were not processed by the SINQ Import process.

**Navigation**

Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Unprocessed Transactions

**Image: Unprocessed Transactions page**

This example illustrates the fields and controls on the Unprocessed Transactions page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Purge Unprocessed Trxs (purge unprocessed transactions)** | Click this button to purge PACT unprocessed transactions from the import process. |

See Understanding the Process Flow for SINQ Transactions.

# Administer PMSO SINQs - Assigned SINQs Page

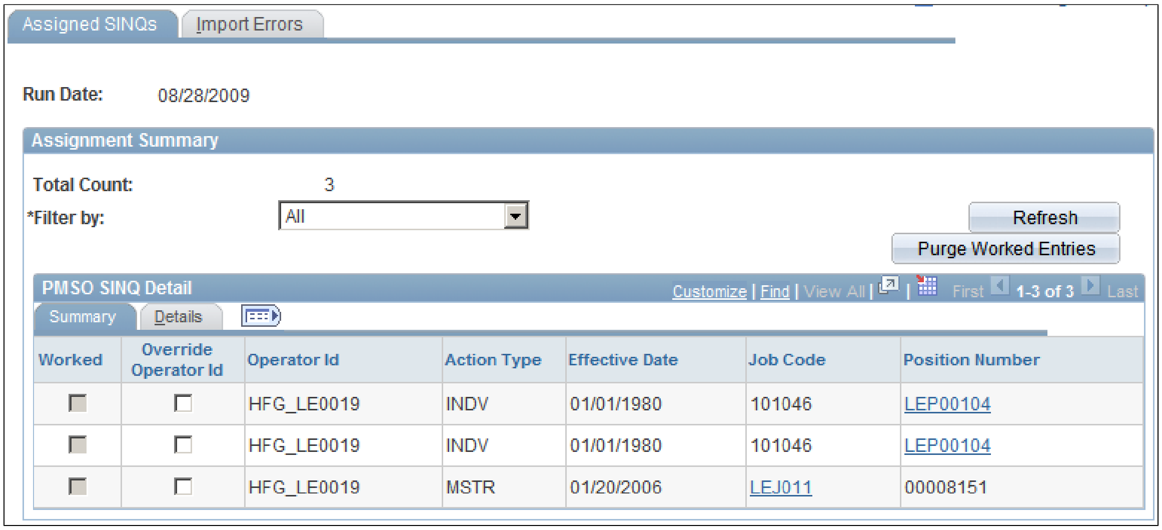
Use the Administer PMSO SINQs – Assigned SINQs page (GVT_SINQPMSO_ADMIN) to work with assigned PMSO SINQs.

### Navigation

Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINQs, Assigned SINQs

### Image: Administer PMSO SINQs - Assigned SINQs page

This example illustrates the fields and controls on the Administer PMSO SINQs - Assigned SINQs page. You can find definitions for the fields and controls later on this page.




For rows with an Action Type *INDV* and a link in the Position Number column, click the link to open the JOB_CODE_TBL component pages for that row.

For rows with an Action Type *MSTR* and a link in the Job Code column, click the link to open the POSITION_DATA component pages for that row.

**Filter by**

Select the criterion by which to filter the transactions listed in the Assignment Summary grid. All options use *like* comparison logic, except *Pay Period* (numeric format).

**Refresh**

Click this button after selecting a filter and a comparison value to refresh the list of transactions.

**Purge Worked Entries**

Click this button to remove from the grid updated transactions that have the check box selected in the Worked column.

**Override Operator Id**

Select this check box to override the current assignment. After you select it, the Operator ID field becomes available for reassignment.

**Job Code**

Click the link in this column to access the Job Code Table component for that job code.

**Position Number**

Click the link in this column to access the Position Data component for that position number.

# Administer PMSO SINQs - Import Errors Page

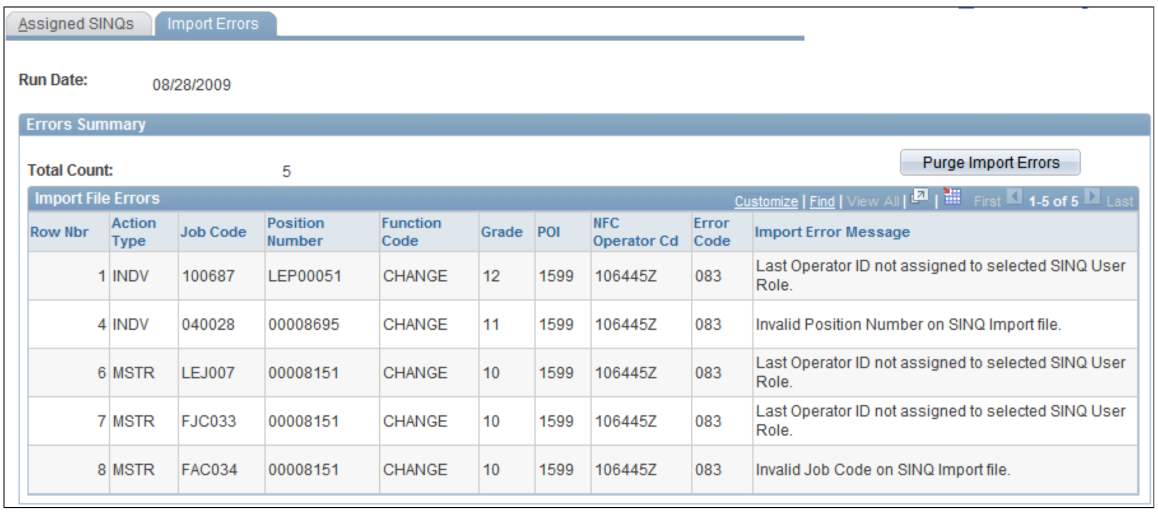
Use the Administer PMSO SINQs - Import Errors page (GVT_SINQPMSO_ERR) to review details of PMSO error transactions.

**Navigation**

Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINQs, Import Errors

**Image: Administer PMSO SINQs - Import Errors page**

This example illustrates the fields and controls on the Administer PMSO SINQs - Import Errors page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Purge Import Errors** | Click this button to purge PMSO error transactions from the import process. |

See Understanding the Process Flow for SINQ Transactions.

## Chapter 23

# Implementing the Oracle Workforce Administration for PeopleSoft Human Resources Partial Process Integration Pack

## Understanding the Workforce Administration for PeopleSoft Human Resources Integration

Oracle provides a partial Process Integration Pack (PIP) that publishes reference data information through the Application Integration Architecture (AIA) layer and sends PeopleSoft HR person, worker, and talent profile entries through AIA to a staging table in PeopleSoft. From there, your organization can build your own integrations to desired target systems.

As part of the Workforce Administration for PeopleSoft HR partial integration pack, PeopleSoft delivers the following:

- New services for synchronization and validation of reference data for use from PeopleSoft HR to the target system.
- Domain Value Maps (DVMs) within PeopleSoft Enterprise Components to define and transform common values for control data between PeopleSoft and the target system

These services are provided to publish data for load and synchronization for the process integration between PeopleSoft HR and the target system:

- Full synchronization for initial loading of person, worker, and talent profile data
- Incremental synchronization and update of person, worker, and talent profile data

**Note:** Changes that are delivered for the Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources Application Integration Architecture (AIA) are posted on My Oracle Support website (http://metalink.oracle.com).

## Prerequisites

To activate services and publish data for the integration between Workforce Administration for PeopleSoft HR and the target system:

- Confirm that all DVMs, both PeopleSoft and Application Integration Architecture (AIA) DVMs, are populated

- Read and become familiar with information in *Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources 3.1 Implementation Guide.*

For more information, see the product documentation for *PeopleTools: PeopleSoft Integration Broker*

# Activating Integrations

To activate the Workforce Administration for PeopleSoft HR process integration, you must complete specific setup tasks and activate the gateways and service operations that are specific to the Workforce Administration for PeopleSoft HR process integration.

The tables in this topic list the setup tasks to accomplish and the gateways and service operations to activate.

## Setup Tasks

This table lists tasks for activating integrations in your database. You should perform these setup tasks on both the publishing and subscribing databases, unless stated otherwise.

| ***Setup Task*** | ***Navigation*** |
|---|---|
| Set up and configure Integration Broker Gateway.<br><br>Multiple steps are required to set up the gateway. Refer to *PeopleTools: Integration Broker, "Managing Integration Gateways"* for details. | PeopleTools, Integration Broker, Configuration, Gateways |
| Activate node definitions. | PeopleTools, Integration Broker, Integration Setup, Nodes |
| Activate service operations.<br><br>• Review Service Operation Security<br><br>• Select active for Handler Status and Routings | PeopleTools, Integration Broker, Integration Setup, Service Operations |
| Provide web service. | PeopleTools, Integration Broker, Web Services, Provide Web Service |

## Sync Messages

This table lists the gateways and service operations to activate for sync messages:

| ***Service Operation/ Description*** | ***Queue*** | ***Operation Type*** | ***Application Engine Transform Program Names*** |
|---|---|---|---|
| Person Documentation ABM | PERSON_DATA | Sync | PER_VISA_XF |
| Person Basic ABM | PERSON_DATA | Sync | PERSON_BASE_XF |

| ***Service Operation/ Description*** | ***Queue*** | ***Operation Type*** | ***Application Engine Transform Program Names*** |
|---|---|---|---|
| Person Diversity ABM | PERSON_DATA | Sync | PER_DIV_XF |
| Dependent Beneficiary ABM | BENEFIT_DATA | Sync | DEPBEN_SY_XF |
| Worker ABM | PERSON_DATA | Sync | WORKER_SY_XF |
| Talent Profile Instance Qualifier ABM | JPM_DATA | Sync | JPM_TP_IQ__XF |
| Talent Profile Content Type ABM | JPM_DATA | Sync | JPM_CT_XF |
| Talent Profile Content Item ABM | JPM_DATA | Sync | JPM_TP_CI_XF |
| Talent Profile Type ABM | JPM_DATA | Sync | JPM_TP_T_XF |
| Talent Profile ABM | JPM_DATA | Sync | JPM_JP_XF |

## Full Sync Messages

This table lists the gateways and service operations to activate for full sync messages:

| ***Service Operation/ Description*** | ***Queue*** | ***Operation Type*** | ***Application Engine Transform Program Names*** |
|---|---|---|---|
| Person Documentation ABM | PERSON_DATA | Full Sync | PER_VISA_XF |
| Person Basic ABM | PERSON_DATA | Full Sync | PERSON_BASE_XF |
| Person Diversity ABM | PERSON_DATA | Full Sync | PER_DIV_XF |
| Dependent Beneficiary ABM | BENEFIT_DATA | Full Sync | DEPBEN_SY_XF |
| Worker ABM | JPM_DATA | Full Sync | WORKER_SY_XF |
| Talent Profile Instance Qualifier ABM | JPM_DATA | Full Sync | JPM_TP_IQ__XF |
| Talent Profile Content Type ABM | JPM_DATA | Full Sync | JPM_CT_XF |
| Talent Profile Content Item ABM | JPM_DATA | Full Sync | JPM_TP_CI_XF |

| ***Service Operation/ Description*** | ***Queue*** | ***Operation Type*** | ***Application Engine Transform Program Names*** |
|---|---|---|---|
| Talent Profile Type ABM | JPM_DATA | Full Sync | JPM_TP_T_XF |
| Talent Profile ABM | JPM_DATA | Full Sync | JPM_JP_XF |

### Steps to Activate Integration Broker Gateways

To activate Integration Broker gateways, complete the following steps:

1. Ping the local gateway (PeopleTools, Integration Broker, Configuration, Gateways) to ensure it is running, the connectors are loaded, and that the status is *Active.*
2. Click the Gateway Setup Properties link on the Gateways page, and ensure that the default local node, usually the database name, has an entry on the PeopleSoft Node Configuration page.
3. Ensure that the default local node, usually the database name, is appended to the Target Location URL at the service configuration (PeopleTools, Integration Broker, Configuration, Service Configuration).
4. Verify that the Domain and its IB dispatchers are running (PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status).
5. Activate node definitions (PeopleTools, Integration Broker, Integration Setup, Nodes).

See *PeopleTools: Integration Broker, "Managing Integration Gateways."*

### Steps to Activate Service Operations

To activate service operations, complete the following steps:

1. Access the service operations that are listed for this integration (PeopleTools, Integration Broker, Integration Setup, Service Operations).
2. Review service operation security by clicking the Service Operation Security link and select *Active* for General, Handler Status and Routings.

### Steps to Activate Delivered Outbound Routings

To activate delivered outbound routings (activate routings that include external alias and transform properties), complete these steps:

1. Access the Routings page (PeopleTools, Integration Broker, Integration Setup, Service Operations, Routings).
2. From the Routings tab, select the Selected check box for the outbound routing whose Receiver Node is *PSFT_XOUTBND,* and click the Activate Selected Routings button.
3. Click the routing name to access the Routing Definitions page. Confirm that the Sender Node on this page is the default local node name and the Receiver Node is the AIA node *PSFT_XOUTBND.*

4. Click the Connector Properties page and replace the <*id:port*> within the PRIMARYURL by the FMW server host name and port number.

5. After the PSFT resolutions are applied, recycle both the PSFT App Server and the PSFT Process Scheduler (Stop/Clear Cache/Start). Recycling these ensures that all of the new IB objects in the resolutions will work correctly.

See *PeopleTools: Integration Broker, "Using the Service Operations Monitor."*

See *PeopleTools: Integration Broker, "Providing Services."*

# Publishing Data

After you initiate the integration, you must publish the data and launch the integration services. These topics discuss how to:

- Publish initial setup (fullsync) data.
- Publish incremental setup (sync) data.

## Publishing Initial Setup (FullSync) Data

Full sync set up is typically a one-time setup activity using service operations with the _FULLSYNC suffix.

Use the Full Table Publish utility to publish the entire setup table. The subscribing database erases its setup table and synchronizes itself by supplying and populating data from the service operation.

Make sure that you have activated the full publish rules before you run this process.

## Publishing Incremental Setup (Sync) Data

Incremental sync changes use service operations with a _SYNC suffix, which are associated with setup pages. When you make changes to corresponding setup data, such as names and addresses, a service operation is published automatically when you save the page.

# Launching the Integration Services

Making updates to the pages listed in this topic or running their associated processes, triggers services for the integration with Workforce Administration for PeopleSoft HR.

## Pages that Launch the Integration Services

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Full Data Publish | EO_FULLDATAPUB | Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish | Run this process for initial ( full) all-date publishing and synchronization of reference data between PeopleSoft and Financials Accounting Hub. |
| Effective Date Pub | EO_EFFDATAPUB | Enterprise Components, Integration Definitions, Initiate Processes, Effective Date Publish | Run this process for incremental effective-date publishing and synchronization of reference data between PeopleSoft and Financials Accounting Hub. |
| Application Engine Request | AE_REQUEST | PeopleTools, Application Engine, Request AE | Run the GL_FSAH_ APFS Application Engine program to publish the initial open period statuses to Financials Accounting Hub at implementation. |

# Populating the Domain Value Maps

This topic provides an overview of domain value maps (DMVs) and discusses how to populate the DVMs.

## Understanding the DVMs

A DVM is a standard feature of Oracle's Service Oriented Architecture (SOA) Suite. DVMs are XML files that contain the mapping between related information in the participating applications. The Application Integration Architecture (AIA) DVMs are maintained in the AIA layer and are used to transform the messages from one system to the expected format of the other system. PeopleSoft maintains DVMs in addition to the DVMs that are stored within AIA. The AIA DVMs and their corresponding PeopleSoft DVMs should be maintained in both systems.

The PeopleSoft ABCS does not reference the AIA domain value maps (DVMs) at runtime.

The transformation within PeopleSoft Integration Broker populates the EBM with AIA Common values using the PeopleSoft Application Integration Framework for DVMs domain value map (DVM) framework, and passes the common values in the Sync<data type>ListEBM.

PeopleSoft DVM values are provided in the AIA DVM to help the end user understand the context for populating DVM data for each participating system requiring DVM translation in their ABCS. The values in the AIA DVM for PeopleSoft are not used by the integration. The ABCS of each participating system requiring DVM translation can use the AIA DVM data to translate to values specific to that system.

Update the PeopleSoft DVMs prior to running any initial loads or initiating any incremental setup or transactional flows.

The PeopleSoft DVMs must be populated, maintained, and synchronized with their corresponding AIA DVM.

It is important to remember that any AIA DVM with a corresponding PeopleSoft DVM must be maintained in both PeopleSoft and in AIA. The AIA DVMs map the data in the third-party target system column to the COMMON column, and the PeopleSoft DVMs map the COMMON column to the PSFT_01 column. The PeopleSoft values within the AIA DVMs are provided as reference only for those DVMs with a corresponding PeopleSoft DVM.

## Pages Used to Create and Maintain the DVMs

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Domain Value Maps | EOTF_POPULATE_DVMS | Enterprise Components, Integration Definitions, Transformation Framework, Populate Domain Value Maps | Populate the DVMs for the Workforce Administration for PeopleSoft HR integration. Make sure that all values are included and that the common values assigned agree to those that are in the corresponding AIA DVM. |
| Define Value Maps - Elements | EOTF_DEFINE_MAPS | Enterprise Components, Integration Definitions, Transformation Framework, Define Value Maps | Define any new DVMs, if needed. |

## Define Value Maps - Elements Page

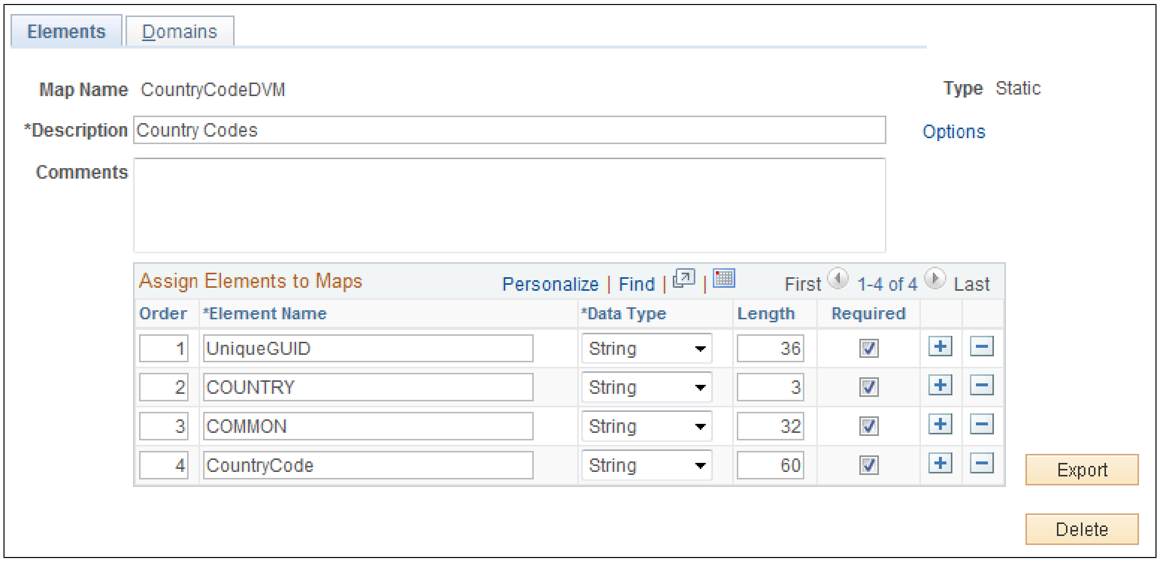
Use the Define Value Maps - Elements page (EOTF_DEFINE_MAPS) to define any new DVMs, if needed.

### Navigation

Enterprise Components, Integration Definitions, Transformation Framework, Define Value Map

### Image: Domain Value Maps

This example illustrates the fields and controls on the Domain Value Maps. You can find definitions for the fields and controls later on this page.




Access all of the PeopleSoft DVMs that are used in the Workforce Administration for PeopleSoft HR integration. Populate or verify that all values are included and that the COMMON values are the same as those in the corresponding AIA DVMs.

To access and update the corresponding AIA DVMs, log into Oracle Enterprise Manager - ESB Control and click the Maps icon.

See For a list of the PeopleSoft DVMS and their AIA DVM counterparts that are delivered for use with each Workforce Administration for PeopleSoft HR integration scenario: *Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources 3.1 Implementation Guide, "Integration Scenarios"*

See *Oracle Workforce Administration Integration Pack for PeopleSoft Human Resources 3.1 Implementation Guide, "Populating the PeopleSoft Domain Value Map (DVMs)".*