

Oracle's PeopleSoft Enterprise 9.0 Release Notes

PeopleSoft Enterprise Human Capital Management 9.0

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INTRODUCTION

Purpose of This Document

This document provides an overview of the new features and enhancements planned for Oracle's PeopleSoft Enterprise Human Capital Management (HCM) 9.0. It is a roadmap intended to help you assess the business benefits of upgrading to HCM 9.0 and plan your IT projects and investments. "HCM" is used throughout this document as a means of grouping our extensive family of products—from PeopleSoft Enterprise Human Resources 9.0 and Performance Management 9.0 to Global Payroll 9.0.

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Throughout this document, you will find examples of Oracle's ingenuity at work. In each section, we provide detailed descriptions of exciting features, functions and products planned for HCM 9.0, along with business benefits that our customers can achieve.

Note. Only those products that have significant enhancements are mentioned in this release document. However, enhancement details for all products will be available in the upcoming release notes.

Related Resources

This section discusses four publications that provide in-depth technical and functional information for new and enhanced functionality that is planned for the upcoming release. In many cases, the content in this document may have originated in the referenced documents.

Statement of Direction

The statement of direction typically is published 9 to 12 months prior to a release. It provides a high-level overview of the major focus of product development efforts, enabling high-level business decision makers to begin preliminary upgrade planning.

Release Value Proposition

The release value proposition provides more functional details than the statement of direction, identifies major enhancements and articulates the expected business benefit. This document is designed to help you determine whether new product features warrant either upgrading from an old release or embarking on a new implementation. With this information, managers can initiate preliminary budget planning and begin putting together a project team to evaluate specific products.

Prerelease Notes

Prerelease notes provide more functional and technical details than the release value proposition. This document describes how each enhancement functions within the context of the greater business process. This added level of detail should enable project teams to answer the following questions:

- What out-of-the-box functionality will change?
- What customizations may be affected?
- How will an upgrade or new implementation affect other systems?
- How will these changes affect the organization?

After the project team has reviewed and analyzed the prerelease notes, business decision makers should be able to determine whether to allocate budget and initiate implementation plans.

Release Notes

Release notes are published at general availability (GA) and validate the final scope of the release. The release notes discuss the features and enhancements that are available with the GA release of each product, describing the finalized functional and technical details that will enable project teams to confirm budgets and complete implementation plans.

Additional Resources

Oracle offers many additional resources that will help your organization determine the effects of upgrading to this release.

Visit the PeopleSoft Customer Connection website frequently to keep apprised of ongoing changes. This table lists the types of resources that are available on Customer Connection:

Resource	Navigation
Upgrade Paths	Support, Roadmaps + Schedules, Release Definitions
Training Opportunities	Education Services
Consulting Readiness	Assess Your Needs
Business Process Maps	Support, Documentation, Business Process Maps (applies to release notes only)
Integration Resources	Support, Documentation, PeopleSoft Enterprise Integration Point (EIP) Catalog (applies to release notes only)
Data Models	Support, Documentation, Data Models (applies to release notes only)
Installation Guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software (applies to release notes only)
Upgrade Guides	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software (applies to release notes only)

EXECUTIVE SUMMARY

Today's business challenges center on an ever-changing, increasingly mobile asset: the workforce. With talent management emerging as a hot-button issue from the boardroom to line-managers, organizations must move towards an environment of total employee engagement, linking individual skills, goals and competencies to those of the organization. In recognizing this important trend, Oracle has worked with our customers to develop automated, business process-based solutions to help organizations not only deploy but also achieve a successful talent management strategy. Today, we take human capital management to a new level in which employees, organizational objectives and processes are linked together through technology to enable mission-critical success.

Through Oracle's 20 years of HR thought leadership, human capital management is recognized as the de facto method for releasing the total value of your workforce. With people at the heart of every business process and every transaction, you must not only retain key talent, but also reward both employees and the organization through measurable, defined successes. By leveraging a comprehensive talent management strategy, you can improve operational efficiencies while turning employees into knowledge workers—and competitive assets.

PeopleSoft Enterprise HCM 9.0 is Oracle's newest planned global solution suite for intuitive and effective human capital management. Creating a rapid return on investment, PeopleSoft Enterprise HCM applications automate business processes, reduce operational costs and increase efficiency, continually defining and leveraging industry best practices.

With the most technically advanced, highly adopted and industry-leading human capital management suite, Oracle's PeopleSoft products are used by 73 of the top 100 companies in the Fortune 500.

PeopleSoft Enterprise Human Capital Management 8.9 was made available in December 2004. In anticipation of changing trends in human capital management and to help organizations receive an even greater measurable return on their investment, we continue to innovate. With HCM 9.0, we plan to release new products, features and functions that set the foundation for creating workforce excellence.

PeopleSoft Enterprise HCM 9.0 is a robust product suite within the overall enterprise strategy of Human Capital Management. This release value proposition describes planned enhancements in HCM 9.0.

HCM Extends Beyond the Walls of HR to Deliver Business Value

PeopleSoft Human Capital Management (HCM) is the enterprise-wide strategy to manage, optimize and leverage the workforce for positive business outcomes. Managing and optimizing people and processes requires that organizations look beyond traditional HR solutions to increase performance throughout the enterprise. PeopleSoft HCM enables organizations to achieve improved business results through technology that can be leveraged within and outside the enterprise to increase workforce performance.

PeopleSoft's market-leading HRMS solution is the core of its HCM solution. Building upon that core are unique workforce solutions such as HelpDesk for Human Resources, Enterprise Learning Management and Enterprise Performance Management. HCM's integration to other enterprise systems enables an unparalleled end-to-end HCM solution. Enhancements throughout the HCM 9.0 release extend Oracle's leadership in the HCM arena. Only Oracle offers a complete HCM solution that supports workforce initiatives to drive overall enterprise performance. To learn more about the complete Oracle's PeopleSoft Enterprise HCM solution please go to <http://www.peoplesoft.com/corp/en/support/documentation/index.jsp> and enter the keywords "Release Value Proposition" into the search box.

PeopleSoft Enterprise HCM 9.0 Business Drivers

HR management is moving into new territory. From personnel department to business partner to organizational driver, the practice of today's HR organization continues to evolve. As we move "beyond the basics," HR must guide the organization through issues such as corporate governance, talent management and operational success.

PeopleSoft Enterprise HCM 9.0 is based on extensive customer feedback, industry best practices, analysts' research and Oracle's own commitment to thought leadership.

HCM 9.0 represents a continued commitment to excellence and quality and centers on three key business drivers:

- Enterprise-Wide Talent Management
- Lean Business Processes
- Extended Value with Innovative, Standardized Technology

Oracle's PeopleSoft Enterprise Release 9.0— Enterprise-Wide Talent Management

With the release of PeopleSoft HCM 9.0, Oracle continues its leadership in the talent management space. The introduction of a centralized Profile Management module delivers enterprise-wide talent management, offering organizations seamless integration of talent management applications. As the foundation for all functional areas of talent management—recruiting, performance management, learning management, analytics and competency management—Profile Management defines the attributes required for individual and organizational success. Representing a best-in-class architecture, updates to Talent Acquisition Manager, Candidate Gateway, ePerformance and eDevelopment further extend PeopleSoft Enterprise HCM's robust talent management solution.

Oracle's PeopleSoft Enterprise Release—Lean Business Processes

Every organization has unique business processes that require systems to support and grow with the business. In HCM 9.0, Oracle offers more flexible and configurable products that enable organizations to tailor applications to business needs. Made possible by new capabilities such as SmartHire, a template-driven approach to streamlining the onboarding process, HCM 9.0 represents a truly configurable application. Additional enhancements to the Person Model will help customers more effectively manage the non-traditional workforce, while an embedded online I-9 processing tool will ensure compliance and increase operational efficiency.

Planned enhancements throughout HCM 9.0 deliver more flexibility so customers are able to adapt the system to their individual requirements while reducing the need for customizations. In areas such as Payroll, Benefits and Performance, customers will find easy-to-use, highly configurable tools that enable them to more effectively execute their business processes.

Oracle's PeopleSoft Enterprise Release 9.0— Extended Value with Innovative, Standardized Technology

PeopleSoft HCM 9.0 leverages the rich technology foundation offered by Oracle's Fusion Middleware. The extended value of this technology centralizes common tasks and components, helping change the way people do business. Oracle XML Publisher reduces the high costs associated with the development, customization and maintenance of business documents while increasing the efficiency of document and reporting management. HCM 9.0 provides an embedded common approval framework across the HCM suite. Enabling organizations to centrally manage the approval and delegation process, this foundation will improve efficiency while providing comprehensive data and audit trails. An ongoing commitment to Services Oriented Architecture (SOA) is delivered for HCM 9.0 with enhanced and additional web services to improve extensibility and performance.

Human Resources and Benefits

Enhancements to our industry-leading core Human Resources and Benefits applications enable organizations to more efficiently maintain talent management and improve employees' ability to improve career growth and improve staff productivity.

Core Human Resources

This category includes the rich applications, modules, features and functions within our Core Human Resources products, enabling organizations to increase productivity with meaningful business processes. Together, these pieces serve as the foundation for a strategic, scalable Human Capital Management system and are at the very center of our full suite of HCM products.

The core Human Resources Management application within HCM 9.0 seeks to improve the efficiency of key HR processes by providing highly configurable features that improve operational efficiencies and reduce the time and effort currently required to manage those processes manually. Features that will be delivered in the HCM 9.0 release of Core Human Resources Management include:

- Profile Management.
- SmartHire.
- Person Model enhancements.
- I-9 Compliance.
- Mass Update enhancements.
- Credit Card enhancements.
- HCM Event Manager.
- HCM Interface Registry.
- HR for France enhancements.
- HR for Japan enhancements.
- HR for Spain enhancements.
- HR for the Netherlands enhancements.
- HR for the United Kingdom enhancements.
- Global Military enhancements.
- Base Benefits enhancements.
- eProfile Manager Desktop

These new features and enhancements reflect input and guidance from existing PeopleSoft Enterprise customers.

Profile Management

For companies to succeed today, they must deploy an end-to-end talent management strategy to better attract, retain and engage people. This requires that everyone who interacts with talent—from recruiters and line managers to compensation planners and the Chief Learning Officer—have a common understanding of talent management components. For example:

- What are the responsibilities for a given job?
- What is required to move from one position to another?
- What are the company's collective strengths and weaknesses?

In HCM 9.0, Oracle delivers a best-in-class architecture for defining the attributes that are required for success in a job or organizational entity. This architecture also provides a common method for tracking the achievements and proficiencies of a company's talent pool.

Your company has the utmost flexibility in defining individual and job attributes, the way they are organized and presented, and the way in which the knowledge can be leveraged across functions.

Enhancements in Profile Management help increase employee retention, improve employee morale, and provide greater insight into talent planning, all of which can lead to increased organization revenues and improved service delivery capabilities.

For example:

- Recruiters are able to generate requisitions automatically based on the actual responsibilities and competencies required by the organization, without having to go to multiple sources each time there is a need.
- HR partners will know that all employees are being evaluated against the appropriate criteria for their position or grade level.
- Executives are able to identify high-potential employees who share competencies and experiences to model profiles.
- Succession planners are able to compare three individuals on a high-risk succession slate.
- Employees are able to proactively manage their career by identifying developmental opportunities to get them to a desired position.

Search and Compare Profiles		
Compare Results		
View Section: <input type="text" value="View All Sections"/>		
Search Criteria	Allan Martin: 50%	Rosanna Channing: 50%
• Competencies <i>Practices ethical behavior</i> : Interest Level: -- Proficiency: 3-Good	• Competencies ■ 0% -- --	• Competencies ■ 0% -- --
• Degrees <i>Bachelor of Arts</i> : Country: --	• Degrees ● 100% United States	• Degrees ● 100% United States
• Language Skills <i>English</i> : Reading Proficiency: -- Speaking Proficiency: -- Writing Proficiency: -- Native Language: -- Able To Translate: -- Able To Teach: --	• Language Skills ● 100% 3 - High 3 - High 3 - High Yes No No	• Language Skills ● 100% 3 - High 3 - High 3 - High Yes No No
• Responsibilities <i>Participate in Quarterly Close Process</i> :	• Responsibilities ■ 0%	• Responsibilities ■ 0%

Compare individuals against a promotional opportunity

The Manage Profiles business process is delivered as part of Human Resources 9.0 and provides the setup and profile administration capabilities. This is teamed with new profile management self service for employees and managers in eDevelopment. Manage Profiles replaces the Manage Competencies business process, providing a new flexible and configurable architecture for managing all types of profiles.

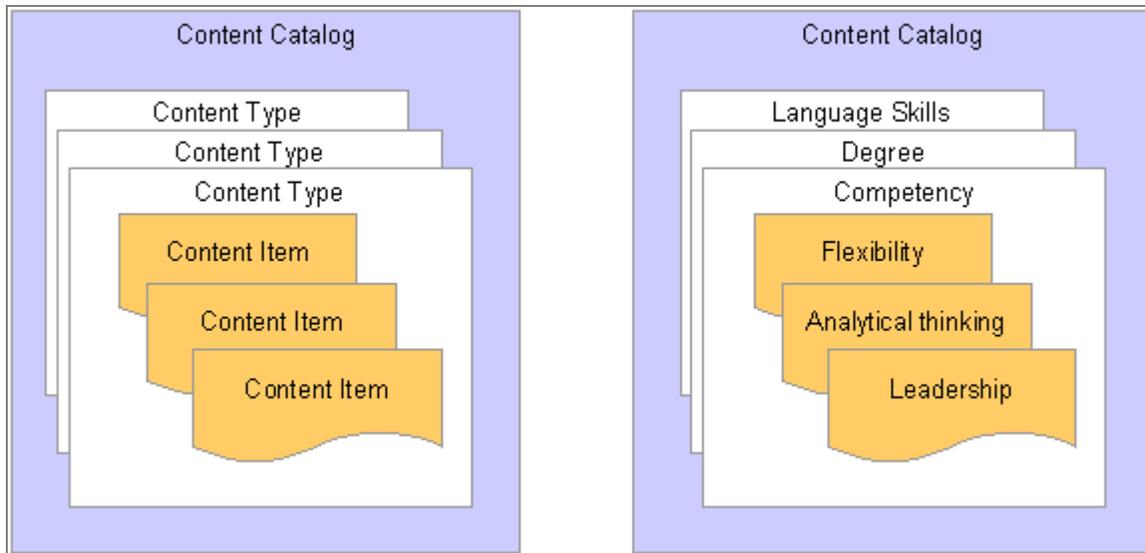
The key elements of the new profile management feature in Human Resources and eDevelopment are:

- A generic framework for defining profile content.
- Configurable profiles.
- Reusable profile content.
- Profile approvals processing and security.
- Enhanced profile search and compare capability.
- Integration.

The setup and management of profiles is supported within Human Resources and leveraged in ePerformance, Talent Acquisition Manager and Learning Management.

A Generic Framework for Defining Profile Content

The content catalog is a newly designed, flexible setup catalog that tracks all qualitative attributes related to job/organization and person profiles. The content catalog brings together all existing data structures supporting competency management and job profiles, including accomplishments, responsibilities, goals and tasks in one unified location.



Content Catalog Structure

In addition to leveraging existing data, you are able to easily add attributes relevant to your organization. These new attributes may be associated with person profiles, job/organization profiles, or both. Both existing and new attributes may be used for searching and comparing purposes. Improvements in the content catalog enable faster response times when researching competencies and also provide for a single source for these qualitative attributes. Improved business flexibility in setup and maintenance will better support an organization's strategic goals.

Information in the content catalog is organized by content type and each item of data within a content type is known as a content item. For example, within the content type DEG (degree), a Bachelor of Arts degree (BA) is a content item.

Content Types

Customers use content types to establish major categories of job or personal attributes. Attributes that were tracked in prior releases, such as competencies, projects, certifications, responsibilities, and so forth, will be converted to content types during upgrade. Customers are able to add content types such as interests, hard skills, job outputs and career potential, as well as anything else they would like to track, at a personal or an organizational/job level.

Before you can add actual content—such as the competencies “presentation skills” and “adaptability to change”—the structure for that content must first be established. In the spirit of flexibility, content types may be defined using a variety of different properties. For example, some content types may require that the associated content items include rating scales. Others may require that a target date be set. When you set up a content type, you select the properties that are shared by items of that type and you define:

- The field label that you want to appear for each property.

For example, you might have a generic description field but you can set up a specific label that makes it clear to users what information they enter in the field.

- The attributes for each property.

For example, whether it is a required field, any minimum and maximum values that apply, and a default value if applicable.

Content Types
Relationship Rules

Content Type: COMPETENCY

Description: Competencies

System Data

Free Form Type Only

Properties
Customize | Find
First 1-11 of 11 Last

Properties
Property Attributes

*Field Name	*Label Text	Sys Data	Key Field	Required		
EFFDT	Effective Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EFF_STATUS	Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JPM_CAT_ITEM_ID	Competency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JPM_CAT_TYPE	Content Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JPM_DESCR90	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CM_CATEGORY	Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DESCRLONG	Long Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DESCRSHORT	Short Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JPM_CAT_ITEM_SRC	Content Supplier	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JPM_TEXT1325_1	ePerformance Descriptor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RATING_MODEL	Rating Model	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Properties for the COMPETENCY content type

Many different properties can be used to describe content types. All properties used to describe existing data will be upgraded into the corresponding content type definition, so no additional work is required. However, if you choose to do so, you are able to add additional properties from the universe of properties for existing content types and create new content types.

Content Items

Content items are added when content types have been established. All items are effective-dated and controlled by status. All other attributes are set according to the content type definition. Content may be defined manually or uploaded from a third-party supplier using delivered PeopleTools integration.

The content type definition determines the fields that profile administrators see when they view, add, or update content items. Here is an example of a competency definition:

Item Details	Relationships	Group Memberships
Content Type:	COMPETENCY	Competencies
Content Item ID:	0100	
Content Items Details Find View All First 1 of 1 Last		
*Effective Date:	01/01/1900	*Status: Active
*Description:	Abstract thinking	
Long Description:	Able to analyze multi-faceted concepts determining a sound	
Short Description:	Abstract	
*Category:	Ability	
Content Supplier:	C Customer Defined	
*Rating Model:	PSCM	Competency Management Scale Proficiency Descriptions
ePerformance Description:	Able to analyze multi-faceted concepts determining a sound solution. Able to think "out-of-the-box". Uses innovative solutions to	
Last Update Date/Time:	24/01/06 13:15:52	Updated By: SYSTEM

[Item Details page for a competency](#)

However, the same Item Details page looks like this for a degree:

Item Details	
Content Type:	DEG Degrees
Content Item ID:	BA
<hr/>	
Content Items Details	
Find View All First 1 of 1 Last	
*Effective Date:	01/01/1900 *Status: Active
*Description:	Bachelor of Arts
Short Description:	BA
Education Level:	Bachelor Degree
Country:	<input type="text"/>
▼ Germany	
Type Of Study:	
Field Of Study:	
▼ Canada	
Stats-Can Degree Level:	
Years of Education:	<input type="text"/>
Months of Education:	<input type="text"/>
Last Update Date/Time:	24/01/06 13:15:52 Updated By: SYSTEM

[Item Details page for a degree](#)

Content Groups

Content items may be grouped together for prompting or reporting purposes by associating them to a content group type. For example, competencies can be grouped into various Competency Groups, such as Accounting, Automotive, Health Care, Managerial, Sales & Marketing and Technical. A content item may belong to more than one content group. For example, presentation skills may belong to the Sales & Marketing group as well as the Managerial group.

Content Group Type

Content Type: COMPETENCY Competencies **System Data**

Group Type: COMP TYPE

Description: Competency Types

Content Group Type					
Customize Find View All 					
First  1-10 of 39  Last					
*Content Group	*Description	Short Description	Content Group Members		
ACCNT	Accountability	Accntabity	Add/View		
ADMIN	Administration	Admin	Add/View		
BANK	Banking Experience	Banking	Add/View		
BUSPLN	Business Planning	Bus Planng	Add/View		
COMM	Communication	Communictn	Add/View		
COOP	Cooperative	Cooperativ	Add/View		
CORP	Corporate	Corporate	Add/View		
DRV	Drive and Ambition	Drive	Add/View		
EDUC	Education	Education	Add/View		
ENTRPR	Entrepreunerial	Entrepren	Add/View		

Example content groups for the COMPETENCY content type

Content Relationships

Content types are sometimes related to each other, for example, in hierarchical parent/child relationships. You can define these relationships at the content type level. This affects how the content type is used in profiles.

Manage Profiles supports the ability to define relationships between different content types and for content items to be linked accordingly. Three relationship types are supported:

- Parent/child.

For example, a subcompetency may be a child of a competency.

- Requires/required by.

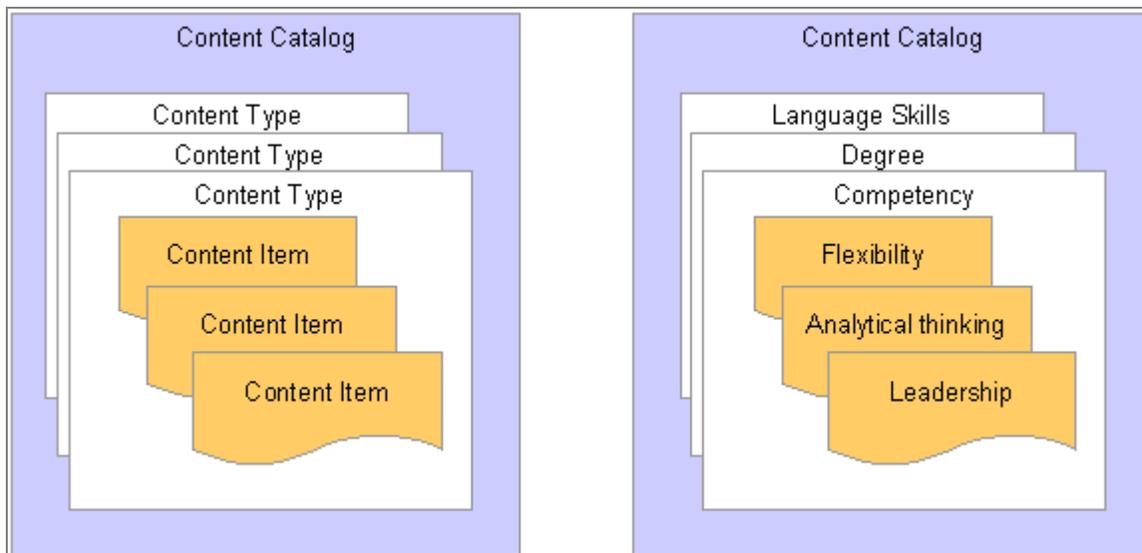
For example, to meet a qualification, all qualification tasks are required to be completed.

- Supported by/Supports.

For example, an individual goal may support an organizational objective.

Configurable Profiles

Profiles are a collection of selected items from the content catalog that describe the desirable attributes of a job or organizational entity or the actual attributes of a person. Profiles are constructed from the content types and content items defined in your content catalog:



Relationship between profiles and the content catalog

In Human Resources 9.0, job or organization profiles can be linked to a number of different entities. Examples include job code, position, department, job family, salary grade, business unit and so on. You can define additional entities according to your business needs.

Profiles provide a 360-degree view of people or organizational entities. They are available to administrators and self-service users (using the profile management self-service available in eDevelopment) for viewing, updating, and approving. Profiles and the content contained within are completely configurable. Your company can leverage the flexible architecture to build in business best practices for tracking and modeling your company's talent.

Person Profiles

A person profile provides a comprehensive look at the proficiencies and achievements of a particular person. It represents the individual as a whole and is independent of any past, current or future jobs. A person can have one profile per profile type. Profiles can be created for all types of workers, including employees, contingent workers and persons of interest.

Most organizations will configure only a single person profile type, so they would have only a single person profile type. Some organizations may have more complex business needs, and Manage Profiles enables you to create as many profile types as you need.

You are able to create person profiles from scratch or from one or more job/organization profiles related to that person's job data.

Profile Details

Betty Locherty [Edit Profile](#)

This profile displays your skills, competencies and accomplishments. Navigate using the bold hyperlinks in the blue shaded area. Use the Profile Actions dropdown to view your profile as of a different date.

As Of Date: 09/07/2006

Description: Betty Locherty

Comments:

Profile Actions:

Competencies [Responsibilities](#) [Qualifications](#) [Education](#) [NVQ](#)
[Projects](#) [Worn Rank](#)

Enter details for this profile item

▼ Competencies (Require Approval) Find First 1-6 of 6 Last				
ID	Competency	Proficiency		
0404	Provides Direction	3-Good		
0511	Managerial Efficiency	4-Very Good		
0708	Develop & implement solutions	3-Good		
8004	Financial Analysis	4-Very Good		
8007	Financial Planning	3-Good		
8008	Forecasting	2-Fair		

Competencies [Responsibilities](#) [Qualifications](#) [Education](#) [NVQ](#)
[Projects](#) [Worn Rank](#)

Viewing the profile of employee Betty Locherty

Job or Organization Profiles (Non-Person Profiles)

A job/organization profile provides a comprehensive look at the desirable attributes and requirements of a particular business entity, such as a job, position, location, business unit and so on.

Profile Types

Manage Profiles is designed to give you greater flexibility to create profiles types that suit your business needs. Your company may simply create a single profile type for jobs and a single profile type for people. Or, you may create several profile types for purposes of template reuse or specific business reasons. We deliver four profile types, but you can define as many profile types as you require for your business needs.

Profile configuration settings are defined in the profile type definition. When users create a profile they select the profile type to use and the new profile is configured according to the profile type.

The profile type controls:

- Entity types to which the profile can be linked.
- Profile content.
- Approvals required for profile changes.

Profile Identities and Associations

Profiles are linked to people to create person profiles, or to business entities to create non-person profiles. With Manage Profiles you have freedom to link your profiles to any business entity you choose, including job code, job family, position, salary grade, and business unit.

You establish entities linked to profiles in the profile type definition. Some profile types may be linked only to positions, for example, while others may be linked to departments, locations and business units. The entities to which a profile is linked are known as *profile identities*.

The screenshot shows the 'Profile Identity Options' configuration screen for a profile type named 'JOB'. The screen has tabs for 'Attributes', 'Identities', 'Content', and 'Associations', with 'Identities' selected. The 'Profile Type' is 'JOB'. The 'Identity Options' section includes fields for '*Effective Date:' (01/01/1900), '*Status:' (Active), and '*Description:' (Job). There is a checkbox for 'System Data' which is checked, and another for 'Approval Req'd for Identities' which is unchecked. Below this is a table titled 'Profile Identity Options' with columns for '*Profile Identity Option', 'End Profile', 'Template', and 'Sys Data'. The table lists four options: Job Code, Job Family, Position Data, and Salary Grade, all of which have checkboxes checked in the 'End Profile', 'Template', and 'Sys Data' columns. A '+ Add Profile Identity' button is at the bottom.

*Profile Identity Option	End Profile	Template	Sys Data
Job Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Family	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Position Data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Salary Grade	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Defining profile identity options for a profile type

In addition to profile identities, you can also link a profile to entities outside Profile Management. These entities are known as profile associations. ePerformance templates are linked to profile types in this way.

Profile Content

Your company is able to structure profiles however you choose. Profile content is divided into tabs that appear as links on the profile pages. Each tab includes one or more content sections.

To illustrate how profile content is structured, consider this example profile:

Person Profile

 [Photo](#)

EmpID: KU0119 Susan Hoinck
Profile Type: PERSON Person
***Profile Status:** Active
Status Date: 24/01/2006

***Description:** Susan Hoinck
Comments:
Profile Actions: .Select Action...

2 item(s) pending approval
 3 item(s) approved (since 26/02/2006)
 3 item(s) denied (since 26/02/2006)

Competencies [Responsibilities](#) [Qualifications](#) [Education](#) [NVQ](#)

Projects [Worn Rank](#)

▼ Competencies (Require Approval) Find | View All | First 1-2 of 2 Last

ID	Competency	Proficiency	
0401	Strategically influences	3-Good	
0402	Influences	3-Good	

[+ Add New Competencies](#)

Competencies [Responsibilities](#) [Qualifications](#) [Education](#) [NVQ](#)

Projects [Worn Rank](#)

▶ Profile Groups

[+ Add Profile to Group](#)

Person Profile page showing the contents of the Competencies tab

In the example profile, there are seven tabs that appear in two navigation bars:

Competencies [Responsibilities](#) [Qualifications](#) [Education](#) [NVQ](#)

Projects [Worn Rank](#)

Profile content is divided into tabs

When you click the tab name, the content sections for that tab are displayed. In the example, the Competencies tab is selected and the page shows the contents of that tab.

Both the tabs and the content sections are configurable. When you set up a profile type you define the tab names and the order in which tabs are displayed. You add one or more content types to each tab to create the content sections; all content type properties are inherited automatically.

To provide further flexibility, you are able to adjust labels and other attributes for properties within the section to meet the needs of a particular profile. You also are able to add properties from the universe of properties. For example, it is common to track target proficiency for job profiles and actual proficiency for employee profiles, so these properties can be added to the content section within the profile type.

The screenshot shows the 'Content' tab configuration for a 'PERSON' profile type. The interface includes a navigation bar with 'Attributes', 'Identities', 'Content', and 'Associations' tabs. Below the navigation bar, the 'Profile Type' is set to 'PERSON'. The 'Content' section has a search bar and navigation controls. It displays fields for '*Effective Date:' (01/01/1900) and '*Status:' (Active). A '*Description:' field contains 'Person'. There is a checked box for 'System Data' and a 'Reorder Content' link. A horizontal menu shows tabs: 'Competencies', 'Responsibilities', 'Qualifications', 'Education', 'NVQ', 'Projects', and 'Worn Rank'. Below this menu are 'Add Tab' and 'Delete Tab' buttons. The '*Tab Name:' field is 'Competencies' and '*Tab Order:' is '10'. A 'View All Sections' link is also present. The 'Content Sections' table below has columns for 'Section Name', 'Parent Section Name', 'Required', '*Move To Tab', and 'Order'. It lists 'Competencies' with a 'Required' checkbox, a dropdown for '*Move To Tab' set to 'Competencies', and an 'Order' of '10'. There are '+ Add Content Section' and '+ Add Sub-section' buttons. At the bottom, another horizontal menu shows the same tabs as above.

Defining structure and content of the Profile Type

Profile Groups

You are able to identify a group of profiles spanning across profile types to ease administration.

Profile Relationships

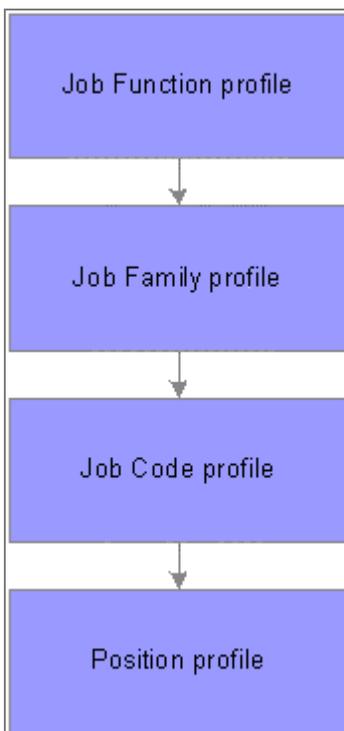
You are able to use related content items in profiles (such as competencies with child sub-competencies) or add related content items on an *ad hoc* basis, where the relationship only exists within a specific profile (and not at the catalog level).

Reusable Profile Content

Often the same profile items appear in related profiles. Employees' profiles can contain profile items that also appear in the profiles for their job code or salary grade. Profiles for similar or related jobs may have common profile items. Manage Profiles includes features to help you streamline profile administration by copying profile items between profiles.

Content Syndication

You are able to syndicate content along a chain of organization profiles. For example, you could set up a job function profile and syndicate the content through the hierarchy to job family, job code, and position profiles.



Cascading syndication

If one profile subscribes to another profile's content and the content of the publishing profile changes, the system automatically updates the content of the subscribing profile. Your company is able to establish any chain of profiles that fits your business. This is very useful if your company has higher-level mandates, such as core competencies or initiatives that apply to many divisions or departments.

Syndication reduces maintenance and ensures consistency by enabling administrators to set up common content once in a source profile and copy it to multiple target profiles.

Importing Content

The import feature enables administrators to copy content from one non-person profile to another. Unlike syndicated content, changes made to the source profile after importing do not affect the target profile.

Copying Content from Related Non-Person Profiles

The copy feature enables administrators, managers, and employees to copy profile items from non-person profiles into a person profile.

Profile Approvals Processing and Security

You can control who is able to view and/or change entire profiles or sections within a profile. Each content section has security settings that control which users can view the section and update it. This allows you to vary the profile content according to the role accessing the profile.

In addition, you are able to control changes to profiles by enabling approval processing for profiles. Approvals processing is an optional feature of profile management. You can use approval processing to control:

- Updates to profile items on person profiles.
- Updates to profile items and profile identities associated with non-person profiles.

Profile approval uses the new HRMS approval workflow engine (AWE) to manage the approvals process. This model gives organizations greater control over their business environment, lowering overall business risk, and the risk of legal non-compliance.

Approvals are set up in the profile type definition. An approval definition is associated with the profile type and you then specify which content sections in the profile type require approval.

We deliver approval definitions for these scenarios:

- Employee changes to their person profiles are submitted to their manager for approval.
- Manager changes to non-person profiles are submitted to the administrator for approval.

Approvals can be simple one-step approvals, or more complex involving multiple approvers, depending on your business needs.

Administrators and managers have options for managing approvals that are routed to them and viewing historical approval information. Employees can view a history of the approval transactions that they have submitted.

Profiles list approved items and identities only. If there are profile items that have not been approved, links are displayed that show how many items have been saved (but not submitted for approval), pending approval, approved, or denied approval.



Approval information is displayed on the profile pages

When users click these links they can see which items have that workflow status:

Non-person Profile

Pending Items

Susan Hoinck

This page shows a summary of the submitted or approval in progress items on your profile.

Profile Type: Person

▼ Changed Competencies (Require Approval)				Find First 1-2 of 2 Last
Disposition	ID	Competency	Proficiency	
Add	0600	Achievement Orientation	4-Very Good	-
Add	0601	Impact and Influence	4-Very Good	-

[Return to Previous Page](#)

Users can quickly access items that are not approved

Enhanced Profile Search and Compare Capability

By establishing a common understanding regarding job requirements, core competencies, business strategies and so forth, you are able to perform targeted analysis through a powerful set of search and compare tools. This will result in improved employee retention and engagement, alignment between employee skills and business goals and overall productivity (that is, putting the right person in the right job).

Some examples of search and compare in action, include:

- Comparing candidates who are up for promotion to job X.
- Searching for the best fit for an open position.
- Identifying and merging job descriptions that are nearly identical.
- Looking for untapped talent—individuals who match up well with an emerging leader profile.
- Providing employees with the scores of profiles according to how well they match the search criteria.

The powerful search engine leverages Verity technology for fast and easy-to-understand search results.

In earlier versions of PeopleSoft Enterprise Human Resources, administrators were able to:

- Compare an employee's competencies and accomplishments with those required by a role.
- Compare the competencies and accomplishments of a team with those required by a job task.

These role matches provided a gap/fit analysis based on competency proficiency and item importance.

The new Manage Profiles business process includes this type of role matching, but also offers two new options:

Option	Description
Search and Compare Profiles	A search and compare tool that enables you to build searches that work with your content catalog and profile types. This option is also available in eDevelopment.
Compare Profiles	Displays an online comparison of a source profile with one or more target profiles. The contents of the source profile and target profiles are displayed in adjacent columns, enabling the user to easily identify the differences between the profiles.

With Search and Compare Profiles, you set up search types to suit your content catalog, profile types, and users.

Searches are linked to roles, enabling you to create a set of searches that are configured specifically for your employees, managers, and administrators. For example, you may want to create simple searches for employees that have default search criteria, but allow administrators to run adhoc searches for which they set up the search criteria from scratch.

Search and Compare Profiles

Search Criteria - Find jobs for this person

Below is the search criteria which was populated from the profile **Susan Hoinck**.

Search for profile results that have an exact match on one or more of the profile item criteria entered.

Search Filters

Search Criteria

Select items in one or more content sections, entering any properties relevant to the search. Specify the item importance and indicate if it is mandatory. Click the Search button to run the search.

Competencies

General

Competency	Importance	Mandatory	Proficiency	Review Active	
Teamwork and cooperation	3 - Average	<input type="checkbox"/>	2-Fair	Yes	
Team leadership	3 - Average	<input type="checkbox"/>	2-Fair	Yes	
Strategically influences	3 - Average	<input type="checkbox"/>	3-Good	No	

[+ Competencies](#)

Degrees

General More...

Degree	Importance	Mandatory	
Bachelor of Arts	3 - Average	<input type="checkbox"/>	

[+ Degrees](#)

Setting up search criteria

When users run a search, the system returns a list of profiles that best match the search criteria. Each profile in the search results list is assigned a score that indicates how well the profile matches the search criteria.

Search and Compare Profiles

Search Results - Find people that fit this job

Below are the search results for **Admin Assistant**.

To view the details for a profile, select the hyperlink on the Profile Name below. Select the score to compare the profile against the search criteria. Select the checkbox for a profile and then click the Select for Compare button to save the profile for detailed comparisons.

[Modify Search Criteria](#) [Search for Profiles](#) Select for Compare

Your search returned result 1 - 10 out of 146. [Next](#)

Search Results		
Select	Score	Profile Name
<input type="checkbox"/>	20	Antonio Santos
<input type="checkbox"/>	20	Harris Voiler
<input type="checkbox"/>	19	Martina Griffiths
<input type="checkbox"/>	13	Barry Campbell
<input type="checkbox"/>	13	Alice Summer
<input type="checkbox"/>	13	Allan Martin
<input type="checkbox"/>	13	Rosanna Channing
<input type="checkbox"/>	13	Stanley Lowe
<input type="checkbox"/>	13	Angela McKay
<input type="checkbox"/>	13	Annie Mirzoyan

▶ Profile Comparisons

The Search Results page lists matching profiles with a profile score

The profile scores give an overall indication of how closely each profile matches the search criteria. However, users can also view a more detailed analysis of the score at the item level by selecting profiles in the search results list and running a comparison with the search criteria.

Integration

The Manage Profiles business process serves as the central repository of profile information for other products within HRMS, and for applications outside of HRMS. Manage Profiles is tightly integrated with HRMS applications including ePerformance, and Recruiting Solutions, and with PeopleSoft Enterprise Learning Management.

We also deliver integration with PeopleSoft Enterprise Financials and Supply Chain Management, PeopleSoft Enterprise CRM, and PeopleSoft Enterprise Performance Management.

SmartHire

Every organization has unique onboarding processes and requires systems to support and grow with business changes. Hiring practices often differ by jobs, geographies, worker types, industries and so forth.

For example, a worker may be a regular full-time employee or a contractor. A retail company may perform decentralized hiring at store locations, whereas a government agency may use a shared service center approach. Each country has slightly different legal reporting requirements that dictate what additional information must be gathered. Any of these variables can change a hiring process.

The new SmartHire feature enables a template administrator to configure hiring pages according to his or her organization's practices. For example, templates may be configured for specific jobs, users, countries, locations, worker types or industries. Configuration options include field and page layout, as well as security and automatic updates. Field attribution features include the ability to default and hide values, override defaulted values, or require fields at the user interface level.

By creating templates that default all data common to a job, a person performing entry only needs to enter variable data such as name or address. This significantly reduces the time it takes to enter hire data, and ensures that the data saved to the database is correct and complete. It also is possible to allow or disallow users from overriding template data so that organizations can determine the level of policy flexibility granted to users.

SmartHire can help an organization improve HCM staff productivity. Reduced data entry requirements, which lead to fewer data entry errors, ultimately will lead to improved data integrity. SmartHire also helps reduce time to hire, which can lead to higher levels of organizational productivity and an improved ability to move managers from a tactical focus (a lengthy hiring process) to more strategic focus (staff and business planning, etc.). Ultimately, being able to hire the right people in a shorter period of time can increase revenue or service delivery potential, leading to improved investor confidence.

The SmartHire feature serves dual purposes for dual HR roles:

1. When leveraged by a centralized HR data entry person through Administer Workforce, SmartHire facilitates faster and more accurate entry of large numbers of workers into similar jobs. For example, a manufacturing company may hire 200 additional machine operators to support increased production. Using a default template, SmartHire can add all information that is consistent across jobs, such as job code, location, pay rate and so forth. The data entry person then only enters information that is unique, such as name, birth date and address.
2. When accessed by managers through eProfile Manager, SmartHire can support a decentralized hiring process. For example, a retail company may have their store managers perform onsite hiring. The onsite managers now are able to enter new employees themselves through a simplified entry page that enforces both company policy and data integrity.

How It Works

The following illustration shows some of the key configuration features included in SmartHire configuration:

Template Section Configuration

Template: KUEMP_ADMIN_ITDEPT **Effective Date:** 01/01/2002

Section ID: NAME_01_ENG **Section Name:** Primary Name - English

Text ID:  **Section Name Override:**

Hide Entire Section

Section Fields								
Seq #	Position	Field Label	Change Label	Default Value	Change Value	Required	Override	Hide
1	Either	Type of Name	Change Label	PRI - Primary	Change Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Left	Name Prefix	Change Label		Change Value	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	Left	First Name	Change Label		Change Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Left	Middle Name	Change Label		Change Value	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Left	Last Name	Change Label		Change Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Left	Name Suffix	Change Label		Change Value	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	Either	Format Using	Change Label	001 - English	Change Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Go To: [Maintain Text Catalog](#)

Key configuration features included in the SmartHire configuration

Using the Template Section Configuration page you can use the:

- Seq # field to set you own field order.
- Change Label field to tailor field labels for your own terminology.
- Change default field values.
- Require the user to enter a value.
- Decide if the user can override the default value.

Additional SmartHire features enable the template administrator to determine the number of pages a template will use and which sections fall on which page. The administrator also is able to configure all text on the template page so that your organization's policies or additional instructions are conveniently conveyed to the end user via the template itself. The template administrator can preview the template in a separate window at any point during the template building process. Once a template is configured, it may appear similar to the following New Hire page example.

The administrator can categorize each template and apply security so that users only see those templates to which they have been granted access. The template administrator can also determine how to handle exception hires. Exceptions may include rehires, identification of duplicate records, handling multiple jobs, or partially completed hires that have been "saved for later" by the end user.

Template-Based Hire

Enter Employee Information

Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later.

Previous
Save and Submit
Save for Later
Cancel

Send to HR for Completion

Hire Template Information

Template:	HX Template for Priority 1 Sections	Effective Date:	11/01/2006
------------------	-------------------------------------	------------------------	------------

Hire Details

Primary Name - English

*First Name:	<input type="text"/>	*Last Name:	<input type="text"/>
---------------------	----------------------	--------------------	----------------------

Birth Information

Date of Birth:	<input type="text" value=""/>	Birth Country:	<input type="text" value=""/>
Birth State:	<input type="text" value=""/>	Birth Location:	<input type="text" value=""/>

Person Gender

*Gender:	<input type="text" value=""/>
-----------------	-------------------------------

Person National ID United States

*National ID Type:	<input type="text" value="Social Security Number"/>	*National ID:	<input type="text" value=""/>
---------------------------	---	----------------------	-------------------------------

Person Address 01 - United States

Address Type:	Home	*City:	<input type="text" value=""/>
*Address Line 1:	<input type="text" value=""/>	*State:	<input type="text" value=""/>
*Postal Code:	<input type="text" value=""/>		

Person Phone Number 01

*Phone Type:	<input type="text" value="Home"/>	Telephone:	<input type="text" value=""/>
---------------------	-----------------------------------	-------------------	-------------------------------

Person Email Address 01

*Email Type:	<input type="text" value="Home"/>	*Email Address:	<input type="text" value=""/>
---------------------	-----------------------------------	------------------------	-------------------------------

Job Information - Job Code

*Job Code:	<input type="text" value=""/>	Job Entry Date:	<input type="text" value=""/>
-------------------	-------------------------------	------------------------	-------------------------------

Job Compensation - Pay Components

Compensation Frequency:	Annual	*Compensation Rate:	<input type="text" value=""/>
Currency Code:	USD		

Comments

Comments:

*Required Fields

Previous
Save and Submit
Save for Later
Cancel

Send to HR for Completion

An example of the New Hire page configured via Template-Based Hire configuration

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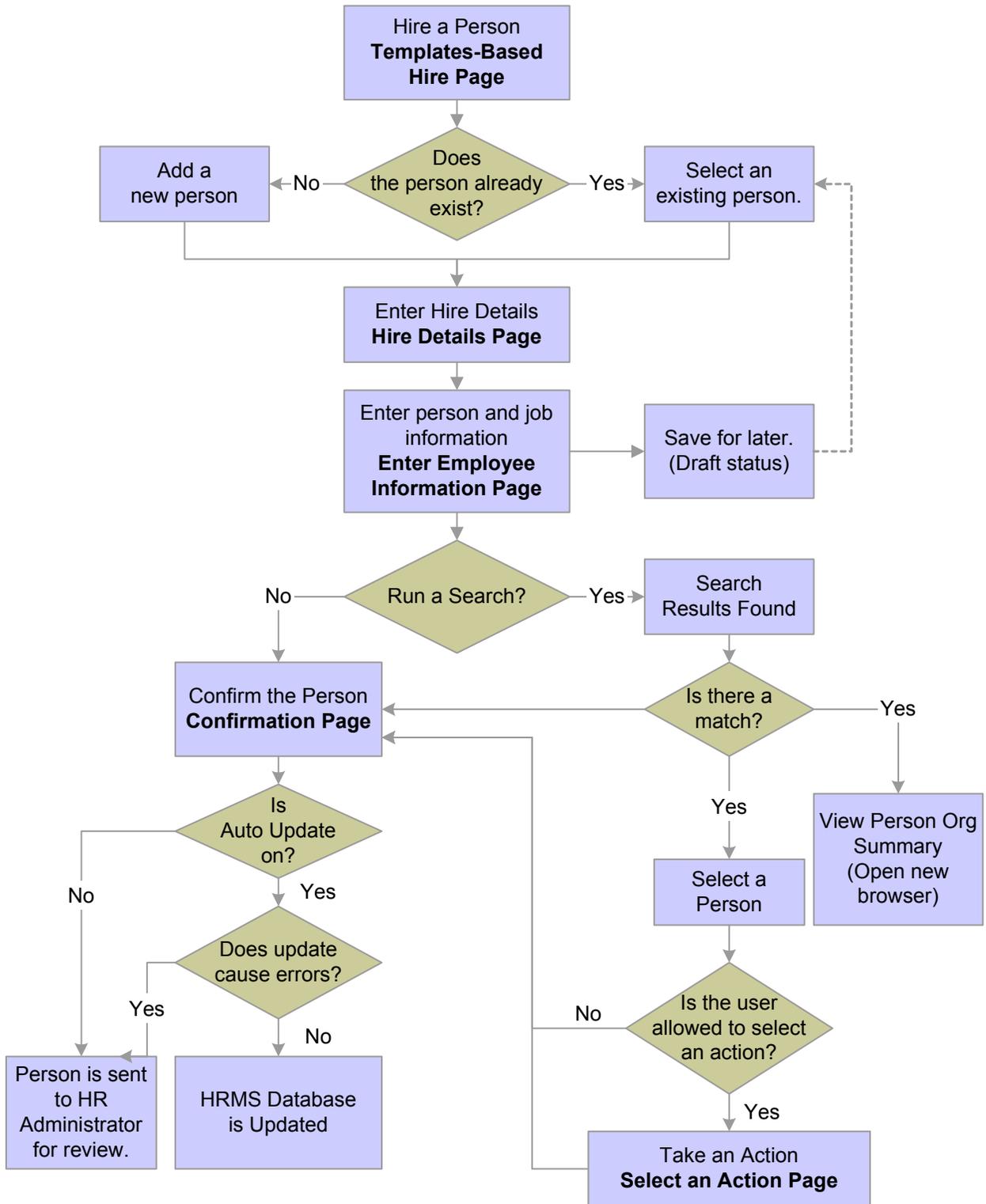
Page 27

Processing Template Based Hires

When hiring a person using the template-based hire feature you will use the following pages:

- Template-Based Hire.
- Enter Hire Details.
- Enter Employee Information.
- Person Match Found.
- Select an Action.
- Confirmation.
- Template-Based Hire Status.

This diagram illustrates the template-based hire process:



The template-based hire process

Starting the Template-Based Hire Process

The Template-Based Hire page is used to add a person to the database using the template-based hiring process. The Draft Hires to Process grid on the Template-Based Hire page displays the people who are in draft status within the hire process.

Template-Based Hire

Choose a template and select Go to enter a new person. The Hires to Process section lists people you have previously started to enter who are in draft status. Select a name to continue the hire process. You have the option to delete people you do not intend to hire.

Add a New Person

Select Template:

Select	Name	Type of Hire	Start Date	Action	Country
<input type="checkbox"/>	Sean Batter	Employee	08/25/2006	Hire	United States
<input type="checkbox"/>	Sally Masters	Employee	09/05/2006	Hire	United States

Go To: [Template-Based Hire Status](#)

Select a template for a new hire

Entering Hire Details

On the Enter Hire Details page enter basic information for the template. Depending on how the template administrator has set up the template configuration, the fields on this page are display only, visible and editable, or hidden.

Template-Based Hire

Enter Hire Details

Name: Sally Masters

The following information is required before hiring, rehiring, adding, or renewing a Person.

Hire Details

Template: KUEMP_ADMIN_ITDEPT - USA HR user hires EMP into IT dept

***Job Effective Date:**

***Action:**

***Reason Code:**

*Required Fields

Enter the basic hire details and click the Next button to complete the hire

Entering Employee Information

The Enter Employee Information page is where you will enter name, home and mailing address, National ID, and job details. The number of sections and fields on this page is dependent upon how the template chosen has been configured by the template administrator.

Template-Based Hire	
Enter Employee Information	
Enter the following employee or contingent worker information. If you cannot enter all of the person's information select Save for Later.	
<input type="button" value="Previous"/>	<input type="button" value="Save and Submit"/>
<input type="button" value="Save for Later"/>	<input type="button" value="Cancel"/>
Hire Template Information	
Template:	KUEMP_ADMIN_ITDEPT - USA HR user hires EMP into IT dept
Effective Date:	09/05/2006
Hire Details	
Primary Name - English	
Name Prefix:	<input type="text"/>
*First Name:	<input type="text" value="Sally"/>
Middle Name:	<input type="text"/>
*Last Name:	<input type="text" value="Masters"/>
Name Suffix:	<input type="text"/>
Birth Information	
*Date of Birth:	<input type="text" value="02/19/1970"/> <input type="button" value="B"/>
Person Gender	
*Gender:	<input type="text" value="Female"/>
Person Marital Status	
*Marital Status:	<input type="text" value="Single"/>

[Enter Employee Information page \(1 of 2\)](#)

Person National ID United States			
National ID Type:	Social Security Number	*National ID:	<input type="text" value="326595245"/>
Person Address 01 - United States			
Address Type:	Home		
*Address Line 1:	<input type="text" value="7787 Macken Street"/>		
Address Line 2:	<input type="text"/>		
Address Line 3:	<input type="text"/>		
*City:	<input type="text" value="Wells"/>		
*State:	<input type="text" value="Georgia"/>		
*Postal Code:	<input type="text" value="55622"/>		
Person Phone Number 01			
Phone Type:	<input type="text" value="Home"/>	Telephone:	<input type="text"/>
Phone Extension:	<input type="text"/>		
Person Email Address 01			
Email Type:	<input type="text" value="Home"/>	Email Address:	<input type="text"/>
Work Location - Job Fields			
Business Unit:	GBIBU	Department:	11000 - Information Systems
Location Code:	KUNY00 - Corporation Headquarters		
Job Information - Job Code			
*Job Code:	<input type="text" value="120000 - Administrator"/>		
Job - Payroll System			
Payroll System:	Payroll for North America		
Job Compensation - Pay Components			
Comp Rate Code:	NAANNL	*Compensation Rate:	<input type="text" value="45000.000000"/>
Currency Code:	USD	Compensation Frequency:	Annual
Comments			
Comments:	<input type="text"/>		
*Required Fields			
<input type="button" value="Previous"/>	<input type="button" value="Save and Submit"/>	<input type="button" value="Save for Later"/>	<input type="button" value="Cancel"/>

[Enter Employee Information page \(2 of 2\)](#)

Enter employee details for the fields that are available based on the template selected.

Saving A New Hire

Once the person’s information has been entered on the Enter Employee Information page you can cancel, save for later, or save and submit the data entered. Once you click the Save and Submit button, one of these pages will be displayed:

- The Person Match Found page displays the possible person matches.
- 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).
- The Confirmation page displays if the user has successfully saved the data to the system.
- The Error Transaction page is displayed when the template administrator is testing the template and the test is unsuccessful.

Viewing the Template Hire Status

The Template Hire Status page displays the persons being processed by the template-based hire process. This page does not show people in draft status. You can only view who is currently being processed by the HR department, view who has been cancelled by the HR dept, and who has successfully been hired and see their Person ID.

Template Hire Status

The following people are currently being processed for hire by the Human Resources department.

Pending Hires						
Name	Type of Hire	Start Date	Action	Country	Status	Person ID
Sally Masters	Employee	09/05/2006	Hire	United States	Error	NEW

The following people have been cancelled by Human Resources. In order to hire this person you must restart the hire process. You have the option to Remove them from your list.

Cancelled Hires
 You do not have any cancelled hires.

The following people have been hired into the system. You have the option to Remove them from your list.

Processed Hires
 You do not have any processed hires.

Go To: [Template-Based Hire](#)

[View the status of pending, cancelled, or processed hires](#)

Person Model Enhancements

Leveraging the Person Model, introduced in PeopleSoft HCM 8.9, organizations are able to easily associate one person to multiple employment instances or to multiple organizational relationships over time. This provides a framework to capture and store all person types, including contingent workers and “persons of interest” within a single database. It also enables organizations to more accurately maintain multiple employee records throughout an individual’s lifecycle with the organization, leading to greater compliance and business insight.

The Person Model enables a single source of truth for employee data and work history. Staff productivity will improve by entering data only once, instead of several times in multiple systems. This provides an improved ability to support strategic business goals. Reducing or eliminating multiple data entry also reduces risks of legal non-compliance.

Contingent Worker Enhancements

The Contingent Worker enhancements for HCM 9.0 provide all PeopleSoft Enterprise customers with numerous benefits. Seeing a growth in contingent workers, we have improved the flexibility to support this segment of the workforce. We have modified the contracts area to include optionally tracking task orders, also referred to as subcontracts. Not only can contingent workers be associated to a high-level contract through the contract template, but also to individual tasks of the overall contract.

The Workforce Job Summary replaces the previous Job Summary, and now includes contingent workers as well as employees. Additional information is visible on these pages based on your organization's industry (that is, U.S. Federal government or Military). Furthermore, you have the option of documenting security clearances and badges for all persons (including persons of interest, contingent workers and employees).

We provide the online capability, as well as an automated notification process, that checks when badges, security clearances, job assignments, contracts and task orders (subcontracts) will expire.

For our U.S. Federal Government customers, we now provide the capability to quickly hire a person who was previously a contingent worker. Using the new "Add Employment Instance USF," customers no longer have to re-key personal information about that person into the Federal Hire component. This personal information now defaults once the contingent worker's ID is selected. This also maintains the continuity and history for that person as a contingent worker and subsequently as an employee.

Improvements in Contingent Worker enhance manager productivity by reducing the amount of project management time required to track the worker, and also lower business risk by eliminating antiquated, costly, paper-based processes. These improvements also will lead to improved morale for contingent workers, which can increase retention and lower the cost of replacing workers who leave.

ERN Delete

With the introduction of the Person Model, organizations are able to easily associate one person to multiple employment instances or to multiple organizational relationships over time. A person can easily be transitioned from a contractor to an employee, or be both at the same time, while maintaining a continuous history with the organization. Much of this newer functionality relies on the ability to manage multiple employee records either sequentially or simultaneously.

Previously, PeopleSoft provided organizations with a batch process that could delete an entire employee ID and all of its associated employee records from the system, wherever the ID exists within HCM. This feature is useful for "no show" new hires who have been entered into the system prior to the worker's hire date. But what if a worker has valid current or prior employment records but fails to appear for an additional or new job? Organizations need a more finite way of managing "no show" workers that can delete a specific employee record while maintaining the integrity of the worker's full history.

In HCM 9.0, the existing batch process for deleting Employee IDs supports the deletion of specific Employee Records. This enhancement gives organizations the flexibility to manage employee records at a more granular and accurate level, leading to better data integrity and reporting for terminations and turnover analysis.

Person of Interest Payees

With HCM 9.0, organizations have more options for the types of non-workers who can be paid or receive benefits. Possible Persons of Interest who may receive payments or benefits from an organization include surviving spouses or former dependents.

This will be particularly useful for organizations that often extend payments and benefits to non-traditional employees, yet have traditionally made these payments outside their HCM solution. Improvements in this area increase the flexibility to provide these benefits (lower cost of benefit delivery) or even increase the delivery capabilities that had previously been cost-prohibitive.

I-9 Compliance

To better comply with the United States' Immigration and Nationality Act, PeopleSoft Enterprise HCM 9.0 enables your company to collect and store all I-9 information. Features include workflow-driven self-service functionality to complete I-9 information, with the ability for employers to complete and submit the required sections.

Improvements in this area will help lower HR printing and mailing costs, and improve employee and manager productivity by automating the approval process. This can also eliminate some approval levels with increased management awareness and confidence in the overall process integrity.

To further reduce administration costs, HCM 9.0 provides reporting and processing functions that:

- Provide notification of upcoming or past-due expiration dates.
- Store, print, and archive I-9 forms as required by law and corporate policy.

Mass Update Enhancements

The Mass Update enhancements in PeopleSoft Enterprise HCM 9.0 assume that a power user can configure and execute mass updates. The user interface for configuration is simple and intuitive while still enforcing data integrity. A user can easily construct a new Mass Update definition or copy an existing definition to modify.

By putting the power and flexibility of Mass Update in the hands of power users, organizations benefit from the operational efficiencies of executing changes en masse without taxing or relying on their development resources.

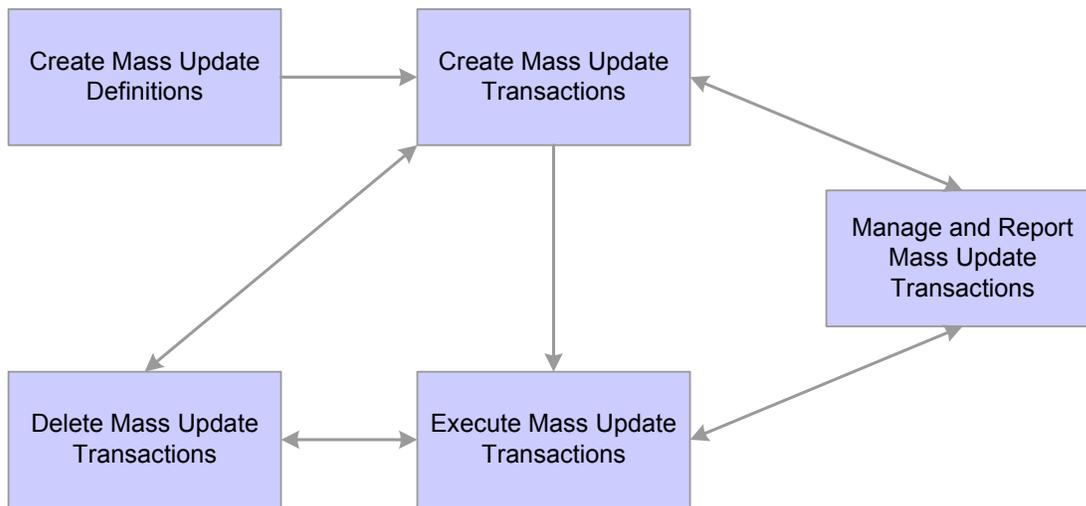
The user is able to choose to have the process update existing rows or add new rows. Both effective dating and effective sequencing are supported. Updating eligible future rows also is supported as an option. Additional steps are added for previewing and manually editing changes online prior to committing the update to the database. A rollback feature also is included so that errors can be reversed if necessary. All of these features provide significantly improved ease of use while safeguarding against errors.

Technically, the new Mass Update process leverages Services Oriented Architecture (SOA) to improve extensibility and performance. A new option delivers multi-threaded processing to significantly improve performance without compromising data integrity enforcement.

In addition to services for job, compensation and person-related information, other services are delivered for updating labor agreements, competencies, military ranks and job profiles. Organizations also are able to create additional customized services should they wish to extend Mass Update processing to more tables.

Improvements in Mass Update will significantly improve staff productivity by eliminating laborious transaction-by-transaction manual efforts. Automating this process also improves data integrity.

The following diagram illustrates the process flow of mass update processing:



Mass Update Process Flow

The new Mass Update is based on three components that access data using the SOA framework:

- Mass Update Manager
- Transaction Processor
- Execution Manager

Mass Update Manager

This is the user interface for configuring mass updates. The user is able to configure mass update definitions, including the population to process, and then create transactions, preview transactions, process transactions, and manage transaction statuses. It invokes the transaction processor for real-time access or the batch manager.

Mass Update Manager consists of:

- The Define Mass Update component for setting up mass update definitions.

- The Create Mass Updates component and related Application Engine (AE) process for generating mass update transactions.
- The Report Mass Updates component and related SQR report for reviewing and printing lists of mass update transactions.
- The Manage Mass Updates component for reviewing or previewing mass update transactions, managing statuses, and processing mass update transactions individually.
- The Execute Mass Update component and related AE process for running mass updates in batch.
- The Delete Mass Updates component and related AE process for deleting pending mass update transactions.

Transaction Processor

Defined as a service in the SOA framework, the transaction processor's role is to access external services to read (select) and write (update) information. Transactions are written as XML messages. Each transaction contains the list of records and fields that are used for a selection or an update.

The processor interprets the message, accesses the correct service based on the records included in the message and returns acknowledgement, including any exceptions. It is generic and requires minimal configuration. As with any service, it can be called by any product, internally or externally.

The Transaction Processor consists of the Configure Processor component for setting up and managing system data that is available for mass updates and an application class that provides access to transaction processing functionality.

Execution Manager

The purpose of this module is to process a set of transactions in batch mode. The batch run can be executed via several processes in parallel to improve performance.

Credit Card Enhancements

With Release 9.0, PeopleSoft Human Resources provides a stronger credit card encryption solution that complies 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 Enterprise 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.

By using the PeopleTools Pluggable Cryptography for strong encryption and decryption, the Human Resources system encrypts data using 3DES algorithms and 168-bit encryption keys. The system encrypts all credit card numbers as soon as they are entered into the system. 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.

PeopleSoft Enterprise Human Resources furthermore enables you to encrypt preexisting credit card numbers according to these latest encryption standards of the system.

Process Credit Card Data Encryption

Enter the record and field name and click Encrypt. The data in the field will be encrypted per HCM Release 9 standards.

Record Name	<input type="text" value="CC_CARD_DATA_E"/>	
Field Name	<input type="text" value="CRDMEM_ACCT_NBR"/>	

Encrypt

[Process Credit Card Data Encryption page](#)

If you have unsecured data in the Credit Card Number field on the Maintain Employee Credit Card Data page, you can run this process one time to encrypt preexisting credit card numbers only.

HCM Event Manager

In the environment for previous releases, the system often contained PeopleCode in a component that detected and reacted to certain changes in data that occurred in that component. For example, in the Job Data component there was code that created an event trigger if certain field data changed. This reactionary code was integrated into the overall process, making the overall process wait for code processing to successfully complete before continuing.

To improve processing, PeopleSoft Enterprise Human Resources 9.0 delivers the HCM Event Manager feature. The HCM Event Manager is a framework that enables you to define, implement, and run business logic for business events.

Using the Event Manager framework, you can define the business events that the system raises when you change certain data in application components or run certain PeopleTools Application Engine processes. You can also define the event handlers that the Event Manager framework executes to react to these specific event instances. Raising an event is the act of creating an event instance. If an event is raised, the Event Manager framework automatically executes the business logic for the registered event handlers of the event.

The Event Manager framework has several advantages over past functionality. One of the major advantages is improved processing performance. The Event Manager framework enables you to manage your business events around the business objects that define the events. By isolating the reactionary business logic within events and event handlers, you improve performance because you no longer have mainline business processes embedded with time-consuming code that runs in the background, as part of its critical path. The Event Manager framework provides a simple mechanism for isolating, automatically running, and monitoring the business logic asynchronously.

Another advantage is that you can define your own business events and build your own event handlers for these events, with minimal impact to the delivered code.

A third advantage is that, through the event monitoring components, you have improved visibility into troubleshooting problems. You can detect and troubleshoot problems using the Event Manager’s problem logging and tracing capabilities. You can monitor event instances and the executions and exceptions of the event handlers through the Event Monitor component or the Event Summary component.

Through the Event Monitor component you can review the status of raised or processed business events and their associated event handler executions.

Event Manager - Monitor ?

Find Event

Last

Refresh

Node

Display Event Channel
 Display Event Keys

Event Instances						
Node	Event ID	Event Created	User ID	Event Keys	Handlers	
PSFT_HR	6	02/14/2006 2:47AM PST	SMPLFED	JPM_PROFILE_ID 200001	Handlers	
PSFT_HR	8	02/16/2006 12:39PM PST	SMPLFED	JPM_PROFILE_ID 200002	Handlers	
PSFT_HR	10	02/16/2006 3:07PM PST	SMPLFED	JPM_PROFILE_ID 200003	Handlers	
PSFT_HR	12	02/23/2006 2:45PM PST	SAMPLE	JPM_PROFILE_ID 100890	Handlers	
PSFT_HR	14	02/24/2006 9:29PM PST	SAMPLE	JPM_PROFILE_ID 100893	Handlers	
PSFT_HR	16	02/24/2006 10:33PM PST	SAMPLE	JPM_PROFILE_ID 100893	Handlers	
PSFT_HR	18	02/24/2006 10:34PM PST	SAMPLE	JPM_PROFILE_ID 100892	Handlers	
PSFT_HR	20	02/24/2006 10:40PM PST	SAMPLE	JPM_PROFILE_ID 100892	Handlers	

Review the status of business events using the Event Manager - Monitor page

Through the Event Summary component you can view a summary of all the logged event instances in the local database. This is useful for quickly identifying problems, such as researching the cause of failed event handler executions to determine a resolution.

Event Manager - Event Summary ?

The information displayed on these pages reflects the contents of the Event Manager logs. Only those Event instances and Event Handler executions that have been logged appear on these pages.

[Refresh](#)

Customize Find View All  First 1-4 of 4 Last				
Event Name	Node Name	Event Instances	Handler Executions	Failed Handlers
JPMNonPersonProfileUpdated	PSFT_HR	4	0	0
JPMProfileAdded	PSFT_HR	160	66	0
JPMProfileItemUpdated	PSFT_HR	116	0	0
JPMProfileUpdated	PSFT_HR	163	54	0

[View a summary of logged event instances using the Event Manager - Event Summary page](#)

PeopleSoft Human Resources also provides the Handler Tester component and the Event Tester component so that you can test event handlers and events outside of the mainline business process.

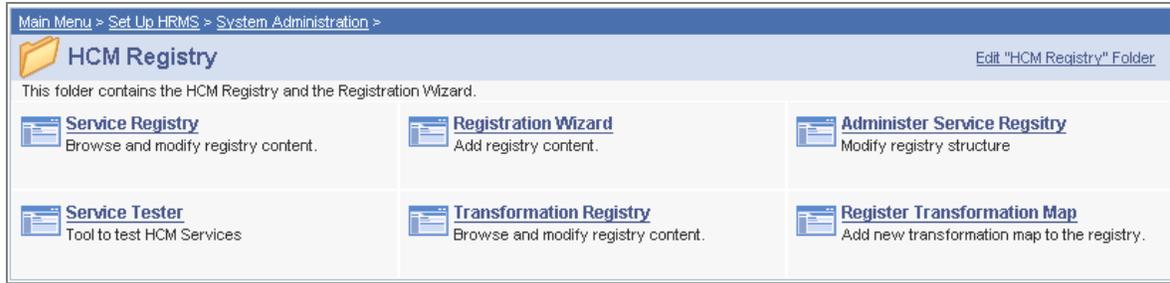
Another feature of the Event Manger framework is that it enables you to manage events that have influence over more than one database instance. You can use the Event Manager framework to process business events that occur on either a local or remote database. Each database has its own local event registry. Within a local event registry, you can define events that you can raise by local process as well as events of interest to applications on the local database that are raised by remote databases. To support the processing of an event on a remote database, remote databases must implement the Event Manager framework. Also, each local event registry must contain entries for the remote events of interest along with their associated local event handlers.

HCM Interface Registry

The fact that the trendy *service orientation* and *componentization* are frequently used interchangeably reveals the unglamorous truth about the underlying effort: it is ultimately just another attempt to stimulate more code reuse. The service-oriented aspect is merely a reflection of the technologies at play, and how the optimal packaging for reusable logic in a distributed architecture is that of a centralized server resource, or service.

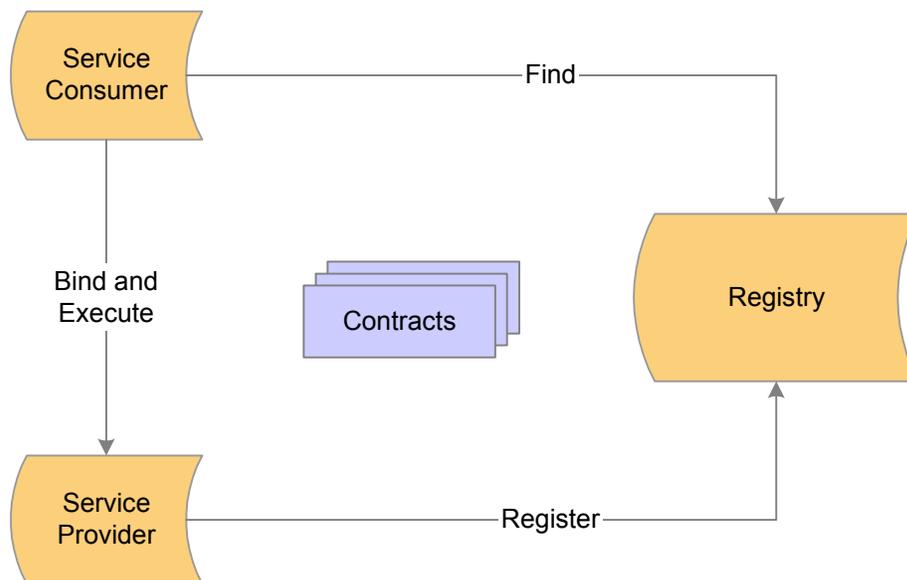
Although code reuse may seem to be a tired concept, this is only due to the difficulties that typically plague attempts to garner support for it. When successfully realized, the benefits of code reuse are spectacular.

To make code reuse more manageable, PeopleSoft Enterprise Human Resources 9.0 provides a registry that enables you to register HCM interfaces for Service Oriented Architecture (SOA).



Use the HCM Registry page to access pages to register HCM interfaces for Service Oriented Architecture (SOA)

The HCM Registry holds all the interface specifications for available services. It stores contracts from service providers and provides those contracts to interested service consumers. The service provider registers the interface, the service consumer locates the interface in the registry and uses the information to bind and execute the contract between the consumer and the provider.



The service consumer finds an interface in the registry and the registry provides the information about a given interface required by the requestor to bind and execute a service

The service consumer is an application, service, or some other type of software module that requires a service. It is the entity that initiates the location of the service in the registry, binding to the service over a transport, and executing the service function. The service consumer executes the service by sending it a request formatted according to the contract.

The service provider is the service, the network-addressable entity that accepts and executes the requests from consumers. It can be a mainframe system, a component, or some other type of software system that executes the service request. The service provider publishes its contract in the registry for access by service consumers.

To set up and use an interface registry, you must first set up the interface contract and register the interface using the Registration Wizard (Setup HRMS, System Administration, HCM Registry, Registry Wizard). An interface contract specifies the way a consumer of a service will interact with the provider of the service, including the format of the request and response from the service. The HCM registry is populated with the existing interface contracts within HCM. To add new interfaces to the registry, you must first define the contract between the services.

Once you have registered the interface, implement it in the providing application. The providing application must implement the interface accurately so that the consumer application does not encounter any unexpected behavior.

After you have registered the interface and implemented it in the providing application, you must set up the consuming application to invoke registered interfaces. If there is an interface in the registry that your application needs to use, you must create code in PeopleCode events in the consuming application to invoke the interface.

You can then use the HCM Registry component to review the HCM registry and modify existing entries.

*Owner Identifier

Click on the interface name to see details.

Left | Right

- [-] HCM Registry
 - [+] HRMS Education And Government
 - [+] Job Profile Management
 - [+] Position Management
 - [+] HCM Shared Components
 - [-] HR Core
 - [+] Compensation
 - [+] Department
 - [-] Job
 - [+] Services
 - [-] sqlViews
 - [HCR_BN_PRG_PR_1-Ver.1.0]
 - [HCR_JOB_1-Ver.1.0]
 - [+] Types
 - [+] Exceptions
 - [+] Job Attributes
 - [+] Mass Update
 - [+] Organization
 - [+] Person
 - [+] Workforce Administration
 - [+] Competency Management
 - [+] Health and Safety Monitoring
 - [+] Recruiting Solutions
 - [+] Campus Solutions

HCM Interface Registry page

The registry lists all the content owners and their interfaces in a tree format. Each tree leaf represents a registered interface. Registered interfaces are grouped by interface folders.

Notice that interfaces fall into one of the following categories:

- *Services*: Synchronous request/response (services) are procedural invocations and can be local and remote. Asynchronous publish/subscribe (events) can be notifications (outbound) or consumption (inbound) and are based on messaging and integration points.
- *SqlViews (views)*: Views are read only and are SQL-based.
- *Types*: Types represent the complex data types used in service invocations.
- *Exceptions*: Exceptions are fatal errors that can occur during service execution and require special handling by the PeopleCode program.

HR for France

PeopleSoft Enterprise HCM 9.0 includes features that enhance the HR Administrator's ability to comply with French legislative requirements and that simplify the processing of critical employee data.

The following enhancements are included in this release:

- Additional options for French companies to track their training costs and comply with regulations.
- Improved tracking and reviewing of pension and contingency fund information for French employers.
- Improved merge process for French public sector data.

New Options For Tracking Training Costs

In PeopleSoft Enterprise HCM 9.0, we have added more options for French companies to track their training costs and comply with regulations. Building on the training law enhancements and the improved 2483 report delivered in release 8.9, we are proposing two solutions:

- PeopleSoft Enterprise Learning Management (ELM) 9.0 as the training system of record, with the Training Administration module used to track employee costs and generate regulatory reports, or
- Training Administration as the training system of record, including training plan, enrollments, costing and statutory reporting.

Tracking Costs with ELM

Choosing PeopleSoft ELM enables French organizations to benefit from advanced catalog management, training self-service, embedded learning, compliance tracking, flexible approvals, pre-emptive notifications and more. Ultimately, ELM will help every part of the organization become more effective by increasing performance across all dimensions of the business.

Existing customers who are used to managing training using Administer Training can choose to keep using it.

PeopleSoft ELM 9.0 provides several new features for France, including:

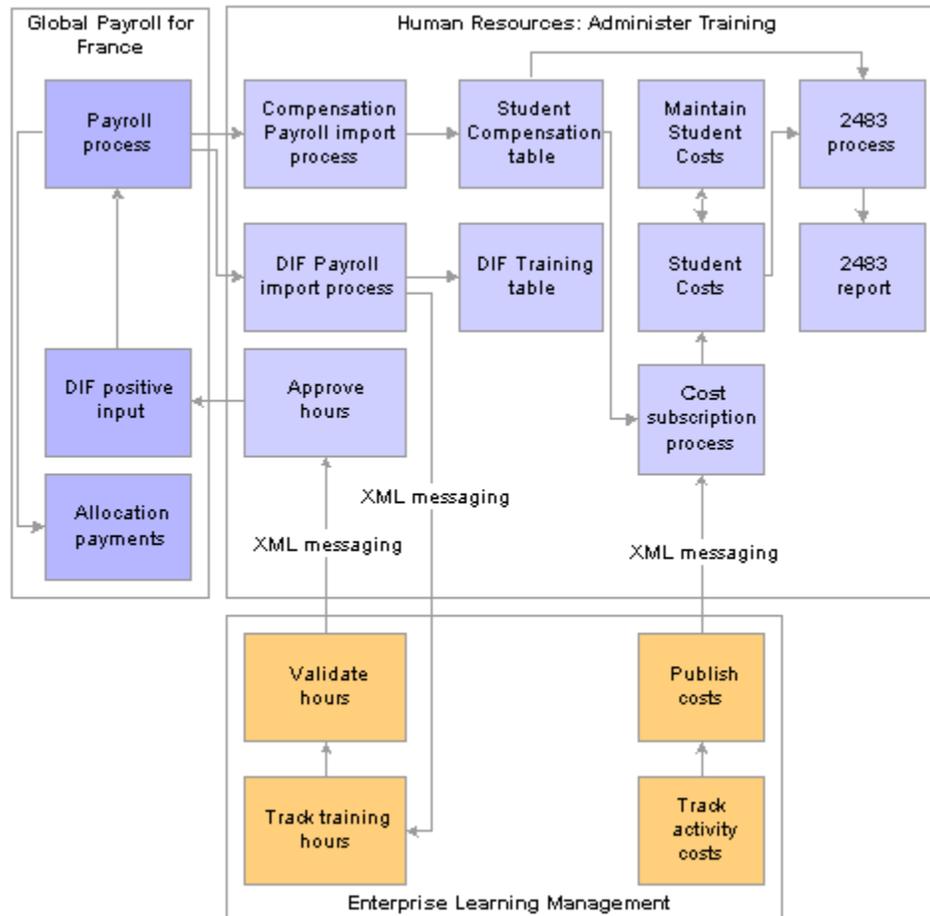
- The ability to plan and budget training for the next plan period (for example, a calendar year) and create a training plan report for the Worker's Council.
- The ability to track DIF training. DIF ("Droit Individuel à la Formation," or Individual Training Right) was introduced by the 2004 training law, which tracks the training hours for specific, identified learning.
- The ability to track the training information needed for the 2483 report.

For customers who choose ELM, we adjust the various labels in Administer Training for seamless integration.

Tracking Costs with PeopleSoft ELM, Administer Training, and Global Payroll

PeopleSoft ELM 9.0 integrates directly with the Administer Training business process in Human Resources 8.9 and above and indirectly with Global Payroll for France 8.9 and above.

The three applications interact as shown in the illustration:



Administer Training integration with Enterprise Learning Management and Global Payroll

To learn more about PeopleSoft Enterprise ELM 9.0, see the *ELM 9.0 Release Value Proposition* and other related release materials.

Pension and Contingency Fund Enhancements

Human Resources 9.0 includes modifications to existing pages and new setup pages that enable you to define pension and contingency fund details for your organization and calculate and report contributions in the DUCS and DADS reports.

The pages for setting up pension and contingency funds are accessed from the Meet Regulatory Requirements business process. Using these pages you can:

- Set up fund codes for your pension and contingency funds.
- Define the institutions that manage the pension and contingency funds.

- Define pension and contingency fund contracts and associate them with companies and establishments.

A new Fund Code page enables you to record the pension and contingency funds for your organization. The Institution Type and Institution Address pages now include fields for specifying:

- DADS and DUCS codes used in the DADS and DUCS reports.
- The SIRET number.

Previously, companies and establishments were associated with pension codes in the Company and Establishment components respectively. For 9.0 we have introduced a new page specifically designed for French customers to record this information. Use the new Pension/Contingency Contracts page to record details of the pension and contingency contracts and link the contracts to establishment and companies:

Pension/Contingency Contracts

Membership Number: KFM3

Pension/Contingency Contracts

Find | View All | First 1 of 1 Last

***Effective Date:** 01/01/2000 ***Status:** Active

***Description:** Contingency contract (mandatory)

Short Description: CONT1

***Institution #:** KFP1 Contingency pension 1

Institution Type: Contingency

Fund Code: MORNAY Mornay Group

Membership Date: 01/01/2000

Mandatory **Optional**

Comment:

Population Category

Customize | Find | First 1-3 of 3 Last

*Category	Category Description	Declared Population	*Base Calculation Type	Employee Rate	Employer Rate	Formula Name	Description
1 220	Managers	220	TA	0.00	1.50		
2 221	Articles 4 and 4 bis	221	TA	0.00	1.50		
3 222	Article 36	222	TA	0.00	1.50		

Companies

Customize | Find | First 1 of 1 Last

*Company	Description
1 KFP1	Business Institute - France

Establishments

Customize | Find | First 1 of 1 Last

*Establishment ID	Description
1 KFP201	Bordeaux - Headquater

Manage pension and contingency contracts using the new Pension/Contingency Contracts page

For contingency contracts, you specify the population that is eligible for the contract in the Population Category grid.

Note. Pension and contingency fund information is still displayed on the Company - Default Settings page and the Establishment Address page. However, the fields are now display-only and reflect the contracts information that is set up on the Pension/Contingency Contracts page.

At the employee level you can assign pension and contingency funds to individual employees from the Contract Data - Contract Type/Clauses page.

AGIRC and ARRCO contracts defined on the Contract Type/Clauses page override any contracts defined at the company or establishment level. However, for contingency funds, contracts assigned at the employee level are added to funds defined at the company or establishment level.

To make it easier for administrators to determine the contracts that apply to individual employees, the new Pension/Cont. Contracts Review page summarizes the funds to which an employee is eligible.

Pension/Cont. Contracts Review

Violette FROGER EMP ID: GF100ME101 Empl Rcd #: 0

Contract Number: 0001

Company: GF1 Societe Francaise informatique

Establishment ID: GF1AI Etbl Admin. Informatique

Inquire Date: 24/08/2006 Refresh

Pension/Contingency Contracts

Contract Details | Payroll Details | FEED

	Membership Number	Description	Institution #	Institution Description	Institution Type	Fund Code	Fund Code Description
1	KFM1	ARRCO contract	KFAR	CGIS Mornay ARRCO	ARRCO	MORNAY	Mornay Group
2	KFM2	AGIRC contract	KFAG	ACGME Mornay AGIRC	AGIRC	MORNAY	Mornay Group
3	KFM3	Contingency contract (mandatory)	KFP1	Contingency pension 1	Contingency	MORNAY	Mornay Group

[New page for reviewing employee pension/contingency contracts](#)

This page lists contracts that are assigned to the establishment and company that the employee works for, and contracts assigned to the employee on the Contract Type/Clauses page.

Global Payroll for France 9.0 incorporates complementary enhancements to processing of pension and contingency fund contributions.

See Global Payroll for France for more information.

Improved Merge Process for French Public Sector Data

The collective merge process that is used to synchronize data in the JOB, JOB_JR, and COMPENSATION tables (job data) with data in Manage French Public Sector tables has been improved and now provides a more rapid and reliable transfer of employee data. The process allows multiple rows of data to be transferred concurrently from French Public Sector tables to HR tables using data streams.

The enhanced merge process involves two steps:



1. Specify the number of streams to use to process and transfer data on the Prepare Merge Process FPS page.

Unlike standard streaming, you do not need to specify which employees to process in each stream. The system determines the most efficient allocation of employees to streams.

Prepare Merge Process FPS

Run Control ID: PS [Report Manager](#) [Process Monitor](#)

Language:

Run Parameters

Number of Streams:

Use the [Prepare Merge Process FPS page](#) to select the number of streams to use to process employee data

2. Select the stream to process and run the employee merge on the FPS Merge Employees page.

FPS Merge Employees

Run Control ID: PS [Report Manager](#) [Process Monitor](#)

Language:

Run Parameters

Stream Number: Log Messages:

[Merge employee data stream by stream on the FPS Merge Employees page](#)

HR for Japan

In HCM 9.0 Human Resource and Global Payroll for Japan, we offer some new functions to simplify administrative work:

- Postal code import process. This feature enables csv format files of postal code data that are supplied by Japan Post to be imported in order to update postal code data smoothly.
- Enhancement of Mass Organizational Change. This feature enhances Mass Organizational Change visually in order to ease operation.

HR for Spain

In PeopleSoft Enterprise Human Resources 9.0 we made significant enhancements to improve local functionality for Spain. This release includes:

- Contrata communications management.
- Delta communications management.
- Improvements to AFI flat file generation.

- Contract printing capabilities.

Contrata Communications Management

Contrata communication management enables you to track multiple persons' labor contract data and to generate an XML flat file to send to I.N.E.M. This feature combined with the Contrat@ web service eliminates the paper communication between companies and I.N.E.M. 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 HRMS 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 Contrat@ 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, templates, and mapping 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. The last step of the XML setup is to define the root node that corresponds to each contract type for Contrata XML file generation.

Once you complete the XML setup, you can then use the Create Contrat@ XML File ESP component to search for and select the persons for whom you need to report Contrata data, load their data into an XML file template, add additional required data, validate the data, and generate the XML file.

Definition
Generation File
Load Response File

XML File Id: 2005_JAN Contracts in January 2005 **Status:** XML File No Generated

Temp ID: C01 Contrat@- Contracts

***File Name:** .XML

***File Path:**

Filter Data

From Date: **To Date:**

Filter By: ▼

Employee Data

	Emplid	Name	Effective Date	Contract Type	Node Status	Description	Details
<input checked="" type="checkbox"/>	GEAC1_0002	Gema López Luengo	2002-01-01	001	Required Data	CONTRATO_100	Details
<input checked="" type="checkbox"/>	GEDEV_JC01	Isabel Sánchez González	2000-01-03	001	Required Data	CONTRATO_100	Details

Generate an XML flat file with persons' Contrata data to send to I.N.E.M.

Before generating the XML file you can view a preview of the XML file, and you can view the contract data that the system has loaded into the XML file for the person and complete the missing information that is required in the XML file.

Details			
Tag	Required	Node Value	
XML File Id:	2005_JAN	Contracts in January 2005	
EmplID:	GEDEV_JC01		
Effective Date:	2000-01-03		
NID	<input type="checkbox"/>	B81473118	✓
CCC	<input checked="" type="checkbox"/>	011128214365546	✓
Person Identification	<input checked="" type="checkbox"/>	51371867X	✓
Name	<input checked="" type="checkbox"/>	Isabel	✓
Last Name	<input checked="" type="checkbox"/>	Sánchez	✓
Second Last Name	<input type="checkbox"/>	González	✓
Gender	<input checked="" type="checkbox"/>		✗
Birth Date	<input checked="" type="checkbox"/>	19690517	✓
Nationality	<input type="checkbox"/>		▲
City	<input type="checkbox"/>		▲
Country	<input checked="" type="checkbox"/>		✗
Social security Number	<input checked="" type="checkbox"/>	282543675493	✓
Begin Date	<input checked="" type="checkbox"/>	20000103	✓
End date	<input type="checkbox"/>		▲
Labor Agreement Flag	<input type="checkbox"/>	<input type="text"/>	▲
Education Level	<input checked="" type="checkbox"/>	<input type="text"/>	✗

[View contract data loaded into the XML file and complete the missing information](#)

After generating the XML file you can send your completed XML files to I.N.E.M. through the Contrat@ web service. Human Resources for Spain provides the XML File Confirmation ESP component to confirm the sending status of communications. The system automatically tracks which persons you have included in communications in order to avoid situations where you report data multiple times for the same person, resulting in unintentional overriding and overlapping of data.

When I.N.E.M. sends your company a response XML file regarding your Contrata communication, you can use the Create Contrat@ XML File ESP component to review the XML response file for errors and make necessary changes. Depending on the error and communication status, you can then communicate the correct data either by contact I.N.E.M. or regenerate the XML file communication for persons whose data is in error.

Delta Communication Management

Delta communication management enables you to efficiently communicate to management entities 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.

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.

Injury	Description	Statements	Details	1st Aid	Diagnoses	Work-Related	Reporting
Incident Number: 00000666 Date: 10/05/2005 Incident							
Person Involved Find View All First 1 of 2 Last							
EmpID: GEAB1_0001 Antonio Diaz Ruiz Empl Rcd Nbr: 0							
Date of Birth: 11/01/1945 Date of Death: Gender: Male							
Employee Data at Incident Date							
Business Unit: ESP01 Spain Business Unit							
Department: 10000 Headquarters							
Job Code: 790000 Sales Manager							
Location: KE01 Madrid Operations Active							
Notification - This Person							
*Date Reported: 10/05/2005							
Time Reported: PST							
Spain							
Incident Type Esp: PAT <input type="checkbox"/> Relapse Accident with sick note							
Absence Begin Date: 10/05/2005 End Date: 10/07/2005 Medical Discharge or Death							

Enter data about people involved in an industrial accident for Delta reporting

Once you have entered data about the industrial accident, you can then use the XML file generation functionality to generate Delta accident reports in XML format based on these industrial accident details. Use the Create Delt@ PAT/RAF Report ESP component and the Create Delt@ RATSBS Report ESP component to generate the necessary Delta accident reports in XML file format.

Definition
Generation File

XML File Id: PATTEST **Status:** XML File No Generated

Temp ID: D01 DELT@PAT

***File Name:** .XML

***File Path:**

Filter Data

***From Date:** ***To Date:** ***Insurance Company Code:**

Filter By:

Employee Data

		Emplid	Name	Incident Date	Description	Node Status	Details
1	<input checked="" type="checkbox"/>	GETX1_0001	Antonio Diaz Ruiz	2005-05-25	PAT	Required Data	Details

Generate Delta accident reports in XML format based on the industrial accident details

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.

Before completing the XML file generation, you can view the data that the system has loaded into the XML file for the person’s incident and complete the missing information that is required in the XML file, and you can view a preview of the XML file for the Delta service or Contrata service before generating the XML file.

```

XML Preview
<MultiPAT>
  <PAT>
    <numreferencia>000000000000</numreferencia>
    <tipo>1</tipo>
    <trabajador>
      <apellido1>Diaz</apellido1>
      <apellido2>____</apellido2>
      <nombre>Antonio</nombre>
      <naf>281738600452</naf>
      <fechaingreso>01011990</fechaingreso>
      <sexo>H</sexo>
      <fechanacimiento>01111945</fechanacimiento>
      <nacion>____</nacion>
      <ipf>102882010H</ipf>
      <situacion>1</situacion>
      <cno>
        <texto>____</texto>
        <codigo>____</codigo>
      </cno>
      <antigüedad>
        <meses>57</meses>
        <dias>0</dias>
      </antigüedad>
      <contrato>001</contrato>
      <regimenss>____</regimenss>
      <textoconv>Labor Agreement 1</textoconv>
      <atep>113</atep>
      <domicilio>Alberique</domicilio>
      <telefono>____</telefono>
      <provincia>28</provincia>
      <municipio>Madrid</municipio>
      <codpostal>28037</codpostal>
    </trabajador>
  </empresa>

```

[Preview the XML file for the Delta service or Contrata service before generating it](#)

Human Resources for Spain provides the Confirm/Unconfirm component to track whether you have sent the XML file to the management entity or cancelled the sending of the file. You can track this information by the sending ID that the XML generation process creates for each XML file that you generate.

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.

AFI Flat File Generation

Human Resources for Spain provides improvements to AFI flat file generation that companies must send to the social security agency.

For Spanish employers, PeopleSoft Enterprise 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 pertains to AFI reporting. If so, the system adds, deletes, or updates the corresponding effective-dated row in the AFI_DATA_ESP record via PeopleTools application messaging. The system uses the ESPAFIData_Sync message subscription within the WORKFORCE_SYNC message to perform the synchronization. The system stores all AFI data in the AFI_DATA_ESP record.

After an AFI-related action takes place, you can access the AFI Data ESP component to view and update AFI data for that employee. You can also use this component to manually enter new rows of data for special situations not handled by job data processing, such as strikes or contract changes.

Employee AFI Data						
Antonio Diaz Ruiz		EMP	ID:	KEG001	Empl Rcd #:	0
Job Information						
Customize Find View All First 1-2 of 2 Last						
General		Reporting				
Eff Date	Seq	Social Security Action	Social Security Reason	Node Status	Details	
04/01/2006	0	Change in Risk Code		Not Communicated	Details	
11/17/1980	0	Hire	Hire	Included in AFI	Details	

View and update AFI data for an employee

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.

Human Resources for Spain provides the Review AFI File ESP component to view all of the employee AFI data that is part of the AFI flat file being communicated to the Social Security General Treasury. Through this component you can also unlink data from the files as necessary so that the data becomes available again for processing in a subsequent AFI flat file.

Review AFI Files

AFI File Name: AF19870*

Time Stamp: 01/01/1900 12:00:00AM

Employee Data

	EmpID	Name	Action Date	Social Security Action	Reason
<input checked="" type="checkbox"/>	KE0005	Javier Lorente Cruz	10/01/1987	Hire	Hire
<input checked="" type="checkbox"/>	KEG005	Alberto Lobo de la Cruz	10/01/1987	Hire	Hire

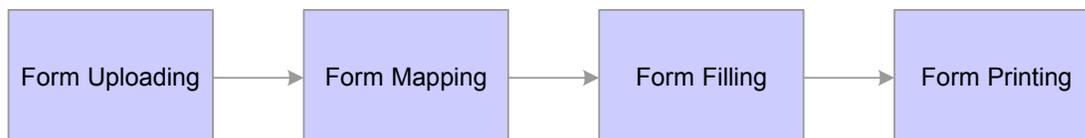
[View the employee AFI data being communicated to the Social Security General Treasury in the AFI flat file](#)

Contract Printing Capabilities

Contract printing capabilities enables you to load the forms into the system, map data to the form fields, enter data into the fields to complete the forms, and print the forms. 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.

To assist employers in the completion of contract forms, Human Resources for Spain provides Contract Printing functionality to load the forms into the system, map data to the form fields, enter data into the fields to complete the forms, and print the forms. 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.

There are four basic tasks involved in Contract Printing functionality:



Basic tasks for contract printing

System administrators must perform form uploading and form mapping tasks whenever there are new contracts that require contract-printing capability. Human Resources administrators perform the form filling and form printing tasks as necessary.

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.

The setup for contract printing is based on an XML set, XML nodes, an XML template, and contract print mapping. Human Resources for Spain delivers an XML set for use with all contract printing, XML nodes for printing unlimited contracts and transformation to unlimited contracts, and an XML template for use with all contract printing. Contract print mapping is the means of associating a contract type with XML templates and XML nodes. You must assign a specific XML node to each contract type because each contract type could report different information. Human Resources for Spain delivers contract print mapping for unlimited contracts.

Contract Printing Mapping

Template Type: P01 Contract Printing Template

Mapped Contracts									
SetID	Contract Type	Description	*Node Id	Description					
1	ESP	001	Unlimited Contract	PE-170	PE-170	+ -			
2	ESP	100	Unlimited Full Time	PE-170	PE-170	+ -			
3	ESP	109	Transformation to Unlimited	PE-172	PE-172	+ -			

Associate a contract type with XML templates and XML nodes as contract printing setup

Human Resources administrators can use the Contract Printing ESP component to generate, review, edit, and validate contract data.

Contract Printing

Contract Printing Run ID: 3

***Description:** 3

Filter Data

From Date: 01/01/1900 **To Date:** 09/14/2006 **Search**

Filter By: None

Employee Data

Select All Unselect All

Emplid	Name	Contract Begin Date	Effective Date	Contract Number	Contract Type	Node Status	Edit Data	Print
<input checked="" type="checkbox"/>	GEAB1_0001 Antonio Diaz Ruiz	1990-01-01	1990-01-01	0001	Unlimited Contract	Required Data	Edit Data	Print
<input checked="" type="checkbox"/>	GEAB1_0002 Alberto Lopez de La Cruz	1990-01-01	1990-01-01	0001	Unlimited Contract	Data OK	Edit Data	Print
<input checked="" type="checkbox"/>	GEAC1_0001 María Isabel Pérez Ballesterero	1990-01-01	1990-01-01	0001	Unlimited Full Time	Data Not Loaded	Contract type not mapped to any template	

Review, edit, and validate contract data, and then print contracts

Human Resources for Spain also provides a component for Human Resources administrators to print contracts in batch for employees who are grouped within a specified Contract Printing Run ID.

HR for the Netherlands

For the Netherlands, Human Resources 9.0 delivers enhancements in these areas:

- Support for new Walvis reporting requirements.
- Support for regulatory changes to savings plans and company car taxation.
- Banking.
- Benefits management.

Support for new Walvis Reporting Requirements

From January 1, 2006, the *Wet Administratieve Lasten Verlichting Inzake Socialeverzekeringwetten* (WALVIS) Act introduced changes to reporting requirements for Dutch employers. The modifications delivered to support these regulatory requirements have been incorporated into Global Payroll for the Netherlands 9.0 and Human Resources 9.0.

See Global Payroll for the Netherlands for details of the payroll changes.

First Day Notifications

One of the new reporting requirements is the First Day Notification (Eerstedagsmelding [EDM]) that employers submit to the Tax Authority when they hire or rehire employees. Human Resources 9.0 enables you to set up and generate First Day Notifications in the correct XML format for transmission to the Dutch Tax Authority.

First you use the new First Day Report Setup page to set up the tax number suffix and define employee classes that are excluded from the notifications for each of your companies.

Then you generate the First Day Notifications and view the results using the First Day Notification NLD component.

First Day Notification
Notification Results

Run Control ID: 01

[Report Manager](#)
[Process Monitor](#)
Run

Report Request Parameters

Message ID text:

Path:

File Name:

Search Criteria

Begin Date: BT End Date: BT

Company: Q Business Institute Netherlands Process Date:

EmpID: Q

Selection: v Select with Matching Criteria

Employees Customize | Find | View All | [grid] First 1 of 1 Last

Data Notification
Detail

EmpID	Empl Rcd#	Name	Hire Date	Rehire Dt	Company
1	0				

Use the First Day Notification NLD component to generate EDM notifications

Health Insurance

The new health insurance act (*Zorgverzekeringswet (ZVW)*) that came into effect on January 1, 2006 introduced a combined health insurance, which replaced the previous public and private health insurance arrangements.

With Administer Salaries for the Netherlands 9.0, you can track the new health insurance on the Social Insurance page, which has been updated to accommodate the new ZVW insurance.

Support for Regulatory Changes to Savings Plans and Company Car Taxation

Administer Salaries for the Netherlands 9.0 has been updated to meet legislative changes to savings plans and company car taxation that were introduced in 2006.

Life Cycle Savings Plans

Under the new legislation, employees can contribute to a new type of savings plan, the life cycle savings plan (*Levensloopregeling*), that enables employees to create a fund that they use at a later date, for example for an early retirement.

Company Car Taxation

From January 1, 2006 the private use of a company car is a taxable benefit that varies according to the employee's private use of the car.

For employees whose private use of a company car exceeds 500 kilometers a year, an amount is added to the bases used to calculate tax and social security deductions.

Modifications to the Tax Data Page

The Tax Data page in Administer Salaries for the Netherlands has modifications for both the savings plans and company car tax changes.

The screenshot displays the 'Tax Data' page for employee Kees den Bakker (Person ID: KN0003). The 'Tax Data Details' section includes the following fields and options:

- *Effective Date:** 28/08/2006
- *Exception tax:** No Exception
- *Tax Table Type:** White Tax Table
- *Travel Data:** Company Car
- No Tax on Car:** (empty dropdown)
- Savings Plan:** Life Cycle Arrangement
- Percentage Special Tax Rate:** 30.00
- Taxable Income:** (empty text box)
- Tax Credits:** Tax Credits
- 30% Ruling:** 30% Ruling
- Anonymous Rate:** Anonymous Rate

The Tax Data page has modifications for savings plans and company cars

When you enter employee tax information, you can now select Life Cycle as a savings plan option. For employees with company cars, use the Travel Data field and the new No Tax on Car field to indicate the rules that apply to the employee.

Banking

Administer Salaries for the Netherlands 9.0 includes enhancements to the Bank/Giro page for multiple jobs and to support different currency codes.

For employees with multiple jobs, you can now enter banking information for each employee record number. This enables you to make payments to different accounts for each of the employee's jobs.

A new currency code field enables you to specify the currency of each account.

Benefits Management

The benefits functionality that is available in Administer Salaries for the Netherlands has been enhanced in line with enhancements made to Manage Base Benefits. For the Netherlands, the key changes are:

- Introduction of the Benefit Rate table that enables you to define more flexible insurance benefit plans than the Age-Graded Rate table, which it replaces.
- The Current Benefits Summary component replaces the Benefits Summary page and the Benefits Summary (PI DedCalc) page.

HR for the United Kingdom

To support the Inland Revenue requirement that employers' year-end reporting contains valid national insurance prefixes only, we have introduced a new setup page for the U.K. that defines national insurance prefixes.

NID Prefix GBR

Effective:
Status:

[AA](#) [AB](#) [AE](#) [AH](#) [AK](#) [AL](#) [AM](#) [AP](#) [AR](#) [AS](#) [AT](#) [AW](#) [AX](#) [AY](#) [AZ](#)
[BA](#) [BB](#) [BE](#) [BH](#) [BK](#) [BL](#) [BM](#) [BT](#)
[CA](#) [CB](#) [CE](#) [CH](#) [CK](#) [CL](#) [CR](#)
[EA](#) [EB](#) [EE](#) [EH](#) [EK](#) [EL](#) [EM](#) [EP](#) [ER](#) [ES](#) [ET](#) [EW](#) [EX](#) [EY](#) [EZ](#)
[GY](#)
[HA](#) [HB](#) [HE](#) [HH](#) [HK](#) [HL](#) [HM](#) [HP](#) [HR](#) [HS](#) [HT](#) [HW](#) [HX](#) [HY](#) [HZ](#)
[JA](#) [JB](#) [JC](#) [JE](#) [JG](#) [JH](#) [JJ](#) [JK](#) [JL](#) [JM](#) [JN](#) [JP](#) [JR](#) [JS](#) [JT](#) [JW](#) [JX](#) [JY](#) [JZ](#)
[KA](#) [KB](#) [KE](#) [KH](#) [KK](#) [KL](#) [KM](#) [KP](#) [KR](#) [KS](#) [KT](#) [KW](#) [KX](#) [KY](#) [KZ](#)
[LA](#) [LB](#) [LE](#) [LH](#) [LK](#) [LL](#) [LM](#) [LP](#) [LR](#) [LS](#) [LT](#) [LW](#) [LX](#) [LY](#) [LZ](#)
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[TA](#) [TB](#) [TE](#) [TH](#) [TK](#) [TL](#) [TM](#) [TP](#) [TR](#) [TS](#) [TT](#) [TW](#) [TX](#) [TY](#) [TZ](#)
[WA](#) [WB](#) [WE](#) [WK](#) [WL](#) [WM](#) [WP](#)
[YA](#) [YB](#) [YE](#) [YH](#) [YK](#) [YL](#) [YM](#) [YP](#) [YR](#) [YS](#) [YT](#) [YW](#) [YX](#) [YY](#) [YZ](#)
[ZA](#) [ZB](#) [ZE](#) [ZH](#) [ZK](#) [ZL](#) [ZM](#) [ZP](#) [ZR](#) [ZS](#) [ZT](#) [ZW](#) [ZX](#) [ZY](#)

The new NID Prefix GBR page provides system validation of NI prefixes

Now when you enter a person's national insurance code on the Biographical Details page, the system validates the prefix against values defined on the NID Prefix GBR page, and issues an error message for invalid prefixes.

The End of Year Pre Validation report (GPGBEYOY) delivered in Global Payroll for the U.K. also uses this information to validate national insurance numbers.

Global Military Enhancements

In HCM 9.0, we introduce Military Rank enhancements that can be applied globally and provide considerable value to global military customers in several ways.

Military Rank

Every military organization must capture and report the same rank-related information for each of their service members. Their key business need is to identify, track and move the most qualified individuals for designated assignments.

New military setup tables allow you to define necessary organizational structures and rank definitions for your own military organization. In case you manage service members from another country's militaries, you should also define those country's military organizational rank structure. With enhancements to the job code, position and employee job, your organization is now able to properly maintain member-level information including a person's military background and skill expertise area. To meet the needs of military organizations, we integrate with other core HR areas and processes, including Job Profile Management and Mass Update.

We also include the capability to search PeopleSoft using additional military fields, such as military service, rank and worn rank. You can now limit your service member search criteria, thereby increasing the usability of the system. Additionally, you can now capture whether service members are deployable or can be reassigned to new duty assignments. Now that this becomes part of PeopleSoft Enterprise, you also gain the benefit of reduced maintenance costs, since you do not have to make as many customizations on your own.

Benefits of Military Services enhancements include a greater ability to meet critical deployment or staffing deadlines by providing a global view of employee data. This will lead to improved military readiness and deployment since we can better select the "right" candidates for duty. Service member morale may increase for example, by better highlighting training improvement areas and increasing the possibility of being picked for choice assignments. Lowering costs of maintaining multiple systems and greater business insight will benefit all military customers.

Base Benefits

Enhancements in HCM 9.0 Base Benefits provide organizations with the ability to improve employee morale and organizational brand image, which leads to becoming an employer of choice. Other benefits include improved staff productivity, more business flexibility and the increased ability to focus on strategic business goals.

Rate Configurations

With PeopleSoft Enterprise HCM 9.0, we reorganized and extended the functionality for rate tables. A single rate structure replaces the old flat, age-graded, salary percentage and service rate tables. This common architecture standardizes the definition of all rate tables.

Benefit Rate Types																	
Benefit Rate Type:	1																
*Description:	Age-Graded (By Gender, Smoker)																
Short Description:	Age-Graded																
*Rate or Percent:	Rate Amount	<input type="checkbox"/> Uses Compensation <input checked="" type="checkbox"/> Uses Demographics															
<table border="1"> <thead> <tr> <th colspan="3">Rate Keys</th> </tr> <tr> <th>*Key Nbr</th> <th>Field Name</th> <th>Matching Operator</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Gender</td> <td>Equality (=)</td> </tr> <tr> <td>2</td> <td>Smoker</td> <td>Equality (=)</td> </tr> <tr> <td>3</td> <td>Age</td> <td>Greater Than or Equal (>=)</td> </tr> </tbody> </table>			Rate Keys			*Key Nbr	Field Name	Matching Operator	1	Gender	Equality (=)	2	Smoker	Equality (=)	3	Age	Greater Than or Equal (>=)
Rate Keys																	
*Key Nbr	Field Name	Matching Operator															
1	Gender	Equality (=)															
2	Smoker	Equality (=)															
3	Age	Greater Than or Equal (>=)															
This definition can not be changed - it is managed by PeopleSoft.																	

Define benefit rate types

When defining rate types, you define:

- Whether the rates are a flat amount or a percentage of base compensation.
- The factors used in the rate table. This can be age, benefit base, benefit plan, coverage code, covered person type, gender, months of service, smoker.
- The operator used to define the factor. This can be greater than, greater than or =, equal, less than, less than or =.

We deliver the following rate types that should fit most needs:

- Age Graded
- Flat Rate
- Percent of Base
- Length of Service
- Compensation Bands
- Covered Person type
- Benefit Plan and Coverage Code

After the rate type is defined, use the Benefit Rate Table page to define the rules for the rate table and the rate data.

Benefit Rate Table

Rate Table ID: B101

Benefit Rate Table Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Effective Status: Active

*Benefit Rate Type: Age-Graded (By Gender, Smoker)

*Description: B101 Short Description:

*Premium Frequency: Monthly *Rate per Unit: None

Currency Code: USD [Specify Optional Limit](#)

Rate Data Customize | Find | View All First 1-4 of 4 Last

Composite Rates | Detail Rates

	Gender (=)	Smoker (=)	Age (>=)	Total Rate	Employee Rate	Employer Rate		
1	Female	No	0	0.00000	0.00000	0.00000	+	-
2	Female	Yes	0	50.00000	0.00000	50.00000	+	-
3	Male	No	0	0.00000	0.00000	0.00000	+	-
4	Male	Yes	0	50.00000	0.00000	50.00000	+	-

Define the rules for the rate table and the rate data on the Benefit Rate Table page

On the Benefit Rate Table page, you define:

- How the cost of benefit rates are quoted.
- Employee premium limits.
- Whether composite rates are based on a specific dollar amounts.

Benefit Rate Table

Rate Table ID: B101

Benefit Rate Table Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Effective Status: Active

*Benefit Rate Type: Age-Graded (By Gender, Smoker)

*Description: B101 Short Description:

*Premium Frequency: Monthly *Rate per Unit: None

Currency Code: USD [Specify Optional Limit](#)

Rate Data Customize | Find | View All First 1-4 of 4 Last

Composite Rates | Detail Rates

	Gender (=)	Smoker (=)	Age (>=)	Total Rate	Before-Tax Rate	After-Tax Rate	Non-Taxable Rate	Taxable Rate		
1	Female	No	0	0.00000	0.00000	0.00000	0.00000	0.00000	+	-
2	Female	Yes	0	50.00000	0.00000	0.00000	0.00000	0.00000	+	-
3	Male	No	0	0.00000	0.00000	0.00000	0.00000	0.00000	+	-
4	Male	Yes	0	50.00000	0.00000	0.00000	0.00000	0.00000	+	-

Benefit Rate Table - Detail Rates tab

You can also define rates based on tax classes. If rates are split, then the matching tax class is required on the deduction code. This allows domestic partner coverage to be managed in a single plan and coverage code.

Calculation Rules

In HCM 9.0, we reorganized the Calculation Rules component by retaining only fields directly related to the calculation of rates. Calculations rules have a simple interface containing fields that impact the calculation of coverage.

Calculation Rules	
Calculation Rules Table ID:	KNUL
Calculation Rules Table Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980
*Description:	KNUL
Short Description:	
Demographics	
*Use Age As Of:	Check Date Month: Day:
*Use Service As Of:	Check Date Month: Day:
*Source for Demographics:	Employee
Benefit Base	
*Use Benefits Base As Of:	Check Date Month: Day:
Source	
<input type="radio"/> Annual Rate <input checked="" type="radio"/> Annual Benefits Base Rate PRIM Primary (From Job Record)	
Multiple Jobs	
<input type="checkbox"/> Combine Base for Multiple Jobs *Group Method: Primary Job in Benefit Record <input type="checkbox"/> Consider Active Jobs Only	
Optional Rate Limit	
Max Deduction % of Gross Pay:	

Determine calculation rules

The basic rules used to calculate coverage include:

- Demographic information, including domestic partner.
- Compensation base.
- Multiple jobs.
- Limits.

Life Insurance / Disability Enhancements

All attributes calculating coverage for life insurance and disability plans are centralized in a common formula-based component. You can select from existing formulas to calculate life insurance coverage or create your own coverage calculation formula.

Coverage Formula	
Formula ID:	B3XADDABBR
Formula Table Find View All First 1 of 1 Last	
*Effective Date:	01/01/2005 + -
*Description:	BenData: 3 x BAS1 ABBR Short Description: 3 x BAS1
Benefit Base	
*Coverage Base As Of:	Check Date v
*Premium Base As Of:	Check Date v
Source	
<input type="radio"/> Annual Rate <input checked="" type="radio"/> Annual Benefits Base Rate <input type="text" value="LIFE"/> Life magnifying glass	
Multiple Job Rules	
<input checked="" type="checkbox"/> Combine Base for Multiple Jobs	
*Group Method:	Flagged Jobs in Benefit Record v
<input checked="" type="checkbox"/> Consider Active Jobs Only	
Maximum Benefit Base:	<input type="text"/>

Use the Coverage Formula page to select from existing formulas or create your own to calculate life insurance coverage (1 of 2)

Coverage Minimum and Maximum

Coverage Minimum: **Coverage Maximum:**

Coverage Formula

Show Formula

Formula Customize | Find | First 1-2 of 2 Last

Seq No	Operand	Entry Type	Numeric Value	Round to Multiple of	Round Up Amount		
10	<input type="text"/>	Constant	3.000			+	-
20	*	Base				+	-

Age Coverage Reduction Customize | Find | First 1-3 of 3 Last

	Age	Percent		
1	70	10		+ -
2	75	20		+ -
3	80	30		+ -

[Use the Coverage Formula page to select from existing formulas or create your own to calculate life insurance coverage \(2 of 2\)](#)

For life insurance, we added the concept of coverage reduction by age and removed hard coding around dependent plans so that you are able to configure as many dependent life plan types as your organization requires.

We also added support for proper calculation of discriminatory life plans. Life insurance plans have been improved to allow:

- Tracking of dependents using two or more plan types.
- A new plan type for spousal life.
- Plans to be flagged as discriminatory.

Life/Accidental	
Plan Type:	21 Supplemental Life
Benefit Plan:	BP0047 Test X-Salary Life
Life/ADD Plans Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980 <input type="text"/> <input type="button" value="31"/>
Coverage Group Code:	B002 <input type="text"/> <input type="button" value="Q"/> Discriminatory Life <input type="checkbox"/>
Coverage Type	
<input checked="" type="radio"/> Plan Level	Formula ID KDUMMYLIF <input type="text"/> <input type="button" value="Q"/>
<input type="radio"/> Employee Level	
Insured Person Type	
<input checked="" type="radio"/> Employee	<input type="checkbox"/> Dependent Specific Coverages?
<input type="radio"/> Dependents	

Determine insurance plans on the Life/Accidental page

Simple Rate Plans

Simple Rate Plans are established to help you easily set up long-term care insurance, employee assistance plans, legal plans and other types of insurances that only require an associated rate.

Simple BenefitTable	
Plan Type:	A1 Legal Services
Benefit Plan:	BULGL BenData: Legal Plan
Simple Plan Find View All First 1 of 1 Last	
*Effective Date:	01/01/2005 <input type="text"/> <input type="button" value="31"/>
Extended Attributes Management	
Menu Name:	ADMINISTER_BASE_BENEFITS <input type="text"/> <input type="button" value="Q"/> Administer Base Benefits
Component Name:	BENEFIT_SUMMARY <input type="text"/> <input type="button" value="Q"/> Hyperlink Label: Summary of Benefits <input type="text"/>

Set up Simple Benefit plans

You can add a link to another component by entering the component name.

Dependent Data

We simplified many of the dependent relationships and mapped them to benefit eligible statuses.

The Approval Workflow Engine (AWE) provides capabilities for creating, running, and managing the approval processes. The AWE is a common component that is shared across multiple PeopleSoft Enterprise applications both within HRMS and other product families.

The common approvals management framework enables customers to create flexible rules around routing, levels and exceptions. Approvals for all transactions are available to the user for review and action in one central location. In addition, users can delegate their approval responsibilities as needed.

Benefits Administration

Benefits Administration functionality adds to the value provided by HR Base Benefits. Enhancements in HCM 9.0 Benefits Administration enables organizations to increase employee satisfaction, increase operational efficiencies and ensure legislative compliance.

Medicare Eligibility

In HCM 9.0, we've added fields to track Medicare entitlements and enrollments and then added these fields to the eligibility tables for Benefits Administration.

The screenshot displays the 'BenAdmin Eligibility Parameters' window. At the top, it shows 'Eligibility Rules ID: KMED'. Below this, there are fields for '*Effective Date: 01/01/1980', '*Status: Active', '*Description: Medical Eligibility', and 'Short Description: Med Elig'. A table on the left lists eligibility fields: Age (checked), Benefits Status, Eligibility Config 1, Eligibility Config 2, Eligibility Config 3, and Eligibility Config 4. On the right, the 'Medicare' section includes '*Group Method: Primary', 'Consider Active Jobs Only' (unchecked), and '*Evaluation Method: 1 or More' with an 'Eligible' dropdown. A 'Criteria' table below shows a single entry for '*Medicare Indicator'.

BenAdmin Eligibility Parameters with Medicare eligibility rules

Employees can be tracked against Medicare A Entitlement, Medicare B and Medicare D.

Benefits Person Data	
Antonio Santos	Person ID: KU0010
Benefits Personal Data	
Highly Compensated Employee:	Not Eligible for the Plan
*Highly Compensated Last Year:	Eligible non-Officer, non 5%
Benefits Personal Data - Date Sensitive Find View All First 1 of 1 Last	
*Effective Date: 09/05/2006	Medicare Number <input type="text"/>
Medicare A Indicator <input type="checkbox"/>	Medicare Reason A <input type="text"/>
Medicare B Indicator <input type="checkbox"/>	Medicare Reason B <input type="text"/>
Medicare D Indicator <input type="checkbox"/>	Medicare Reason D <input type="text"/>

[Track employees against Medicare A, Medicare B and Medicare D Benefits on the Benefits Person Data page](#)

Dependent Coverage

With HCM 9.0, Benefits Administration is configured to allow overage dependents to remain covered in plans until your policy says they are no longer eligible.

We also make provisions for events to maintain dependents and coverage when employees are migrated from one plan to another.

Event Rules	EOI and Level Rules	Date Rules	Billing Rules
Event Rules ID: B101			
Event Rules Find View All First 1 of 1 Last			
*Effective Date: 01/01/1980		Status: Active	
*Description: 1st of Mo following 3 Months		Short Descr: 3 Months	
Event Class Find View All First 1 of 5 Last			
Event Classification: FSC Family Status Change			
<input type="checkbox"/> Ignore Plan <input checked="" type="checkbox"/> Pre-enter <input type="checkbox"/> Elect Required <input type="checkbox"/> Ignore Overage Dependent <input type="checkbox"/> Retain Covered Dependent			
<input type="checkbox"/> Ignore Dep/Ben Edits <input type="checkbox"/> Ignore Investment Edits <input checked="" type="checkbox"/> Provide FlexCR Upon Default <input type="checkbox"/> Use History			
*Default Method: Default to Lowest Elig Option		*Allowable FSA Pledge Changes: N/A	
Self-Service Configuration			
<input checked="" type="checkbox"/> Collect Dep/Ben <input checked="" type="checkbox"/> Allow Dep/Ben Additions <input checked="" type="checkbox"/> Collect Fund Allocations			
Certification			
Certificate ID			
Electable Options			
*Select Allowed: All Plans		<input type="checkbox"/> Coverage Code Control	
Coverage Code Control Customize Find View All First 1 of 1 Last			
	*Covered Person Type	Same	More
		Less	*If No Current Coverage
1			Allowed

Event Rules allow you to maintain dependents and coverage when employees move from one plan to another

eBenefits

Employee self-service is your organization's window to your workers. HCM 9.0 eBenefits enhancements provide employees with a predictable, consistent user experience to improve your organization's relationship with your workers. Other benefits will include increased operational efficiencies and more flexible business processes.

Certification

In HCM 9.0, we provide the ability to associate certification questionnaires with certain dependent relationships or with certain plan types (wellness plans, for example). Certificates are built using the Certification Definition page.

Certification Definition

ID: BUDMPRTNR

Certificate Find | View All First 1 of 1 Last

*Effective Date: 01/01/2005 *Status: Active

*Description: BenData: Domestic Partner Cert *Short Desc: DP Cert

Passing Value: 4 **Max of:** 4 *Apply Weighting: None Test Certificate

Instructions

In order to cover a domestic partner under our health and life insurance plans, your relationship must meet the criteria listed below. Please answer each question.

Agreement

*Type: Agree

I understand that any misrepresentation is grounds for termination.

Certification Definition (1 of 3)

Questions Find | View All First 1 of 2 Last

*Type: Yes / No *Sequence Number: 1 Weight: 0

Question Text

You and your partner are in a mutually exclusive and supportive relationship for the past six months

Available Responses Customize | Find | View All First 1-2 of 2 Last

*Sequence Number	*Label Text	Response Value
1	Yes	2
2	No	1

Certification Definition (2 of 3)

BenData: Domestic Partner Cert

In order to cover a domestic partner under our health and life insurance plans, your relationship must meet the criteria listed below. Please answer each question.

You and your partner are in a mutually exclusive and supportive relationship for the past six months

- Yes
 No

You and your partner share a residence and your finances are mixed.

- Yes
 No

I understand that any misrepresentation is grounds for termination.

Agree

Decline

Certification Definition (3 of 3)

Implement certifications using either Event Rules or Dependent Relationships.

This certificate, if assigned to a particular benefit plan or dependent relationship, appears in eBenefit self-service to the participant.

Dependent Validation

In addition to certification, HCM 9.0 features optional workflow to help manage self-reported dependent data.

Dependent Workflow	
Dependent Certification	
Control when to receive notifications upon Certification of Dependents within eBenefits. Check 'Pass' to receive notification each time a dependent is certified. Check 'Fail' to receive notification each time a dependent fails certification.	
<input type="checkbox"/> Pass	<input checked="" type="checkbox"/> Fail
Dependent Information	
Check the box next to the items to monitor within eBenefits Dependent/Beneficiary Personal Information Page. If the checked items are modified within eBenefits the Benefits Administrator will be sent an e-mail notification.	
<input type="checkbox"/> First Name	<input type="checkbox"/> Marital Status
<input type="checkbox"/> Last Name	<input type="checkbox"/> Marital Status Date
<input type="checkbox"/> Gender	<input type="checkbox"/> Student
<input type="checkbox"/> Birthdate	<input type="checkbox"/> Disabled
<input checked="" type="checkbox"/> National ID	<input type="checkbox"/> Smoker
<input checked="" type="checkbox"/> Relationship	<input type="checkbox"/> Country
<input type="checkbox"/> Phone	<input type="checkbox"/> Address

[Manage self-reported dependent data using Dependent Workflow](#)

Talent Management

Enhancements in our talent management applications—Recruiting Solutions, ePerformance, and eDevelopment—combined with enhancements to our world-leading core HR application will enable organizations to deploy end-to-end talent management best practices across their enterprise and strengthen their position in the market as an employer of choice. HCM 9.0 is focused on integration, standardization, and leveraging new technology.

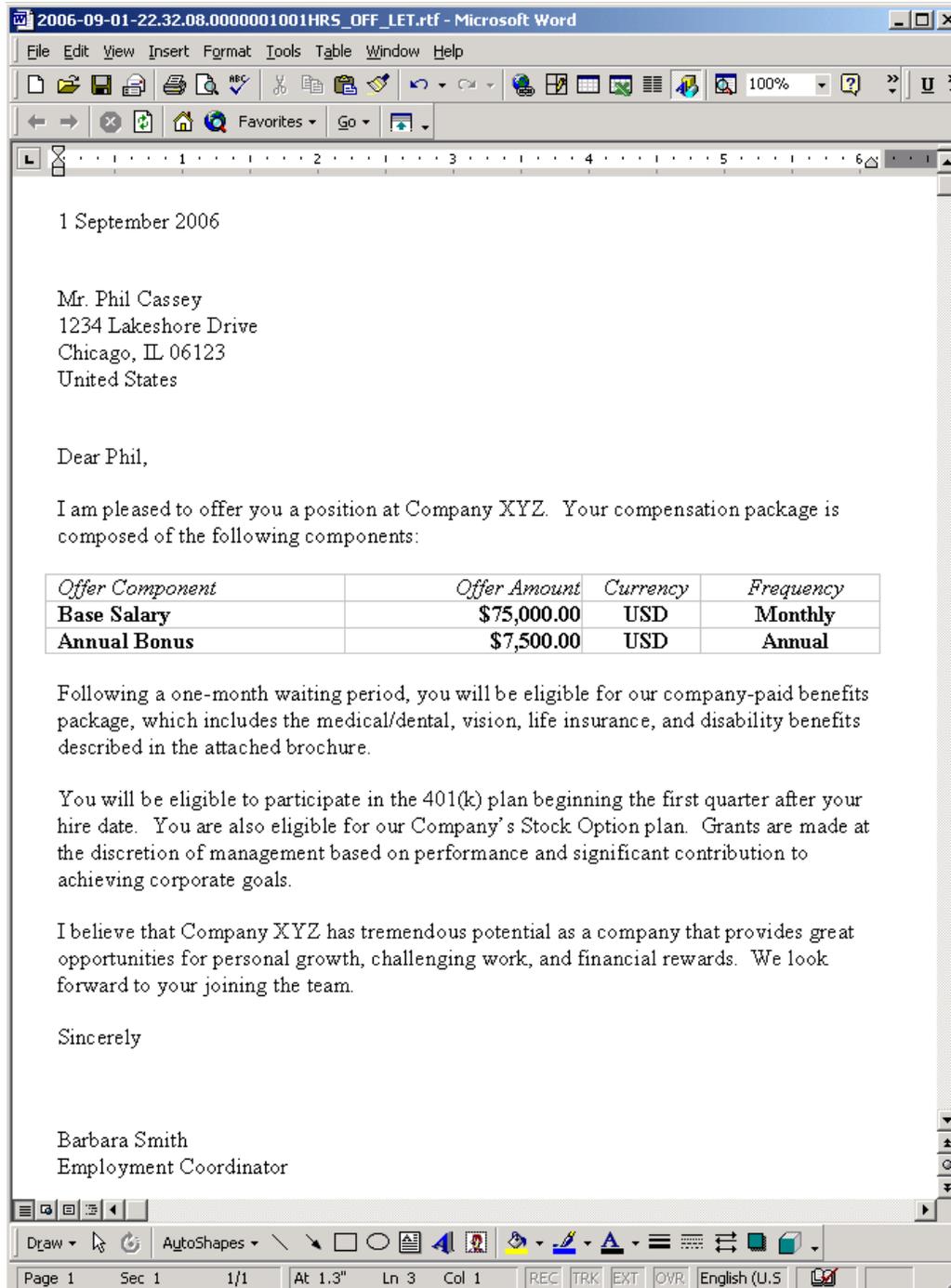
Recruiting Solutions

Customers engaged in global recruiting need to be able to stay a step ahead in the area of managing applicants. With HCM 9.0, customers benefit from the tighter integration with current products and gain efficiencies in their recruitment process due to new technology adopted in HCM 9.0 Recruiting Solutions.

Recruitment Letters

In addition to the current batch process for printing recruitment letters, applicant, interview, and offer letters can be generated, edited online, and printed immediately. This provides significant changes in flexibility and ease of use for customers.

By taking advantage of Oracle's XML Publisher, these letters can be generated into third-party editors. This allows users to view the letter from the application page and tailor some of the text to unique situations.



Letter content can be edited online

Once the letter has been finalized and saved, customers are able to email the letter to the applicant.

In today's competitive labor market, it is critical that employers get to their top candidates as quickly as possible. Emailing the letter gets an applicant, interview, or offer into the applicant's hands much faster. This expedites the recruiting process tremendously.

If there are any questions regarding the content of the letter, the customer always has accessibility to what was stated in the original offer. The system automatically saves an applicant, interview, or offer letter to the applicant's record and is easily accessible by the employer, so managers can quickly refer to it.

Comments

Phil is a great fit for this Job Opening, and we're hoping he'll be on board in time for the launch of our new Corporate University.

Added By: Betty Locherty 09/07/2006 10:48PM

Last Updated By: Betty Locherty 09/07/2006 10:48PM

[+ Add Another Comment](#) [Previous Comment](#) [Next Comment](#)

[Return to Previous Page](#)

▼ **Disposition History**

Offer	Status	Reason	Status Date	Letter
Offer	010 Extend		09/07/2006	

You have successfully saved Phil Cassey's job offer.

A letter automatically attached to an applicant's record in the original format

Customers are able to maintain contact notes for each letter sent to track this important information that may have been communicated over the phone, via email, or in person. A contact note is created automatically each time that letter generation is utilized. Contact notes are editable, while attachments can be added or deleted.

Manage Applicant: Demonstration Applicant

Name: Demonstration Applicant **Applicant Type:** External Applicant
Applicant ID: 100269 **POI Type:** Unknown
Contact: None **Status:** 010 Active
Phone: None
Email:

*Take Action: Select Action... Go Previous | Next Applicant
Applicant Applicant List

Contact History

Owner ID	Recruiter Name	Contact Date	Subject
KU0007	Betty Locherty	06/14/2006	Interview Letter
KU0007	Betty Locherty	06/13/2006	Offer Letter
KU0007	Betty Locherty	06/13/2006	Offer Letter
KU0007	Betty Locherty	06/13/2006	Offer Letter

Interested Party
No interested party have been added to this applicant's profile

[Attach a note or comment to a letter](#)

Interview Notes

Having effective interviews is a key component in the hiring process. Providing your employees with the resources they need when conducting interviews is invaluable. To help meet this need, interview notes with attachments are available.

With HCM 9.0, attachments such as interview guidelines can be attached to interview notes. If each interviewer is asking the same question, the hiring manager and recruiter will be able to compare feedback from each interview.

ePerformance

Companies continue to place increased importance on their performance management practices—and for good reason. Research shows that leading organizations deploy business practices to ensure employees have the right skills and competencies to achieve objectives, to align those objectives with corporate goals and to identify and reward individuals who are positively impacting corporate goals.

ePerformance 9.0 delivers an expanded feature set to assist organizations in driving employee and organizational success. These enhancements provide more accurate employee performance ratings, which lead to improved employee morale. IT costs to maintain custom interfaces will also be reduced through delivered integration, providing a single source of truth for performance reviews. As organizations merge, add lines of business or evolve, these enhancements also provide adaptable processes for changing business requirements.

Learning Management Integration

Clear communication is the key to creating a high performance culture. In addition to communicating *what* is expected of employees by establishing goals, competencies and responsibilities, companies must communicate *how* employees can achieve them. Therefore, organizations are pushed to establish learning activities (through training programs, online coursework, shadow assignments, etc.) that tie directly to corporate strategies, key competencies and job role success.

ePerformance 9.0 provides the following integrated links to Enterprise Learning Management 9.0:

- Within the context of a performance evaluation process, managers and employees have real-time insight into all completed and planned learning for the individual. Optionally, the completion of required learning can be incorporated into the individual's overall performance rating.
- While completing a performance or development document, managers and employees may look for and add appropriate learning to the individual's plan. The manager or employee is able to pull up the course catalog from within the document and any courses selected will be immediately added to the document.
- Upon completion of a performance evaluation, any gaps between an individual's desired and actual proficiency will drive the creation of learning objectives and associated learning within Enterprise Learning Management. The evaluation data from ePerformance can be sent to an employee's person profile, which in turn can be sent to Learning Management.

Section 2 - Learning Section

Learning Section will be evaluated by:
Employee, Manager

Learning Name	Type	Status	Status Date
Oracle OHUG Conference	Supplemental	Enrolled	04/14/2006
Communication Etiquette	Activity	Enrolled	04/12/2006
Coping With Stress	Activity	Enrolled	04/12/2006
Conflict and Confrontation	Activity	Enrolled	04/14/2006

[Search for Learning](#)

Section Summary
Section Weight: %

[Return to Document Detail](#)

[Learning insight within the performance document](#)

Leverage Profile Management

HRMS developed a new module called Profile Management, which is designed to track and manage competencies, accomplishments, job responsibilities, and job tasks. This new module replaces the existing competency management and allows users to add new types of content that can be used by ePerformance.

ePerformance adopted Profile Management and now uses:

- Content types and Content items to add performance criteria to templates, and performance and development documents.

Note. ePerformance moved its Mission Statements, Initiatives, Goals, and Responsibility components to Profile Management's Content Catalog and Content Items.

- Nonperson profiles to add performance criteria to templates, and performance and development documents.
- Add evaluation data to an employees' person profile.

Content Items

The Section Definition defines which Content Type from Profile Management is associated with the Section in ePerformance. When the section is added to the template, the system uses this Content Type to determine which items can be selected on the Content Items page.

Performance criteria are selected using the Content Items page in Profile Management. When you look up an Item ID, the system pulls items created on the Content Items page based upon the Content Type enabled for the Section.

General	Process	Structure	Content
Document Type: KOANNUAL Annual Review			
Template ID: LEARNING		Effective Date: 01/01/1980	
Sections Find View All First 1 of 2 Last			
Section: Competency Section		Load Content from Profile	
Section Items Find View All First 1 of 2 Last			
Item ID: LOM00001		+ -	
Title: Action Oriented			
Description: Enjoys working hard; is action oriented and full of energy for the things he/she sees as challenging; not fearful of acting with a minimum of planning; seizes more opportunities than others.			
Rating Model: L-24		+ -	
<input checked="" type="checkbox"/> Mandatory			

Content descriptions

Downloading Content from Nonperson Profiles

The Initialize from Job Profile found on the Template Structure page adds content to the performance or development document from the appropriate Job Profile. The new feature here is that the user can now select from any Profile Type in the system. They are no longer limited to Job Profiles.

In addition to adding individual items on a performance or development document, the system can also pull items attached to a job profile when the document is created. To enable this feature, select the Initialize from Profile check box in the Profile Management group box on the Structure page and identify the Profile Type.

Profile Management	
<input checked="" type="checkbox"/> Initialize from Profile	Profile Type: Job

Profile Management group box on the Structure page

To load items into the template from a Profile, click the Load Content from Profile link and the Load Content From Profile page displays.

Load Content From Profile

Search for Content

Content Type: Competencies

Profile Type:

Profile ID:

Select Items

	Item ID	Title
<input type="checkbox"/>	H0P602	602 Job Profile Competency
<input type="checkbox"/>	H0P603	603 Job Profile Competency
<input type="checkbox"/>	H0P604	604 Job Profile Competency
<input type="checkbox"/>	H0P605	605 Job Profile Competency

[Select All](#) [Deselect All](#)

Use the Load Content From Profile page to load items into a template from a Profile

From this page, you select the Profile Type Profile ID to find all the items associated with that profile for this section. Add one or all the items listed in the Select Items grid. These items will display on the Content page.

Updating Person Profiles

ePerformance can update an employee’s person profile with rated items from the performance or development document. To set up the system, use the Section Roles group box on the Structure page to define which roles are allowed to update the person profile. Any content can be updated, not just competencies.

Section Roles

Rate/Weight
Section
Item
Profile Management

*Role	Update Person Profile	Person Profile Type	Instance Qualifier		
Employee	<input checked="" type="checkbox"/>	Person		<input type="button" value="+"/>	<input type="button" value="-"/>
Manager	<input checked="" type="checkbox"/>	Person		<input type="button" value="+"/>	<input type="button" value="-"/>

Define which roles are allowed to update a person profile

When the document is complete, the system will add a new row to the person profile for each content item added or updated from the performance or development document.

Customer-Driven Enhancements

PeopleSoft has responded to the needs of customers to provide enhancements that improve the management of goals and competencies and proficiency/rating descriptions.

Define Goals and Competencies with More than 254 Characters

According to our customers, the communication of goals and competencies often requires a significant amount of text. As a result, description fields in ePerformance 9.0 have been expanded from 254 to 1325 characters. Performance criteria are entered using the Content Item - Item Details page.

Item Details	Relationships	Group Memberships
Content Type:	COMPETENCY	Competencies
Content Item ID:	0100	
Content Items Details Find View All First 1 of 1 Last		
*Effective Date:	01/01/1900	*Status: Active
*Description:	Abstract thinking	
Long Description:	Able to analyze multi-faceted concepts determining a sound	
Short Description:	Abstract	
*Category:	Ability	
Content Supplier:	C Customer Defined	
*Rating Model:	PSCM	Competency Management Scale Proficiency Descriptions
ePerformance Description:	Able to analyze multi-faceted concepts determining a sound solution. Able to think "out-of-the-box". Uses innovative solutions to	
Last Update Date/Time:	01/24/06 1:15:52PM	Updated By: SYSTEM

[Use the Content Item - Item Details page to enter performance criteria](#)

Proficiency/Rating Description

In HCM 9.0, we've added the ability to display Proficiency Descriptions to support numeric ratings. The individual choosing a rating is able to view detailed rating descriptions describing the specific proficiency required for the area being evaluated. These descriptions are available for selection during the evaluation and for viewing after the evaluation is completed.

Release 9.0 includes the ability for a reviewer to first view an explanation of the review ratings defined for the model and then select a rating that best fits the performance of the individual being evaluated, based on the description of the rating value.

To see the proficiency description, click the Rating Explanation icon on the performance or development document.

Section 1 - Competencies

Competency 1: Abstract thinking		Rating Explanation icon
<p>Description: Able to analyze multi-faceted concepts determining a sound solution. Able to think "out-of-the-box". Uses innovative solutions to solve problems.</p> <p>Rating: 5-Expert </p>		
Competency 2: Teamwork		
Description:		
Behavior 1: Willingly shares knowledge with others		
Willingly shares knowledge with others		
Rating: Very Good		
Rating: Very Good		
Competencies Summary		
Rating: 4-Very Good		

Rating Explanation icon on the evaluation document

The system displays the window with the rating and expanded description.

Performance Document - Performance Document

Manager Evaluation

Adland Chu, Clerk-Payroll Sr
Performance Document: 01/01/2004 - 12/31/2004

Section 2 - Responsibilities

Responsibility 1: Research Market Trends

Proficiencies			
	Rating	Numeric Rating	Description
<input type="radio"/>	Company Maker	5.00	Even the best people may have only a few towering strengths, and some very good people have none. The Learner is outstanding in this area, a model, one of the best you've ever seen - people might seek out this person for guidance in this area. A rare skill; a gift; anyone who knows this person well would rate this as a 'Company Maker'.
<input type="radio"/>	Exceeds Expectations	4.00	The Learner has notable strength in this area; better than most. The Learner could be a coach in this area. Might select this person for a team just for this special talent. A clear majority of people who know him/her would agree with this rating.
<input type="radio"/>	Meets Expectations	3.00	The Learner does what is expected; about like most others. If everyone performed this well on key skills, the organization would be competent and successful. Different raters might disagree on this rating; some seeing it as a talent, some as a weakness.
<input type="radio"/>	Needs Improvement	2.00	Almost everyone has a few of these, i.e. not always up to standard on everything. The results have fallen short, and opportunities have been missed because of this weakness. The Learner is working on improving this competency. With normal development, this could be raised to at least 'Skilled/OK'.
<input type="radio"/>	Unsatisfactory Performance	1.00	There is a serious, pressing need to improve in this area; it is hurting performance. The Learner does not understand this area, does not accept the need, or does not know what to do about it. It remains an issue; his/her career could be stalled or stopped. Almost everyone who knows him/her would agree with this rating.

Use Selected Rating

[Return to Performance Document Selection](#)

Detailed rating descriptions

Document Cloning

Creating new performance or development documents is a time-consuming process. If a company requires that an evaluation occur every quarter, the manager must create a new performance document each quarter and modify the criteria. This can be quite cumbersome, especially in situations where the participants extensively modify the criteria.

ePerformance 9.0 customers have the ability to clone and reuse the prior content (Sections, Items, Sub-Items, and so forth). You define who can create a new document for a new performance or development period by selecting employee, manager, or both next to the Clone Existing Document field on the Document Types page.

Document Type: PERFORM

Document Type Detail Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 ***Status:** Active

***Description:** Performance Document

Short Description: Perform **Official Review**

***Document Usage:** Performance

Initiate Process: Employee Manager
 Employee can Select Manager

Clone Existing Document: Employee Manager

Template Source: User Specified
 Profile Management

Profile Type:

Default Template:

Definition ID:

Use the [Document Types](#) page to define who can create a new performance or development document

If you give the employee or manager the ability to clone an existing document for a specific document type, the Create from Prior Document field displays on the Create <Performance/Development> Documents page. If you select yes, then you must enter the document you want to use as the source of the new document.

Cloned documents contain only the section and items of the source document.

Create Performance Documents

Below is a list of employees that you selected for Performance Document Creation. Complete the information in the *Document Creation Details* section below, then click the **Create Documents** pushbutton to generate documents for these employees.

Document Creation Details

Period: 01/01/2006 - 12/31/2006

Document Type: Performance Document

Create from Prior Document: Yes No

Prior Document:

Create Performance Documents

Leveraging XML Publisher for Printing Performance and Development Documents

Customers can modify the layout of the XML template, which enables them to tailor the printed document to meet their organizations needs.

Leveraging Standard Approvals and Delegation

ePerformance leverages the common HCM framework for approval of performance documents. The Approval Workflow Engine (AWE) provides capabilities for creating, running, and managing the approval processes. The AWE is a common component that is shared across multiple PeopleSoft Enterprise applications both within HRMS and other product families.

The common approvals management framework enables customers to create flexible rules around routing, levels and exceptions. Approvals for all transactions are available to the user for review and action in one central location. In addition, users can delegate their approval responsibilities as needed.

These improvements provide an organization with greater business flexibility and will help shorten the review cycle with a faster, more streamlined approval process.

eDevelopment

Studies show that it is not enough to retain good employees. Instead, companies differentiate themselves based on employee engagement—the extra efforts put forth by their employees. The leading factor in engaging employees is providing them with learning and development opportunities and visibility to those opportunities.

In 9.0, eDevelopment leverages the enhanced profile management functionality in Human Resources to provide employees with a single place to identify and track their career aspirations and accomplishments. In addition, employees are able to search for jobs that match up well to their own skills and qualifications, or compare various positions of interest to them. Results from these comparisons may assist employees in determining their next career steps, developmental goals, and targeted learning. The new XML Publisher tool enables employees to view and print a formatted profile document in Word or PDF, without having to recreate a resume. This document can be leveraged for internal projects, assignments or job opportunities.

Providing employees with better development opportunities will help improve employee morale and increase staff retention. A more skilled workforce improves an organization's bottom line or service delivery capabilities and image as an employer of choice.

Betty Locherty
Profile as of 2006-09-07

General Information

Employee ID:	KU0007	Betty Locherty	Profile Status:	Active
Profile Type:	PERSON	Person	Status Date:	2006-03-07

Competencies

Content Item ID	Description	Evaluation Type	Reviewer ID	Proficiency
0404	Provides Direction	Approved/Official	KU0007 Betty Locherty	3-Good
0511	Managerial Efficiency	Approved/Official	KU0007 Betty Locherty	4-Very Good
0708	Develop & implement solutions	Approved/Official	KU0007 Betty Locherty	3-Good
8004	Financial Analysis	Approved/Official	KU0007 Betty Locherty	4-Very Good
8007	Financial Planning	Approved/Official	KU0007 Betty Locherty	3-Good
8008	Forecasting	Approved/Official	KU0007 Betty Locherty	2-Fair

Responsibilities

Content Item ID	Description	Proficiency

Honors and Awards

Content Item ID	Description	Issue Date
DLA	Distinguished Lectureship Awrd	1980-01-01

[My Profile document in PDF format](#)

Employee and Manager Self Service for Profile Management

eDevelopment 9.0 has major enhancements to include employee and manager self-service for profile management that enables them to:

- Create and maintain person profiles.

Employees can view and edit their existing person profiles, and create new profiles. Managers can create, view, and update the person profiles for their team. Depending on the configuration of your profile types, approvals workflow is triggered when employees update their person profiles.

- Approve changes to person profiles (manager only).

Depending on profile approval configuration, managers use the Approve Profiles option to review changes to their employees' person profiles that require approval, and approve or deny the changes.

- View approval history (employee only).

Employees can view the approval status of profile changes that they have submitted for approval and view the history of profile approvals.

- Manage interest lists.

Interest lists enable employees and managers to identify jobs that are of interest to the employee. Each employee has one interest list that is accessed by the employee, the employee's manager, and the profile administrator. Employees can add profiles to their interest list using the My Interest List option, when viewing job profiles, or from the profile search results. Similarly, managers can view and update their employees' interest lists using the Team Interest Lists option or they can add a profile to an employee's interest list while viewing job profiles.

- View job profiles.

Employees have two options for viewing job (non-person) profiles. My Job Profiles lists job profiles related to their current jobs, and View Job Profiles is a general option for viewing any job profile. Managers view job profiles using the View Job Profiles option.

- Search and compare profiles.

Employees and managers use Search and Compare Profiles to run any of the search types that have been configured for them.

- Create and maintain job profiles (manager only).

Managers can create and update job profiles. Depending the configuration of your profile types, approvals workflow is triggered when managers update job profiles. The typical approver for job profiles is the profile administrator, although this can be configured according to your business needs.

Time and Pay

Enterprise time and pay products include Payroll for North America, Global Payroll and Country Extensions, ePay, Payroll Interface, Time and Labor, and Absence Management. These products not only solve your fundamental global workforce management needs, but enable you to take strategic advantage in extending business processes out to your workforce and enable managers, administrators, and executives to execute daily business with real-time data at hand.

Payroll for North America

Enterprise Payroll for North America helps organizations reduce time spent preparing, processing and maintaining their payroll system. It is a mature, proven payroll solution that accurately and efficiently manages payroll functions while ensuring compliance with federal, state and local requirements.

In HCM 9.0, we have added:

- Flexibility for garnishment processing by leveraging the Canadian rules-based engine to meet the ever-changing regulatory requirements in the United States. This gives customers complete control over all aspects of their garnishment calculations by providing users more flexibility in defining the applicable earnings and exemptions. These changes increase staff productivity by reducing the amount of manual labor required to compute garnishments, which also improves data accuracy. Business flexibility is also improved.
- Enhancements to the integration between Enterprise Payroll for North America and Enterprise Time and Labor.
- A streamlined menu structure for year-end reports.

Garnishment Setup and Processing Enhancements

To meet the ever-changing regulatory requirements in the United States, Payroll for North America 9.0 leverages the Canadian rules-based engine to provide flexible garnishment calculation formulas for the U.S. We have also made improvements in disposable earnings definition, employee garnishment data setup, garnishment processing and distribution, and inquiry into employees' garnishment history.

Payroll for North America 9.0 includes these enhancements to increase flexibility and usability of garnishment processing:

- Streamlined method of adding deductions to disposable earnings definitions.
- (USA) Flexible garnishment calculation formulas.
- Utility for cloning garnishment rules.
- (USA) Historical view of garnishment proration rules.
- Improved usability of Garnishment Specification Data pages.

- Enhanced garnishment deductions processing.
- More specific distribution of payroll data for garnishment payments.
- New page for reviewing garnishment history.

Streamlined Method of Adding Deductions to Disposable Earnings Definitions

Payroll for North America provides a streamlined method to add deductions to the disposable earnings definition.

Disposable Earnings Definition

DE Definition ID: FEDERAL

Disposable Earnings Definition Find | View All | First 1 of 1 Last

***Effective Date:** 01/01/1980 ***Status:** Active

***Maintenance Responsibility:** PeopleSoft

***Description:** Federal Definition

Definition: The federal definition of disposable earnings is the amount left after deductions required by law are subtracted from wages.

Deductions Reducing DE

Load Deductions

Deductions Details Customize | Find | View All | First 1-5 of 5 Last

	*Plan Type	Benefit Plan	Description	*Deduction Code	Description	*Deduction Class	
1	General Deducti			T4UW	ST - UWay	After-Tax	+ -
2	Medical	TMDKP	Medical KP	TMEDIC	Medical	Before-Tax	+ -
3	Dental	TCOMP1	Comprhnsv	TDENT	Dental	Before-Tax	+ -
4	401 (k)	TS401J	410 flat	TS401K	401k Plan	Before-Tax	+ -
5	401 (k)	TS401K	401 (k)	TS401K	401k Plan	After-Tax	+ -

Load deductions to disposable earnings definitions individually or by plan

The Disposable Earnings Definition page provides two options for loading deductions into both U.S. and Canadian disposable earnings definitions:

- Use the Load Deductions button to access the Load Deductions to Reduce DE page, where you can load deductions into the Deductions Details grid by plan type, or by plan type and benefit plan.

After loading deductions using the Load Deductions button, you can delete any of the loaded deductions that are not appropriate. You can also add additional deductions manually or by using the Load Deductions option again.

- Manually enter deductions using the editable fields in the Deductions Details grid.

General deductions must be manually entered.

(USA) Flexible Garnishment Calculation Formulas

In Release 9.0 we provide more flexibility for defining garnishment rules used by the U.S. Federal Government, U.S. states and localities, and U.S. territories.

In addition to using delivered rules maintained by PeopleSoft, U.S. employers can now define a formula for garnishment rules by entering calculation steps into an online component instead of using a predefined formula. This functionality is similar to existing functionality provided for Canadian employers.

The new Garnishment Rules Table component provides pages on which you:

- Specify which earnings are subject to garnishment at the rule level.

Description	Earnings Inclusions/Exclusions	Exemption Variables	Calculation Formula
Law Source: \$U Federal		Rule ID: GENERAL	
Garnishment Rule Details Find View All First 1 of 4 Last			
Description: General Exemption			
Effective Date: 09/01/1997		Status: Active	
Earnings Code Inclusions/Exclusions Customize Find View All First 1-2 of 2 Last			
*Earnings Code	Description	*Include/Exclude Indicator	
021	Overtime	Exclude	+ -
BNS	Bonus	Include	+ -

Specify earnings subject to garnishment at the rule level

Select an earnings code and specify *Include* or *Exclude* to override the effect of the Subject to Garnishment setting on the Earnings Table - Taxes page for the selected earnings code and garnishment rule.

- Specify values for exemption variables that you use in the calculation rule.

Description	Earnings Inclusions/Exclusions	Exemption Variables	Calculation Formula
Law Source: \$U Federal		Rule ID: STUDENT	
Garnishment Rule Details Find View All First 1 of 1 Last			
Description: Delinquent student loan			
Effective Date: 09/01/1997		Status: Active	
Exemption Variables			
Exemption Percent 1:	<input type="text" value="75.00"/>	Dependents Excluded:	<input type="checkbox"/>
Exemption Percent 2:	<input type="text"/>	Exemption Amount Per Dependent:	<input type="text"/>
Exemption Percent 3:	<input type="text"/>	Exemption Amount Per Allowance:	<input type="text"/>
Exemption Percent 4:	<input type="text"/>	Minimum Exemption:	<input type="text"/>
Exemption Amount 1:	<input type="text"/>	Maximum Exemption:	<input type="text"/>
Exemption Amount 2:	<input type="text"/>	Amount Frequency	
Exemption Amount 3:	<input type="text"/>	<input type="radio"/> Daily <input checked="" type="radio"/> Weekly <input type="radio"/> Monthly	
Exemption Hours 1:	<input type="text" value="30.00"/>		
Exemption Hours 2:	<input type="text"/>		

Specify exemption values for calculation formulas

Specify values for exemption percents, amounts, and hours, and the frequency of the exemption. You can also specify the exemption per dependent amount and the number of dependents that are excluded from that. In addition, you can specify a minimum or maximum exemption amount and define a *Min/Max Check* condition in the calculation formula.

- Define the steps in the calculation formula for the garnishment rule.

Define calculation formulas

For each step in the calculation, identify its calculation type and specify the condition, elements, and operand. This table shows an example of defining the steps in a U.S. garnishment calculation formula:

Step	Calculation Type	Formula
Step 1	DE for Rule (disposable earnings)	earnings subject to garnishment – federal taxes = result of step 1
Step 2	DE for Rule (disposable earnings)	result of step 1 – state taxes = result of step 2
Step 3	DE for Rule (disposable earnings)	result of step 2 – local taxes = result of step 3
Step 4	DE for Rule (disposable earnings)	result of step 3 – selected employee deductions = result of step 4 This is the total disposable earnings amount.
Step 5	Exemption	result of step 4 × exempt percent 1 = result of step 5

Step	Calculation Type	Formula
Step 6	Amount available for garnishment	result of step 4 – result of step 5 = amount available for garnishment

- Define a U.S. garnishment rule for a law source and rule ID by using (referencing) the same calculation formula as another law source and rule ID already defined in the system.

[Example of referencing another calculation formula on the Calculation Formula page](#)

This option is particularly useful if both rules use the same types of exemption variables but those variables do not have the same values.

Utility for Cloning Garnishment Rules

You can copy rules by cloning one law source and rule ID combination into multiple combinations of law source and rule ID using the Rules Clone Utility Application Engine process (GARN_CLONE).

The screenshot displays the 'Clone Garnishment Rules' application. At the top, the 'Run Control ID' is 001, and there are buttons for 'Report Manager', 'Process Monitor', and 'Run'. Below this is a 'Process Request Parameter(s)' section. Underneath, there is a 'Current Garnishment Rule' table with the following data:

*Law Source:	Value	Description
CA	California	
*Rule ID:	NO EXEMPT	No Exemptions
*Effective Date:	01/01/1980	

At the bottom, there is a 'New Garnishment Rule(s)' table with the following data:

*Law Source	*Rule ID	*Effective Date
AL	ALNOEXEMPT	01/01/2006

Copy rules from one law source and rule ID to another

You create customer-maintained rules when you clone existing rules.

(USA) Historical View of Garnishment Proration Rules

Release 9.0 provides these enhancements to garnishment proration rules functionality:

- You can now view garnishment proration rules historical data in descending order of effective date for multiple rules sharing the same proration rule state and type of garnishment.
- We deliver a new CBFRRSP support proration rule for Colorado and provide instructions for setting up the employee's garnishment data to correctly process child and spousal support garnishments coming on one and two separate court orders.

Improved Usability of Garnishment Specification Data Pages

In Release 9.0 we have improved the general usability of the U.S. and Canadian Garnishment Specification Data pages along with these specific modifications:

- On the Garnishment Spec Data 1 page we provide three new garnishment statuses, *released*, *cancelled* and *terminated*.
 - Use the *released* status if the garnishment order is released by the issuing agency, such as the IRS (internal revenue service).
 - Use the *cancelled* status if the garnishment order is cancelled by the issuing agency, such as the U.S. Department of Education for Student Financial Assistance.

- Use the *terminated* status if the garnishment order is terminated by the issuing agency, such as the California Franchise Tax Board.
- On the Garnishment Spec Data 2 page we added Vendor Name to the prompt and added the vendor Location field to the page.
- On the Garnishment Spec Data 4 and 5 pages we now disable the DE Percent and Flat Amount fields if the maximum option is selected for the deduction calculation.
- On the Garnishment Spec Data 6 page we have provided the following enhancements:
 - Added an edit to prevent saving the Garnishment Specification Data component if the Law Source and Rule ID fields are not completed.
 - Added additional exemption variables to enable overrides that correspond to the Exemption Variables page and the Calculation Formula page.
 - Restructured the Deductions Allowed in DE Calculation section of the page into a grid.
- On the Garnishment Spec Data 7 page we added PeopleCode to ensure that an employee's garnishments for the same vendor with different locations and/or remit address sequences appear on separate invoices or vouchers and are sent to the correct addresses.

Enhanced Garnishment Deductions Processing

We have modified the garnishment processing COBOL programs to achieve the following goals:

- Flexibility in calculating disposable earnings, exemption amount, and maximum amount available for garnishment.
- Recognize employee deductions that are added after the garnishment specification data is created, assuming they are allowed in the customer-supported DE definition and the DE definition is not FEDTAXLEVY.
- Update garnishment status to *Complete* on the Garnishment Spec Data 1 page when the garnishment limit or stop date is reached.
- Use overrides of exemption variables entered in garnishment specification data in the garnishment calculation.
- Ensure that the total garnishment deducted amount is correct when a negative manual check is created to record the refund of an overpayment that included a garnishment.
- Issue error message 000335 (Court Ordered Amount Not Available) when the total of multiple garnishments exceeds the maximum deduction amount, even though each garnishment is below the maximum deduction amount.
- Provide ability to override the garnishment deduction on a separate check.

- Prevent error message 000098 (Garn Spec requires rule) when the employee has multiple garnishments with the same garnish law source and rule ID and the stop date of one garnishment falls on the check date.
- Prevent error message 000078 (Both Grossup & Garnish Processing) when the employee has a complete garnishment that is not included in the check with the grossup.

More Specific Distribution of Payroll Data for Garnishment Payments

We have enhanced the Extract Non-Tax Deductions process, which prepares data for Accounts Payable, to achieve the following goals:

- Create one invoice or voucher per garnishment for employees who have multiple garnishments for the same vendor.
- Send the remit address for the location and sequence number selected and saved on the Garnishment Spec Data 2 page rather than the remit address sequence number for the vendor default location.

New Page for Reviewing Garnishment History

We added a new inquiry page that payroll administrators can use to review the garnishment history for a selected employee.

Review Garnishments

Evelyn Sims **Person ID:** KU0043

Garnishment Information Find | View All | First 1 of 4 Last

Garnishment ID: KUCHA2
Type: Child Support
Court Name: Tarrant County Family Court
Court Document IDs: TC60011-A

Payee Name: [Garnishment Spec Pages](#)

Paycheck Information Customize | Find | View All | First 1-4 of 4 Last

Pay Period End Date	Garn Disposable Earnings Amt	Exempted Amount	Garnishment Amount	Company Fee	Payee Fee	Deducted Amount	Garnishment Refund	Review Paycheck
04/07/2000	2591.72	1295.86	100.00			100.00		Review Paycheck
03/10/2000	2591.72	1295.86	100.00			100.00		Review Paycheck
02/11/2000	2591.72	1295.86	100.00			100.00		Review Paycheck
01/14/2000	2591.72	1295.86	100.00			100.00		Review Paycheck

Review an employee’s garnishment history on the new Review Garnishments page

Links on the page provide access to the employee’s Garnishment Spec Data pages and Paycheck Deductions page. Both pages open to the employee’s first garnishment ID; from there you can scroll to the data that you want to view.

Enhancements in the Integration with PeopleSoft Enterprise Time and Labor

For release 9.0, Payroll for North America includes the following significant enhancements in the integration with PeopleSoft Enterprise Time and Labor:

- New filtering and separate check parameters for the Load Time and Labor process.



- Enhanced error reporting for the Load Time and Labor process.
- Load processing performance enhancements.
- New payable time reversal processing.

New Filtering and Separate Check Parameters for the Load Time and Labor Process

We have redesigned the run control options for the Load Time and Labor process to give you more control over the time that is loaded to paysheets for each employee for on-cycle pay runs, off-cycle pay runs, separate checks, online checks, final checks, and so forth.

New options on the Load Time and Labor component (PY_LDTL_RC) enable you to specify whether to load all available time, only prior period time, or to filter time by additional parameters.

We also added additional options to enable you to pay out such on-cycle earnings as bonuses, award payouts, leave payouts, or prior period time on a separate check for tax purposes and presentation purposes.

New fields and pages in the Load Time and Labor component enable you to:

- Specify the processing option on the Load Time and Labor page:

The screenshot shows the 'Load Time and Labor' process request parameter form. At the top, there are three tabs: 'Load Time and Labor' (selected), 'Filters', and 'On-Cycle Separate Check'. Below the tabs, the 'Run Control ID' is 001. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The main section is titled 'Process Request Parameter(s)' and contains the following fields:

- *Pay Run ID: KU1-00-18 (with a search icon) and US Wk18-00
- *Description: Load TL
- *On or Off-Cycle: On-Cycle (dropdown menu)
- *Processing Option: Load Filtered Time (dropdown menu) and Load Time to Separate Check
- OK to Pay
- Refresh Request
- Request Source: User

New parameters are added to the Load Time and Labor page

Select from three processing options:

- The Load All Time option loads all available payable time for the pay run ID.
- The Load Filtered Time option enables you to enter additional selection criteria on the Filters page.
- The Load Prior Period Time option enables you to load payable time for dates prior to the pay period begin date and to use additional filters.

The Load Time to Separate Check option enables you to load all filtered time or prior period time to on-cycle separate checks.

- Specify additional load parameters for filtered time and prior period time on the Filters page:

Load Time and Labor		Filters	On-Cycle Separate Check	
Run Control ID: 001		Report Manager Process Monitor		Run
Employee(s) Customize Find First 1 of 1 Last				
*EmplID	Empl Rcd #	Name		
<input type="text"/>	<input type="text" value="0"/>			+ -
Earnings Code(s) Customize Find First 1 of 1 Last				
*Code	Description			
<input type="text"/>				+ -
Paygroup(s) Customize Find First 1 of 1 Last				
*Company	Description	*Pay Group	Description	
<input type="text"/>		<input type="text"/>		+ -
Date Range				
From Date:	<input type="text"/>	Through Date:	<input type="text"/>	

New Filters page for restricting the payable time loaded

If you don't want to load all time for all employees included in the pay run ID, you can restrict the load selected paygroups in the pay run or to selected employee IDs. You can restrict the load to an employee's specific job by specifying an employment record number.

Enter earnings codes to load data for a special payment, such as a bonus run. If no earnings codes are selected, the system assumes that you want to load data for all earnings codes.

Select dates to restrict the load to a date range. You can load all time prior to a particular date by entering only an end date. If you enter only a from date, the system enters the pay end date as the default through date.

- Select up to three groupings of earnings codes for separate checks on the On-Cycle Separate Check page:

The screenshot shows the 'On-Cycle Separate Check' page with three separate check groupings. Each grouping has a table with columns for Earnings Code, Description, and Prior Period Adjustments Only. The first grouping shows 'REG' for Regular with a checkbox for Prior Period Adjustments. The other two groupings are empty.

[Create up to three separate check earnings groupings on the On-Cycle Separate Check page](#)

For each set of earnings codes, specify whether to load the selected earnings code to a separate check only for prior period time. This option is not available if you selected the Load Prior Period Time processing option.

To load time to separate checks when using the Load Prior Period Time processing option, select the Load Time to Separate Check option on the Load Time and Labor page.

This table summarizes the availability of the Load Time to Separate Check option, the Filter page, and the On-Cycle Separate Check page in the Load Time and Labor run control component under various conditions:

Pay Run	Processing Option	Load Time to Separate Check	Filter page	On-Cycle Separate Check page
On-Cycle	All Time	Unavailable	Hidden	Visible
On-Cycle	Filtered Time	Available	Visible	Hidden if Load Time to Separate Check is selected Visible if Load Time to Separate Check is cleared
On-Cycle	Prior Period	Available	Visible	Hidden if Load Time to Separate Check is selected Visible if Load Time to Separate Check is cleared
Off-Cycle	All Time	Unavailable	Hidden	Hidden

Pay Run	Processing Option	Load Time to Separate Check	Filter page	On-Cycle Separate Check page
Off-Cycle	Filtered Time	Unavailable	Visible	Hidden
Off-Cycle	Prior Period	Unavailable	Visible	Hidden

This table provides examples of how the On-Cycle Separate Check page might be used for some of the load processing options:

Processing Option	Example of On-Cycle Separate Check Page Usage
Load All Time	Indicate that overtime is to be paid on a separate check, but all other time is paid on the regular check.
Load Filtered Time	Load only one employee for only one earnings to a separate check.

We added an additional Filter Options page in the online check feature so that you can now filter time for earnings codes and date range when you select to load available time from Time and Labor into an online check.

In addition, we added all of the fields and pages for new load parameters to the online Review Time and Labor Load inquiry component (PY_LDRTL_TBL).

Enhanced Error Reporting for the Load Time and Labor Process

We enhanced error reporting so that you can track all payroll error messages for each employee for whom time has not been accepted by payroll. We created a new table to store error messages so that you can view messages for load processes that you run one after another with the same pay run ID. Now you can view error messages in the online Time and Labor Load inquiry component even after the Pay Calculation process has run.

We modified the existing Review Time and Labor Load inquiry component to display contents of the new error message table:

- The Load Messages page displays messages from the load process for the last payroll request number, displaying one row for each employee who has messages.

New Load Messages page lists each employee with error messages

- The Payroll Load Messages page, accessed by a Details link from the Load Messages page, displays details of all load messages for the selected employee.

New Payroll Load Messages page lists all messages for each employee

Load Processing Performance Enhancements

We made two modifications that improve speed of performance and avoid deadlocks when loading Time and Labor earnings to paysheets:

- To increase processing speed, we revised the way the Time and Labor Load process deletes holiday hours before loading Time and Labor earnings.

Now the process uses a single delete statement to remove holiday hours from all paysheets in the pay calendar rather than using a separate statement for each paysheet.

- To avoid potential deadlocks when concurrently run jobs simultaneously try to update table statistics and delete data from the PS_PY_PYBL_TM_WRK temporary table, we added two fields to the Time and Labor Installation Table page in the TL_INSTALL component:

- Concurrent Load Time and Labor.

Select this option only if you run the load process concurrently.

If you do not select concurrent processing, the Load Time and Labor process updates statistics after it loads the data.

If you select concurrent processing, the update statistics portion of processing is never run and your DBA must update statistics periodically as with any other large table.

- Load Process Retention.

If you select concurrent processing, use this new field to specify how many process runs to retain in the temporary work table. After loading data, the load process deletes data that is older than the process retention specified.

New Payable Time Reversal Processing

With the enhanced check reversal and confirmation processing, the system automatically creates offsets for reversals in the Payable Time table in Time and Labor for audit trail purposes and labels them with the new *Reversed* status and reason.

- To initiate payable time reversal processing, we added the new Payable Time Reversal Type field to the Paycheck Reversal/Adjustment page:

The screenshot displays the 'Paycheck Reversal/Adjustment' page. At the top, there is a 'Run Control ID' field with the value '01' and a 'Run' button. Below this are links for 'Report Manager' and 'Process Monitor'. The main section is titled 'Process Request Parameter(s)' and contains several input fields: '*Company:' (GBI - Global Business Institute 9999), '*Pay Group:' (KU4 - US Monthly), and '*Pay Period End Date:' (04/30/2000). A 'Pay Run ID' field shows 'KU4-05-04'. There are two columns of criteria: 'Selection Criteria' and 'Alternate Selection Criteria'. The 'Selection Criteria' includes 'Paycheck Number: 1545', 'Paycheck Issue Date: 03/31/2000', and 'EmplID: KU0002' with a 'Net Pay' of \$9,711.88 for 'Baran, Charles'. The 'Alternate Selection Criteria' includes '*Pay Group: KU4', '*Pay Period End Date: 03/31/2000', '*Page #: 21', '*Line #: 1', and 'Separate Check #: 0'. There are radio buttons for 'Reversal' (selected) and 'Reversal/Adjustment', and a checkbox for 'Delete Reversal/Adjustment'. Below these are 'Accounting Period Option' (radio buttons for 'Original', 'Current', 'Specified') and 'Time and Labor Option' (a dropdown menu for 'Payable Time Reversal Type' set to 'Reverse and Generate New Row').

New Time and Labor option on the Paycheck Reversal/Adjustment page

The Payable Time Reversal Type field becomes visible only if you're processing a reversal without adjustment and the check you're reversing includes payable time from Time and Labor.

The field has two possible options:

- Select *Reverse Only* if you want to reverse the check and you do not need to reprocess the time at a future date.

When you confirm the reversed check, the system creates a new payable time offset row with reversed quantity and costs, status *Reversed*, and reason *Reversed*. This time cannot be reprocessed.

- Select *Reverse and Generate New Row* if you want to reverse the check and reprocess the time later.

When you confirm the reversed check, in addition to creating an offset row with status and reason *Reversed*, the system also creates a new payable time row to be pulled for future payment. The new future row is an image of the original row that was reversed, and has the default status from Time Administration.

- To support this processing, we created a PS Job to launch the Pay Confirmation process in two steps:
 - The existing Pay Confirm COBOL SQL process (PSPCNFRM).

2. The new Time and Labor Pay Reversal process (TL_PAY_REVRS).

This new process creates the necessary offset rows and new rows of payable time as required by the payable time reversal type specified on the PaycheckReversal/Adjustment run control page.

- To Reverse Time and Labor payable time generated by a check reversal in the event of unconfirming payroll, we created the Reverse Time and Labor Application Engine process (TL_UNCONFIRM).

The Reverse Time and Labor process (TL_UNCONFIRM) corrects the corresponding payable time rows in Time and Labor that were created by the Time and Labor Pay Reversal process (TL_PAY_REVRS) during pay confirmation.

If a future row of payable time that was created during reversal confirmation has already been loaded to payroll, the system does not delete rows; instead it issues a warning message and manual adjustment is required.

Streamlined Menu Structure for Year-End Reports

In release 9.0, we added a new menu folder named "Year-End/NewYear Preparation" to the existing U.S. Annual Processing folder. The new folder now contains the Open/Close Pay Calendar report and FUTA Reconciliation report, as well as the Default Tax report and the reports related to W-4 and W-5 processing, which were formerly in the "Employee Pay Data, Tax Information" folder.

We also moved the Canadian Default Tax Data report and Exemption report from the Employee Pay Data folder into the existing Canadian Year-End/NewYear Preparation folder.

Global Payroll Core

Global Payroll Core is a flexible, rules-based engine capable of processing both delivered country extensions and customer-configured payrolls. In PeopleSoft Enterprise HCM 9.0, we have enhanced features used by both payroll functional and technical users. These enhancements provide organizations with greater business flexibility, improved staff productivity (less time required for process tasks), faster data retrieval times by enabling archiving of older data (retrieval times are faster with a smaller production database), and an increased ability to analyze the payment process.

Enhancements for HCM 9.0 include:

- Enhancements to rules packager.
- Support for archiving data.
- Enhancements to triggers.
- Enhancements to earning and deduction assignments.
- Support for generating report data.
- Enhancements to off cycle processing.
- Enhancements to payslips.

Enhanced Rules Packager Tool

The enhanced Rules Packager tool enables the movement of element-based data from one database to another. This customer- and country extension-requested enhancement improves the overall setup and procedure for the packager utilities, providing a more flexible, simple, and straightforward process.

Specific changes include:

- A simpler, more streamlined process for creating and applying regular and version based rule packages.
- The ability to specify default packager-related options on the installation table.
- Greater control of which sections of the Compare Report should be printed (warnings/errors, new elements, modified elements, deleted elements, unchanged elements).
- The ability to sort the Compare Report by country.

Creating and Applying Packages

The process of creating packages, generating package scripts, and exporting rule packages has been simplified by bringing control of these steps within a single component—the Create/Export Rule Package component. You can run each of these steps—from package creation, to script creation, to package export—as part of a single continuous process, or one step at a time. The Global Payroll system ensures that each step runs to completion before the next step begins, and displays the status of the package so that you can track your progress through the export process.

Similarly, the process of importing, comparing, and upgrading rule packages has been simplified by consolidating these steps within the Apply Rule Package component.

[Package Definition](#) **Package Processing** [View Package](#)

Package ID: GAU8388D 8.3 -> 8.8 Upgrade Delete Pkg **Process**

Processing Options

Created Scripts Created Exported [Process Monitor](#) [Package Status](#)

Create Processing

Create Package

Export Processing

Create Scripts Export Package [View Scripts](#)

*Script Location:
Script Location example: C:\folder\

Create packages and scripts and export packages from a single location using the Package Processing page of the Create/Export Rule Package component

Select the Create Package, Create Scripts, and Export Package check boxes to run the create and export package process as a continuous set of interlinked steps, or run one step of the process at a time.

Package Definition	Package Processing	Package Elements	Package Compare Audit
Package ID:	AURUL	Global Payroll AUS Rules	Process
Processing Options			
<input type="checkbox"/> Imported <input type="checkbox"/> Compared <input type="checkbox"/> Upgraded Process Monitor Package Status			
Import Processing			
<input checked="" type="checkbox"/> Import Package View Scripts			
*Script Location: <input type="text" value="C:\ExpScripts\"/>			
Script Location example: C:\folder\			
Compare Processing			
<input checked="" type="checkbox"/> Compare Package <input type="checkbox"/> Update Statistics			
<input checked="" type="checkbox"/> Create Compare Report			
Compare Report Print Options			
<input checked="" type="checkbox"/> Errors/Warnings <input checked="" type="checkbox"/> Modified <input type="checkbox"/> New <input type="checkbox"/> Deleted <input type="checkbox"/> Unchanged			
Upgrade Processing			
<input checked="" type="checkbox"/> Upgrade Package <input type="checkbox"/> Update Statistics			
Continue Upgrade Processing			
<input type="checkbox"/> With Errors <input checked="" type="checkbox"/> With Warnings			

Import packages, compare packages, and upgrade packages from a single location using the Package Processing Page of the Apply Rule Package component

Select the Import Package, Compare Package, Create Compare Report, and Upgrade Package check boxes to run the apply rule package process as a continuous set of interlinked steps, or run one step of the process at a time.

Selecting Default Options on the Installation Table

Use the installation table to specify:

- A default location for the scripts used in the export and import processes for rule and non-rule packages.
- Compare Report print options for standard and version based rule packages to control the type of information that appears in the report.
- The conditions under which an upgrade is permitted—that is, you can elect to proceed with upgrades despite errors and warnings in the compare process, or choose not to allow upgrades containing errors or warnings.

The ability to define these options at the installation table level means that you do not need to redefine the same basic information each time you export and import a package. However, Global Payroll enables you to override any defaults you select so that you can configure each export and import of Global Payroll rules to meet your specific needs.

Installation Settings		Schedule Settings	
▼ Checkpoint Intervals			
Identify Phase:	<input type="text" value="2000"/>	Intervals explained: One of the parameters that affect batch processing performance is the amount of work accumulated in the system before changes are committed to the database. The "Checkpoint Intervals" measure the accumulated work in terms of the number of payees processed in a given processing phase between each commit. The optimal setting is unique to each installation and phase. The "Progress Interval" controls when progress is recorded on the process log during the calculation phase.	
Calculate Phase:	<input type="text" value="1000"/>		
TL Feed Phase:	<input type="text" value="3000"/>		
*Cancel Phase:	<input type="text" value="2000"/>		
Progress Interval:	<input type="text" value="500"/>		
Absence Processing			
Months of Absence History:	<input type="text" value="24"/>		
		<input type="checkbox"/> Bundle PI on Output	
▼ Packager Processing Defaults			
Script Location:	<input type="text" value="\\MDAROSA04.peoplesoft.com\ESPI"/>		
Script Location example: C:\folder\			
Rule Packager Defaults			
Compare Report Print Options			
<input checked="" type="checkbox"/> Errors/Warnings		<input checked="" type="checkbox"/> Modified	
<input type="checkbox"/> New		<input type="checkbox"/> Deleted	
		<input type="checkbox"/> Unchanged	
Continue Upgrade Processing			
<input type="checkbox"/> With Errors		<input type="checkbox"/> With Warnings	

Select default processing options at the installation level

Using the Compare Report

In HCM 9.0, the Compare Report includes a new Summary Detail page that enables you to easily determine what information is included in the report output. This page lists the source database, the target database, an *imported at* date and timestamp, a *compared at* date and timestamp, and shows the filters used to select elements for the package—that is, the countries selected as well as the print options.

You can also sort the Compare Report by country.

The report body for the New and Deleted Elements section shows only the most important information from the GP_PIN table for each new or deleted element: the PIN code, name, description, and comments. As a result, these sections are easier to read and interpret.

In addition, you now have the ability to select the sections of the report you want to view (elements with errors and warnings, modified elements, new elements, deleted elements, or unchanged elements) at either the installation level or on the Package Processing page of the Apply Rule Package component. This enables you to reduce the amount of unnecessary data in the Compare Report.

Data Archive/Purge Templates

Customers seek to implement an archiving strategy that not only addresses the large amount of data that ERP applications create—which ultimately slows down their production system (and reporting)—but also to comply with regulatory requirements.

The importance of knowing what tables can be archived safely under what circumstances requires a thorough understanding of the system. In HCM 9.0, we deliver templates with documentation for archiving Global Payroll results data under specific conditions.

Enhancements to Triggers

In HCM 9.0, Global Payroll provides trigger enhancements that enable you to:

- Segment and prorate earning and deduction assignments.
- Manage used or obsolete segmentation triggers to prevent unnecessary segmentation of payroll results and possible calculation errors.
- Identify the source and cause of a trigger—that is, the record, field, or field value change that generates a trigger.
- Define offsets for retro triggers so that you can control the effective date of a retroactive data change.

Segmenting Earning and Deduction Assignments

Beginning with release 9.0, Global Payroll enables you to create segmentation trigger definitions for the earning and deduction assignment record GP_PYE_OVRD. With this enhancement, you can assign an earning or deduction to a payee on the Element Assignment by Payee or Payee Assignment by Element components, and the system will automatically segment—and prorate—the element when the assignment begin and end dates cover only a portion of the pay period.

See also Enhancements to Earning and Deduction Assignments.

Managing Used or Obsolete Segmentation Triggers

Normally, if a segmentation trigger is generated during a calculation period, it should cause segmentation to occur every time that period is processed. However, there are times when segmentation events need to be modified or removed after they are entered in the system, either because they should not have been entered at all, the dates of the events were entered incorrectly, or other data was recorded in error. Starting with release 9.0, the Global Payroll system addresses the problem of unnecessary segmentation triggers by automatically deleting them in response to the following data changes at each of the three trigger levels (*Record, Field - Non Value Based, Field - Value Based*):

Segmentation
Retro
Iterative

Catherine Duval Person ID: KFG0001

Segmentation Triggers						
Event ID	Source/IS	Value				
Country	Effective Date	Event ID	Character Value	Numeric Value	Date Value	Element
AUS	01/15/2000	JOB	13000			

Value tab of the Segmentation page showing trigger source information

The system displays field values for segmentation triggers at the following trigger levels:

Trigger Level	Information Displayed
Field, Non-Value Based	Field Value Information. For segmentation triggers generated from effective-dated records, the system displays the character, date, or numeric value that triggers segmentation.
Field, Value-Based	Field Value Information. For segmentation triggers generated from effective dated records, the system displays the character, date, or numeric value that triggers segmentation. For segmentation triggers generated from the begin- and end-dated earning and deduction assignment record (GP_PYE_OVRD), the system displays the name of the element that triggers segmentation.

Defining Offset Days

When you define triggers for retroactive processing, you can enter a positive or negative number in the Offset Days field to increase or decrease the retro trigger effective date in relation to the date of a field value change. For example, if you enter -1 in the Offset Days field on the Trigger Definitions - Field Values page for one of the values listed in the Field Values group box, and you retroactively enter that value into the database with an effective date of January 1, 2000, the system automatically adjusts the trigger effective date to December 31, 1999 (one day earlier). The system then processes pay periods going back to December 1999 rather than January 2000.

Trigger Definitions

Field Values

Country: FRA France

Record (Table) Name: JOB

Field Name: ACTION

Field Values					
Sequence	Character Value	Trigger Event ID	Offset Days		
14	RET	DEPART	-1	+	-
15	XFR	DEPART	-1	+	-
16	TWP	DEPART	-1	+	-
17	TWB	DEPART	-1	+	-

No Match on Field Value Option

Do Not Trigger
 Trigger
 Trigger Event ID:

Specify offset days on the Trigger Definitions - Field Values page to manage the effective dates of retroactive triggers

Enhancements to Earning and Deduction Assignments

Prior to release 9.0, the Global Payroll system did not process earning and deduction assignments that were not active as of the pay period (segment) end date, and did not prorate assignments that covered only a portion of the pay period. However, with the enhancements to earning and deduction assignments in the current release, you have the option to process and prorate earnings/deductions assigned to only a portion of the pay period—regardless of whether they are active as of the end date—in addition to those that are active as of the period end date.

For example, assume that an earning element E1 for 300 USD is assigned to a payee with begin and end dates of 10 and 20 June respectively (assume a monthly pay period), and that the system is set up to trigger segmentation from the earning and deduction assignment record for this element. Based on the assignment begin and end dates, the system will slice the pay period into three segments and process, and prorate, the element in the second slice:

Element	Slice 1 June 1–10	Slice 2 June 11–20	Slice 3 June 21–30
Earning = E1 Calculation Rule = Amount Amount = 300	Element not resolved in slice 1.	Resolved amount after proration = 100 (proration factor = .333333333)	Element not resolved in slice 3.

Note. This enhancement is configurable by country and is therefore optional. You can use this new functionality or continue using the system as it works in releases prior to HCM 9.

System Data

This feature provides sample rules that are meaningful and useful for customers seeking to utilize best practices for common payroll requirements when using Global Payroll Core for configuring their own country extension.

Report Data

In HCM 9.0, we release Generate Report Data (Report Data) for Global Payroll Core and all country extensions, which eases the extraction of data from the result tables. This provides an efficient and configurable extract tool that addresses the complexities of the payroll results in a consistent, configurable, high performance method for reporting in Global Payroll.

The Report Data feature includes the following functionality:

- Roll out Report Data functionality to all Global Payroll customers.
- Provide a Payroll Results Register that utilizes Report Data as the extraction method and is robust enough to retire duplicate functionality (two reports for each of the following: core, Australia, Hong Kong, Malaysia, New Zealand, and Singapore and one report for the United States).
- Modify Generic Reports to replace the data extraction method (an AE program) for the report with Report Data, thereby retiring duplicate functionality for extracting results.

Report Data Functionality

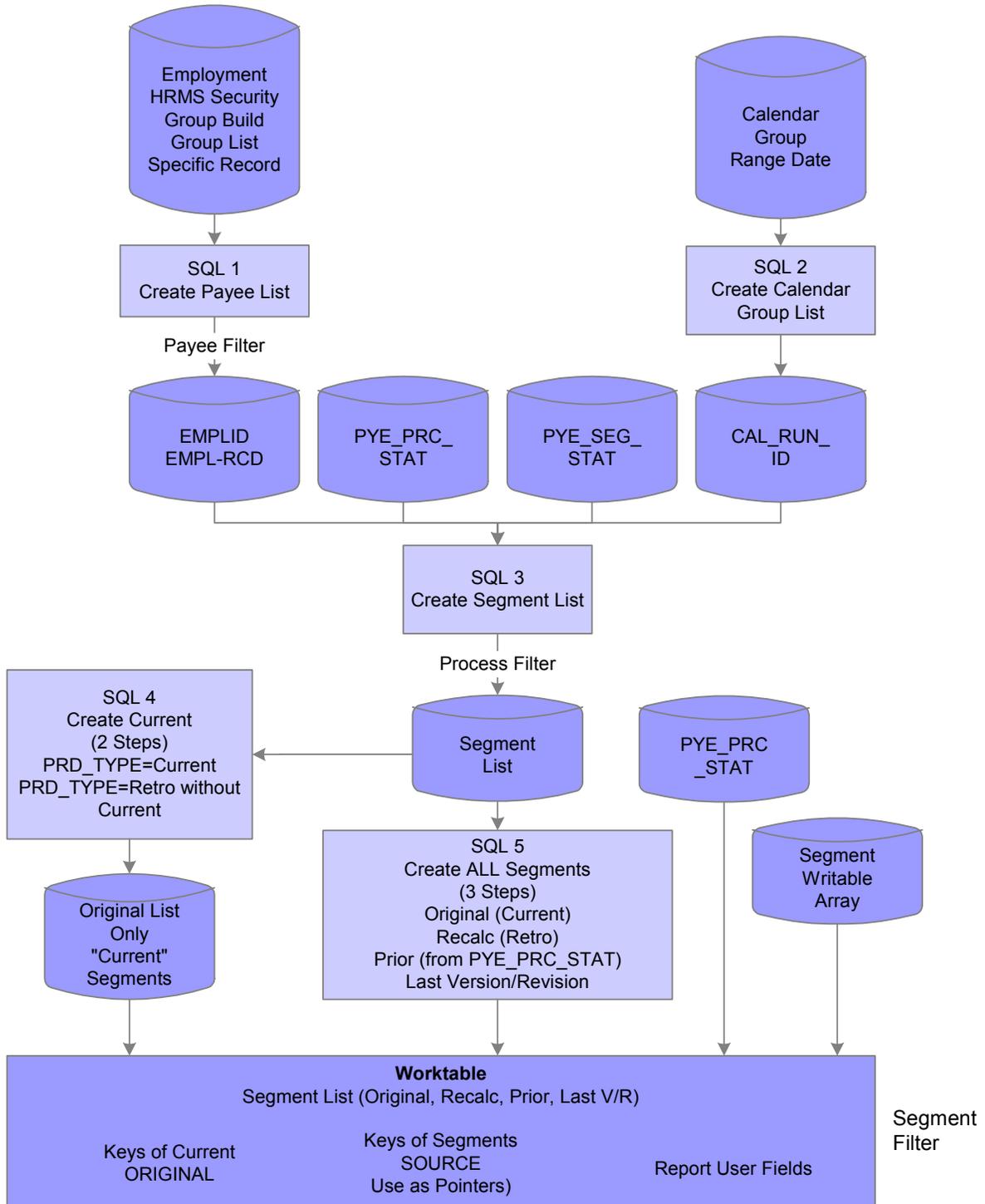
Using the report data generation process, you can easily read payroll results tables and use this data to populate your own reports. The report data generation process enables you to create reports that contain:

- Corrective and forwarding retroactivity or a mixture of the two.
- Segmentation, retro-segmentation, and segmentation cancelled by retroactivity.
- Reverse calculations.
- Global Payroll status, indicators, and other technical fields.

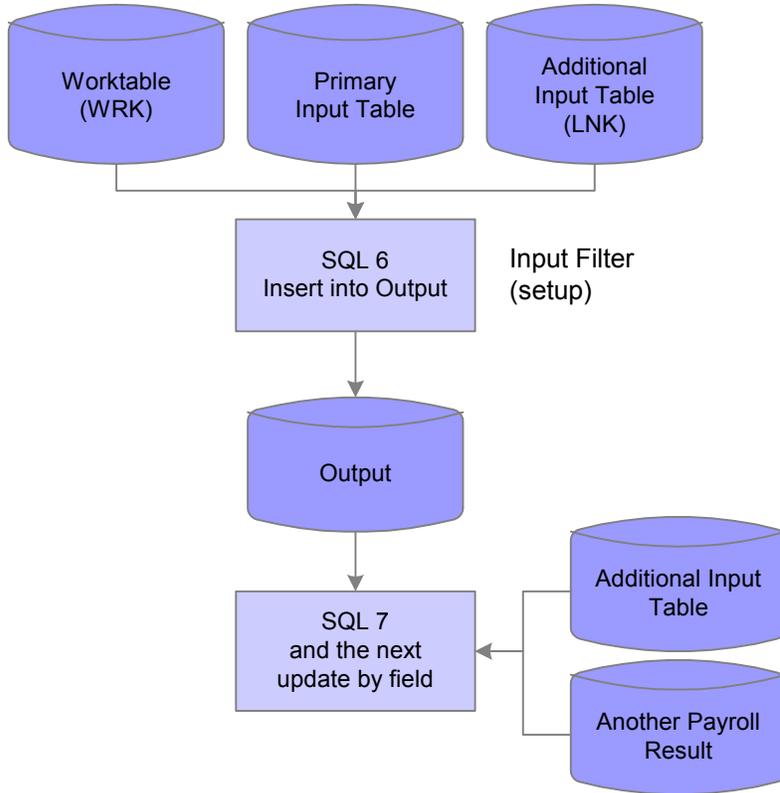
- Pay group, pay entity, and payment key changes resulting from corrective retroactivity.
- Calculation results stored in earnings, deductions, balance accumulators, accumulators stored with each calculation, absence daily data, processed positive input, generated positive input, supporting elements stored with each calculation, and specific result tables (writable arrays).
- Multiple selections by process run.
- Data based on a calendar group or a period of time.
- Results from finalized and un-finalized calendars.
- Payees selected from any table at the EMPLID level, adhering to HRMS security.
- Appropriate payroll segments.
- Selected elements.
- Any and all slices.

Report Data Generation Process

The following diagrams provide an overview of the Report Data Generation process.



Overview of Generating Report Data 1



Overview of Generating Report Data 2

Defining Report Data

Creating reports using the report data generation process involves:

- Selecting output tables and primary input tables.
- Mapping fields from the primary input tables to fields on the output tables.
- Creating input filters (optional).

Define Report Data

Country: USA United States

Report Data: GPUSFDSM

***Description:** Federal Tax Summary **Generate Log**

Segment Writable Array: GPUS_FWT_WA Tax Data Writable Array **Run Time Security Override**

Row Level Security

Process Details				
*Sequence	*Output Table	*Primary Input Table	Writable Array Table	*Segment Option
10	GPUS_FDSM_TMP	Writable Array Table	GPUS_RSLT_FD_WA	Original and Retro

Comments: Federal Tax Summary report summarizes period-to-date income tax withheld, disability, FICA, and unemployment taxes at the federal level.

Updated By: HCRUSA_GP **Last Updated:** 10/12/04 4:34:36.000000AM

Selecting output tables and primary input tables

Report Data Process Details

Sequence: 10
Output Table: GPUS_FDSM_TMP Tax Report Temporary Table
Primary Input Table: GPUS_RSLT_FD_WA Writable Array Table

Additional Input Tables Customize | Find | View All First 1 of 1 Last

*Input Table	*Join with	Update Sequence	Join Condition Defined
GP_ELN_TMP	Primary Input (Many to Many)		<input checked="" type="checkbox"/>

Generate Field Map

Field Map

Customize | Find | View All First 1-8 of 8 Last

*Output Field	*Input Type	Input Record	Input Field	Reverse Sign
COMPANY	Primary Input	GPUS_RSLT_FD_WA	COMPANY	<input type="checkbox"/>
GPUS_TAX_AMT	Primary Input	GPUS_RSLT_FD_WA	GPUS_TAX_AMT	<input checked="" type="checkbox"/>
GPUS_TAX_CATEGORY	Additional Input	GP_ELN_TMP	GP_ELN_PIN_ATTR1	<input type="checkbox"/>
GPUS_TAX_GRS	Primary Input	GPUS_RSLT_FD_WA	GPUS_TAX_GRS	<input checked="" type="checkbox"/>
GPUS_TAX_NL_GRS	Primary Input	GPUS_RSLT_FD_WA	GPUS_TAX_NL_GRS	<input checked="" type="checkbox"/>
GPUS_TAX_RPT_TYPE	Primary Input	GPUS_RSLT_FD_WA	GPUS_TAX_RPT_TYPE	<input type="checkbox"/>
GPUS_YE_RPT_CO	Primary Input	GPUS_RSLT_FD_WA	GPUS_YE_RPT_CO	<input type="checkbox"/>
PYMT_DT	Internal Worktable	GP_RPTW_TMP	PYMT_DT	<input type="checkbox"/>

Mapping fields

The Generate Field Map push button generates a field mapping based on the output table definition, the primary input table, the additional input tables, the writable array segment and the worktable. Once the field mapping has been generated, you can change it using the Field Map group box.

Input Filter	Aliases Available for Filter
*SQL	PRI=GPUS_RSLT_FD_WA WRK=GP_RPTW_TMP LNK=GP_ELN_TMP
AND LNK.PROCESS_INSTANCE=WRK.PROCESS_INSTANCE	
AND LNK.COUNTRY=%PARM.TAXRPTS.COUNTRY	
AND LNK.GP_ELN_SET=%PARM.TAXRPTS.GP_ELN_SET	
AND LNK.GP_ELN_PIN_ATTR1 IN ('01','02','03','04','05','06','07')	
AND PRI.CALC_SEQ_NUM=(
SELECT MAX(PR2.CALC_SEQ_NUM)	
FROM %table(GPUS_RSLT_FD_WA) PR2	
WHERE PR2.EMPLID=PRI.EMPLID	
AND PR2.CAL_RUN_ID=PRI.CAL_RUN_ID	
AND PR2.EMPL_RCD=PRI.EMPL_RCD	

Creating input filters

Use the SQL field to write a where clause to execute during the selection of the primary input table.

Payroll Results Register

As part of the rollout of the Report Data feature, Global Payroll Core 9.0 delivers the Payroll Results Register as an example report to demonstrate how customers can utilize the Report Data feature. This new Payroll Results Register report replaces the old Global Payroll Core Payroll Results Register and Payroll Results Summary reports. In addition, it replaces the following country-specific payroll data reports:

- Payroll Results Register AUS
- Payroll Results Register HKG
- Payroll Results Register MYS
- Payroll Results Register NZL
- Payroll Results Register SGP
- Payroll Results Register USA
- Reconciliation AUS
- Reconciliation HKG
- Reconciliation MYS
- Reconciliation NZL
- Reconciliation SGP
- Pay Components HKG
- Pay Components MYS
- Pay Component NZL
- Pay Components SGP

Payroll Results Register	
Run Control ID: PS	Report Manager Process Monitor <input type="button" value="Run"/>
Language: English	
Report Parameters	
*Report Run By: Calendar Group	*Report Type: Employee Detail
*Calendar Group ID: G1_GRP_PERF_AUG04	Aug 04 Performance Testing
Period Information	
Date Type:	
Date From:	Date To:
Year:	Quarter:
List Set	
*Country: USA	Create Element List Set
*List Set: GP000001	Payroll Results Register

Creating a results report (1 of 2)

▼ Sort Sequence	
Calendar Group:	<input type="text" value="1"/>
Pay Entity:	<input type="text" value="2"/>
Pay Group:	<input type="text" value="3"/>
Company:	<input type="text"/>
Department:	<input type="text"/>
Location:	<input type="text"/>
Establishment:	<input type="text"/>
Run Type:	<input type="text"/>
Currency:	<input type="text"/>

Employee Level Sort

Employee Name and Empl Rcd Nbr

Employee ID and Empl Rcd Nbr

▼ Payee Population	
*Population Method:	<input type="text" value="All Payees"/>
Group ID:	<input type="text"/>
Group As Of Date:	<input type="text"/>
Refinement Date:	<input type="text"/>
Group List ID:	<input type="text"/>

Payees		Customize	Find	First	1 of 1	Last
EmplID	Name					
<input type="text"/>	<input type="text"/>					

▼ Organizational Selection		Customize	Find	First	1 of 1	Last
Selection	Selection Value					
<input type="text"/>	<input type="text"/>					

Creating a results report (2 of 2)

You can use this page to generate three different types of reports:

- Employee Detail provides segment detail for each employee and includes both an Earnings and Deductions section and an Accumulator and Arrears section.
- Employee Summary summarizes all segments and does not include an Accumulator and Arrears section.
- Organizational Summary does not include any employee detail. It lists totals summarizing the earnings and deductions within an organization.

The Payroll Results Register report requires that you select a list set in the List Set group box. A list set represents groups of elements and corresponding element attributes associated with a specific application. The list set that you select determines which earnings, deductions, and accumulators the system uses to extract report data for the Payroll Results Register. It also determines the sections and titles of the printed report.

Report ID: GP000001		PeopleSoft Payroll Results Register Employee Detail		Page Number: 1 Run Date: 09/14/2006 Run Time: 14:02:54				
Calendar Group ID: G1_GRP_DERF_AUG04 Aug 04 Performance Testing		Payroll Status: Finalized		Performance Test Pay Group				
Pay Entity: K1GDERFPE Performance Test Pay Entity		Pay Group: K1GDERFPG		Performance Test Pay Group				
Employee ID: G1GPERF78 Record Number: 0		Name: Allende, Isabel		Regular Day				
Calendar ID: G1_DERF_AUG04		Run Type: K1GWPAY		Payment Date: 08/31/2004				
Calendar Period ID: G1_AUG04 M Aug 2004 Monthly		Pay Period Begin Date: 08/01/2004 End Date: 08/31/2004		Payment Date: 08/31/2004				
Segment Number: 1		Payment Keys		Gross Pay: 12,000.00				
Version Number: 1		Company: K1G		Net Pay: 7,077.95				
Revision Number: 1								
Segment Status: Active in Segment								
Segment Begin Date: 08/01/2004 End Date: 08/31/2004								
Earnings								
Element Name	Inst	Slice Date	User Field 1/3/5	User Field 2/4/6	Amount/Adjustment	Base/Adjustment	Rate/Percent	Unit/Adjustment
SALARY	0	08/01/2004			12,000.00			
		08/31/2004						
Deductions								
Element Name	Inst	Slice Date	User Field 1/3/5	User Field 2/4/6	Amount/Adjustment	Base/Adjustment	Rate/Percent	Unit/Adjustment
401K EE	0	08/01/2004	K1G	G1A	500.00	12,000.000000		
		08/31/2004	40	G1401K				
			2004-01-01					
DENTAL EE	0	08/01/2004	K1G	G1A	10.00			
		08/31/2004	11	G1DEN1				
			2004-01-01					
DENTAL ER	0	08/01/2004	K1G	G1A	10.00			
		08/31/2004	11	G1DEN1				
			2004-01-01					
FWT	0	08/01/2004	193700007	10	2,561.12			
		08/31/2004	M					
MEDICAL EE	0	08/01/2004	K1G	G1A	75.00			
		08/31/2004	10	G1MED1				
			2004-01-01					
MEDICAL ER	0	08/01/2004	K1G	G1A	125.00			
		08/31/2004	10	G1MED1				
			2004-01-01					
MEDICARE EE	1	08/01/2004	193700007	10	172.77			
		08/31/2004						
MEDICARE ER	1	08/01/2004	193700007	10	172.77			
		08/31/2004						

[Viewing the Payroll Results Register report](#)

Generic Reports

The Generic Reports process now uses Report Data to extract results. The Generic Reports run control page now triggers:

1. The GP_GENRPT Application Engine program. This program prepares parameters for Report Data, which extracts the results for the GPGENRPT SQR process based on the specified run control options and setup.
2. The GPGENRPT SQR program. This program reads the payroll results from the extracted Report Data results and formats the report.

Off Cycle On Demand Payment Processing

Off cycle processing functionality is useful for any organization, but especially for organizations that have higher attrition rates (such as hospitality, retail, and other services industries).

Global Payroll supports four types of off cycle transactions:

- Manual Payments

You can record payments for items that you calculate and pay outside of the system, such as cash or check payments.

- **Corrections**

These are transactions that correct the results of a finalized payroll. Examples include paying a new hire that was not included in the regular run, and reversing a bonus payment that was made to a payee in error.

- **Additional Payments**

These are one-time payments, such as a special bonus or expense reimbursement that fall outside of the on cycle process and for which calendars would not ordinarily be defined. (This was called *Unscheduled Payments* in 8.9.)

- **Advances**

Advances are the processing of segments before they are normally scheduled, such as the early payment of wages due to termination, or the processing and pay of leave in advance.

In Global Payroll Core 9.0, this functionality has been enhanced to make the processing of off cycle transactions easier. Off cycle processing has been simplified by adding all steps from creation of the request to processing the off cycle transactions on one page. Each individual transaction page is configurable. This allows you to simplify data entry for the end user by selecting the fields and values that are allowed on the page.

Configuring Off Cycle Transactions

The configuration definition enables you to control several aspects of an off cycle request. Using the Off Cycle Configuration page enables you to:

- Identify which off cycle transaction types are valid for your organization.
- Determine basic field level defaults for the request page, based on the type of off cycle transaction.
- Identify business reasons and configure the data that is required on the request page, based on the transaction type.

Off Cycle Configuration

You can configure off cycle requests for each type of transaction. Each off cycle transaction type has different page characteristics. Some fields are common across transaction types while others are unique by transaction type.

Off Cycle Configuration	
Country: Mexico	Off-Cycle Type: Additional Payment
<input checked="" type="checkbox"/> Allow Requests to be entered	Default Reason: <input type="text"/>
List Reasons for Additional Payments Find View All First 1 of 1 Last	
*Reason: <input type="text" value="BONUS"/>	+ -
*Description: <input type="text" value="Bonus not paid out"/>	
Short Description: <input type="text" value="Bonus not"/>	
Calendar Controls	
<input type="checkbox"/> Hide Calendar Controls	<input checked="" type="checkbox"/> Allow entry of Begin Date
	<input checked="" type="checkbox"/> Allow entry of End Date
Processing Controls	
<input type="checkbox"/> Hide Processing Controls	<input checked="" type="checkbox"/> Allow entry of Payment Keys
Run Type: <input type="text" value="KY NOMINA"/>	<input checked="" type="checkbox"/> Allow entry of Run Type
*Payment Method: <input type="text" value="Use Normal Distribution"/>	<input checked="" type="checkbox"/> Allow entry of Payment Method
*Element Selection: <input type="text" value="All"/>	<input checked="" type="checkbox"/> Allow entry of Element Selection
Element Set: <input type="text"/>	

Configure the fields to be used when entering additional payment off cycle requests

Off Cycle Configuration	
Country: Mexico	Off-Cycle Type: Advance
<input checked="" type="checkbox"/> Allow Requests to be entered	Default Reason: <input type="text"/>
List Reasons for Advances Find View All First 1 of 1 Last	
*Reason: <input type="text" value="TERMINATE"/>	+ -
*Description: <input type="text" value="Immediately Payment"/>	
Short Description: <input type="text" value="Immediatel"/>	
Processing Controls	
*Payment Method: <input type="text" value="Use Normal Distribution"/>	<input checked="" type="checkbox"/> Allow entry of Payment Method
	<input checked="" type="checkbox"/> Allow Partial Period Advances

Configure the fields to be used when entering advance off cycle requests

Off Cycle Configuration	
Country: Mexico	Off-Cycle Type: Correction
<input checked="" type="checkbox"/> Allow Requests to be entered	Default Reason: <input type="text"/>
List Reasons for Corrections Find View All First 1 of 1 Last	
*Reason: <input type="text" value="OVERTIME"/>	<input type="button" value="+"/> <input type="button" value="-"/>
*Description: <input type="text" value="Missed Overtime"/>	
Short Description: <input type="text" value="Missed Ove"/>	
Method of Correction	
*Type of Correction: <input type="text" value="Replacement"/>	<input checked="" type="checkbox"/> Allow entry of Correction Type
*Retro Method: <input type="text" value="Use Existing Retro Rules"/>	<input checked="" type="checkbox"/> Allow entry of Retro Method
Processing Controls	
<input type="checkbox"/> Hide Processing Controls	
*Payment Method: <input type="text" value="Use Normal Distribution"/>	<input checked="" type="checkbox"/> Allow entry of Payment Method
*Element Selection: <input type="text" value="All"/>	<input checked="" type="checkbox"/> Allow entry of Element Selection
Element Set: <input type="text"/>	

Configure the fields to be used when entering correction off cycle requests

Off Cycle Configuration	
Country: Mexico	Off-Cycle Type: Manual Payment
<input checked="" type="checkbox"/> Allow Requests to be entered	Default Reason: <input type="text"/>
List Reasons for Manual Payments Find View All First 1 of 1 Last	
*Reason: <input type="text" value="HIRE"/>	<input type="button" value="+"/> <input type="button" value="-"/>
*Description: <input type="text" value="Hired & Not Paid"/>	
Short Description: <input type="text" value="Hired & No"/>	
Calendar Controls	
<input type="checkbox"/> Hide Calendar Controls	
	<input checked="" type="checkbox"/> Allow entry of Begin Date
	<input checked="" type="checkbox"/> Allow entry of End Date
Processing Controls	
<input type="checkbox"/> Hide Processing Controls	
Run Type: <input type="text" value="KY NOMINA"/>	<input checked="" type="checkbox"/> Allow entry of Payment Keys
*Element Selection: <input type="text" value="All"/>	<input checked="" type="checkbox"/> Allow entry of Run Type
Element Set: <input type="text"/>	<input checked="" type="checkbox"/> Allow entry of Element Selection

Configure the fields to be used when entering manual payment off cycle requests

Processing Off Cycle Transactions

Off cycle processing has been simplified by creating one page that enables the user to access pages to start the process, create a calendar group, enter transaction data, calculate the off cycle and finalize or cancel the process.

Off Cycle On Demand

The Off Cycle On Demand page is used as a dashboard to create the off cycle request and process it. The buttons are available once certain steps are completed:

- The Create Request button is available when you add a new off cycle on demand request. Once a request has been created and you access the Off Cycle On Demand page, the Create Request button will read Edit Request.
- The Create Calendar Group button is available once at least one off cycle request has been created. Once a request has been created and you access the Off Cycle On Demand page, the Create Calendar Group button will read Edit Calendar Group.
- The Calculate button is available once the calendar group is created.
- The Finalize and Cancel buttons are available once the off cycle request has been calculated.

Off Cycle On Demand			
Pay Group:	KY MENSUAL	Grupo de Pago Mensual	
Target Period ID:	KYM05P12	KYM05P12 Monthly	12/01/2005 - 12/31/2005
Off Cycle Group:	OFF CYCLE	Country:	MEX
Set Up Request			
<input type="button" value="Create Request"/>	<input type="checkbox"/>	Request entered	
<input type="button" value="Create Calendar Group"/>	<input type="checkbox"/>	Calendar Group created	
		Calendar Group:	
Process Calendar Group			
<input type="button" value="Calculate"/>	<input type="checkbox"/>	Results can be finalized	
<input type="button" value="View Status and Results"/>		Processing Status:	Unprocessed
<input type="button" value="Finalize"/>	<input type="checkbox"/>	Finalized	
			<input type="button" value="Cancel"/>

[Dashboard to access pages to process an off cycle transaction](#)

Off Cycle Request

The functionality for entering off cycle requests remains the same. On this page enter the default payment date and employee ID for each type of off cycle transaction. Enter the details for the off cycle request by accessing the Payment Details, Correction Details or Advance Details icon.

Off Cycle Request

Pay Group: KY MENSUAL Grupo de Pago Mensual

Target Period ID: KYM05P12 KYM05P12 Monthly 12/01/2005 - 12/31/2005

Off Cycle Group: OFF CYCLE **Country:** MEX

Payment Date: 02/28/2006

▼ **Manual Payments to Record**

Manual Payments - List Payees and Payments to record
Customize | Find | First 1 of 1 Last

*Employee ID	Name	Empl Rcd Nbr	*Reason	Payment Number	Payment Details		
KY0001	Jorge Luis De La Peña Martínez López	000	HIRE	00000000000000000000			

▼ **Calendars to Correct**

Corrections - List Payees and Calendars to correct
Customize | Find | First 1 of 1 Last

*Employee ID	Name	Empl Rcd Nbr	*Reason	Calendar To Correct	Correction Details		
KY0002	Ma. de Lourdes Hernández Peña	000	OVERTIME				

▼ **Additional Payments (2)**

Additional Payments - List Payees to pay
Customize | Find | First 1-2 of 2 Last

*Employee ID	Name	Empl Rcd Nbr	*Reason	Payroll Calendar ID	Payment Details		
KY0003	Ma. Esther Velázquez Sosa Villegas	000	BONUS	KYM05P12###1			
KY0005	José Silva Marín	000	BONUS	KYM05P12###1			

▼ **Advances**

Advances - List Payees and Calendar Groups to advance
Customize | Find | First 1 of 1 Last

*Employee ID	Name	Empl Rcd Nbr	*Reason	Calendar Group	Advance Details		
KY0004	Manuel Haces Rodriguez	000	TERMINATE				

[Enter basic information for the off cycle requests](#)

Manual Payment Detail

A manual payment is a payment that is prepared outside of the Global Payroll system. You might have a remote office with no access to Global Payroll that occasionally needs to write a manual payment to process a last-minute payroll adjustment. Or you might correct errors in system-produced paychecks by producing manual payments. Enter the details for the manual payment on the Manual Payment Detail page.

Off Cycle Request

Manual Payment Detail

Pay Group: KY MENSUAL **Period ID:** KYM05P12 **Off Cycle Group:** OFF CYCLE
Employee ID: KY0001 **Name:** Jorge Luis De La Peña Martínez López **Empl Rcd Nbr:** 0
Reason: HIRE
Calendar ID: KYM05P12###1

Calendar Controls

***Payment Date:** 11/15/2006
***Period Begin Date:** 12/01/2005 ***Period End Date:** 12/31/2005

Processing Controls

***Run Type:**

Element Selection

All
 Elements with Positive Input
 Limited Element Set

Element Set:

Enter calendar controls and processing controls

Manual Payment Detail

***Payment Number:** ***Issue Date:** **Payment ID:**

Input Values		Calculated Values		Validation Status	
Gross Pay:	<input type="text" value="0.000000"/>	Last Validated Gross:	<input type="text" value="0.000000"/>	<input checked="" type="radio"/> Not Validated	
Net Pay:	<input type="text" value="0.000000"/>	Last Validated Net:	<input type="text" value="0.000000"/>	<input type="radio"/> Validated	
				<input type="radio"/> Validate at Calculation Time	

Earnings Customize | Find | View All | First 1 of 1 Last

Main Components | **Additional Components**

Element Name	Description	Instance Number	Unit	Amount	Percent Contribution	Calculated Value	
<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text" value="0.000000"/>		<input type="text" value="0.000000"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Deductions Customize | Find | View All | First 1 of 1 Last

Main Components | **Additional Components**

Element Name	Description	Instance Number	Unit	Amount	Percent Contribution	Calculated Value	
<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text" value="0.000000"/>		<input type="text" value="0.000000"/>	<input type="button" value="+"/> <input type="button" value="-"/>

[Supporting Element Overrides - Payment Level](#)

Enter your manual payment details

Correction Request Detail

With its built-in retroactive processing capabilities, Global Payroll generally handles corrections as a basic part of regular on cycle payrolls. With off cycle processing, you can quickly address the more critical exceptions. Enter the details for the correction on the Correction Request Detail page.

Off Cycle Request

Correction Request Detail

Pay Group: KY MENSUAL **Period ID:** KYM05P12 **Off Cycle Group:** OFF CYCLE
Employee ID: KY0002 **Name:** Ma. de Lourdes Hernández Peña **Empl Rcd Nbr:** 0
Reason: OVERTIME

Target Calendar ID: KYM05P12###2

Calendar To Correct

*Calendar ID: [P.I. Calendar To Correct](#)
 Look up advances where the calendar itself is not yet finalized [Absence Event Entry](#)

Method of Correction

Type of Correction: Replacement
Retro Method: Use Existing Retro Rules

Processing Controls

*Payment Date: 11/15/2006
*Payment Method: Use Normal Distribution

Element Selection

All
 Elements with Positive Input
 Limited Element Set Limited Element Set Name:

[P.I. Target Calendar](#) [Supporting Element Overrides - Target Calendar](#)
[Review Triggers](#) Retro Triggers Exist

▼ Retro Triggers Customize | Find | View All | First 1 of 1 Last

Trigger Effective Date	Trigger Event ID	Trigger Status	Trigger Source	Trigger Tag

[Enter correction details](#)

Additional Payment Detail

Additional payments are one-time payments that are processed outside of the normal processing cycle. Examples include a one-time bonus, an award, expense reimbursement, or rent paid for an employee's housing. Enter the details for an additional payment on the Additional Payment Detail page.

Off Cycle Request

Additional Payment Detail

Pay Group: KY MENSUAL **Period ID:** KYM05P12 **Off Cycle Group:** OFF CYCLE
Employee ID: KY0003 **Name:** Ma. Esther Velázquez Sosa Villegas **Empl Rcd Nbr:** 0
Reason: BONUS
Calendar ID: KYM05P12###1

Calendar Controls

***Payment Date:** 11/15/2006 
***Period Begin Date:** 12/01/2005  ***Period End Date:** 12/31/2005 

Processing Controls

***Run Type:** KY NOMINA 
***Payment Method:** Use Normal Distribution 

Element Selection

All
 Elements with Positive Input
 Limited Element Set Limited Element Set Name:

[Positive Input](#) [Supporting Element Overrides](#)

[Enter additional payment details](#)

Advance Request Detail

Advance processing is the processing of on cycle calendars ahead of their regular schedule. Examples include payments for early termination and a full or partial period advance. Enter the details for an advance on the Advance Request Detail page.

Off Cycle Request

Advance Request Detail

Pay Group: KY MENSUAL **Period ID:** KYM05P12 **Off Cycle Group:** OFF CYCLE
Employee ID: KY0004 **Name:** Manuel Haces Rodriguez **Empl Rcd Nbr:** 0
Reason: TERMINATE
Calendar Group: 

Calendars Customize | Find | View All |  First 1 of 1 Last

Calendar ID	Payment Date	Calculate From Date	Calculate Thru Date
	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 

[Review Triggers](#) [Absence Event Entry](#) [Review Payee Calendar Override](#) Overrides exist

▼ Retro Triggers Customize | Find | View All |  First 1 of 1 Last

Trigger Effective Date	Trigger Event ID	Trigger Status	Trigger Source	Trigger Tag

[Enter advance details](#)

Administrator View of Payslips

The ability for employees to view or print a copy of the payslips online was provided as a part of ePay in Release 8.9. In HCM 9.0, we expanded the feature to provide administrators the same view as employees. The ability to view payees' payslips greatly enhances the ability of the payroll clerk or administrator to provide support to payees when they contact the payroll department with questions about their payslips. Additionally, the payroll clerk or administrator can control which individual payslips payees can view online by modifying the payslip status.

Note. The ePay product is required for payees and administrators to view self-service payslips.

Review Self Service Payslips

Samuel Brooks **Person ID:** G1EE0001

Selection Criteria

Filter By: ▼

From Date: Select with Matching Criteria

To Date: Clear

Select Payslip Customize | Find | First ◀ 1-2 of 2 ▶ Last

Payslip Content Details
Payslip File Details

Payment Date	Period Begin Date	Period End Date	Net Pay	Description	Status	Payslip ID
2/6/2009	01/26/2009	02/01/2009	929.60	GP US Dept C	Original ▼	G1_GRP_FEB09_SBW000000006
1/2/2009	12/22/2008	12/28/2008	929.60	GP US Dept C	Original ▼	G1_GRP_JAN09_SBW000000006

Viewing a list of generated payslips for a payee

Enter search criteria to generate a list of payslips for a payee. Click a link in the Payment Date column to open a PDF version of the respective payslip.

GP US Company C 546 K1C Avenue P.O. Box 678 San Francisco, CA 94563		Payment Date: 01/02/2009 Period Begin Date: 12/22/2008 Period End Date: 12/28/2008	
Samuel Brooks 1265 Bluebird Dr Pleasanton, CA94588 SSN:567-01-0001	Employee ID: G1EE0001 Department: K1GDPC-GP US Dept C Location: Los Angeles Office Job Title: Staff Pay Rate: \$1,500.00 W	TAX DATA: Federal CA State Marital Status: S S Allowances: 0 0 Additional Pct.: Additional Amt.:	
HOURS AND EARNINGS			
-----Current-----			
Description	Rate	Hours	Earnings
Salary			1,500.00
Total			1,500.00
DEDUCTIONS			
Description	Current	YTD	
Saving Bonds-EB200	60.00	60.00	
Total	60.00	60.00	
EMPLOYER PAID BENEFITS			
Description	Current	YTD	
TAXES			
Description	Current	YTD	
FIT Withholding	301.03	301.03	
OASDI Tax	93.00	93.00	
Medicare Tax	21.75	21.75	
CA Withholding	94.62	94.62	
Total	510.40	510.40	
ABSENCE HOURS			
NET PAY DISTRIBUTION			
Check#	00000000000005284	929.60	
Total		929.60	

Viewing a payslip

Global Payroll for Australia

Global Payroll for Australia 9.0 offers several modifications to simplify payroll processing for your organization:

- Support for archiving data.
- Enhancements to retroactive tax processing.
- Enhancements to administering superannuation fund.

Support for Archiving Data

Global Payroll for Australia 9.0 generates a large amount of result data. To keep the amount of saved data manageable, it can be helpful to archive it periodically. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, PeopleSoft Global Payroll for Australia delivers a predefined archive object (GPAU_RSLT_ARCHIVE) and archive template (GPAURSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Enhancements to Retroactive Tax Processing

Global Payroll for Australia 9.0 provides payroll rules and elements to calculate taxes on payments that are granted retroactively. The system manages the following tax situations:

- Taxes owed on retroactive bonuses when the payment applies to a single pay period. This includes marginal tax, HELP and SFSS.



- Taxes owed on retroactive bonuses when the payment applies to multiple pay periods. This includes marginal tax, HELP and SFSS.
- Taxes owed on back payments, including salaries and wages accrued in the current financial year. This includes marginal tax, HELP and SFSS.
- Taxes owed on back payments, including salaries and wages accrued in the previous financial year. This includes marginal tax, HELP and SFSS.

Enhancements to Superannuation Administration

ComSuper initiated an online superannuation service to enable employers to submit, correct, and validate superannuation data. The introduction of this service signified a move toward true continuous reporting of SAF data. This enhancement to superannuation enables employers to define Payroll Interface File (PIF) data and generate the PIF for delivery to ComSuper.

Create Super Rpt File	
Run Control ID: PS	Report Manager Process Monitor Run
Report Type <input checked="" type="radio"/> ComSuper <input type="radio"/> SuperEC <input type="radio"/> Agest	Select Either Date Range or Calendar Group ID *Date From: 01/01/2004 *Date To: 01/31/2004 Calendar Group ID: KAM04M01
Test Indicator Acknowledgement <input checked="" type="checkbox"/> Test Indicator <input type="checkbox"/>	
Pay Entity *Pay Entity: GAAUSBI Australian Business Institute2 Deduction Recipient AUS List	
ComSuper Payroll Run Number: 1	

Use the [Create Super Rpt File](#) page to generate PIF data

Global Payroll for Brazil

Global Payroll for Brazil offers numerous enhancements for release 9.0 to simplify payroll processing for your organization.

Support for Archiving Data

PeopleSoft Enterprise Global Payroll for Brazil generates a large amount of result data. To keep the amount of saved data manageable, it can be helpful to archive it periodically. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, Global Payroll for Brazil delivers a predefined archive object (GPBR_RSLT_ARCHIVE) and archive template (GPBRRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Segmentation Triggers With Earning and Deduction Assignments

In Global Payroll for Brazil 9.0, you can define segmentation triggers only for effective dated records, with one exception: you can define segmentation triggers for the begin-dated and end-dated earning and deduction assignment record GP_PYE_OVRD. This exception enables you to assign an earning or deduction to a payee on the Element Assignment by Payee (GP_ED_PYE) or Payee Assignment by Element (GP_ED_ELEM) components, and segment (and prorate) the element when the assignment begin date comes after the pay period begin date, and/or the assignment end date comes before the period end date.

Expanded Brazil Report Functionality

Global Payroll for Brazil 9.0 expands report functionality with the following new reports:

- DARF (Documento de Arrecadação Federal) report.
- DIRF (Declaração do Imposto Retido na Fonte) report.
- Monthly DIRF report.
- PIS (Programa de Integração Social) report.
- RAIS (Relação Anual das Informações Sociais) report.
- IREN report.
- Averages report.
- Provisions report.

Avg. Report BRA

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)**Run**

Generation Options	
*Company:	KRC Empresa Demonstração Ltda
*Run Type Name:	KR FOLHA M Monthly Payment Run Process
*Element List:	KR EXEMPLO Exemplo
*Sort ID:	KR SORT Exemplo de Sort ID
Number of Copies:	1
<input type="checkbox"/> Print Element List Description	
Average Calculation Period	
*Begin Date:	01/01/2006 *End Date: 01/31/2006
Selection Criteria	
<input checked="" type="radio"/> Select Establishment ID <input type="radio"/> Select Department ID <input type="radio"/> Select Employees <input type="radio"/> Select Group ID	
<input type="checkbox"/> Exclude Data	
Establishment Data	
Establishment ID:	<input type="text"/> Find First 1 of 1 Last

The Averages report enables you to view details on how averages are calculated during the payroll process

Global Payroll for France

In release 9.0, Global Payroll for France offers several significant enhancements to simplify payroll processing and enable the HR/Payroll organization to operate more effectively as a strategic partner in the overall organization.

Enhancements for HCM 9.0 include:

- Support for archiving data.
- Enhancements to contingency fund processing.
- Address mapping for DUCS.
- Enhanced DUCS contact recording.
- Support for professionalization contracts.
- Enhancements to earning and deduction assignments.
- Integration with learning management applications.
- Ability to compensate learners for DIF and other training completed outside the normal work schedule.

Support for Archiving Data

Global Payroll generates large amounts of result data, which often needs to be maintained for auditing or regulatory purposes, and which should periodically be archived. To facilitate this requirement, PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager.

To aid in archiving your data, PeopleSoft Global Payroll for France delivers a predefined archive object and an archive template created using the Data Archive Manager. The archive template uses queries to select and store data by calendar group ID from calculation, banking, and other tables.

Enhancements to Contingency Fund Processing

For release 9.0, Global Payroll for France delivers many enhancements to contingency funds functionality. These changes integrate with the improved contingency funds management functionality in Human Resources for France.

The contingency funds enhancements for Global Payroll for France are:

- Modification of the existing arrays so that they retrieve new and additional data from Human Resources that the system needs to process contingency fund deductions.
- Removal of codes for the data types SUPFUND and CONFUND that were previously delivered as part of the DADS setup on the Data Type page (Setup HRMS, Product Related, Global Payroll & Absence Mgmt, Social Security/Insurance, DADS Structures FRA).

You no longer have to define the codes on this page because you instead define them on the Institution Type page within Human Resources.

- Creation of new contingency fund deductions using multiple resolutions functionality with accumulator drivers.

Having one generic deduction for the employee contribution and one deduction for the employer contribution enables you to process the necessary deduction for one or more (single or multiple) contracts.

- Inactivation of the following existing processing sections used to calculate contingency fund deductions in the past: PRV SE A36 (Contingency Fund Art. 36) and PRV SE A4 (Contingency Fund Art.4).

Customers who upgrade from a previous release must set the inactivation date to reflect the date when they want to apply the new rules.

- Inactivation of rates assigned to contingency funds on the Contingency Rate tab of Contingency Rates FRA component (Setup HRMS, Product Related, Global Payroll & Absence Mgmt, ARRCO/AGIRC/Contingency Rates FRA).

You now enter rates directly in the contingency contract. The system retrieves these rates by the arrays reading the contract. The system stores the rates in dedicated accumulators per contingency contract.

Customers who upgrade from a previous release must set the inactivation date to reflect the date when they want to apply the new rules.

- Removal of the definition of the contribution list in the DUCS contributions setup for contingency funds (Code 909).

Using a new bracket setup, as soon as the system calculates a set of contingency contributions (employee + employers on the same base) it automatically populates the DUCS writable array that the system later uses in the DUCS computation.

Customers who upgrade from a previous release must set the inactivation date of the old rules to reflect the date when they want to apply the new rules.

- Redefinition of the impact of mandatory and optional contracts on fiscal net.

For mandatory contingency contributions, the system deducts the payee part from the fiscal net. For non-mandatory contingency contributions, the system adds the employer part to the fiscal net.

- Rework of net to gross calculation because the deductions for contingency funds calculations have been replaced.

Global Payroll for France 9.0 delivers a new section PRV SE COTIS GN that contains the deductions dedicated to the payee and employer contributions calculations.

- Enhancements to the user interfaces of DUCS setup pages, such as the ability to define whether a DUCS contact is a recipient or sender for DUCS type 903 on the Contact Definition page.

Address Mapping For DUCS

With Release 9.0, Global Payroll for France enables you to define a correspondence between PeopleSoft address fields storing the INSEE code and DUCS TAT and TRS records.

DADS Address Mapping		DUCS Address Mapping	
Country	FRA	Description	France
		<input type="checkbox"/> Default Address	
DUCS Address Mapping			
Customize Find View All First 1-2 of 2 Last			
*Record	Description	*Address Field 1	Address Field 2
1	TAT Additional Transportation	ADDRESS1	
2	TRS Transportation	ADDRESS2	

DUCS Address Mapping page

This mapping is recommended to extract the INSEE code declared in transportation and additional transportation contributions for each establishment.

Enhanced DUCS Contact Recording

When recording the list of contacts for DUCS, Global Payroll for France 9.0 provides the ability to indicate whether the contact is a sender or recipient of DUCS.

Contact Definition		Address and Phone	
Contact Definition:	GF0579	*Description:	Groupe Mornay
OPS Identification Find View All First 1 of 1 Last			
*DUCS Type:	903	Agirc Arrco Other	
Contact Type			
<input checked="" type="radio"/> Sender <input type="radio"/> Recipient			
*Identifier Type:	SIRET		
Establishment ID:	GFZ01	Etablissement Mornay	
Reference 1:	GF0579		

Indicate the status of a contact on the [DUCS Contacts FRA - Contact Definition page](#)

Support for Professionalization Contracts

Global Payroll for France provides rules to manage minimum wage levels, social security contribution exemptions, and other conditions related to the professionalization contract.

Delivered Professionalization Contract Rules

PeopleSoft Global Payroll for France delivers a number of rules to manage minimum salary requirements and contribution exemptions for payees with professionalization contracts, including:

- Minimum wage controls.

Global Payroll for France controls that payee compensation falls within the statutory minimum wage (SMIC) based on age and educational level. For example, if an employee is under 21 and doesn't have a professional baccalaureate, the employee qualifies for at least 55% of the SMIC. And if the employee is under 21 and has, at a minimum, a professional baccalaureate degree, the employee qualifies for at least 65% of the SMIC.

- Contribution exemptions.

Global Payroll for France delivers two social security scheme codes—code 456 and code 457 (for Alsace Moselle)—to manage contribution exemptions. To view the rates and percentages associated with these schemes, access the URSSAF Rates and URSSAF Additional Setup pages.

To trigger the contribution exemptions associated with these social security codes, specify CDP (limited professionalization contract) or CPI (unlimited professionalization contract) as the contract type on the Contract Type/Clauses page in PeopleSoft Human Resources, and then enter either code 465 or 457 in the Social Security Code field for each qualified payee.

- Limitations on benefits in kind.

The system contains rules to ensure that benefits in kind do not constitute more than 75% of the minimum wage. In other words, employees with professionalization contracts must receive at least 25% of their compensation in monetary form.

- Warnings to enforce age limits for assigning professionalization contracts.

The system generates an error message if a social security code for professionalization contracts is assigned to an employee who is 26 years of age or over and below 45.

- Warnings to prevent exemptions from extending beyond the contract end date.

At the end of the professionalization period in an unlimited contract, the specific compensation rules and social security exemptions associated with the contract must be stopped and the payee can then continue employment under a new social security scheme. To prevent the conditions of the professionalization period from extending beyond the contract end date, Global Payroll for France issues a warning to the user to assign payees to a new social security scheme. This warning is generated when the current pay period end date exceeds the contract expected end date.

Enhancements to Earning and Deduction Assignments

Global Payroll for France has defined the following earnings so that they are automatically segmented and prorated (using the proration factor defined on the earning definition pages) when they are assigned to a payee on the Element Assignment by Payee or Payee Assignment by Element components and the assignment period covers only a portion of the pay period:

Earning	Description
SALAIRE BASE	Base Salary
IND KILOMETR	Mileage Allowance
AN NOURRITUR	Meal Benefit in Kind
AN AUTRES	Other Benefits in Kind
AN VEHIC REG	Car Benefit in Kind Regular
AN AUTRE REG	Other Benefit in Kind Regular
PANIER J I	Day Meal Allowance
PANIER N I	Night Meal Allowance Liable to Contributions
AN VEHICULE	Car Benefit in Kind
STG OBL AT	Mandatory Training Allowance
STG OBL NAT	Mandatory Training Allowance
STG NOBL	Non-Mandatory Training Allowance
AFB SAL 12M	Base Salary–12 Months

Earning	Description
AFB SAL 13M	Base Salary–13 Months

With this enhancement, you no longer need to manually calculate or adjust the amount of the earnings when the assignment dates do not cover the entire pay period.

Compensating Learners for DIF Training and Other Training Completed Outside of Normal Work Hours

Global Payroll for France integrates with both the Administer Training business process and with Enterprise Learning Management to enable users to track DIF balances and compensate learners for DIF training and other training completed outside of the normal work schedule.

Integration with the Administer Training Business Process

Global Payroll for France and the Administer Training business process interact as follows:

- Use the Administer Training business process to track learning costs and to manage enrollment and other day-to-day tasks.
- The Administer Training business process compiles payroll and other Human Resources information and generates the 2483 report.
- Global Payroll for France computes learner and internal instructor salaries for the 2483 report and calculates learners' DIF entitlement balances. It also calculates the salary for DIF and skills development training completed outside of normally scheduled work hours. Administer Training Business process users can then import DIF balances from Global Payroll for France back into the training management application where they can be viewed by managers on the enrollment pages.

Integration with Enterprise Learning Management

Global Payroll for France interacts with Enterprise Learning Management through the Administer Training business process as follows:

- Use the Enterprise Learning Management application to set up the learning catalog, instructors, vendors, and so on. You also use this application to track learning costs and to manage enrollment and other day-to-day tasks.
- The Administer Training business process in Human Resources compiles information provided by Enterprise Learning Management and payroll and generates the 2483 report.

- Global Payroll for France computes learner and internal instructor salaries for the 2483 report and calculates learners' DIF entitlement balances and returns the results to Enterprise Learning Management (indirectly through Human Resources). It also calculates the salary for DIF and skills development training completed outside of normally scheduled work hours. Enterprise Learning Management can then display DIF balances to learners and managers on self-service pages and to administrators on the roster pages.

Global Payroll for Germany

Making timely payments to your workforce, while lowering your total cost of ownership, is a business goal that your organization can achieve with Global Payroll for Germany. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for Germany 9.0 offers several modifications to simplify payroll processing for your organization:

- Enhancements to German eGovernment with RehaDat Elan.
- Enhancements to German eGovernment with eStatistik.
- Support for electronic certificates.
- Support for KUG processing.
- Support for employee loans.
- Support for archiving data.

Enhancements to German eGovernment: RehaDat Elan

Germany mandates that all employers with an employee count over a particular threshold hire a certain percentage of disabled employees, or pay an equalization fee. Global Payroll for Germany 9.0 provides functionality to analyze and categorize these employees, and to submit reports electronically to the appropriate employment agency. PeopleSoft has partnered with RehaDat Elan to deliver the final report formats.

RehaDat Elan has defined the structure and layout of three CSV data files required for the electronic reporting of disabled employees, which are delivered in Global Payroll for Germany 9.0: DSB_FILE_LAYOUT_A_GER, DSB_FILE_LAYOUT_C_GE, and DSB_FILE_LAYOUT_D_GER. Using these files RehaDat Elan creates the required reports to be submitted.

Improved Data Capture for Disability Reports

Global Payroll for Germany 9.0 delivers new functionality designed to capture specialized data for more granular reporting about your disabled employees.

Apprentice Data

RehaDat Elan requires the inclusion of apprentice data for the proper reporting of disability information. Apprentice data specifies whether a disabled employee is an apprentice, and the start and end date of their apprenticeship.

As an enhancement to release 9.0 of PeopleSoft Enterprise Human Resources, this apprentice data can now be captured on the Disability page, under the Germany Disability section, when entering other employee disability information:

Disability | Accom Request | Accom Option | Accom Job Task

Glenn Simon **Person ID:** K0HU25

Disability Status

Disabled

▶ **Switzerland**

▼ **Germany**

Disability Find | View All First 1 of 1 Last

*Effective Date: 08/03/2006

*Disabled Type: Not Disabled

Handicap Percent: Disabled Position Count: 0

Evaluate: Part Time Work Details: None or Other

Card Number: *Card Issue Date: Exp. Date:

Disability Status Office:

City: Postal Code:

Apprentice Apprentice Begin Date: Apprentice End Date:

Capture apprentice employee information when entering other disability information

Employee Subcategories

RehaDat Elan’s disability reports distribute disabled employee information into different columns and sections, depending on an employee’s subcategory. Employee subcategories are tied to specific labor agreements and employee categories on the Job Labor page. To control the reporting of this data, Global Payroll for Germany 9.0 provides further refinement of disabled employee subcategories through a new Disability Category Setup page.

Disability Category Setup GER

Customize | Find | View All | First 1-4 of 4 Last

	*Employee Subcategory	Exclude	Apprentice	Lawyer or Teacher Trainee		
1	AUX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
2	DIR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
3	37.2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
4	NW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Assign attributes to existing employee subcategories to refine disability reporting

Central Processing of Disability Reports

Once you have entered all disabled employee information, the disability report can be generated from one central page. Simply select the company and company type for which you are running the process. Companies that have at least one location and related social insurance unit will be available for selection. After the company is selected, the grid is populated with the company's social insurance numbers and corresponding locations. Select the location you wish to declare for a given social insurance number.

Heavily Disabled GER

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

Year

Company Continental Commerce - Germany

***Company Type**

	Employer Social Insurance Nbr	*Location	Main Employer ID
1	91200003	Zweigstelle München	<input checked="" type="checkbox"/>
2	91300004	Zweigstelle Hamburg	<input type="checkbox"/>
3	91400005	Zweigstelle Dresden	<input type="checkbox"/>
4	91500006	Zweigstelle Brandenburg	<input type="checkbox"/>
5	91600007	Stuttgart	<input type="checkbox"/>
6	91700008	Bonn	<input type="checkbox"/>

[Create disability reports to be submitted to the government through RehaDat Elan](#)

Enhancements to German eGovernment: eStatistik

New eGovernment initiatives require that data essential for legislative reporting, and other services, be submitted to government offices electronically. In compliance, Global Payroll for Germany 9.0 delivers eStatistik to support the creation and transmission of payroll statistical information to the respective statistical bureaus. This information is transferred in the XML format *DatML/RAW*, the standard format used to transfer statistical raw and metadata electronically.

Global Payroll for Germany 9.0 delivers two statistic transfer formats:

Statistic	Description
Laufende Verdiensterhebung im Produzierenden Gewerbe, Handel, Kredit- und Versicherungsgewerbe	Ongoing Salary statistic
Bruttojahresverdiensterhebung im Produzierenden Gewerbe, Handel, Kredit- und Versicherungsgewerbe	Annual Gross Salary statistic

Using eStatistik reporting, you transmit the following information:

- Salary and wage totals by sex, employee type (white collar or blue collar) and employee performance group per company location.
- Blue-collar hourly work time for the 29th through 31st day of the month.
- Relevant special circumstances for salary increases of white-collar workers.
- Pay entity location, such as address, sector, and tariff number.
- Generated reports for a calendar year, or a calendar month.

Version Control Support

With eStatistik you can generate preliminary or final reports, and run reports for different pay entities and for various locations.

Payroll Statistics

Run Control ID: 2005_KD913

[Report Manager](#)
[Process Monitor](#)
Run

Language: German

Report Parameters

For Month 31

Contact Name Sabine Bergmann

For Year 2005

Email ID Sabine.Bergmann@Oracle.com

Telephone Number 089 / 0815

Preliminary Runs

Generate Preliminary File
 Preliminary Print

Official Runs

Generate & Send Official File
 Final Print

Population Selection

Pay Entity: GD4 German Payroll Comp.4

Location Information

Customize | Find | View All
First 1 of 1 Last

Location Selection

	*SetID	*Location Code	Description	Employer SI Number
1	DEU01	KD913	HH	89856913

Control reporting parameters from a single page

Once a statistical process has been completed, use the XML Process Status page to check the status of jobs in progress, manage completed jobs, or re-print jobs.

XML Processing Status

▼ Filter Criteria

Electronic Process Run Type	Payroll Statistics
XML Return Status	Pay Entity
Run Type	Pay Group

[Process Monitor](#)

Runs in Progress

Customize | Find | View All | First 1-2 of 2 Last

Run Status	Run Details					
Return Ticket	Run Type	Last Update Timestamp	XML Return Status			Delete XML Ticket
1 00001NLUGK6SCTLK2U	Statistics	10/21/05 12:47PM	Success	Check File Status	Final Print	<input type="checkbox"/>
2 00001NLUHLEQ0HL0L5	Statistics	10/21/05 12:47PM	Success	Check File Status	Final Print	<input type="checkbox"/>

Completed Tickets

Customize | Find | View All | First 1 of 1 Last

Run Status	Run Details				
Return Ticket	Run Type	Last Update Timestamp	XML Return Status	Date Last Printed	Delete XML Ticket
1 00001NLHKUV8B4FET3	Statistics	10/18/2005 6:16PM	Success	10/18/2005	Re-print Copies <input type="checkbox"/>

[Filter XML jobs using run status, Pay Entity, or Pay Group information](#)

Support for Electronic Certificates

The German government requires employers to provide various certificates to their employees at their request, or on the occurrence of certain business events. The various government bodies have currently predefined approximately 35 different employment related certificates, which require management and processing by German employers.

Delivered in release 9.0 of Global Payroll for Germany is a certificate framework to manage frequently changing certificate content and layout. With this solution, additional certificates can be incrementally delivered and existing certificates easily updated.

Delivered Certificates

Global Payroll for Germany 9.0 initially delivers five predefined certificates:

Certificate	Description
Verdienstbescheinigung zur Berechnung von Kranken-/Versorgungskranken-/Verletzten-/Übergangsgeld	Certificate to calculate payments for health and accident insurance.
Arbeitsbescheinigung gemäß § 312 SGB III	Employer generated certificate of employment.
Antrag auf Mutterschaftsgeld	Certificate issued to mothers to claim benefits in the six-week period before the birth of a child.
Antrag auf Erziehungs-geld	Application for parental leave aid after the birth of a child.
Antrag auf Wohngeld § 25 ABS.2	Application for living allowance, for people who need assistance with living expenses from the community where they live.

Managing Certificates

The primary function of certificate management is to define, store, and populate certificate templates with data supplied by Global Payroll, or the user, and immediately produce the certificate for viewing or printing.

Certificates are defined using a form management component, which allows you to:

- Set up basic form information, including effective dates and status, and attach a pdf file to define a certificate’s structure.

Pdf Form Definition
AE Module Setup
Parameter Setup Per Module

Form ID: CT_MUGE

Form Setup Find | View All | First 1 of 1 Last

*Effective Date: 01/01/2006 + -

Status: Active v

*Description: Antrag auf Mutterschaftsgeld

Comment: Entgeltbescheinigung zur Berechnung von Mutterschaftsgeld.
PDF Template erzeugt November 2005 nach standardisierten Vorgaben Stand August 2005.

	*Language Code	Default Language	Attached File	Add	Delete	View	Details		
1	German	<input checked="" type="checkbox"/>	MUGE112005.pdf		Delete	View	Details	+	-
2		<input type="checkbox"/>		Add			Details	+	-

Define employee certificates using pdf forms

- Specify which application engine (AE) modules to execute during form processing. A delivered AE library provides a common set of functions for use across 35 different certificates. Each certificate uses the library to retrieve and populate payroll and manual data into the certificate, according to the certificate definition.

[Pdf Form Definition](#) | **AE Module Setup** | [Parameter Setup Per Module](#)

Form ID: CT_MUGE Antrag auf Mutterschaftsgeld

AE Library Parameter Setup Find | View All First ◀ 1 of 1 ▶ Last

+ -

Effective Date: 01/01/2006

Program Name:

Section:

Attach application engine modules to certificate forms

- Define individual form parameters to be manually populated before certificate processing. Parameters are required by the AE program to correctly report certain certificate information. Parameters can be used to report information not necessarily associated with pdf form fields.

[Pdf Form Definition](#) | [AE Module Setup](#) | **Parameter Setup Per Module**

Form ID: CT_MUGE Antrag auf Mutterschaftsgeld

Modul Parameter Setup Find | View All First ◀ 1 of 1 ▶ Last

+ -

Effective Date: 01/01/2006

		Customize Find View All			First ◀ 1-2 of 2 ▶ Last	
*Sequence	Form Field Name	Field Type	*Description	Prompt	View Name	
1	<input type="text" value="1"/> MUGE22_MGI	<input type="text" value="0"/>	Gehalt wurde als festes Monatsgehalt gezahlt (J/N)	<input type="text"/>	<input type="text"/>	+ -
2	<input type="text" value="2"/> MUGE231_RE	<input type="text" value="0"/>	Nettogehaltsliste immer drucken (J/N)	<input type="text"/>	<input type="text"/>	+ -

Set up additional data inputs to complete employee certificates

Certificate Processing and Review

Once certificate forms have been defined and stored, certificates can be generated by payroll staff through Global Payroll Certificates, and made available to employees through the self-service eCertificates.

Create Certificates | **View/Change History**

EmplID: KD0002 **Isabella Maria Amme** **Empl Rcd Nbr:** 0

Selection Criteria

*Form ID: 01/01/2006 Antrag auf Mutterschaftsgeld
 Begin of Protection Period:
 Pay Entity:

Certificate Run Parameter Customize | Find | View All | First 1-2 of 2 Last

Description	Y/M	Character Value	Date Value	Numeric Value
1 Gehalt wurde als festes Monatsgehalt gezahlt.	<input checked="" type="checkbox"/>			
2 Nettogehaltsliste immer drucken.	<input checked="" type="checkbox"/>			

Clerk: Betty Locherty 555/123-4567

Create | [Process Monitor](#) | **Process Instance**

Generate single or multiple employee certificates from a central processing page
 Certificates can be viewed or modified before finalization:

Create Certificates | **View/Change History**

EmplID: KD0002 **Isabella Maria Amme** **Empl Rcd#:** 0

[Process Monitor](#) | **Process Instance** **Refresh**

Certificate Created/Issued Find First 1-2 of 2 Last

Form ID: CT_ERGE	01/01/2006	Antrag auf Erziehungsgeld	
Last Updt: 03/08/2006 12:52AM	Finalized <input checked="" type="checkbox"/>	Modified <input checked="" type="checkbox"/>	
Version: 2	Finalize	Review/Modify	View
Clerk: KU0007			
Form ID: CT_ARBS	01/01/2006		
Last Updt: 03/08/2006 12:35AM	Finalized <input type="checkbox"/>	Modified <input type="checkbox"/>	
Version: 1	Finalize	Review/Modify	View
Clerk: KU0007			

View or edit certificates individually or in batches

Support for KUG Processing

When employers must periodically close down part or all of their operations because work is unavailable, KUG (*Kurzarbeitergeld*) insurance funds are provided for a set period of time by the *Bundesagentur für Arbeit* (BfA) to prevent permanent terminations or factory closure.

KUG funds paid by the BfA cover part of the difference between the normal pay (*Solltengeld*) and the actual pay (*Istentgelt*) for employees. Employers must also pay social insurance contributions for a fictive amount based on the difference.

Delivered KUG Elements

To facilitate the accurate calculation and processing of KUG insurance payments, Global Payroll for Germany 9.0 delivers a set of earnings, deduction, and variable elements. The tables that follow list the new elements to be delivered in the 9.0 release.

Earnings Elements

Global Payroll for Germany uses these earnings to calculate payments for KUG:

Earnings	Description
DE_KU_EKKUG	Pay reduction by KUG.
DE_KU_HKGBA	KUG hours with amount of KUG BA.
DE_KU_HKGKK	KUG hours KG with amount of KUG KK.
DE_KU_HKUG	Normal KUG hours.
DE_KU_KUG	KUG pay.
DE_KU_KUGKK	Sick pay (KG) with the amount of KUG payable by health insurance.
DE_KU_NEBEN	KUG other employer payments.

Absence Element

Global Payroll for Germany uses this absence element to calculate payments for KUG:

Deduction	Description
DE_AB_M90	KUG absence hours.

Variable Elements

Global Payroll for Germany uses these customer-maintained accumulators to support calculation of KUG payments:

Accumulators	Description
DE_KU_K_BASISK	KUG reducible pay. Includes all earnings affected by KUG reduction, such as salary.
DE_KU_K_BASISM	KUG overtime pay. Does not include one-time payments.
DE_KU_K_BASISN	KUG non-reducible pay. Does not include one-time payments or overtime (<i>Mehrarbeit</i>).
DE_KU_K_NEBENE	Other employer pay.
DE_KU_K_REDUCT	KUG payment reduction. You can override the payment reduction with this accumulator.

Support for Employee Loans

Global Payroll for Germany 9.0 now enables you to process employee loans through the payroll system. When first granted, a loan is included in the employee's regular pay for one pay period; afterward, set up the payroll system to take repayments from the employee over successive pay periods, until the amount is repaid in full.

When granting a loan, you can configure Global Payroll for Germany 9.0 to select one of the following three calculation methods for repayment:

1. You specify the number of periods over which the repayment is to be made, and let the system determine the **end date** and the **monthly payment amount**.
2. You specify the monthly payment amount, and let the system determine the **number of periods**.
3. You specify the end date, and let the system determine the **payment amount per period**.

You can also enter an individual interest rate for each loan. The system automatically calculates tax advantages resulting from a below-market interest rate on the loan.

Loan Setup	Payment Schedule
EmplID: KD0001 Heiner Breit-Gossmann Empl Rcd Nbr 0	
Loans Find View All First 1 of 1 Last	
Instance: 1 Description: <input type="text"/>	
Account Number: <input type="text"/>	
Investment Number: <input type="text"/>	
Payment Data	
*Pay-Out Date: <input type="text"/>	Stopped <input type="checkbox"/> As Of: <input type="text"/>
Company Interest: 0.00	Reason
*Loan Amount: <input type="text"/>	*Currency: EUR
Payment Schedule	
*Calculation Type: End Date	<input type="button" value="Create Schedule"/>
*Begin Date: <input type="text"/>	End Date: <input type="text"/>
Repayment: <input type="text"/>	
*Payment Prds: 1	

From the Loan Setup page you can record the details of a loan payment made to an employee

Once the loan data has been captured, you can view the status of an employee's loan and the repayments that they have made.

Loan Setup | **Payment Schedule**

EmplID: KD0001 Heiner Breit-Gossmann **Empl Rcd Nbr** 0

Advance/Loan Totals Find | View All First 1 of 1 Last

Instance Number: 1

Total Amt: 5,147.05 **Remaining Balance:** 5,147.05 **Currency:** EUR

Loan Amortization Table Customize | Find | View All | First 1-6 of 13 Last

Month	Year	Capital	Interest	Repayment	Paid
10	2005	375.10	20.83	395.93	<input type="checkbox"/>
11	2005	376.66	19.27	395.93	<input type="checkbox"/>
12	2005	378.23	17.70	395.93	<input type="checkbox"/>
1	2006	379.80	16.13	395.93	<input type="checkbox"/>
2	2006	381.39	14.54	395.93	<input type="checkbox"/>
3	2006	382.98	12.95	395.93	<input type="checkbox"/>

The payment schedule displays the original amount of the loan and the remaining amount to be repaid

Delivered Loan Elements

To facilitate employee loan processing, Global Payroll for Germany 9.0 delivers a set of earnings, deduction, and variable elements. The tables that follow list the new elements to be delivered in the 9.0 release.

Earnings Elements

Global Payroll for Germany uses these earnings to calculate payments for loans:

Earnings	Description
DE_LN_SALIKD	In kind loan taxable excess. Shows the excess interest amount that results when the interest rate is lower than the statutory rate.

Deduction Elements

Global Payroll for Germany uses these deductions to calculate payments for loans:

Deductions	Description
DE_LN_DD_CAP	Loan capital deduction. Used for repayment of the capital portion of a loan.
DE_LN_DD_INT	Loan interest deduction. Used for repayment of the interest portion of a loan.

Variable Elements

Global Payroll for Germany uses these variables to calculate payments for loans:

Variables	Description
DE_LN_VR_MINLOAN	Minimum loan balance. If the total loan balance is greater than this value, tax advantage is calculated if the loan interest rate is less than the statutory interest rate.
DE_LN_VR_STAT_INT	Statutory interest rate, as specified by German government regulations.

Support for Archiving Data

Global Payroll generates large amounts of result data, which often needs to be maintained for audit or regulatory purposes, and which should be periodically archived. To facilitate this requirement, PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager.

As an aid in archiving your data, PeopleSoft Global Payroll for Germany delivers a predefined archive object and an archive template for use with the Data Archive Manager. The archive template uses queries that select data by calendar group ID, which can be used to archive single or multiple calendar group data. Archiving captures data from the calculation, banking, general ledger, and other post processing tables.

The following is a list of result tables that are archived from Global Payroll for Germany:

Calculation (Writable Array):	GPDE_BV_RP, GPDE_GR_RSLT_WA, GPDE_RP_0001, GPDE_RP_0002, GPDE_RP_0003, GPDE_RP_AZ01, GPDE_RP_FL01, and GPDE_RP_SI01
Banking:	GPDE_BK_XFER_EE
General Ledger:	None
Other Post Processing:	None

For Global Payroll for Germany, no other tables are archived.

Global Payroll for Hong Kong

Global Payroll for Hong Kong 9.0 generates a large amount of result data. To keep the amount of saved data manageable, it can be helpful to archive it periodically. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, PeopleSoft Global Payroll for Hong Kong delivers a predefined archive object (GPHK_RSLT_ARCHIVE) and archive template (GPHKRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Global Payroll for India

Global Payroll for India 9.0 offers these features to simplify payroll processing for your organization:

- Income Tax: Generation of Form 24Q and Electronic Filing of Income Tax.
- Support for Archiving Data.
- Employee State Insurance: Form 7.
- Labour Welfare Fund Deduction.

Income Tax: Generation of Form 24Q and Electronic Filing of Income Tax

Income tax is an annual tax charged at the rates applicable for that assessment year. According to the Income Tax rules amendments, every person responsible for deducting tax should deliver quarterly statements, in accordance with the provisions of Form 24Q, for tax deducted at the income source.

The quarterly statement is a return of income tax that is required to be submitted by the employer at the end of every quarter for salaries paid during the preceding quarter, using the specified format. This form contains details for all kinds of payments and other remittance information that the employer paid to employees during the previous financial year.

This means that the employer must submit Form 24Q for every three months using the prescribed format. These forms should be delivered on or before July 15, October 15, and January 15 for the first three quarters of the financial year, and on or before April 30 following the last quarter of the financial year.

The run criteria for Form 24Q will be by PAN number and TAN number, as it is done in the current Form 24.

Tax Form Setup and Generation

Global Payroll for India delivers a set of pages to set up monthly tax receipt data for Form 24Q:

Form 24Q Details							
Establishment ID	KPEST1						
Year	2005						
Quarter Of Year	Q1						
Customize Find View All							
Tax Amount Detail		Tax Voucher Detail					
Sr. No.	Month	TDS	Surcharge	Educational Cess	Interest	Others	Total Tax D
1	1 APR	100.00	100.00	100.00	100.00	100.00	
2	2 MAY	200.00	200.00	200.00	200.00	200.00	
3	3 JUN	300.00	300.00	300.00	300.00	300.00	

Record the types of payments made to recipients during the period

Form 24Q Details										
Establishment ID		KPEST1								
Year		2005								
Quarter Of Year		Q1								
Tax Amount Detail Tax Voucher Detail Customize Find View All First 1-3 of										
Sr. No.	Month	Voucher Number	Voucher Date	Cheque No.	BSR Code	Book Entry	Section under payment made	Total Nos of Empl for whom tax deposited		
1	1 APR	42343	04/01/2005	42323	2423	<input checked="" type="checkbox"/>	234234	5		
2	2 MAY	23423	05/01/2005	24	4323423	<input type="checkbox"/>	3243	10		
3	3 JUN	4234234	05/01/2005	324	234	<input checked="" type="checkbox"/>	23423	15		

Capture and report related payment voucher details

Following the provisions of the Income Tax Act, 1961, specific entities making payments to persons for salaries and services are required to deduct or collect taxes on these payments at the source (TDS /TCS). The taxes are then deposited at any bank authorized to collect payments. For filing purposes, the National Securities Depository Ltd. (NSDL) is authorized to act as intermediary and receive the e-TDS/e-TCS returns on behalf of the Income Tax Department.

In compliance with Income Tax Department notifications "Electronic Filing of Returns of Tax Deducted at Source Scheme, 2003" and "Electronic Filing of Returns of Tax Collected at Source Scheme, 2005," Global Payroll for India 9.0 delivers a new report, Form 24Q, as part of an e-tax filing solution to automate the processing of TDS/TCS tax returns, and create the appropriate data files for electronic filing.

Tax Data Files Generated

The following table lists the tax data files generated by Global Payroll for India for subsequent electronic delivery to the NSDL:

File Name	Description
Annexure1.csv	Line item breakdown of the TDS detail, by employee. Includes only column numbers 313 to 326.
Annexure2.csv	Continuation of the breakdown of the TDS detail, by employee. Includes column numbers 327 to 352.
Annexure3.csv	Continuation of the breakdown of the TDS detail, by employee. Includes column numbers 353 to 368.
Form24Q.txt	ASCII text file of the tax data for Form 24Q.
GPINQT01_452.PDF	Generated tax form 24Q in PDF format. The system populates the form field entries from information provided in the tax form setup, and from Global Payroll employee tables. Print the form for signature.

After capturing the tax receipt data, generate Form 24Q and the related data files in one step:

QT Reports			
Run Control ID:	Q1	Report Manager	Process Monitor
		<input type="button" value="Run"/>	
Year:	<input type="text" value="2006"/>		
Quarter Of Year:	<input type="text" value="Q1"/>	Begin Date:	04/01/2006
		End Date:	06/30/2006
Payee Sort Option:	<input type="text" value="Name, Employee Rcd Nbr"/>		
*Establishment ID:	<input type="text" value="KPEST1"/>	<input type="button" value="Search"/>	Estab 1 of GP1
Report Filed For Quarter	<input type="checkbox"/>	<input type="checkbox"/>	Government Organization
Provisional Receipt No.:	<input type="text" value="Q10001"/>		

Use the [QT Reports page](#) to generate the 24Q tax form and electronic files

The generation of electronic filing requires the eTDS Preparation and File Validation Utility (FVU).

After preparing the e-TDS/e-TCS return, it is advisable to check the format level accuracy of the e-TDS/e-TCS return using the latest File Validation Utility (FVU).

Support for Archiving Data

Global Payroll generates large amounts of result data, which often needs to be maintained for audit or regulatory purposes, and which should be periodically archived. To facilitate this requirement, PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager.

As an aid in archiving your data, PeopleSoft Global Payroll for India delivers a predefined archive object and an archive template for use with the Data Archive Manager. The archive template uses queries that select data by calendar group ID, which can be used to archive single or multiple calendar group data. Archiving captures data from the calculation, banking, general ledger, and other post processing tables.

The following is a list of result tables that are archived from Global Payroll for India:

Calculation (Writable Array):	GPIN_LTA_TOT_WA, GPIN_LTA_WA, GPIN_MDA_TOT_WA, GPIN_MDA_WA, and GPIN_PSLP_RSLT
Banking:	None
General Ledger:	None
Other Post Processing:	<ol style="list-style-type: none"> 1. Payslip Related: GPIN_PSLP_MSGPY. This table stores result payslip message information by cal_run_id. 2. Payee Reports: GPIN_PR_TMP and GPIN_PR_TMP3

For Global Payroll for India, no other tables are archived.

Employee State Insurance: Form 7

In Global Payroll for India, we have provided the Employees' State Insurance (ESI) feature. It is a Social Security plan that provides certain benefits in cash and kind to employees covered under the plan.

A new statutory form has been added to the Employee State Insurance report group of Global Payroll for India 9.0. The new form, Form 7—Register of Employees, captures employee insurance and work details, employee contributions to state insurance, and employer contribution information. The information is displayed on a monthly basis for a six-month period.

In PeopleSoft, use the Print ESI Form 7 page to generate this form.

Print ESI Form 7

Run Control ID: TEST [Report Manager](#) [Process Monitor](#) Run

***Establishment ID:** Estab 1 of GP1

***Year:**

***Contribution Period:** ▼

***ESI Local Office:**

***Payee Sort Option:** ▼

Employer's Challan Number Details			
	ESI Challan Number	Date	
1	<input type="text"/>	<input type="text" value="31"/>	Customize Find <input type="button" value="🔍"/> First ◀ 1 of 1 ▶ Last
			<input type="button" value="+"/> <input type="button" value="-"/>

[Use the Print ESI Form 7 page to capture employee's insurance information](#)

Labour Welfare Fund Deduction

The Labour Welfare Fund (LWF) has evolved to extend a measure of social assistance to workers in the unorganized sector. LWF is a welfare fund collected by the Government of India from both employees and employers.

A new section (LWF SE ALL) has been added to calculate LWF deductions in Global Payroll for India 9.0. This deduction can occur monthly, semi-annually or annually depending on the policies of each individual state. The deduction amount also varies from one state to another.

In PeopleSoft, use the Print LWF Report page to generate this form.

Print LWF Report

Run Control ID: NJ [Report Manager](#) [Process Monitor](#) Run

***Establishment ID:**

Year:

***Contribution period:**

***LWF Local Office:**

January-December
 January-June
 July-December

Pay Details

Cheque/DD No:	Cheque/DD Date:	Bank Details:
<input type="text"/>	<input type="text"/>	<input type="text"/>

Use the [Print LWF Report](#) page to capture employee's Labour Welfare Fund deductions

Global Payroll for Italy

Global Payroll for Italy 9.0 delivers enhancements in these areas:

- Regulatory and non-regulatory reporting.
- Support for archiving data.
- Proration of earning and deduction assignments.

Regulatory and Non-Regulatory Reporting

New reports have been added to Global Payroll for Italy 9.0, offering customers an expanded range of regulatory and non-regulatory reports.

770 Year-End Report

The 770 report summarizes employees' tax and social security contributions for the year. It is submitted to the *Ministero delle Finanze* in September each year for the previous year.

To support the requirements of the 770 year-end report, Global Payroll for Italy 9.0 includes these enhancements:

- A new Provider Data page for setting up provider details.
- Enhancements to the Additional Company Information page to associate a company with a provider and enter additional data required for the 770 year-end report. This page also has a new group box for contractor information for the Electronic CUD (e-mens) report.

- Modifications to the Assignee Data page to record earnings and taxes paid by assignees while working abroad. This information is included in the 770 year-end report.
- A new run control page for generating data for the 770 year-end report.

Companies may submit the 770 year-end reports themselves or use another organization to handle the submissions. The Providers Data page in Global Payroll for Italy 9.0 enables you to set up provider details.

Providers Data

Provider Code: K101

Details Find | View All First 1 of 1 Last

***Effective Date** 01/01/2001 ***Status** Active

Description Business Institute

***Provider Type** Company sending File directly

***Provider Tax Code** ABC123DEF456 **Sender Person Tax Code**

Software Provider Tax Code XYZ098UVX765

INPS Site 4902 MILANO NORD

Addresses Find | View All First 1 of 1 Last

***Address Type** Address

Country: ITA Italy

Address: Via Rossi 4
20121 MILANO (MI) [Edit Address](#)

New Providers Data page for identifying organizations that submit reports

Note. Provider data is also used by the Electronic monthly CUD (e-mens) report.

Global Payroll for Italy 9.0 includes the 770 Report process (GPIT_770) that extracts the data required for the 770-year end report for one or more companies.

The 770 year-end report uses information generated by the CUD report, so you must run the CUD report first. Use the same run control ID to run both reports.

770 Run Control
CUD Run Control

Run Control ID: 01
[Report Manager](#)
[Process Monitor](#)
Run

Language:

Selection Criteria

*Provider Code Business Institute

Company		Customize Find View All <input type="button" value="📄"/>	First <input type="button" value="⏪"/>	1 of 1	Last <input type="button" value="⏩"/>
	*Company	Descr			
1	<input type="text" value="K11"/> <input type="button" value="🔍"/>	Business Institute - Italy	<input type="button" value="+"/>		<input type="button" value="-"/>

[New 770 Run Control page](#)

INAIL Year-End Report

The INAIL Year-End Report (*Autoliquidazione*) is submitted to the Italian National Authority for Insurance and Work Accidents (*Istituto Nazionale per l'Assicurazione degli Incidenti sul Lavoro*) in February each year for the previous year.

A new run control page has been added to Global Payroll for Italy to generate the INAIL year-end report for selected companies, establishments, pay groups, or INAIL codes.

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Language: English

Selection Criteria

*From Date: 01/01/2006 *Thru Date: 31/12/2006

Pay Entity:

Company			
Customize Find View All First 1 of 1 Last			
	*Company	Descr	
1	KI1	Business Institute - Italy	+ -

Establishment			
Customize Find View All First 1 of 1 Last			
	Establishment ID	Descr	
1			+ -

Pay Group			
Customize Find View All First 1 of 1 Last			
	*Pay Group	Descr	
1			+ -

INAIL Code			
Customize Find View All First 1 of 1 Last			
	*INAIL Code	Description	
1			+ -

Generate the INAIL year-end report using the INAIL Run Control page

Normally, you run the report for a year but you can also generate a report for part of a year to check contributions.

The INAIL Year-End report extracts and prints the data required for the INAIL report. Customers use the report generated to extract data needed for submission to the government.

Electronic Monthly CUD Report

The Monthly CUD report (also known as the e-mens report) is a new regulatory report. Companies provide a CUD report to the social security authority (INPS) that contains employees' social security information. The monthly report is an XML file that is sent electronically to the social security authority.

The Electronic CUD Monthly Report (GPIT_CUDE_AE) in Global Payroll for Italy generates an XML file that meets the formatting requirements of the social security authority.

Payroll Element Reports

Global Payroll for Italy delivers these payroll element reports that enable customers to analyze earnings and deductions over a period:

Report	Description
Pay Element Summary report (GPITRS01)	Summarizes the total values of earnings and deductions for a given period. The earnings and deductions that are included in the report are defined by a print class, or you can run the report for all earnings and deductions.

Report	Description
Pay Element History report (GPITRS02)	Summarizes the total values of earnings and deductions by month for a given period. You can run the report for one or more companies or establishments, or for selected employees. The earnings and deductions that are included in the report are defined by a print class.

Contribution Report

The Contribution report (GPITCTR1) provides a way for customers to reconcile the monthly DM10 report or to check single contributions. You configure the report to meet your requirements. Use the Contribution Report Setup page to set up the sections of the report and the elements to include in each section.

Contribution Report Setup

Section Find | View All First 3 of 4 Last

Section ID: + -

Sequence Number:

Description:

*Section Type:

General Element
 Employee Element

Seq.#	Description	*Calculation Rule	*Element Type	Element Name	Sign		
1	CFL 54	Amount	Earnings	INPSERRIDC54	Add	+	-
2	CFL 56	Amount	Earnings	INPSERRIDC56	Add	+	-
3	CFL 57	Amount	Earnings	INPSERRIDC57	Add	+	-
4	CFL 58	Amount	Earnings	INPSERRIDC58	Add	+	-
5	CFL 59	Amount	Earnings	INPSERRIDC59	Add	+	-
6	CFL 75	Amount	Earnings	INPSERRIDC75	Add	+	-
7	CFL 76	Amount	Earnings	INPSERRIDC76	Add	+	-
8	CFL 77	Amount	Earnings	INPSERRIDC77	Add	+	-
9	RID CUAF	Amount	Earnings	INPSERCUAFRI	Add	+	-

[New setup page for the Contribution report](#)

Support for Archiving Data

Global Payroll generates large amounts of result data, which often needs to be maintained for audit or regulatory purposes, and which should periodically be archived. To facilitate this requirement, PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager.

To aid in archiving your data, PeopleSoft Enterprise Global Payroll for Italy delivers a predefined archive object and an archive template for use with the Data Archive Manager. The archive template uses queries to select and store data by calendar group ID from the calculation, banking, and general ledger tables.

Proration of Earning and Deduction Assignments

PeopleSoft Enterprise Global Payroll 9.0 offers a new configuration option that determines whether earnings and deductions assigned to payees are processed within a given period. In earlier releases, earnings and deductions were processed if the assignment was active on the segment end date only. You can specify that earnings and deductions are processed if the assignment is active:

- At the segment end date.
- At any time between the segment begin and end date.

This feature is configured by country. Italy is configured to process earning and deduction assignments that are active at any time within the segment. This setting means earnings and deductions that are assigned to an employee, for all or part of the pay period, are processed. Earnings and deductions that are assigned for part of the pay period are segmented and prorated.

To support this configuration, Global Payroll for Italy delivers a segmentation trigger for the earning and deduction assignment record (GP_PYE_OVRD) and sample earnings with proration defined.

Global Payroll for Japan

Oracle continues to study the best business practices and incorporate them into local functionality to help our customers manage their payroll processes more effectively and reduce manual work.

In Global Payroll for Japan 9.0, we will offer some new functions to simplify administrative work, including:

- Streamline Personal Exemption Judgment.
- Create Inhabitant Tax Payment File.
- Wage Certificate at 60.
- Zaikei Saving Plan.

Streamline Personal Exemption Judgment

To reduce the end user's data entry burden at the time of Year End Adjustments (YEA), the Dependent Tax Data page has been modified in 9.0 to include two new check boxes, Subject to Deduction and Parent Living with Payee:

Dependent Tax Data

Iseshima Yoshiko **Person ID:** J2007

Dependent Tax Data Find | View All First 1 of 1 Last

Dependent ID: 01 **Name:** Iseshima Maki

Relationship: Mother

Date of Birth: 12/31/1931 **74 Years 3 Months** **Date of Death:**

Dependent Detail Information Find | View All First 1 of 1 Last

***Effective Date:** 01/01/2001 **Empl Rcd Nbr:** 0

Subject to Deduction **Parent Living with Payee**

Dependent Job: **Expected Annual Income:**

Reason of Change:

Disability Description

Dependent Disability Type:

Disability Description:

Reason of Disability Change:

The **Dependent Tax Data** page has new check boxes to streamline age-dependent deductions

These check boxes streamline the judgment of age-dependent deductions. During payroll calculation the system automatically judges age-dependent deductions.

Create Inhabitant Tax Payment File

This feature enables you to create a file to facilitate inhabitant tax payments by banks. This feature supports the standardized format that is defined by the Regional Banks Association of Japan. After payroll is finalized and appropriate adjustments are made, you run a process that creates a banking file that summarizes inhabitant tax amounts sorted by municipal government.

The file contains data for both the salary-based inhabitant taxes and the retirement allowance-based amounts. You submit this information to a single bank that transfers these tax payments to the respective municipal governments.

Wage Certificate at 60

Older employees are eligible to receive an Employment Continuation Benefit in proportion to their wages during a specific period before becoming 60 years old. The Wage Certificate at 60 feature enables you to identify employees who reach age 60 within a specified date range and print the Wage Certificate.

Wage Cert at 60

Run Control ID: 1

[Report Manager](#)[Process Monitor](#)

Run

Language:

English

Report Request Parameter(s)

*Labor Insurance Establishment:	JL030000001	CarrotSoft, Tokyo
Business Unit:	JCS01	CarrotSoft
Department:		
*60 Years Old from:	04/01/2006	*To Date: 04/30/2006
<input type="checkbox"/> Overwrite Checkbox		
<input type="checkbox"/> Payee List		
Go To:	Payee List	

Identify employees who reach age 60 and print the Wage Certificate

Zaiki Savings Plan

This feature enables customers to deduct a specified amount from a payee's salary and bonus using delivered elements to set up a Zaiki deduction. These deductions use the Element Assignment By Payee component in Global Payroll.

Deducted amounts can be printed on pay slips and wage ledgers.

Global Payroll for Malaysia

Global Payroll for Malaysia 9.0 provides new functionality in the following areas:

- Support for Archiving Data.
- Form E.

Support for Archiving Data

Global Payroll for Malaysia 9.0 generates a large amount of result data. To keep the amount of saved data manageable, it can be helpful to archive it periodically. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, PeopleSoft Global Payroll for Malaysia 9.0 delivers a predefined archive object (GPMY_RSLT_ARCHIVE) and archive template (GPMYRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Form E

Every employer is required to complete and submit to the Inland Revenue Board of Malaysia a Form E (CP8) at year-end. This report identifies all payees, their total remuneration, and total tax deductions for the year.

Global Payroll for Malaysia 9.0 provides a new Form E (CP8) report that complies with legislative changes that went into effect on April 1, 2005. This report serves as a cover note for the Form E and contains employer details compiled from CP 8A/8C reports.

Payee Extract

Run Control ID: NJ [Report Manager](#) [Process Monitor](#)

Language: English

Report Parameters

Report Extract:	<input type="text" value="GPMYTX09"/> <input type="button" value="Q"/>	Form E
Calendar Group ID:	<input type="text" value="KM M200601"/> <input type="button" value="Q"/>	2006 01 - Monthly
Period ID:	<input type="text"/> <input type="button" value="Q"/>	
Begin Date:	01/01/2006	
End Date:	01/31/2006	

Payee List [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

EmpID	Employee		
1	<input type="text"/> <input type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Group

Group ID: **Rebuild Group**

As Of Date:

Refinement Date:

[Use the Payee Extract page to generate the Form E](#)

Global Payroll for Mexico

Global Payroll for Mexico offers numerous enhancements for Release 9.0 to simplify payroll processing for your organization. These enhancements include:

- Inter-company transfer process.
- Overtime parameters enhancement.
- Batch positive input enhancements.
- Mass positive input capability.
- Loan assignment enhancement.
- Expanded SUA report functionality.
- Christmas bonuses deducting absences.

- Inter-bank payment code enhancement.
- Vacation summaries feature.
- ChartFields remapping after initial calculation.
- Off-cycle payment enhancement.
- Data archiving.

Inter-Company Transfer Process

The government requires that companies report employee's income from former and current employers separately on Form 37—the annual earnings and deductions legal report. This applies to employees who change jobs between unaffiliated companies as well as to employees who transfer from one internal company to another. Global Payroll for Mexico provides functionality to meet the Form 37 tax reporting requirements for inter-company transfers where the internal companies have a different employer RFC within the system. Use this feature to maintain the accumulators, earnings, and deductions for employees when the employees do inter-company transfers. After processing the data, you can generate the Form 37 report with separate company reporting data for employees with inter-company transfers.

The Inter-Company Transfer feature centers around the Inter-Company Transfer Application engine process. The Inter-Company Transfer process:

- Identifies which employees have qualifying inter-company transfers to process.
- Confirms that the last payroll that includes the transferring employee is finalized.
- Loads the specified earnings, deduction, and accumulator elements of the former company and their values into the Other Employer page based on the values last calculated by the payroll engine.
- Inserts the specified elements and their values into the Other Employer page as former employer data. Updates the values of the specified accumulators elements of the former company to zero.

By using the Intercompany Transfer check box on the Action Reason page in Human Resources, you can indicate the action and reason code combinations that are valid for processing of inter-company transfers within Global Payroll for Mexico.

The new Inter-Company Transfer Mapping page enables you to define which accumulators, earnings, and deduction elements from the prior company to carry over to the new company for employees with inter-company transfers. The Inter-Company Transfer process uses these mappings to upload the employee's finalized payroll values for these elements to the Other Employer Page between the internal companies.

Inter-Company Transfer Mapping

Company: KYF Compañía Financiera

Intercompany Transfer Mapping Find | View All First 1 of 1 Last

*Effective Date: 01/01/2001

Elements Mapping Customize | Find | View All First 1-6 of 32 Last

	Entry Type	Element Name	Description	*Earning/Deduction Code
1	Deduction	INCAP ENF TR	Work Related Illness	Total Earnings
2	Deduction	INCAP MATERN	Maternity Leave	Total Earnings
3	Deduction	INCAP RIESGO	Work Risk Leave	Total Earnings
4	Deduction	INCAP TRAYEC	In Transit Work Risk Leave	Total Earnings
5	Deduction	INCAP ENFERM	General Sickness	Total Earnings

Define which elements from the prior company to carry over to the new company for employees with inter-company transfers

The new Inter-Company Payee Detail MEX page enables you to view the employees with inter-company transfers. The system loads data from Human Resources into this table for employees with new job data rows where the specified action and reason code combination qualifies for processing of inter-company transfers. The system also updates the data on this page after a user runs the Inter-Company Transfer process by displaying the ID of the user who ran the process and a reason value.

Inter-Company Payee Detail MEX

EmplID: KY0002 **Ma. de Lourdes Hernández Peña** **Empl Rcd Nbr:**

Intercompany Payee Data Customize | Find | View All First 1 of 1 Last

Payee Transfer Detail | Calendar Detail

Date of Change	Company	Description	Action Reason	Description	User ID	Reason
02/02/2001	KYF	Compañía Financiera	ICT	Intercompany Transfer		

View the employees with inter-company transfers

Use the new Inter-Company Transfer MEX run control page to run the Inter-Company Transfer process to adjust accumulator balances for employees who transfer between internal companies.

Inter-Company Transfer MEX

Run Control ID: ICT [Report Manager](#) [Process Monitor](#) **Run**

Process Instance:502

Run Control ID Processing

*Calendar Group ID: KYM0102 Monthly Payroll February 2001

*Pay Group: KY MENSUAL Grupo de Pago Mensual

Adjust Accumulator Balances

Undo Process

Calendar IDs Customize | Find | View All First 1 of 1 Last

Calendar ID	Run Type Name	Payment Date	Calculate Thru Date
1 KYM KYM02	KY NOMINA	02/28/2001	02/28/2001

Run the process to adjust accumulator balances for employees who transfer between internal companies

Overtime Enhancement

Global Payroll for Mexico 9.0 offers you the ability to specify the number of hours in a day that double overtime is non-taxable. The system counts any double-overtime hours in excess of this value for a given day as taxable.

Overtime Parameters

Pay Group: GY MENSUAL Pruebas Mensual

Overtime Parameters

Find | View All First 1 of 1 Last

***Begin Date:** 01/01/2001 **End Date:**

Double Overtime

Maximum Times per Week: **Maximum Hours per Day:**

Maximum Hours per Week: **Non Taxable Hours per Day:**

***In Excess Hrs. per Day:**

Specify the number of hours in a day that double overtime is non-taxable

When you enter overtime, the system calculates the non-taxable hours and displays the results in the Double Hours fields in the Enter Overtime MEX component. The system calculates any daily double-overtime hours in excess of the value that you specify in the Non Taxable Hours per Day field as taxable double overtime hours, displaying these results in the Double Hours Txbl fields in the Enter Overtime MEX component.

Overtime

Pay Group: GY MENSUAL **Week:** 32 **Begin Date:** 08/08/2005 **End Date:** 08/14/2005

Year: 2005 **Calendar ID:** GYM GYM05M08

Data

Find | View All First 2 of 2 Last

***EmplID:** GY0002 Eduardo Velázquez Hernández **Empl Rcd#:** 0

Only Weekly Overtime

Weekly Overtime

Double Hours:	6.00	559.62	Triple Hours:	Exc Hrs:	1.00	150.00
Double Hours Txbl:	5.00	432.69	Holiday Hours:	Day Off Hours:		

Daily Overtime

Customize | Find First 1-2 of 2 Last

Hours Detail

	*Date	Overtime Hours	Holiday Hours	Day Off Hours	Override Hourly Rate	Hourly Rate
1	08/08/2005	3.00			<input type="checkbox"/>	43.269231
2	08/09/2005	4.00			<input checked="" type="checkbox"/>	50.000000

The system calculates the taxable double overtime hours and displays the results in the Double Hours Txbl fields

If you enter overtime on a daily basis, the system determines the corresponding hourly rate day-by-day, using the appropriate hourly rate for each day. With this enhancement, you can override this hourly rate value. You do not need to wait until the payroll clerk enters an hourly rate change for the employee before entering the overtime.

Batch Positive Input Enhancements

The Batch Positive Input Application Engine process reduces time-consuming data entry in Global Payroll for Mexico by loading data into the system in batch from a flat file. In previous releases, you can use the process for loading earnings and deductions, and for deleting previously loaded data according for a specific batch. Global Payroll for Mexico 9.0 now enables you to also create flat files for supporting elements as part of the batch positive input process.

To use this functionality, you must create the flat file that contains the data that you want to load. This text file can be in plain text or csv format but must follow a specific layout for batch positive input processing. When you run the Batch Positive Input process it reads the information from the flat file and loads the data into the positive input records. You can then access this data through the Positive Input page in the core application.

Mass Positive Input Capability

The new Mass Positive Input feature enables you to insert earnings and deductions in mass into the positive input table for a group of payees in a specific calendar.

The mass positive input processing offers several valuable features. For example, you can select specific payees or create groups of payees, which enables you to load positive input for a specific subset of payees within a pay group that are associated with a given calendar. You can also enter earnings, deductions, and supporting element overrides details for payees in mass, which saves valuable time by eliminating repeated data entry.

You can also use the Mass Positive Input process to delete records from the positive input table that were previously inserted by the process. The process is able to recognize and delete records according to the batch code assigned to the record.

Use the new Mass Positive Input component to enter the processing parameters for mass positive input of payees earnings and deductions, to enter the supporting element overrides for the given elements in the mass positive input processing, and to run the process to insert this data into the positive input table.

Mass Positive Input

Run Control ID: MPI_1 [Report Manager](#) [Process Monitor](#)

Pay Group

*Pay Group: KY MENSUAL Description: Grupo de Pago Mensual Pay Entity: KY002
 *Calendar ID: KYM NOM KYM05P01 Begin Date: 01/01/2005 Period End Date: 01/31/2005
 *Batch Code: MPI_1 Description: Delete Data

Select Payee List

Select Group Build Group ID: KY ALL Mexico Employees [Create a Group ID](#)
 Select By Payee List

Earnings and Deductions [Customize](#) | [Find](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

Action	Main Components		
Entry Type	Element Name	Description	
Earnings	QTRLY BONUS <input type="text"/>	Quarter Bonus	<input type="button" value="+"/> <input type="button" value="-"/>

Use the Mass Positive Input process to delete records from the positive input table that were previously inserted by the process

Loan Assignment Enhancement

PeopleSoft Global Payroll for Mexico now delivers the DIVIDE PRESTAMO driver accumulator that enables you to track arrears individually.

[Calendar Group Results](#) | **Earnings and Deductions** | [Accumulators](#) | [Supporting Elements](#)

David Serrano Rojas EMP ID: GY0006 Empl Rcd #: 0
 Calendar Group ID: GYM04M01 Nómina Mensual 0401

Calendar Information [Find](#) [First](#) 2 of 2 [Last](#)

Calendar ID: GYM GYM04M01 Pay Group: GY MENSUAL
 Segment Number: 1 Version: 1 Revision: 1
 Gross Result Value: 16,080.00 MXN Net Result Value: 9,257.00 MXN

Earnings & Deductions [Customize](#) | [Find](#) | [View All](#) | [First](#) 31-35 of 41 [Last](#)

Element Type	Element Name	Amount	Description	Instance	Slice Begin Date	Slice End Date	Resolution Details
Deduction	IYV PAT	515.400000	Disability and Life ER	0	01/01/2004	01/31/2004	Resolution Details
Deduction	PRESTAMO CIA	833.330000	Company Loans	1	01/01/2004	01/31/2004	Resolution Details
Deduction	PRESTAMO CIA	416.670000	Company Loans	2	01/01/2004	01/31/2004	Resolution Details
Deduction	PROV AGUIN	849.310000	Christmas Bonus Provision	0	01/01/2004	01/31/2004	Resolution Details
Deduction	PROV PMA VAC	214.020000	Vacation Premium Provision	0	01/01/2004	01/31/2004	Resolution Details

Process multiple loan deductions for the same payroll calendar run and track their balances individually

Notice that the PRESTAMO CIA deduction occurs twice for the employee in the same payroll run and arrears are tracked separately.

Expanded SUA Report Functionality

Global payroll for Mexico 9.0 expands report functionality for SUA data by providing new pages for generating additional SUA reports. You can now generate distinct SUA reports with:

- Hire or Rehire payee data such as name, hire date, and so on.
- Transactions of each payee.
- Employee affiliation data.
- Employee INFONAVIT loans data.
- Employee disabilities data.

Christmas Bonuses Deducting Absences

Global Payroll for Mexico 9.0 delivers a new Xmas Bonus Deduct Absences check box on the Absences page to use when you are defining the absence parameters for a pay group.

The screenshot shows the 'Absences Parameters' form for pay group 'KY MENSUAL'. The form is divided into several sections:

- Absences Parameters:** Includes fields for *Begin Date (01/01/2001), End Date, *Subsidy Base (SDI), Days without Subsidy, *Factor (7th Day Factor), and a numeric value of 116.666667. There are checkboxes for IMSS Agreement and Xmas Bonus Deduct Absences.
- Disability:** Includes a checkbox for Allow Salary Change.
- Vacation Parameters:** Includes a checkbox for Negative Balance Option, *Vacation Premium Type (Annual), Vacation Premium Month (5), Vacation Premium Day (5), Annual Application Options (Vacation Days and Premium), and a checkbox for Discount Vacation Takes.

The payroll process can deduct employee absences from the Christmas bonus payment calculation

Select this check box to have the payroll process deduct employee absences from the Christmas bonus payment calculation for payees in the specified pay group. The system inserts a row with the variable AG VR APLICA AUS and numeric value equal to 1 in the grid on the Pay Groups - Supporting Element Overrides page for the specified pay group. Clear this check box to exclude employee absences from the Christmas bonus payment calculation. The system changes the numeric value of the variable to 0. By default this check box is cleared.

Inter-bank Payment Code Enhancement

With Release 9.0, Global Payroll for Mexico now provides the ability to enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account when defining bank account information for a payee.

Click the new Other Required Information link on the Maintain Bank Accounts page 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.

Inter-bank Payment Scheme

Inter-bank Payment Scheme

CLABE

Enter the Clave Bancaria Estandarizada (CLABE) number for a bank account

Enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account.

Vacation Summaries Feature

Global Payroll for Mexico 9.0 provides a new Vacations Summary component.

Use the Vacations Summary component to review vacation summaries for an employee.

The Vacations Summary page enables you to view a summary of vacation information for an employee. For each row of vacation data, the system displays applicable dates, entitlements, adjustments, absences taken, and balance.

Vacations Summary		Vacations Detail		Vacations Earnings		
Employee ID:	GY0001	Name:	Karina Bernal Macías	Empl Rcd Nbr:	0	
<div style="text-align: right;"> Customize Find View All First 1-2 of 2 Last </div>						
	From	Through	Entitlement	Adjustment	Absence Taken	Balance
1	01/01/2000	12/31/2000	0.000000	0.000000	0.000000	0.000000
2	01/01/2001	12/31/2001	14.000000	0.000000	4.000000	10.000000

View a summary of vacation information for an employee

The Vacations Detail page enables you to view details about vacations that an employee has already taken. For each vacation event, the system displays the begin date, end date, absence duration, and absence description.

Vacations Summary		Vacations Detail		Vacations Earnings	
Employee ID:	GY0001	Name:	Karina Bernal Macías	Empl Rcd Nbr:	0
Vacations Description					
Customize Find View All First 1 of 1 Last					
Begin Date	End Date	Absence Duration	Description		
1 01/07/2004	01/12/2004	4.00	Regular		

[View details about vacations that an employee has already taken](#)

The Vacations Earnings page enables you to view details about earnings that an employee has received for vacations already taken. For each vacation earning, the system displays the slice begin date, slice end date, unit delta, and amount earned.

Vacations Summary		Vacations Detail		Vacations Earnings	
Employee ID:	GY0001	Name:	Karina Bernal Macías	Empl Rcd Nbr:	0
Vacations Earnings					
Customize Find View All First 1 of 1 Last					
Slice Begin Date	Slice End Date	Unit Delta	Amount		
1 01/01/2004	01/31/2004	4.000000	180.960000		

[View details about earnings that an employee has received for vacations already taken](#)

ChartFields Remapping After Initial Calculation

Now Global Payroll for Mexico enables you to define ChartField remapping data used during the General Ledger (GL) interface process and post payroll costs to differing levels of ChartFields based on GL groupings codes or accounts. You set up GL ChartField parameters that enable you to remap default ChartFields. For example, you might require that a higher level of ChartFields be attached to each of your cost centers. Instead of using multiple departments for each cost center, you may require one department at a global ChartField level, which covers all departments. By remapping the departments to the one global department you are able to roll costs from the various cost centers into this one department.

To remap General Ledger (GL) ChartFields for Global Payroll for Mexico, use the new GL ChartField Remapping MEX (GPMX_GL_MAP) component.

Through this component you can:

- Set up GL ChartField parameters that enable you to remap ChartFields according with your business needs.
- Configure and maintain GL remapping data.
- Set up different levels of ChartFields based on GL groupings codes or accounts.

GL Chartfield Remap					
Pay Entity:	KY002	Entidad de Pago 2			
Business Unit:	KY001	Unidad de Negocios 1 - México	General Ledger Unit:	KY001	
Chartfields Find View All First 1 of 1 Last					
*Effective Date: 01/01/2001 + -					
Chartfields to be passed to GL					
<input checked="" type="checkbox"/> DEPTID					
<input checked="" type="checkbox"/> GP PAYGROUP					
Chartfield Transformations Customize Find View All First 1-3 of 3 Last					
Chartfields Transformed Values + -					
Account	Grouping Code	DEPTID	GP PAYGROUP		
1 609037	CRED ART 115	22000	KY QUINC	+ -	
2 602002	CUOTA IMSS E	22000	KY QUINC	+ -	
3 602003	CUOTA IMSS P	22000	KY QUINC	+ -	

Remap General Ledger (GL) ChartFields for Global Payroll for Mexico

The default ChartFields values appear in the fields on the ChartFields tab. To remap the default settings, select the new values on the Transformed Values tab.

The ChartField remapping process:

- Uses specified ChartField overrides and updates the GP_GL_DATA records.
- Enables the finalize phase of the GL Interface process to correctly summarize transactions by using your selected combination of ChartFields, grouping codes, and account values.

Off Cycle Payment Enhancement

Global Payroll for Mexico 9.0 delivers off-cycle configurations for off-cycle requests. You can use the delivered manual payments configuration for new hires that are not paid, the delivered correction payment configuration for missed overtime, the delivered additional payment configuration for bonuses not paid out, and the delivered advance payment configuration for advance terminations. You can define additional configurations for off-cycle requests on the Off-Cycle Configuration page.

Data Archiving

PeopleSoft Enterprise Global Payroll for Mexico generates a large amount of result data. To keep the amount of saved data manageable, you should periodically archive it. PeopleSoft Enterprise PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, PeopleSoft Enterprise Global Payroll for Mexico 9.0 delivers a predefined archive object and an archive template. The delivered archive template uses queries that select data by calendar group ID.

Global Payroll for New Zealand

Global Payroll for New Zealand 9.0 enhancements include enhanced support for data archiving by delivering a predefined archive object (GPNZ_RSLT_ARCHIVE) and archive template (GPNZRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Global Payroll for Singapore

Global Payroll for Singapore 9.0 generates a large amount of result data. To keep the amount of saved data manageable, it can be helpful to archive it periodically. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, PeopleSoft Global Payroll for Singapore delivers a predefined archive object (GPSG_RSLT_ARCHIVE) and archive template (GPSGRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Global Payroll for Spain

For Release 9.0 Global Payroll for Spain delivers a wide range of features to expand your payroll processing and reporting capabilities. These features especially focus on better meeting the regulatory needs of companies in Spain. This release includes:

- New business process management features.
- Enhanced social security data management.
- Expanded tax data management capabilities.
- Additional processing and reporting tools.

New Business Process Management Features

Global Payroll for Spain now delivers the following new features to help you manage your business:

- Pension plan management.
- Termination management.
- Special collective management.
- Self-insurance data management.
- Medical report (FDI) data management.

Pension Plan Management

Global Payroll for Spain now provides functionality for managing pension plans. The system supports both the individual system and collective system pension plan types.

To manage pension plans, you must first create pension plan definitions.

Pension Plan Definition

Pension Plan Id: C

Pension Plans Find | View All First 1 of 1 Last

***Effective Date:** 09/01/2005 ***Status:** Active

***Description:** Collective Contributive

***Pension Plan Type:** Collective **Pension Plan Contribution**

General Information

Company: KE1

Pension Plan Name: COLLECTIVE CONTRIBUTIVE

Pension Fund Name: SFD

Pension Fund NIF: G50000819

Create pension plan definitions

After you have defined the pension plans, you can then assign employees to pension plans and maintain contribution data. Contribution data includes contributor, amount and payment type (earning or deduction).

Payee Pension Plan

Employee ID: KEG020 **Name:** Manuel Baquero Marco **Empl Rcd Nbr:** 0

Definition Find | View All First 1 of 2 Last

***Effective Date:** 09/28/2005 ***Status:** Active

***Pension Plan ID:** CN **Description:** Collective non contributive

Disability >=65%

Contribution Customize | Find Contribution 1-2 of 2 Last

	*Contributor	Payment Assignment	Payment Selected	*Retribution Type	Key	Subkey	Amount	Currency Code
1	Company	Payment Assignment	-----0--	Earnings in	C	01	140.000	EUR
2	Employee	Payment Assignment	-----0--	Deduction			30.000	EUR

Assign employees to pension plans and maintain contribution data

Once your employees have pension plan assignments, you can calculate payroll for employees with pension plans and generate regular reports that include information related to pension plans.

Also included in pension plan management is the ability to create the file version of the Model 345 in the required format, a step that is necessary for year-end pension plan reporting. This report reflects the contributions made by the company to employees' pension plans. The file contains each employee who has a pension plan within a selected fiscal territory and calendar year.

The Model 345 Application Engine process also generates a summary text file that states the total companies, total employees, and total contributions that were processed. You can use this summary information to manually complete the official model that is presented to the tax office together with the Model 345 file.

Termination Management

With release 9.0, Global Payroll for Spain provides termination management functionality that enables you to manage termination information and calculations under non-standard conditions. For example, an employee or employer might preadvise of the termination with fewer days than the law requires, an employee's severance pay might be different than the amount set by the law, or an employee might not agree with the termination reason and pursue litigation. For such cases in which the termination process has exceptions, it is necessary to provide additional information so that the payroll process can calculate the desired results for termination pay. This new feature enables you to handle pre-advised days not fulfilled, severance pay, and job litigation salary.

To set up the termination management functionality, you must define for each termination reason the default statutory values for the number of days by year and the maximum number of periods for severance pay, as defined by the social security general treasury (Tesorería General de la Seguridad Social [T.G.S.S.]).

Statutory Rates		Severance Days							
Statutory Severance Days				Customize	Find	View All	First	1-9 of 9	Last
	*Termination Reason	*Effective Date	Days/Year	Max. Periods					
1	Objective innap. after 97	01/01/2000	33	24	+	-			
2	Objective innap. before 97	01/01/2000	45	42	+	-			
3	Collective dismissal	01/01/2000	20	12	+	-			
4	Non-fulfillment by employer	01/01/2000	45	42	+	-			
5	Disciplinary innappropriate	01/01/2000	45	42	+	-			
6	Disciplinary	01/01/2000	0	0	+	-			
7	Objective	01/01/2000	29	12	+	-			
8	End of temporary contract	01/01/2000	8	99	+	-			
9	Voluntary	01/01/2000	0	0	+	-			

Define for each termination reason the default statutory values for severance pay

You must then define daily salary and severance pay settings that the payroll process uses for terminations of labor agreements.

Extra Period Elig. Earnings
Complementary Benefits
Terminations

SetID: ESP **Labor Agreement:** KE01

Terminations
Find | View All First ◀ 1 of 1 ▶ Last

Effective Date: 01/01/2002 **Status:** Active

Definition of Daily Salaries

Pre-advised Daily Salary: Daily Salary for Preadvised D.

Severance Daily Salary: Daily Salary for Severance Pay

Job Litigation Daily Salary: Daily Salary for Job Lit Salar

Severance Days Customize | Find | View All | First ◀ 1-3 of 3 ▶ Last

	*Termination Reason	Days/Year	Max. Periods		
1	Collective dismissal <input type="text" value="Collective dismissal"/>	22	24	+	-
2	Non-fulfillment by employer <input type="text" value="Non-fulfillment by employer"/>	45	24	+	-
3	Disciplinary innappropriate <input type="text" value="Disciplinary innappropriate"/>	45	24	+	-

[Define daily salary and severance pay settings for terminations of labor agreements](#)

When you execute a termination action an employee through the Job Data component, you can then use the Manage Terminations ESP component to provide additional termination data that impacts payroll calculation, if necessary, for that terminated employee. This component works in conjunction with the termination processing functionality of the Job Data component.

Manage Terminations ESP		
Luis Hidalgo Solana	ID KEG011 Empl Rcd# 0	
Manage Terminations ESP		
Termination Date: 07/09/2005	Company Seniority Date: 03/13/1988	
Termination Reason: <input type="text" value="Disciplinary inappropriate"/>	Currency Code: <input type="text" value="EUR"/>	
Pre-advised Days Non-Fulfilled		
Num. Preadvice Days: <input type="text" value="5"/>	<input checked="" type="checkbox"/> Appealed	
Who Pre-advises: <input type="text" value="Company"/>	Appealed	
<input checked="" type="checkbox"/> Overwrite Severance Pay	Conciliation Date: <input type="text" value="07/31/2005"/>	Sentence Date: <input type="text" value="07/31/2005"/>
Severance Pay		Final Date for Job Lit. Salary: <input type="text" value="07/31/2005"/>
Days/Year: <input type="text" value="50"/> Statutory Values 45	Sentence Job Lit. Salary: <input type="text" value="2,000.00"/>	Sentence Severance Pay: <input type="text"/>
Max. Periods: <input type="text" value="42"/> 42	Unemployment Benefits: <input type="text"/>	
Severance Pay Amount: <input type="text"/>		
Comment: <input type="text"/>		

Provide additional termination data that impacts payroll calculation

Special Collective Management

Special collectives are groups of people that require different payroll treatment because they have a special labor relation with the company for which they work. Global Payroll for Spain 9.0 provides functionality to manage the relationship between companies and these following special collectives:

- Displaced persons and expatriates.
- Scholarship holders.
- Pre-retired.
- Professionals.

This includes functionality to manage payments, social security contributions, taxation, and reporting for each of the special collective types.

Displaced Persons and Expatriates

Global Payroll for Spain provides functionality to manage displaced and expatriate employees. This functionality includes management of social security contributions, taxes, and affected legal documents. Because an employee's payroll conditions can change when affected by transnational geographic mobility, Global Payroll for Spain provides solutions for various payroll conditions.

For this special collective you must:

- Define the withholding percentage for non-residents for each fiscal territory on the Calculation Data page of the Fiscal Territories component.

- Indicate whether employees are affected by transnational mobility on the Transnational Mobility page and if so, also indicate whether the employee receives compensation, pays taxes, and contributes to social security.

You can then use the IRNR Tax Review component to view the IRNR tax data for non-resident employees that the payroll process generates and adjust data manually as necessary. The system uses this data for IRNR tax documents.

Global Payroll for Spain also enables you to create the Model 216 and Model 296 report files. The Model 216 report file is a summary of the monthly or quarterly IRNR non-resident income tax data. The Model 296 report file is a summary of the annual IRNR non-resident income tax data.

Scholarship Holders

Scholarship holders with fellowships have a unique contractual relation with the company and require special treatment with respect to IRPF taxes and social security contributions. The amounts companies pay to fellowship scholarship holders are not considered salary and are free of IRPF taxation. However, companies must declare this information in IRPF tax reports. Global Payroll for Spain enables you to declare this mandatory information in the Model 110 report, Model 111 report, Model 190 report, and Tax Deduction report. Regarding social security contributions, Global Payroll for Spain provides the necessary contribution ID as part of the social security scheme to account for fellowship scholarship holders. The scheme ID is 0111 and the social security contribution ID is 008. It is maintained on the Contribution page of the Social Security Scheme Table component. It is necessary to identify this employee as an Intern in the Empl Class field on the Job Information page.

To manage scholarship holders without fellowships, you can set up these persons as normal employees with a special contract type of practice or training. There is no additional setup or processing required.

In the last case, to manage scholarship holders from a separate entity, you can handle these persons the same way that you would handle persons that another company provides as professionals.

Pre-retired Employee Assignments

Pre-retired employees are employees who have partially or completely ended their labor relations with a company but voluntarily maintain a special contractual relation with the company until legal retirement termination. Global Payroll for Spain 9.0 provides functionality that enables you to:

- Assign pre-retirement.
- Assign gradual and flexible retirement.

For assignment of pre-retirement, Global Payroll for Spain includes functionality to manage the following pre-retirement plan scenarios:

- The company terminates the employee but pays the employee the agreed upon amount until the employee reaches the retirement age of 65.
- The company agrees to pay a supplemental amount to the employee as a supplemental unemployment benefit or subsidy.

- The employee continues to contribute to social security to maintain privileges, and the company reimburses the employee for this amount.

Global Payroll for Spain provides payroll elements for each of these three scenarios for both regular pay and non-regular pay. These elements store the agreed amount to pay to the pre-retired employee, taking the agreed upon amount from the Compensation page. As regular income, employees pay IRPF taxes as they normally do. As non-regular income, the payroll system applies a reduction of 40% to the IRPF tax base.

Global Payroll for Spain likewise provides functionality for assignment of gradual and flexible retirement. In cases where there is an extension of working life, companies can benefit from some social security contribution reductions that they must assign to eligible employees. These extensions of working life pertain to (a) employees over 65 with at least 35 contributing years or (b) employees over 60 with at least 5 seniority years.

For employees over 65 with 35 contributed years, Global Payroll for Spain provides the necessary contribution ID as part of the social security scheme to account for active employees age 65 or older. The scheme ID is 0111 and the social security contribution ID is 007. It is maintained on the Contribution page of the Social Security Scheme Table component. In addition to the social security contribution ID for employees who are age 65 or older, you can define a reduction ID that defines the correct reduction amount on the Reduction Data page of the Reductions ESP component.

For employees over age 60 or greater with 5 seniority years in the company, you can define a reduction ID to manage this type of reduction to social security contributions through the Reduction Data page of the Reductions ESP component.

For all types of employee pre-retirement assignments, the payroll process and FAN file generation process take into account the contribution data and reduction data. These processes also account for the reductions in social security contributions.

Professionals Management

Professionals are persons who provide a company a service without a labor contract. Professionals are contingent workers, not employees. The professional provides the company with a bill. The company must pay the professional's bill and withhold a percentage of IRPF tax from the amount paid to the professional. The withholding percentage for IRPF taxes depends on the perception key and subkey that defines the services offered by the professional. The company does not have to contribute to social security for the professional.

Global Payroll for Spain enables you to maintain perception key and subkey data for tax models. A subkey, together with a key, identifies the kind of job that a professional provides to a company.

To indicate that the person is a professional, you can now select the Contingent Worker check box on the Organizational Relationships page of the Human Resources application.

Then, through the IRPF Tax Review ESP component you can enter the amount paid to the professional and the withholding amount applied. You can also specify the perception key and subkey to identify the work that the professional provides. The report generation processes consider the values that you enter on this page when you generate the Model 110 report, the Model 111 report, the Model 190 report, the individual professional's Tax Deduction report, and the Tax Deduction report.

Self-Insurance Data Management

Self-insurance companies are companies that are self-insured and voluntarily collaborate with Social Security in the management of benefits provided under the general scheme for temporary illness according to the terms of the collaboration. As defined by the General Law on Social Security (LGSS) Article 77, there are two types of self-insurance collaboration with Social Security:

- Collaboration for work-related injury or occupational disease (AT/EP).
- Collaboration for non-work-related injury or common disease (non-AT/EP).

PeopleSoft Enterprise Global Payroll for Spain 9.0 enables you to manage self-insurance data for companies that collaborate with Social Security to provide benefits for temporary disability.

This new feature provides:

- A new page to define and manage, by employer social security number, the information for self-insurance companies.
- New and modified payroll rules and elements to adapt contribution calculations to the new functionality.
- Changes in the definition of the RED system FAN File and the TC1 Report to account for the new functionality.
- Capability to handle terminated employees on temporary disability who must continue receiving benefits from self-insurance companies.

Use the Self-Insurance Data page to set up and maintain self-insurance percentages and details for companies (at the employer social security number level) with voluntary self-insurance collaborations.

Self-Insurance Data

Self-Insurance Percentages Find | View All First 1 of 1 Last

***Effective Date** ***Status**

Percentage for AT/EP

Percentage for non AT/EP

Self-Insurance SSN Employers Customize | Find | View All First 1 of 1 Last

	*SSN	Company	*Eff Date	*Status	Check AT/EP	Check non AT/EP	
1	28123456789 <input type="button" value="Q"/>	KE1 Business Institute - Spain	06/05/2006 <input type="button" value="B1"/>	Active <input type="button" value="v"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Maintain self-insurance details, by employer social security numbers, for companies with voluntary self-insurance collaborations

For the payroll process to include the employee in case of terminated employees who were in absence at the termination date, you must terminate the employee with an Action/Reason field value of Terminated with Pay (TWP action), or similar action with a payroll status value of Terminated With Pay, on the employee's job data record. This sets the Payroll Status field value for the employee to Terminated With Pay and makes the employee eligible for payroll processing. You can determine which actions have this payroll status by viewing the Payroll Status field value for the action definition on the Action page of the Action Reason component.

When the employee's temporary illness ends, you must then update the employee's payroll status to Terminated by selecting the Terminated (TER action) in the Action/Reason field so that the payroll process no longer includes the employee.

As part of the self-insurance feature Global Payroll for Spain has also modified several Application Engine processes and SQRs so that the FAN File and TC1 Report include data for self-insurance companies.

Medical Report (FDI) Data Management

According to order TAS/339 of 2004, organizations participating in the Sistema RED (social security online service) must track and communicate the disability status of employees to the social security agency either by entering disability data on the official Social Security website, or by transmitting the data using an electronic medical report text file with an FDI extension.

To support this requirement, PeopleSoft Global Payroll for Spain provides application pages, processes, and reports that enable organizations to collect and track information about temporary disabilities, and to report this information to the responsible authorities.

Through this new feature you can define a time limit for transferring medical report data to the social security agency.

The screenshot shows a web form titled "Social Security Data". At the top, there is a navigation bar with "Find | View All" and "First 1 of 1 Last". Below this, the form contains several sections:

- Effective Date:** A text box containing "01/01/2000" with a calendar icon.
- Status:** A dropdown menu set to "Active", with "+" and "-" buttons to its right.
- WinSuite:** A section header followed by a text box for "*WS File Version:" containing "5.4.1".
- FDI Security Days:** A section header followed by three text boxes: "*Sick Note:" (5), "*Medical Discharge:" (5), and "*Confirmation Note:" (5).

[Define a time limit for transferring medical report data to the social security agency](#)

You can then use the new FDI Additional data page to enter sick note, confirmation note, and medical discharge note data prior to generating the medical report text file for the social security agency. Use this page also to enter economic data required to produce the medical report.

Absence Event Entry		Forecast Messages		FDI Additional Data			
Employee ID:	KE0001	Name:	Antonio Rodriguez Salgado		Empl Rcd Nbr:		
Additional Data Find View All First 1 of 1 Last							
Absence Take:	IT	Temporary Disability					
Begin Date:	10/01/2005	End Date:	10/15/2005	Original Begin Date:	10/01/2005		
Physician ID:	00000011	Area Identifier Code:	12				
Absence Reason:	2	Non-industrial accident					
Economic Data							
*Full/Part Time:	Full-Time	<input type="button" value="Search"/>					
*Contribution Days:	12						
*Common Contingency Base:	12,000.000000						
Contribution Overtime:							
Notes Customize Find View All First 1-3 of 3 Last							
Type	Date	Number	Discharge Reason	Sending ID	Confirmed	Modified	
1 PB	10/01/2005				<input type="checkbox"/>	<input type="checkbox"/>	+ -
2 PC	10/10/2005	1			<input type="checkbox"/>	<input type="checkbox"/>	+ -
3 PA	10/15/2005		Recovery		<input type="checkbox"/>	<input type="checkbox"/>	+ -

Enter data for sick, confirmation, and medical-discharge notes to the Social Security

With the FDI data in the system, you can use the new Create FDI File ESP page to define report parameters and generate the medical report text file. Then you can use the new FDI Confirmation page to confirm or unconfirm the transmission of a medical report text file to the social security agency.

Enhanced Social Security Data Management

With Release 9.0, Global Payroll for Spain makes management of social security data easier with the following enhancements:

- Social security contribution data review.
- Overriding BRDs and relapse days for absence events.
- Calculating BRDs in absence relapses.
- Reporting contracts less than 7 days.

Social Security Contribution Data Review

Global Payroll for Spain 9.0 enables you to view the social security contribution data that the FAN file contains to ensure that the collected data is correct. You can view the data for multiple employees within a specific company for a specified period and payment type through the Collective Report ESP component. Or, you can view data for individual employees for a specific time period through the Individual Report ESP component. You can only view data through these components. If you need to modify data, you must recalculate the data by running the payroll process again.

Collective Report ESP

Company: KE1 Business Institute - Spain

Social Security Number: 28123456789 GBI - Madrid

Year: 2005 **Month:** 1 **EmplID:**

Payment Type: Regular and Vacancies

[Excel Export](#)

Detail of Payees (DAT Segment) Customize | Find | View All | First 1-8 of 8 Last

Main Data		Indicators		EBB					
EmplID	Name	National ID	Soc.Sec. Risk Code	Secondary Risk Code	Contract Type	Social Security Work Group	Days / Hours	Details	
1	GESSE1_0023 Sánchez González, Isabel	282543675493	114	097	309	08	31	Details	
2	GESSE1_0028 Lopez de La Cruz, Alberto	289122785369	113		003	08	42	Details	
3	GESSE1_0029 Alonso Díaz, Ana	285060990090	113		003	08	42	Details	
4	GESSE1_0030 Parra Dato, German Luis	287621524453	113		001	08	31	Details	
5	GESSE1_0031 Muñoz Pavón, Antonio	283105169390	113		001	08	31	Details	
6	GESSE1_0032 Díaz Cruz, Isabel	282671360536	113		001	08	31	Details	
7	GESSE1_0033 Barroso Rodríguez, Luis	282543675493	113		001	08	31	Details	
8	GESSE1_0034 Gaspar Solana, Luis	287760052274	113		001	08	31	Details	

Verify the accuracy of the social security contribution data that the FAN file contains

Overriding BRDs and Relapse Days For Absence Events

With enhanced processing, Global Payroll for Spain now provides the ability to override daily benefits base (Base Reguladora Diaria) (BRD) and relapse days for a specific social security absence event.

Companies must report absences events to Social Security through the mandatory FDI report. As part of this communication companies must include values for contribution days, common contingencies base, and, if applicable, contribution overtime. You can have absence event processing automatically determine these three values when calculating the BRD, or you can manually enter or override values on the FDI Additional Data page of the Absence Event ESP component. You might need to enter values for a BRD, for example, in cases where you have not yet run the absence processing to calculate BRD prior to entering the absence event.

Before performing the BRD calculation, the absence processing analyzes whether there is a value in the Common Contingencies Base field on the FDI Additional Data page. If there is no value in the field, the absence processing calculates the BRD and determines these data values. However, if there is an existing value in this field the absence processing does not perform the BRD calculation because the primary value that it needs to calculate already exists.

Global Payroll for Spain now also enables you to override relapse days for absences that you must report to Social Security.

Calculating BRDs in Absence Relapses

When an employee's temporary disability is a relapse of a previous temporary disability, the system must continue to calculate the employee's Social Security legal benefits. When performing the calculation, the system must use either the BRD associated with the initial temporary disability or the BRD associated with the new temporary disability.

Global Payroll for Spain provides a new feature that enables you to choose which BRD you want the system to use to calculate the Social Security legal benefits for the employee during an absence event relapse, either the initial BRD or the new BRD.

As part of this new feature Global Payroll for Spain delivers four new variables, one for each absence type, to enter into the system how to calculate the BRD when an employee has a relapse absence event for a temporary disability.

The default value of these variables is A, which calculates the BRD by dividing the amount of the worker's contributory base for the month prior to the original begin date of the disability by the number of days to which the contribution refers. To calculate the BRD with the daily base related to the month before the last absence instance, you must change the Value of the variable to N on the Definition page of the Variables component. To access this page, navigate to Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Supporting Elements, Variables.

Reporting Contracts Less Than 7 Days

For Release 9.0, Global Payroll for Spain now provides functionality for the handling Social Security contributions and reporting related to contracts that have a duration of less than 7 days. These enhancements include modification to Global Payroll rules related to Social Security contribution calculations, and modifications to the periodic Social Security legal reports (specifically the RED system FAN File and TC1 Report).

In accordance with the specifications of Additional Provision Six of Law 12/200, an employer's common contingencies quota for Social Security must increase by a fixed percentage, as determined by INSS, for employees whose contracts have an effective duration of less than 7 days. The increase to the common contingencies quota at time of publication is currently 36 percent. The system stores the value of this percentage increase in the SS VR PCT 7D variable. Employers must include data reflecting this increased common contingencies quota when reporting to Social Security through the RED system FAN File and the TC1 Report.

To determine the effective duration of an employee's contract, the system uses the Contract Begin Date and Contract End Date on the Contract Status/Content page of the Update Contracts component. When a contract has a duration of less than 7 days, the system assigns a value to the SS VR CONTR 7D FLG variable to indicate this fact.

The RED system FAN File and TC1 Report reflect data related to employee contracts that have an effective duration of less than 7 days. The TC1 Report includes related key, base, percentage, and quota data under the Other Concepts key. The FAN File includes the additional quota in the line EDTCA11 under the Other Concepts key and updates the amount for line EDTT10 accordingly.

Expanded Tax Data Management Capabilities

Have more visibility and control over your tax data with the following expanded capabilities:

- IRPF tax data review.
- Tax statements for historical territories.
- Tax base estimation enhancements.

IRPF Tax Data Review

Global Payroll for Spain 9.0 provides the new IRPF Tax Data Review ESP component to view the IRPF tax data that the payroll process generates for employees and, if necessary, to manually adjust this data. You can also use this component to view accumulated tax data for the year. In the case of non-employees for whom the payroll process does not calculate IRPF tax data, such as professionals, you can use this component to enter the IRPF tax data for the person. The report generation processes use this data for the Model 110, Model 111, and Model 190 reports.

EmpID	Emp#	Name	National ID	Key	SubKey	Salary Income	Salary Withholding	In Kind Income	In Kind Withholding	EE In Kind Withholding	Reductions	Contribution	Calendar ID
GESS1_0023	0	Isabel Sánchez González	51371867X	A	00	1596.50	239.48					118.30	GEDEV_BV
GESS1_0028	0	Alberto Lopez de La Cruz	46563414Y	A	00	270.38						19.27	GEDEV_BV
GESS1_0029	0	Ana Alonso Diaz	50184294L	A	00	270.38						19.27	GEDEV_BV
GESS1_0030	0	German Luis Parra Dato	50309937J	A	00	1596.50	239.48					118.30	GEDEV_BV
GESS1_0031	0	Antonio Muñoz Pavón	50299705Q	A	00	1596.50	239.48					118.30	GEDEV_BV

[View and adjust IRPF tax data that the payroll process generates for employees](#)

Tax Statements For Historical Territories

Global Payroll for Spain now provides functionality to facilitate completion reporting for historical territories. For the Model 190, Global Payroll for Spain delivers the official report for each fiscal territory. If you select to generate Model 110 and Model 110 report data for an historical territory, the process generates a free format file that contains the information that needs to be reported. You can then use this file as a reference when entering reporting data on the official website of the historical territory. For the state territory the process generates a flat file that you can electronically import into the official program provided by the tax authorities. Aside from a few exceptions, the application previously only enabled you to generate tax reports for the state fiscal territory.

This capability to generate reports for all fiscal territories, including historical territories, includes the following reports:

- Model 111/110
- Model 190
- Model 216
- Model 296

In addition, Global Payroll for Spain now provides functionality that enables you to print the Model 110 report for the state territory using the printing module that the state territory provides through its official web service. As part of this new functionality Global Payroll for Spain delivers the following new fields on the Create 111/110 Model File page: Pay Type, Declaration Type, Signature City, and Signature Name.

Tax Base Estimation Enhancements

Global Payroll for Spain calculates IRPF taxes for the state and all of the fiscal territories as a percentage of an employee's taxable income. The percentage of an employee's income that applies to IRPF taxes is based on the employee's annual income, minus reductions due to personal situations, number of dependents, salary level, and disability. You run the process that calculates the tax percentage as part of regular payroll. Whenever information affects an employee's taxes, the employer must recalculate the tax percentage by running the normalization process. The law states that employers must normalize tax percentages for their employees at least once quarterly even if no information changes.

When calculating an employee's tax percentage, whether through the regular payroll process or the normalization process, the system estimates the employee's annual income because the actual amount is not available until the end of the year. The system performs the same tax base estimate calculations for all fiscal territories, both state and historical.

Global Payroll for Spain 9.0 enables you to control the level of accuracy that you want to have for the tax base estimate defining how you want the system to estimate the annual taxable base during the calculation of IRPF taxes.

Tax Base Estimate Calculation

The estimated tax base consists of three parts:

- The amount paid from the beginning of the year through the last month.
- The amount for the current month.
- The amount estimated for the remainder of the year.

Each part of the estimated tax base consists of three different members:

- Fixed income.
- In kind income.
- Variable compensation.

The system performs a separate calculation for each part and stores the results of the tax base calculation details. The system calculates the total estimated tax base using the following equation:

$$\text{Total Base} = \text{Accumulated values year-to-date} + \text{current month values} + \text{year remainder estimation}$$

When estimating the tax base the system also considers compensation coming from earnings entered through the Earnings and Deduction Assignments menu components. The system adds these earnings to the corresponding member of the tax base (fixed income, in kind income, or variable compensation) based on the nature of the compensation. You can view the tax base calculation details through the IRPF Calculation Results ESP component.

Custom Rules for Tax Base Estimation

To enable you to further control the calculation of tax base estimation, Global Payroll for Spain 9.0 provides an alternative way to calculate the tax base by delivering two configurable formulas that your implementation team can use to set up custom requirements for estimating tax base. These configurable formulas are distinct from the delivered tax base estimation formulas so that modification and use of these configurable formulas does not impact the maintenance of the standard delivered formulas.

One configurable formula enables you to write your own code on how to calculate the estimated tax base without using the delivered calculation method. Code entered in this formula will override the whole Tax Base. You can use this formula also to provide override to the calculated Tax Base. To do that you can give value to the element through any of the mechanism Global Payroll Core provides to override supporting elements.

Another configurable formula enables you to include other earnings in the tax base calculation in addition to the ones entered through the Job data component or the components in the Earning and deduction assignment menu.

Tax Base Estimation Variables

Global Payroll for Spain 9.0 delivers several variables to define how you want the system to calculate the tax base estimation.

One variable provides the option to include future job data events and future seniority events in the year as part of the calculation of estimated tax base through a delivered variable.

A second variable controls whether the system includes future information for earnings that are entered through earning and deduction assignments as part of the tax base estimate calculation.

You can set the variable values at the element definition level. Or, you can control the setting by using the supporting element override functionality at the payee level.

A third variable allows to define whether the system includes the earning in the tax base estimate calculation when the earning is entered through E&D assignment at earning level or employee/earning level.

Estimated Tax Base Overrides

Global Payroll for Spain 9.0 provides the ability to override each member of the estimated tax base or the final estimated tax base. The system uses the override values that you enter instead of the calculated values for the corresponding part of the tax base estimate. You perform these overrides using the supporting element override functionality.

Additional Processing and Reporting Tools

In addition to the numerous new features above, Global Payroll for Spain 9.0 provides these enhancements:

- New tools for payroll data verification.
- Off-cycle payroll correction processing.
- Archiving data.

New Tools For Payroll Data Verification

Validating the accuracy of data that is used to produce a payroll is essential to generating correct payroll results. Global Payroll for Spain 9.0 provides new tools for verifying payroll data:

- The IRPF Comparison report helps you identify and validate changes in IRPF withholding percentages for payees in a selected company, pay entity, or other grouping.
- The updated IRPF Calculation Results component enables you to view the earnings and deductions that make up a selected payee's base amount for IRPF tax withholding.
- The Earnings and Deductions report lets you review earning and deduction calculations after running the payroll process and before running the banking process.

Off-Cycle Payroll Correction Processing

A common cause of missing information is that your company might run payroll before the end of the month to ensure that employees receive their money by the last day of the month. Because of the early payroll run there might be missing information from the remaining days of the month that you need to report to Social Security, such as terminations, hires, sicknesses, and overtime.

Global Payroll for Spain provides two options for reporting the missing information to Social Security in a FAN file. One option for reporting the missing information to Social Security in a FAN file is to wait until the next payroll and run retroactive processing of payroll as part of the payroll calculation for the subsequent month to correct the payroll and pay for differences. You must report this retroactive processing information in a complementary FAN file when generating the FAN file for the subsequent month. Due to reporting the information late, Social Security charges a surcharge.

To avoid paying the accompanying surcharge for the complimentary FAN file report, you can run a correction in two different ways:

1. Running off-cycle processing to make payroll corrections for the affected payroll so that you can report the information to Social Security using the latest payroll run. By running the payroll correction before the subsequent payroll run, you can avoid generating a complimentary FAN file and its accompanying surcharge.
2. Running a special new Run Type "CORRECCION" to cause the same effect.

Global Payroll for Spain delivers off-cycle configurations for corrections off-cycle requests that are related to the following reasons: new hires, new terminations (for terminations after the first payroll run), and payroll correction. Define configurations for off-cycle requests on the Off-Cycle Configuration page.

Archiving Data

PeopleSoft Enterprise Global Payroll for Spain generates a large amount of result data. To keep the amount of saved data manageable, you should periodically archive it. PeopleSoft Enterprise PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, PeopleSoft Enterprise Global Payroll for Spain 9.0 delivers a predefined archive object (GPES_RSLT_ARCHIVE) and an archive template (GPESRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Global Payroll for Switzerland

Making timely payments to your workforce, while lowering your total cost of ownership, is a business goal that your organization can achieve with Global Payroll for Switzerland. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for Switzerland 9.0 offers several modifications to simplify payroll processing for your organization:

- Enhancements to Swiss eGovernment.
- Swiss tax statement revisions.
- Support for archiving data.
- Enhancements to triggers.

Enhancements to Swiss eGovernment

Swiss eGovernment, or ELM (*einheitliches Lohnmeldeverfahren*), is the secure electronic transmission of salary declaration for social insurance, taxation and statistical reporting.

As demand by governments for electronically submitted data has increased, Swiss companies have begun reporting information relating to social insurance, taxation, and statistical data to government agencies and insurance providers electronically.

In response to this demand, Global Payroll for Switzerland delivers new eGovernment functionality that enables year-end legal reporting from a single location, simplifying the process.

Dashboard Processing

From a central dashboard, eGovernment allows you to manage the year-end reporting process. With the dashboard you can:

- Run reports in different modes, such as in test mode for data checking.
- Control which reports to add to the ELM transfer file.
- Generate test versions of the ELM transfer file for auditing of the XML data.
- Set run control parameters for all reports on the dashboard from a default set of run control parameters.

Following is an example of the dashboard:

Prepare Files
Process Files

Run Control ID: CH_AHV_Year
[Report Manager](#)
[Process Monitor](#)
Run

Language: English

Group Box

Year

Company

Issued Date

Domain ID

Request For

Create File	Y	Contact Person	Fritz Meyer-Brauns
Validate file	Y	Email ID	Fritz.brauns@ORACLE.COM
Sign file	Y	Telephone	987896567
Encrypt file	Y	Monitor ID	PEOPLESOFT

Outbound File Directory: C:\TEMP

Comment: This is a Comment for Domain 2

Provider Type	Run_Options	Report Status	Additional Data	Details
1 UVG-LAA	✓	OPEN	<input type="checkbox"/>	Details
2 KTG-AMC	✓	OPEN	<input type="checkbox"/>	Details
3 BVG-LPP	✓	OPEN	<input type="checkbox"/>	Details

Manage the year-end reporting process from a central dashboard

Reporting Elements

During processing, governmental data is generated from existing sets of legal reports and stored in separate XML records. The records are created using the following report set:

- GPCHSI07 - UV Yearly.
- GPCHSI08 - AHV Year.
- GPCHSI09 - Non AHV/ALV.

- GPCTX07 - Tax Statement.
- GPCHST02 - Salary Structure.
- GPCHAL05 - FAK Yearly.
- GPCHPK01 - BVG-Pension.
- GPCTX01 - Source Tax Year.

The XML data is stored in three formats: summary results by company; employee data by emplID, empl_rcd, and company; and employee details data.

Once the dashboard parameters have been set, click the Run button on the dashboard. This generates the ELM files in the directory specified in the dashboard setup.

Finalize	<input type="text" value="Test"/>	<input checked="" type="checkbox"/> Create ELM
File Directory	<input type="text" value="C:\templGW1_test"/>	

Signature Data	
Creation date:	<input type="text" value="03/13/06 11:33PM"/>
Name:	<input type="text"/>
Email ID:	<input type="text"/>
Telephone:	<input type="text"/>
Comment:	<div style="border: 1px solid black; height: 100px;"></div>

[Specify the file directory for ELM files in the dashboard setup](#)

Swiss Tax Statement Revisions

Beginning in 2007 a new, mandatory Swiss tax statement format will replace the existing cantonal tax statement forms. To support this requirement, Global Payroll for Switzerland release 9.0 will provide new pages to capture data required by this new tax statement format.

In conjunction, a new report process is delivered in release 9.0 to create the tax statement file in XML format for use with ELM (*einheitliches Lohnmeldeverfahren*).

New Pages Supporting the Revised Tax Statement

The following table lists the new pages in Global Payroll for Switzerland 9.0 delivered to support the revised tax statement:

Page Name	Description
Law 2006	Add company-level values for the LAW report required by the new Swiss Tax Statement format.
Law Messages	Map eligible messages for the company.
Payslip	Specify payslip style for the company.
Sender Details	Captures information about the report sender.
Report Messages	Add report messages to the tax statement.

Page Name	Description
Company Location	Store location codes required by the 2006 tax statement.
Data	Add employee-specific data for the LAW report that are required by the new Swiss Tax Statement format.
Messages	Control message generation at the employee level.
Expatriate	Specify how employee's tax statement should report expatriate periods.
Tax Statement 2006	Generate the GPCHTX07 tax report.
Override 2006 Tax Statement	View and edit the PDF form generated for the 2006 Tax Statement.

Using the new Tax Statement 2006 page, you can generate the tax statement report:

Tax Statement 2006

Run Control ID: 101 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: German

Report Parameters

Date Option: Yearly Report
 Pay Year:
 Pay Entity:
 SetID:
 Department:
 Issued Date:
 *Run Type: Interface and Print
 Split
 Include Pending Calculations

Sort Criteria

Company	Description
1	

Canton	Description
1	

EmpID	Name
1	

Generate the tax statement report (GPCHTX07) on the new run control page

After generation, you can view or edit the tax statement:

Override Tax Statement 2006

van Wezel, Mercedes Miss Employee **EmpID:** KW0001 **Empl Rcd#:** 0

*Begin Date	*End Date	*Company	Version	Status	Source Indicator	Details	View	Edit
12/06/2005	12/06/2005		1	Open	User	Details	View	Edit

View or edit the content of an employee's tax statement

Support for Archiving Data

Global Payroll generates large amounts of result data, which often needs to be maintained for audit or regulatory purposes, and which should be periodically archived. To facilitate this requirement, PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager.

As an aid in archiving your data, PeopleSoft Global Payroll for Switzerland delivers a predefined archive object and an archive template for use with the Data Archive Manager. The archive template uses queries that select data by calendar group ID, which can be used to archive single or multiple calendar group data. Archiving captures data from the calculation, banking, general ledger, and other post processing tables.

The following is a list of calculation (writable array) result tables that are archived from Global Payroll for Switzerland:

GPCH_RP_0001	GPCH_RP_FK02	GPCH_RP_SI07
GPCH_RP_0002	GPCH_RP_MT	GPCH_RP_SI08
GPCH_RP_EO01	GPCH_RP_PK011	GPCH_RP_TX01
GPCH_RP_FK01	GPCH_RP_PK013	GPCH_RP_TX05

For Global Payroll for Switzerland, no other tables are archived.

Enhancements to Triggers

In Global Payroll, a trigger is a mechanism used to detect online data changes that result in a system action. Before using triggers to process a payee, perform segmentation or a retroactive process, a trigger definition must be set up.

For triggers, a predefined effective date type is required, however certain triggers may need date adjustments at processing time to properly record a triggered event. Previously, adjustments to trigger effective dates required setting offset values for individual fields manually during trigger definition.

New in release 9.0, Global Payroll for Switzerland automatically provides effective date offset values for select fields. For example, for the Action field, the following Offset Days values are pre-set to **-1**:

- TER (termination)
- RET (retirement)
- LOA (leave of absence)
- LOF (layoff)
- TWP (termination with pay)
- TWB (termination with benefits)

Global Payroll for the Netherlands

Global Payroll for the Netherlands 9.0 delivers enhancements in these areas:

- Support for WALVIS reporting requirements.
- Support for regulatory changes to savings plans and company car taxation.
- Support for archiving data.
- Support for proration of earning and deduction assignments.

Support for WALVIS Reporting Requirements

From January 1, 2006, the *Wet Administratieve Lasten Verlichting Inzake Socialeverzekeringwetten* (WALVIS) Act changed the way that employers in the Netherlands report tax and social security contributions. The key legislative changes were:

- New wage declaration (*Loonaangifte* 2006) combining tax and social security reporting.
- Change to the calculations of social security contributions.
- New health insurance.

The modifications delivered to support these regulatory requirements have been incorporated in Global Payroll for the Netherlands 9.0.

Wage Declarations

Global Payroll for the Netherlands 9.0 includes significant enhancements that enable you to set up and generate wage declarations:

- New and modified setup pages for recording information required for the wage declarations.
- Enhancements to the Define Payee Data page to record employees' employment codes that are required by wage declarations.
- New accumulators that are designed for Wage Declaration reporting. The Wage Declaration requires employers to report on some earnings and deductions that are defined and maintained by customers. However, we deliver accumulators that are used by the Wage Declaration process. During implementation, customers make the appropriate earning and deduction elements members of the delivered accumulators.
- New processes for generating wage declarations, sending corrections to declarations previously submitted, and creating reports of employees processed in wage declarations.
- A new Wage Declaration Review page has been added to provide information about employees who were processed in a wage declaration.

- New pages for importing and reviewing return messages received from the Tax Authority in response to wage declarations that you have submitted.

We have added or modified the following pages to enable customers to set up insurance information that is required for wage declarations:

Page	Navigation	Description
Sector & Risk Group NLD	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Sector and Risk Group NLD	A new page used to set up social security sector and risk codes.
Insurance Group NLD	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Social Security/Insurance, Insurance Group NLD	This page has new fields for tracking the sector and risk codes for an insurance group. Other changes to this page were made to support the new combined health insurance. See the section on combined health insurance.
Tax Reports Setup	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Reports, Tax Reports Setup NLD	This page has a new field for recording the last wage declaration message number, which is defined once during implementation and then updated automatically.

Global Payroll for the Netherlands includes these processes for generating and reporting on wage declarations:

- The Wage Declaration Interface process (GPNL_WD_AE) creates the wage declaration in XML format required for submission to the Tax Authority.
- The Wage Declaration SQR report (GPNLWD01) provides a summary of the totals reported in wage declarations that you have previously created.

Wage Tax Declaration	
Run Control ID: 01	Report Manager Process Monitor Run
Report Request Parameters	
Begin Date:	01/01/2006 
End Date:	31/01/2006 
Company:	GND  The Netherlands Company D
	<input type="checkbox"/> All Companies Same Tax Number
	<input type="checkbox"/> Reuse Last Message Number
Message ID text:	GNDJAN06
Indicator:	Complete 
File Path:	\\temp\
File Name:	GNDjan06.xml
Contact Name:	GN100ME100  Bakker,Anita
Telephone:	0204625697
Tax Red R & D:	0.000000

New page for generating Wage Declarations

If you need to send corrections to a wage declaration already submitted, you rerun the same Wage Declaration Interface process and use the Indicator field to define a correction report.

The Tax Authority issues return messages, in XML format, in response to submitted wage declarations. Return messages are used to acknowledge receipt of the declaration and notify employers of errors in the declaration.

Return messages are in XML format and therefore not easily readable. The solution provided by Global Payroll for the Netherlands is an import process that imports return messages into tables in the database, and a page for viewing the imported return messages online.

Social Security Contributions Changes

The Walvis legislation introduced changes to the way that social security contributions are calculated and reported in the Netherlands:

- Calculation of social security contributions based on the VCR method (*Voortschrijdend Cumulatief Rekenen*).
- Calculation of social security contributions based on the payment period, instead of the number of worked days.
- Social security reporting to be included in the wage declaration that is submitted to the Tax Authority.

The new VCR method for calculating employee and employer contributions uses the current pay period and the total year-to-date contributions, according to the *Grondslagaanwasmethode*.

Combined Health Insurance

From January 1, 2006, the new health insurance act (*Zorgverzekeringswet (ZVW)*) came into effect. This act introduces a combined health insurance that replaces the public and private health insurance arrangements that were dependent on employees' salary levels.

Here is a summary of the modifications to Global Payroll for the Netherlands that have been made in this release to implement the change in health insurance:

- A new ZVW insurance code has been added to the Insurance Code NLD table and the existing ZFW code is inactive from January 1, 2006.
- The ZVW insurance has been added to the insurance group for standard social insurances and the existing ZFW insurance has been removed.
- The employee's premium that is dependent on the annual salary is defined on the Insurance Premium NLD page.
- The EE Social Insurance NLD page has new fields for specifying the contribution method and the employee's ZVW code. The ZFW fields are hidden when the effective date is January 1, 2006 or later.
- New deductions have been delivered for processing the health insurance contributions.

Support for Regulatory Changes to Savings Plans and Company Car Taxation

Global Payroll for the Netherlands has been updated to meet the legislative changes to savings plans and company car taxation that were introduced in 2006.

Life Cycle Savings Plans

Under the new legislation, employees can contribute to a new type of savings plan, the life cycle savings plan (*Levenslooplegeling*), that enables employees to create a fund that they use at a later date, for example for an early retirement.

In Global Payroll for the Netherlands, you can now select Life Cycle as a savings plan option on the Employee Tax Data page and specify the contribution amount at the payee level using positive input or recurring deduction assignments.

Global Payroll for the Netherlands delivers these new elements for processing life cycle savings plan deductions and payments:

Element	Description
LEVENSLLOOP	A deduction used to track employee contributions to life cycle savings plans.
LEVENSL BIJD	An earning used to track the employer contribution to employees' life cycle savings plans.
LEVENSL OPN	An earning used to track the amount paid to employees from their life cycle savings.

Company Car Taxation

From January 1, 2006 the private use of a company car is a taxable benefit that varies according to the employee's private use of the car.

For employees whose private use of a company car exceeds 500 kilometers a year, an amount is added to the bases used to calculate tax and social security deductions.

We've enhanced the Employee Tax Data page to meet the new rules on company car tax.

The Employee Tax Data page has modifications for savings plans and company cars

For employees with company cars, use the Travel Data field and the new No Tax on Car field to indicate the rules that apply to the employee.

Global Payroll for the Netherlands delivers these elements for tracking the values related to company car use:

Element	Description
INHD AUTO	A deduction to track the amount deducted for the private use of a company car. The deduction is taken from the employee's net income.
LEASE BEDRAG	An earning used to track the amount added to employees' earnings for private use of a company car

Support for Archiving Data

Global Payroll generates large amounts of result data, which often needs to be maintained for audit or regulatory purposes, and which should periodically be archived. To facilitate this requirement, PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager.

To aid in archiving your data, PeopleSoft Enterprise Global Payroll for the Netherlands delivers a predefined archive object and an archive template for use with the Data Archive Manager. The archive template uses queries to select and store data by calendar group ID from the calculation, banking, and general ledger tables.

Support for Proration of Earning and Deduction Assignments

PeopleSoft Enterprise Global Payroll 9.0 offers a new configuration option that determines whether earnings and deductions assigned to payees are processed within a given period. You can specify that earnings and deductions are processed if the assignment is active:

- At the segment end date.
- At any time between the segment begin and end date.

This feature is configured by country. The Netherlands is configured to process earning and deduction assignments that are active at any time within the segment. This setting means earnings and deductions that are assigned to an employee, for all or part of the segment, are processed.

To support this configuration, Global Payroll for the Netherlands also delivers a segmentation trigger for the earning and deduction assignment record (GP_PYE_OVRD).

Global Payroll for the United Kingdom

Global Payroll for the U.K. 9.0 delivers enhancements in these areas:

- National Insurance overrides.
- Court order processing.
- Support for archiving data.
- Off-cycle processing.
- Triggers.
- Validation of statutory details.

National Insurance Overrides

National Insurance (NI) is normally calculated automatically during payroll processing. However, in exceptional situations payroll administrators need to override NI deductions manually using positive input.

Global Payroll for the U.K.9.0 offers enhancements to the processing of National Insurance (NI) overrides that ensure the NI accumulators are updated correctly.

These new deductions have been introduced to process NI overrides:

Deduction	Description
NIO DD EES	Employee NI
NIO DD EESRB	Employee NI – Rebate
NIO DD ERS	Employer NI
NIO DD ERSRB	Employer NI – Rebate

A new formula developed for NI overrides is triggered by the presence of an element override using the variable NI VR OVR IND. When the system detects the element override, it uses the new formula to calculate the NI deductions and then copies the values of the NIO deductions to the standard NI deductions.

To help you track NI overrides, a payee message is generated for payees whose NI is adjusted using positive input.

Court Order Processing

Following a thorough review of the court order feature provided in Global Payroll for the U.K., we have improved court order entry and processing in payroll. These improvements are incorporated into Global Payroll for the U.K. 9.0.

Modifications to the Court Order page reduce errors when entering court order information and the changes to court order processing ensure accurate payroll results.

Support for Archiving Data

Global Payroll generates large amounts of result data, which often needs to be maintained for audit or regulatory purposes, and which should periodically be archived. To facilitate this requirement, PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager.

To aid in archiving your data, PeopleSoft Global Payroll for the U.K. delivers a predefined archive object and an archive template for use with the Data Archive Manager. The archive template uses queries to select and store data by calendar group ID from the calculation, banking, and general ledger tables.

Off-Cycle Processing

Off-cycle processing is a feature of Global Payroll core for processing payments and making corrections to payroll results outside the normal payroll schedule.

Global Payroll 9.0 offers enhancements to off-cycle processing that make it easier to create and process off-cycle requests.

Building on the core enhancements, Global Payroll for the U.K. delivers off-cycle configurations that provide default settings when you enter an off-cycle request. Using the delivered configurations to create an off-cycle request reduces the data and options that are presented on the Off Cycle Request page.

Triggers

With Global Payroll 9.0 you can specify an offset that adjusts the retro trigger effective date in relation to the date of a field value change. The retro trigger delivered for JOB data for the U.K. has been modified to make use of the Offset Day field for certain action codes.

Trigger Definitions

Field Values

Country: GBR United Kingdom
Record (Table) Name: JOB
Field Name: ACTION

*Sequence	*Character Value	*Trigger Event ID	Offset Days		
1	HIR <input type="text"/>	JOB <input type="text"/>	0	<input type="button" value="+"/>	<input type="button" value="-"/>
2	TER <input type="text"/>	JOB <input type="text"/>	-1	<input type="button" value="+"/>	<input type="button" value="-"/>
3	RET <input type="text"/>	JOB <input type="text"/>	-1	<input type="button" value="+"/>	<input type="button" value="-"/>
4	LOA <input type="text"/>	JOB <input type="text"/>	-1	<input type="button" value="+"/>	<input type="button" value="-"/>

No Match on Field Value Option

Do Not Trigger
 Trigger

Trigger Event ID:

Retro triggers for the U.K. use the new Offset Days field to adjust effective date

For example, the termination code (TER) has an offset of -1, which means that when a termination is processed retroactively, the effective date of the retro trigger is the effective date of the termination event minus one day. If the effective date of the termination (entered in Job Data) is May 1, 2006, the retro trigger date would be April 30, 2006 (which is normally the last day worked). Previously, some customers modified the system to adjust the retro trigger effective date for terminations. With Global Payroll for the U.K. 9.0, the modifications are no longer required.

Validation of Statutory Details

In 2005, HM Revenue and Customs introduced validation standards for data that is submitted in end of year reports.

To support these requirements, Global Payroll for the U.K. provides additional validation of statutory information and a new end of year pre validation report. Now when you enter employees' statutory details, the system checks that the following are valid:

- Tax code format.

- National Insurance (NI) prefix. This validation uses the new NID Prefix page added to Human Resources 9.0.
- SCON format and compatibility with the NI category selected.
- ECON format and compatibility with the NI category selected.

The system also validates the format of ECON numbers when you set up pay entity details and run the End of Year Return process.

A new report, the End of Year Pre Validation report (GPGBEOY) identifies payee data that does not meet the requirements of the HM Revenue and Customs validation standards. This enables customers to identify invalid data before they submit end of year returns.

Global Payroll for United States

Global Payroll for United States 9.0 provides new functionality in the following areas:

- Support for archiving data.
- Enhancements to U.S. savings bond purchases.
- Enhancement to state tax processing.

Support for Archiving Data

To aid you in archiving your result data using the Data Archive Manager, PeopleSoft Global Payroll for United States delivers a predefined archive object (GPUS_RSLT_ARCHIVE) and archive template (GPUSRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Enhancements to U.S. Savings Bond Purchases

PeopleSoft Global Payroll for United States 8.9 delivered a bond purchase process that was incorporated in the payroll calculation process. To accommodate integration with third-party vendors, the bond purchase process no longer runs during payroll calculation. PeopleSoft Global Payroll for United States now delivers a separate Bond Purchase Calculation Application Engine process that you run after finalizing the payroll calculation process.

Overview of New U.S. Savings Bond Purchase Process

To assign and process bond deductions:

1. Assign applicable bonds to a payee on the Savings Bond Assignment page.
2. Run the payroll calculation process, which processes each of a payee's bond assignments, and calculates the deduction amount.
3. After finalizing the payroll process, run the Bond Purchase Calculation Application Engine process (GPUS_BNDCALC).
4. After running the Bond Purchase Calculation process, you run the Savings Bond Purchase PSJob process (GPUS_BND).

Bond Purchase Calculation USA

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Process Parameters

*Calendar Group ID: Apr 04 Performance Testing

Calculating bond purchases

The Bond Purchase Calculation process (GPUS_BNDCALC) updates the bond activity log with bond deductions that the system processed for the selected calendar group. In addition, it determines whether the deductions for a given payee are sufficient to fund the bonds assigned to that payee.

Savings Bond Activity Log USA

Employee ID: G1EE0001 Name: Samuel Brooks Empl Rcd Nbr: 0

Savings Bond ID: EE200 Bond Number: 1 Bond Balance: 60.00

From Date: To Date: [Create Activity Log](#)

Activity Log Customize | Find | First 1 of 1 Last

Processed	Transaction	Amount Collected	Purchase Amount	Number of Bonds	Payment Date
<input checked="" type="checkbox"/>	Deduction	60.00			01/02/2009

Viewing Savings Bond Activity

The Savings Bond Activity Log USA page displays bond activity for a payee. The log shows how much money has been deducted toward bond purchases, and how much of that money has been applied to the purchase of the assigned bonds. The system updates the data in the log when you run either the Bond Purchase Calculation process and the Savings Bond Purchase process.

Savings Bond Report and Interface USA

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Language:

Process Parameters

*Bond Output Layout:

Pay Entity: GP US Pay Entity C

Calendar Group ID: Weekly Pay Group

Begin Date:

End Date:

Running the Savings Bond Purchase process and generating reports

The Savings Bond Purchase process identifies all payees with funded bonds (unprocessed purchase transactions) and processes the purchase of those bonds. In addition, it selects the Processed check box for any unprocessed purchase transactions, creates the Bond Purchase Report (GPUSBND1), and generates a standard flat file or a magnetic media flat file according to the Bond Output Layout that you select.

Enhancement to State Tax Processing

Global Payroll for United States 9.0 provides a new application engine process (GPUS_AZ_WHLD). For payees with Arizona state withholding tax data this process updates the Arizona percentage of federal withholding based on the current state-defined values.

Arizona Withholding Update USA page

Arizona Withholding Update USA	
Run Control ID: PS	Report Manager Process Monitor <input type="button" value="Run"/>
Process Parameters	
*Effective Date:	<input type="text" value="01/01/2005"/> <input type="button" value="B"/>

Running the Arizona Withholding Update application engine process

ePay

ePay offers employee self-service that enables employees to manage their own personal payroll information. With HCM 9.0, using XML Publisher (XMLP) to deliver in PDF format, we expanded the self-service options for the Payroll for North America product to include some of the delivered paper year-end forms while improving our currently delivered View Paycheck transaction. These enhancements help eliminate paper, thereby reducing operational costs and improving the bottom line. Self-service access always improves employee morale by putting the employee in control and improves payroll staff productivity by reducing employee help desk calls. This enables staff to focus on more strategic tasks.

Self Service Year-End Forms provide employees access to an electronic version of their W-2, W-2c, T4 and T4A forms. This solution uses the payroll system's annual processing to create these year-end forms in PDF format. It uses the same rules to provide paper year-end forms as online forms. Oracle creates and stores the data in XML format and builds the PDF for display on demand using XMLP templates. Employees then are able to view or print the forms. By enabling employees' self-service access to this data, these new features will significantly reduce calls to HR or the payroll department for replacement forms because employees are able to simply print another one if they need it.

We also provide a Payroll Administrator View, whereby the administrator can access employees' forms to verify or to reprint upon request. The payroll clerk is able to view all employees' forms even if the employee has not consented to receiving their forms electronically. To assist with the process of obtaining the employee's consent, we deliver new pages, workflow, notifications and reports.

Self-Service Paycheck in PDF Format enhances the existing View Paycheck functionality to display YTD hours and amounts on each paycheck, defer the display of checks within self-service to a day specified by the administrator, and provide PNA/ePay customers with self-service paychecks in PDF format. In addition, we deliver paycheck report templates that customers can modify to add their company logo, for example. Similar to Self-Service Year End Forms, a payroll administrator view is provided with which an administrator can access an employee's self-service paychecks to enable quicker responses to payroll inquiries.

Note. Year-end forms are not customizable because they are government-defined.

Enhancements to Self-Service Paycheck Viewing and Printing

In release 9.0 we have enhanced the existing View Paycheck transaction for customers who use Payroll for North America and ePay. New paycheck creation processes using XML Publisher (XMLP) enable you to create paychecks that can be printed and displayed in self-service in PDF format.

XMLP is the new tool for PDF report and form generation that will be used in the new Fusion application. You may remain with the existing technology or move to the new technology.

We created new print processes for the enhanced paycheck viewing and printing functionality delivered for self-service paychecks using XMLP. Although we retain the existing SQR print processes, the advantages of the enhanced XMLP self-service paycheck functionality include:

- Now you can specify when self-service paychecks are available for employee viewing.
- The year-to-date amounts for earnings, taxes, deductions, and leave balances are displayed on all PDF checks created with the XMLP functionality viewed in self-service, not just on the current paycheck.
- The self-service paycheck displays and prints to a single page.
- The self-service paycheck is identical to the printed check stub or direct deposit advice.

In addition, payroll administrators can now view employees' self-service paychecks in an online view that replicates the employees' view, regardless of whether you use the SQR or XMLP process to create the checks.

If you continue using the existing SQR check and advice print processes, the View Paycheck transaction now opens to a list of paychecks rather than to the current paycheck. Otherwise, the self-service display of paychecks and advices remains unchanged.

The Payroll for North America and ePay applications provide:

- New check and advice reports and self-service setup options.
- New PDF check and advice creation processes.
- New administrator and employee paycheck view pages.

New Check and Advice Reports and Self-Service Setup Options

Payroll for North America delivers XMLP reports as RTF templates that define the layout of the printed checks and advices:

Report Definition				
Report Name	Description	Data Source Type	Data Source ID	Data Source Owner
PRTCNAV	Print Can Advice Forms	XML File	CNADVICES	Public
PRTCNCHEQ	Print Canadian Cheques	XML File	CNCHEQUES	Public
PRTUSADV	Print US Advice Forms	XML File	USADVICES	Public
PRTUSCHK	Print US Checks	XML File	USCHECKS	Public

XMLP reports for printing PDF paychecks and direct deposit advice forms

Report Definition				
Report Name	Description	Data Source Type	Data Source ID	Data Source Owner
SSPCNAV	Can Self Service Advice Form	XML File	CNADVICES	Public
SSPCNCHEQ	Can Self Service Paycheque	XML File	CNCHEQUES	Public
SSPUSADV	US Self Service Advice Form	XML File	USADVICES	Public
SSPUSCHK	US Self Service Paycheck	XML File	USCHECKS	Public

XMLP reports for displaying self-service paychecks and direct deposit advice forms

You can modify the delivered templates using PeopleTools XMLP functionality to address your specific formatting requirements. After modifying each template, you must upload it to the corresponding report definition.

Use the Paycheck Options Table page in Payroll for North America to set up the options for displaying self-service paychecks.

Paycheck Options Table					
Paycheck Setup ID: PNAUSA					
Parameters Find View All First 1 of 1 Last					
*Effective Date: 01/01/1900		*Description: US Setup			
URL Identifier: PY_SSP_ATTACHMENT					
Report Definitions					
Printing			Viewing		
*Check Report ID: PRTUSCHK		*Check Report ID: SSPUSCHK			
*Advice Report ID: PRTUSADV		*Advice Report ID: SSPUSADV			
Self Service Options					
Display Options					
<input type="checkbox"/> PDF Paychecks Only			<input type="checkbox"/> \$0 or Negative Manual Checks		
Paycheck Availability Customize Find View All First 1-3 of 3 Last					
Company	Description	Pay Group	Description	Days From Check Date	
PSF	Financial Aid - Work Study	PSF	Work Study Pay Group		
PSU	PeopleSoft University	PS1	Student Refunds	-2	
PSU		PS2		2	

Specify self-service paycheck options

Payroll for North America supports only the two delivered paycheck setup IDs—*PNAUSA* for the U.S. and *PNACAN* for Canada.

Options that you specify include:

- The report IDs for printing and self-service viewing.
- The URL for the XML data to display self-service checks.

We deliver the Paycheck Options table with the PY_SSP_ATTACHMENT URL address and associated table for storing the XML self-service paycheck data. If you create a separate table and URL to store the data, enter your URL on this page.

- Whether to display only PDF checks.

The ePay View Paycheck transaction displays paychecks and direct deposit advice forms created in release 9.0 and later in PDF format only. You must specify whether to display only the paychecks created in PDF format or to display both the PDF paychecks and the historical paychecks created prior to implementing the XML PDF processes.

- Whether to display manual paychecks with \$0 or negative amount in self-service.

Specify whether you want the system to display manual paychecks of zero dollars and manual paychecks with negative net pay amounts in self-service.

- Days from check date that the paychecks should be available in self-service.
Specify paycheck availability for each combination of company and paygroup.

Note. If you remain with the existing technology, and choose not to display \$0 or Negative Manual Checks, if an employee's current check is \$0 or Negative, the YTD amounts will not be available from Self Service, View Paycheck. This is because the system recognizes the \$0 or Negative check as the most current check, and therefore the YTD amounts are included on this check. The YTD amounts are available in Self Service on the next check with positive pay.

New PDF Check and Advice Creation Processes

These PSJob processes prepare the check and advice report files for self-service viewing and PDF printing:

- Print US Checks PSJob process (PYCHKUSA).
- Print Canadian Cheques PSJob process (PYCHQCAN).
- Print US Direct Deposit Advice PSJob process (PYDDAUSA).
- Print Can Direct Deposit Advice PSJob process (PYDDACAN).

Each of these PSJob processes comprises the following:

- An SQR that generates the XML data for the check or advice print file and individual check or advice files.
- An Application Engine process (PY_SSP_BUILD) that inserts individual paycheck data XML files into the database.
- XMLP generates the self-service check from the XML data when the employee views a paycheck in the ePay View Paycheck transaction or when the payroll administrator views paychecks by employee in an online view page.
- An Application Engine process (PY_SSP_PRINT) that generates a PDF print file containing the paychecks in the pay run, in batches that you define.

Payroll for North America 9.0 provides two sets of run control pages for checks and direct deposit advices, one set for the existing SQR print processes, and one set for the new PSJob processes that produce checks and advices in PDF format.

All of the PDF creation run control pages for the PSJob processes contain similar run parameters for PDF check and advice printing in the U.S. and Canada.

Create Check PDF																
Run Control ID: 01	Report Manager Process Monitor <input type="button" value="Run"/>															
Report Request Parameter(s)																
<table border="1"> <thead> <tr> <th colspan="2">On-Cycle Run</th> </tr> </thead> <tbody> <tr> <td>Pay Run ID:</td> <td><input type="text" value="KU1-05-50"/> <input type="button" value="Q"/></td> </tr> <tr> <td></td> <td>US Wk50-05</td> </tr> </tbody> </table>	On-Cycle Run		Pay Run ID:	<input type="text" value="KU1-05-50"/> <input type="button" value="Q"/>		US Wk50-05	or									
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Payroll Cycle																
<input type="radio"/> On-Cycle	<input type="radio"/> Off-Cycle	<input checked="" type="radio"/> Both														
Off-Cycle Pay Calendar																
Company:	<input type="text"/>															
Pay Group:	<input type="text"/>															
Pay End Date:	<input type="text"/>															
Process Page:	<input type="text"/> Thru: <input type="text"/>															
<table border="1"> <thead> <tr> <th colspan="2">Sif Srvc Availability Override</th> </tr> </thead> <tbody> <tr> <td>Days From Check Date:</td> <td><input type="text"/></td> </tr> </tbody> </table>	Sif Srvc Availability Override		Days From Check Date:	<input type="text"/>	<table border="1"> <thead> <tr> <th colspan="2">Check/Advice Numbers</th> </tr> </thead> <tbody> <tr> <td>Starting Number:</td> <td><input type="text"/></td> </tr> <tr> <td>Ending Number:</td> <td><input type="text"/></td> </tr> </tbody> </table>	Check/Advice Numbers		Starting Number:	<input type="text"/>	Ending Number:	<input type="text"/>					
Sif Srvc Availability Override																
Days From Check Date:	<input type="text"/>															
Check/Advice Numbers																
Starting Number:	<input type="text"/>															
Ending Number:	<input type="text"/>															
Batch Size: <input type="text"/>																
Message: <input type="text"/>																

Example of a PDF creation process run control page

To override the paycheck availability value on the Paycheck Options table for this check or advice print run, enter a different number of days from check date. The system requires confirmation of the override.

Specify the number of individual paychecks that you want to batch together into one PDF print file.

New Administrator and Employee Paycheck View Pages

We have revised the self-service paycheck view pages that employees use to view paychecks. To resolve questions raised by employees about their paychecks, we now provide an online view of paychecks for payroll administrators:

- The employee View Paycheck page displays a list of paychecks by check date.

View Paycheck
Locherty, Betty

Select Paycheck Find | View All | First 1-10 of 18 Last

Check Date	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
2005-04-15	Global Business Institute 9999	04/02/2005	04/15/2005	\$3619.12	4107	<input checked="" type="checkbox"/>
2005-04-01	Global Business Institute 9999	03/19/2005	04/01/2005	\$3619.12	3968	<input type="checkbox"/>
2005-03-18	Global Business Institute 9999	03/05/2005	03/18/2005	\$3619.12	3603	<input type="checkbox"/>
2005-03-04	Global Business Institute 9999	02/19/2005	03/04/2005	\$3619.12	3490	<input type="checkbox"/>
2005-02-18	Global Business Institute 9999	02/05/2005	02/18/2005	\$3619.12	3158	<input type="checkbox"/>
2005-02-04	Global Business Institute 9999	01/22/2005	02/04/2005	\$3619.12	3041	<input type="checkbox"/>
2005-01-21	Global Business Institute 9999	01/08/2005	01/21/2005	\$3619.12	2874	<input type="checkbox"/>
2005-01-07	Global Business Institute 9999	12/25/2004	01/07/2005	\$3619.12	2641	<input type="checkbox"/>
2000-04-21	Global Business Institute 9999	04/08/2000	04/21/2000	\$3465.79	1707	<input type="checkbox"/>
2000-04-07	Global Business Institute 9999	03/25/2000	04/07/2000	\$3465.79	1591	<input type="checkbox"/>

Example of employee self-service paycheck selection

Depending upon setup options, the page can list PDF paychecks and historical checks that are not in PDF format. By clicking the check date link, employees access PDF paychecks in a new window and view historical paychecks on the View Paycheck page.

Employees cannot view their PDF paychecks until the availability date specified for the print run.

- The payroll administrator view replicates the employees' view.

View Self Service Paycheck
Betty Locherty

Select Paycheck Find | View All | First 1-10 of 18 Last

Check Date	Company	Pay Begin Date	Pay Period End Date	Net Pay	Paycheck Number	PDF File
2005-04-15	Global Business Institute 9999	04/02/2005	04/15/2005	\$3619.12	4107	<input checked="" type="checkbox"/>
2005-04-01	Global Business Institute 9999	03/19/2005	04/01/2005	\$3619.12	3968	<input type="checkbox"/>
2005-03-18	Global Business Institute 9999	03/05/2005	03/18/2005	\$3619.12	3603	<input type="checkbox"/>
2005-03-04	Global Business Institute 9999	02/19/2005	03/04/2005	\$3619.12	3490	<input type="checkbox"/>
2005-02-18	Global Business Institute 9999	02/05/2005	02/18/2005	\$3619.12	3158	<input type="checkbox"/>
2005-02-04	Global Business Institute 9999	01/22/2005	02/04/2005	\$3619.12	3041	<input type="checkbox"/>
2005-01-21	Global Business Institute 9999	01/08/2005	01/21/2005	\$3619.12	2874	<input type="checkbox"/>
2005-01-07	Global Business Institute 9999	12/25/2004	01/07/2005	\$3619.12	2641	<input type="checkbox"/>
2000-04-21	Global Business Institute 9999	04/08/2000	04/21/2000	\$3465.79	1707	<input type="checkbox"/>
2000-04-07	Global Business Institute 9999	03/25/2000	04/07/2000	\$3465.79	1591	<input type="checkbox"/>

Example of View Self Service Paycheck page for administrators

The system selects the PDF File option for checks displayed in PDF format.

Payroll administrators can view all paychecks regardless of the availability date specified for the print run and regardless of whether the Paycheck Options table specifies that only PDF paychecks are available.

New Self-Service Viewing and Printing of Year-End Forms

PeopleSoft has enhanced Payroll for North America and ePay functionality so that employees can access an electronic version of their W-2 and W-2c forms or T4 and T4A forms. New pages in PeopleSoft ePay, along with new and existing pages and processes in Payroll for North America, provide the capability to manage employee consent to receive electronic year-end forms and to generate and display the forms in the employee self-service application for viewing and printing.

Using XML Publisher (XMLP) along with Payroll for North America's annual processing, you can now create year-end forms in PDF format and make the forms available to eligible employees through self-service. For those employees who do not consent to receiving the forms online, you print the PDF forms to send to the employees.

This capability results in greater convenience for employees and reduces the calls and processing time in the payroll department for replacement forms. The administrator's view of the self-service forms provides administrators convenient access to the same information that employees see, resulting in greater efficiency in responding to inquiries.

Note. Year-end forms refers to the Canadian T4 and T4A forms and the U.S. W-2 forms—W-2, W-2AS, W-2GU, and W-2VI, as well as the W-2c.

The Payroll for North America and ePay applications provide:

- New setup pages to identify tax forms and set up self service options.
- New pages, workflow, process, and report to manage employee consent and notification.
- New XMLP processes for self-service and PDF forms.
- New pages for employee self-service and administrator online view of year-end forms.

New Setup Pages to Identify Tax Forms and Set Up Self-Service Options

Use new setup pages in the Payroll for North America, Define Annual Tax Reporting menu folders to specify tax form XMLP options and self-service options:

- On the Tax Form XMLP Options page, specify the tax year, the tax form, the XMLP report definitions, and the URL for the table in which the XML data is stored for producing the self-service forms:

Tax Form XMLP Options

Tax Year: 2005

Tax Form Options Find | View All First 9 of 10 Last

*Tax Form ID: + -

Report Definitions Customize | Find | View All First 1-4 of 4 Last

Report Name	Description	Template ID	Description	Copy Type	Burst?	Batch Size	+ -
<input type="text" value="PYW205N_CO"/>	W2 Company Print Form 2005	<input type="text" value="PYW205N_CO_1"/>	W2 Company Copy	Company	<input type="checkbox"/>	<input type="text"/>	+ -
<input type="text" value="PYW205N_EE"/>	W2 Employee Print Form 2005	<input type="text" value="PYW205N_EE_1"/>	W2 Employee Copy	Employee	<input type="checkbox"/>	<input type="text"/>	+ -
<input type="text" value="PYW205N_GVT"/>	W2 Government Print Form 2005	<input type="text" value="PYW205N_GVT_1"/>	W2 Government Copy	Government	<input type="checkbox"/>	<input type="text"/>	+ -
<input type="text" value="PYW205S_EE"/>	W2 Employee SS Form 2005	<input type="text" value="PYW205S_EE_1"/>	W2 Employee Copy	Employee	<input checked="" type="checkbox"/>	<input type="text"/>	+ -

XML Data Files

URL Identifier: W2W2C XML DATA

Filing Instructions

URL Identifier: Year End Filing Instructions

Attached File:

Last Update Date/Time 06/08/2006 9:37:21AM **by** SAMPLE

Specify tax forms, year, and URL for self-service data storage

Each year we provide instructions in the Year-End Guide to help you add a new row on this page for the current tax year and add the appropriate report definitions. Additionally, each year we provide updated report definitions with updated templates for the PDF forms in layouts that have been approved by the Internal Revenue Service (IRS) or Canada Revenue Agency (CRA).

In the URL Identifier field, you enter the URL to the table in which you store the XML data for self-service viewing. We deliver a URL and associated table for this purpose for each country. If you create a separate table and URL to store the data, you must enter your URL here.

In the Batch field, enter the number of individual paychecks that you want to batch together into one PDF print file.

- On the Year End Form Options page, enable functionality for employee consent and self-service year-end forms or slips:

Year End Form Options

W-2 Reporting Company: GBI Global Business Institute 9999

Self Service Options Find | View All First 1 of 1 Last

Tax Year: 2005

Electronic Forms Option

Enable Electronic Year End Forms In Self Service

Tax Form Options Find | View All First 1 of 1 Last

Tax Form ID: W-2

Self Service Availability

Availability Date: **Availability Notification** **Date Notified:**

Report Definitions Customize | Find | View All First 1-4 of 4 Last

Report Name	Description	Template ID	Description	W-2/W-2c Type	Burst?	Batch Size
PYW205N_CO	W2 Company Print Form 2005	PYW205N_CO_1	W2 Company Copy	Company Copy	<input type="checkbox"/>	
PYW205N_EE	W2 Employee Print Form 2005	PYW205N_EE_1	W2 Employee Copy	Employee Copy	<input type="checkbox"/>	
PYW205N_GVT	W2 Government Print Form 2005	PYW205N_GVT_1	W2 Government Copy	Government Copy	<input type="checkbox"/>	
PYW205S_EE	W2 Employee SS Form 2005	PYW205S_EE_1	W2 Employee Copy	Employee Copy	<input checked="" type="checkbox"/>	

Last Update Date/Time 08/22/2006 5:46:07PM **by**

Enable self-service and consent functionality for the tax year and tax form

The Year End Form Options page configures printing of year-end forms in XML/PDF format for the company specified (W-2 company for the U.S.). The output files are determined by the tax year and tax form ID.

Select the Enable Electronic Year End Forms in Self Service option to enable the W-2 company or T4/T4A company to provide XML/PDF forms or slips in the ePay self-service transaction. If this option is not selected, employees cannot enter or withdraw consent or view year-end forms and slips.

After generating the individual PDF forms, enter an availability date when employees can view the forms in self-service. After entering an availability date, click the Availability Notification button to trigger workflow to send email notification of form availability to employees who are eligible to receive the electronic form.

After you click the Availability Notification button and trigger the workflow email notification, the system enters the current date as the date notified.

New Pages, Workflow, Process, and Report to Manage Employee Consent and Notification

You must secure employee consent before you can provide self-service viewing and printing of electronic year-end forms or slips in place of printed forms. If employees currently do not have a valid consent on file at the time of generating the year-end forms or slips, you must provide the document in paper format.

In Payroll for North America, you must use the correct XMLP year-end form creation process to create year-end forms in PDF format for printing and to display the year-end forms in self-service. The processes print the forms only for employees who have not consented to electronic forms.

This table describes the availability of year-end forms in each country by employee consent status:

Country	Consent Status	Form Availability
U.S.	Consented	The PDF year-end form creation process suppresses the printing of the employee's paper W-2 or W-2c. The employee views and prints the year-end form through self-service.
U.S.	No Consent Received Withdrawn Reset by Employer	The PDF year-end form creation process prints the employee's paper Form W-2 or W-2c. The employee can also view and print the year-end form through self-service.
Canada	Consented	The PDF year-end form creation process suppresses the printing of the employee's paper T4 or T4A. The employee views and prints the year-end slip through self-service.
Canada	No Consent Received Withdrawn Reset by Employer	The PDF year-end form creation process prints the employee's paper T4 or T4A. The employee cannot view or print the year-end slip through self-service.

Use new pages and processes in both Payroll for North America and Self Service menus to manage consent:

- Use the new Year End Form Text page, to enter text for consent emails and notifications to employees:

Year End Form Text

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

Search by:
Text Type
▼
begins with

▼

Include History
 Correct History

Search
[Advanced Search](#)

Search Results

View All First ◀ 1-14 of 14 ▶ Last

Text Type	Country	Usage	Description
Consent	CAN	Page Text	Consent Instructions
Consent	USA	Page Text	Consent Instructions
Withdrawal	CAN	Page Text	Consent Withdrawal Instruction
Withdrawal	USA	Page Text	Consent Withdrawal Instruction
Consent	CAN	Email Text	Consent Granted Confirmation
Consent	USA	Email Text	Consent Granted Confirmation
Withdrawal	CAN	Email Text	Consent Withdrawn Confirmation
Withdrawal	USA	Email Text	Consent Withdrawn Confirmation
Reset	CAN	Email Text	Consent Reset Notification
Reset	USA	Email Text	Consent Reset Notification
Available	CAN	Email Text	T4/T4A Slips Available
Available	USA	Email Text	W-2 Form Available
Correction	CAN	Email Text	Amended T4/T4A Slips Available
Correction	USA	Email Text	W-2c Form Available

Year End Form Text Search page showing the types of text to set up

Year End Form Text	
Text Type:	Consent Instructions
Country:	CAN Canada
Text Details Find View All First 1 of 1 Last	
Effective Date:	01/01/1980
Usage:	Page Text
*Description:	Consent Instructions
Text:	<p>You must complete this consent form to receive electronic T4 and T4A slips. If you do not submit a consent form or a withdrawal of consent form, the Payroll Department will process your year-end slips based on the information currently on file. After you submit your consent form, it will remain valid until you submit a withdrawal of consent form. The exception is when your employment is terminated or electronic access to forms is discontinued.</p> <p>If you have any questions, please contact your Payroll Administrator.</p>

Example of Canadian Consent Instructions text on the Year End Form Text page

- Employees use a self-service page to grant and withdraw consent to receive electronic year-end forms or slips:

W-2/W-2c Consent Form	
Betty Locherty	
<p>You have consented to receive electronic W-2 and W-2c forms. If you prefer to receive paper W-2 and W-2c forms, you must submit a withdrawal of consent form. After you submit the withdrawal of consent form, it is valid until you submit a new consent form.</p>	
Your Current Status: Consent received.	
<input type="checkbox"/> Check here to withdraw your consent to receive electronic W-2 and W-2c forms.	

Example of an employee's consent form

The T4/T4A Consent Form page for Canada is identical to the U.S. page illustrated.

Appropriate text appears on the page based on the employee's current consent status. After saving an update on the page, the employee must enter password verification. After verification, the system displays confirmation of the submit and triggers email confirmation of the change.

- Use a new reset process to reset consent status when needed:

Reset W-2 Consent Status

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameter(s)

Type of Processing

All Employees

Selected W-2 Companies

W-2 Reporting Companies

[Customize](#) | [Find](#) | [View All](#) | First ◀ 1 of 1 ▶ Last

Company	Description		
		+	-

Selected Employees

Employees

[Customize](#) | [Find](#) | [View All](#) | First ◀ 1 of 1 ▶ Last

EmpID	Name		
		+	-

Select the employee population to reset the W-2 or T4/T4A consent status

The Reset Form Consent Application Engine process (PYE_RESCAN or PYE_RESUSA) resets consent status to *Reset Consent* for all employees, selected companies, or selected employees, according to specified run parameters.

You might use this process to reset the consent status of terminated employees to ensure the printing of paper year-end forms.

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Page 220

- Administrators can use an online inquiry page to monitor employee consent status:

Review T4/T4A Consent Status

Helen Johnson ID KC0018

Consent Information

Find | View All First 1 of 2 Last

Effective Date: 08/25/2006 **Effective Sequence:** 0

Last Update Date/Time 08/25/2006 3:55:02PM by PS

Consent Status

- No consent received. Print paper forms.
- Consent granted. Produce electronic forms.
- Consent withdrawn. Print paper forms.
- Consent reset by employer. Print paper forms.

Email Notification Status

<input type="checkbox"/> Consent Granted	<input type="checkbox"/> Consent Withdrawn	<input type="checkbox"/> Consent Reset
<input checked="" type="checkbox"/> T4 Slip Available	<input type="checkbox"/> T4A Slip Available	<input type="checkbox"/> Amended Slip Available

[Review employee consent and notification status online](#)

This page contains a data row for each change in the employee’s consent and notification status.

- You can also use the Year End Consent SQR report (TAX900CS or CTX900CS) to monitor employee consent status:

Year End Consent Status Report

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameter(s)

From Date: 01/01/2005

Thru Date: 12/15/2005

Status Type: All

- All
- Consented
- Reset
- Withdrawn

[Year End Consent Status Report page showing available status type parameters](#)

The report lists employees’ most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.

New XMLP Processes for PDF and Self Service Forms

Payroll for North America provides new run control pages and processes to create PDF versions of W-2/W-2c forms and T4/T4A slips and to create the XML data files for viewing and printing in self-service.

Each of the XML year-end form process run control pages initiates a print job that comprises three processes:

- An SQR process that generates the XML data for the print file and the individual year-end form or slip files.
- An Application Engine process that inserts individual year-end form data XML files into the database for self-service viewing.
- An Application Engine process that creates a print output file containing print images of forms for paper copy printing in PDF format.

This print file contains only employees who have not consented to receive electronic forms.

With release 9.0, you can continue to use the existing SQR print processes if you do not want to make year-end forms available to employees in self-service. You must be careful to select the correct print process from the menu to generate the XML files for PDF print and self-service viewing.

- Use the Create W-2 PDF Forms page to create U.S. W-2 PDF forms for print and self-service viewing:

Create W-2 PDF Forms

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

Balances for Year: 2003 **Form ID:** IMP01

US/Territory: US **Process Type:** Original

Copy Type: **Primary Sort:** None Final Print

Second Sort:

W-2 Reporting Companies

All Companies
 Selected Companies

Company	Description
1	

Employees

All Employees
 Selected Employees

Employee ID	Name

States and Localities

All States and Localities
 Selected States and Localities

State	Description	Locality	Locality Name
1			

[Create W-2 PDF forms for print and viewing](#)

Select the Final Print option to enable employee self-service viewing as of the availability date specified on the Year End Form Options page. Do not select the option if the run is a trial run.

- Use the Create T4 PDF Slips page to create Canadian T4 PDF forms for print and self-service viewing:

Create T4 PDF Slips

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) **Run**

Report Request Parameter(s)

T4 Form Type: XML Publisher

Copy Type: 2 Employee Copy

Primary Sort: Company

Second Sort: Location Code

Third Sort: Employee Name

Processing Type: Print All Originals Final Print

Employee(s) Selected For Reprint [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

EmpID	Name
1	

Create T4 PDF slips for print and viewing

Select the Final Print option to enable employee self-service viewing as of the availability date specified on the Year End Form Options page. Do not select the option if the run is a trial run. Availability of self-service T4 and T4A slips is also subject to the employee’s consent status.

New Pages for Self-Service and Administrator Online View of Year-End Forms

Release 9.0 provides self-service viewing and printing of year-end forms for eligible employees and online viewing of employees’ forms for payroll administrators.

Employees can view only their own forms in self-service. The form or slip and filing instructions open in separate windows when the employee clicks the corresponding document link.

U.S. employees can view and print year-end forms and filing instructions, listed by tax year:

View W-2/W-2c Forms

Betty Locherty

[View a Different Tax Year](#)

Select Year End Form						1 of 1
Tax Year	W-2 Reporting Company	Tax Form ID	Issue Date	Year-End Form	Filing Instructions	
2005	GBI	W-2	08/25/2006	Year End Form	Filing Instructions	

U.S. employees select the self-service year-end form or instructions to view

Canadian employees who have consented to electronic slips can view and print year-end slips and filing instructions, listed by tax year:

View T4/T4A Slips

Helen Johnson

[View a Different Tax Year](#)

Select Year End Form								1 of 1
Tax Year	Company	Province	Wage Loss Plan	Tax Form ID	Sequence	Year-End Slip	Filing Instructions	
2005	GBI	QC	KRG	T4 Slip	0	Year End Slip	Filing Instructions	

Canadian employees select the self-service year-end slip or instructions to view

The payroll administrator can search by employee ID to view the forms of all employees after either an interim or the final print run.

The payroll administrator's view is similar to the employee's view, with the addition of the Final Print indicator. If Final Print is not selected, only the payroll administrator can view the form. If Final Print is selected, the eligible employee can also view the year-end form in self-service on or after the availability date.

View W-2/W-2c Forms

Betty Locherty

[View a Different Tax Year](#)

Select Year End Form							1 of 1
Tax Year	W-2 Reporting Company	Tax Form ID	Issue Date	Year-End Form	Filing Instructions	Final Print	
2005	GBI	W-2	08/25/2006	Year End Form	Filing Instructions	<input checked="" type="checkbox"/>	

Payroll administrator view for U.S. employees

View T4/T4A Slips

Helen Johnson

[View a Different Tax Year](#)

Select Year End Form								1 of 1
Tax Year	Company	Province	Wage Loss Plan	Tax Form ID	Sequence	Year-End Slip	Filing Instructions	Final Print?
2005	GBI	QC	KRG	T4 Slip	0	Year End Slip	Filing Instructions	<input checked="" type="checkbox"/>

[Payroll administrator view for Canadian employees](#)

Industry Enhancements—U.S. Federal Government NFC Interface

Release 9.0 provides enhancements to the existing NFC interface reporting capability, including the:

- Addition of many new PAR, Position and Job Code fields required for Human Resources processing at the U.S. National Finance Center (NFC).
- Ability to run regulatory edits online prior to data submission to the NFC for additional validation.
- Import and workflow processes for NFC files—SINQ, PACT and PMSO errors resulting from the NFC Personnel Edit Subsystem (PINE).

These improvements provide Federal customers with greater business and operational flexibility, a reduced risk of non-compliance and improved data integrity. These modifications will reduce your need to customize your own PeopleSoft systems, as well as improve data quality to NFC since we are enabling users to run regulatory edits on individual personnel actions.

Time and Labor

Companies today require a time and attendance application that addresses industry-specific and global time and attendance needs. To enable greater efficiency, this application must act as a single repository of time that processes all rule requirements while integrating with HR, financial, manufacturing and distribution systems.

Time and Labor is a flexible, integrated solution that gives organizations the intelligence and power in a single repository to determine key performance indicators that are impacted by time-related data. It is designed to support the time-related needs of a wide range of business functions—including payroll, financial and cost accounting, project management, employee benefits and organizational administration—across industries.

Time and Labor enables organizations to:

- Reduce their gross payroll costs by automating time capture and complex pay rate calculations.
- Improve employee productivity by streamlining time-consuming processes.

- Reduce infrastructure costs by consolidating disparate legacy and homegrown systems.
- Support better decision making with enterprise analysis of labor data.
- Ensure that the right worker is in the right job at the right time.
- Increase customer satisfaction as cost effectively as possible.

In Time and Labor 9.0, improvements have been made to the existing integration with Payroll for North America, Global Payroll and Absence Management. Improvements in these critical integration points provide improved payroll data integrity, which will result in more accurate financials results, and ultimately, improved investor confidence. Additionally, elimination of manual intervention or any custom interfaces or workarounds will improve staff productivity and lower IT costs.

Integration with Payroll for North America and Global Payroll

Time and Labor 9.0 integrates with both Payroll for North America and Global Payroll.

Reconciling Reported and Payable Time

Sending time for payment from Time and Labor to payroll is a frequently used transaction. In addition, payroll personnel have only a small processing window to take reported time, process it through Time Administration, and review it before sending it to payroll. If any issues arise during this process, administrators must be made aware of it immediately.

Time and Labor 9.0 provides online reconciliation tools that can be used after the Time Administration and Load to Payroll processes to ensure that time passes to payroll correctly. The first process reveals any reported time that has yet to be generated into payable time, to assist in troubleshooting any issues related to the Time Administration process. The second process reveals any payable time that has yet to be sent to Payroll, which helps identify any issues related to transferring time to either Payroll for North America or Global Payroll.

Unprocessed Payable Time					
Payable Time Details					
Laura Jones		Employee ID: K0W005			
Job Title: Representative-Customer		Employee Record Number: 0			
		<< Previous Employee Next Employee >>			
Start Date:	08/07/2006	End Date:	08/11/2006	Payroll System:	North American Payroll
Payable Time Details					
Customize Find First 1-3 of 3 Last					
Date	Time Reporting Code	Type	Quantity	Payable Status	Payable Reason Code
08/07/2006	KUREG	Hours	8.00	Approved	
08/08/2006	KUREG	Hours	8.00	Approved	
08/09/2006	KUVAC	Hours	8.00	Approved	
Return to Select Employee					

[View unprocessed payable time details](#)

Payable Time Status and Reason Codes

To assist in filtering detailed payable time and troubleshooting issues online, a status code and several reason codes have been added to payable time. By doing so, the administrator or manager has additional ways to identify the current state of payable time, as it relates to payroll processing.

We added a status code of "reversed" to indicate to the reviewer that the row of time was reversed, and whether that time can be re-processed in a future pay cycle or if it's cancelled. In addition, we added several reason codes to help differentiate how payable time came to its status of closed, reversed or rejected.

Load Time and Labor Filters (PNA Only)

In Time and Labor 9.0, the Load Time and Labor process for Payroll for North America contains filter criteria, giving customers the flexibility and control of selecting which specific payable time rows to send to payroll. Administrators have the ability to identify any combination of employees, pay groups and/or earnings codes and date range to include on the pay run whether it's on cycle or off cycle.

In addition, this component allows the designation of whether specific earnings or prior period time should be allocated to a separate check. For greater control, the filter options also are available during this process.

Check Reversals (PNA Only)

When check reversals occur in Payroll, it's important for Time and Labor to remain in sync with that reversal and be able to indicate the proper status to the reviewer of payable time. Therefore, Time and Labor 9.0 reflects a "reversed" row within payable time for Payroll for North America customers, to indicate that the original row of time was paid and then reversed.

There is a new field on the Paycheck Reversal/Adjustment page where the user selects whether time should be reprocessed for each check that is reversed. This option provides organizations the ability to specify whether these reversed rows can be re-processed to Payroll, or if they should be considered "cancelled." This will help the reviewer pair off those rows that were reversed as easily as possible and allows those rows to be filtered when viewing payable time or processing the Payable Status report.

Integration with Absence Management

Time and Labor offers several new integration features with Absence Management.

Absence Entries on Timesheets

Time and Labor 9.0 provides an improved solution to how absence time is displayed, received and processed within the application, enabling tighter integration when used in conjunction with Payroll for North America and Global Payroll. Time and Labor's self-service timesheets are enhanced to enable both the entry of absence time and worked time. In addition, this information is displayed in real-time.

This feature continues to allow the entry of planned absences within the Absence Management module, while time reporters are able to use Time and Labor's timesheets to add, change or delete absence entries during and after the affected time period. This reduces the amount of time spent reporting and modifying this information, by eliminating additional navigation to separate modules.

Approve Reported Time

Timesheet Summary

Employee Selection Criteria

[Click for Instructions](#)

View By: Date: **Include Absence**

[<< Previous Week](#) [Next Week >>](#)

Employees For Sandra Pierce, Time Needing Approval From 03/27/2006 - 04/02/2006

Select	Name	Job Description	Hours to be Approved	Reported Hours	Scheduled Hours	Exception	Absence to be Approved	Approved/Submitted Hours	Denied Hours	Employee ID	Empl Rcd Hbr
<input type="checkbox"/>	Osmar Mutukurnan	Administrator-Network Services	0.00	24.00	40.00		<input type="checkbox"/>	24.00	0.00	K0W202	0

[Select All](#) [Deselect All](#)

Approve Reported Time (page prototype; subject to change)

From the summary page, the manager is able to access the detailed timesheet of an employee, which displays any absence entries that exist for that employee for the selected period. One or multiple rows then can be selected to approve or deny the absence entries.

Consideration of Absence Data

In Time and Labor 9.0, the Time Administration and Mass Time processes consider and include absence data when creating reported time from scheduled time. These processes work in conjunction with existing absence data, as well as any existing holiday schedules, to prevent overstating employee hours worked. To provide additional flexibility, an Installation option enables organizations to specify whether or not these processes should prevent worked time from being created on a given day when an absence event occurs on that same day.

Absence Management

Absence Management is designed for organizations to plan and manage absence events within a single, customizable rules-based application. Combining self-service capabilities, Absence Management 9.0 deepens integrations to Time and Labor, which will improve staff productivity by reducing manual work, and increases overall data integrity through less data entry errors.

Absence Management 9.0 focuses on improving customers' superior ownership experience by tightening integration with other key HCM modules and adopting common HCM methods for the handling of key business processes.

Absence Management 9.0 offers several modifications to simplify absence processing for your organization:

- Integration with PeopleSoft Enterprise Time and Labor.
- Enhancements to the approval process.
- Enhancements to the delegation process.

The following sections provide a more detailed overview for the enhancements to Absence Management 9.0.

Absence Entries on Timesheets

Absence Management functionality has been enhanced for those users integrating with PeopleSoft Enterprise Time and Labor. In 9.0, users are able to view absence entitlement balances and enter absences from the Time and Labor Timesheet page. Users can report and approve absences using the Timesheet page. This facilitates absence entry in Time and Labor, since the end-user entering time will have access to all entitlement balances prior to entering time that will reduce these balances. They will be aware at point-of-entry if the employee has enough entitlement to take the absence, by forecasting absence balances while reporting absences on the Timesheet page.

Enabling Absence Entry in PeopleSoft Enterprise Time and Labor

You specify which absence take element to allow entry on the Time and Labor Timesheets.

The screenshot displays the configuration page for an absence element. The 'Administrative Rules' section is expanded, showing the following settings:

- Country:** CYM (Cayman Islands)
- Absence Take:** KOWAT SICK TAKE (Sick)
- Self Service Rules:**
 - *Effective Date:** 01/01/1990
 - *Status:** Active
 - Unit Type:** Hours
- Administrative Rules:**
 - *Allow Request By:** Employee and Manager
 - *Request As:** Employee
 - Approval Process ID:** Absence_Mgmt_BySupervis
 - Approval Definition ID:** SHARE
 - Cancellation Option:** Change Status on Record
 - *Allow Entry in Time and Labor:** (This checkbox is highlighted with a red box in the original image)
- Page Display Rules:**
 - Display Reason
 - Reason Required
 - Display Current Balance
 - Current Balance Accumulator:** KOWAE SICK_BAL
 - Balance Display Option:** Not Summarized
 - Display Original Begin Date
 - Allow Partial Days
 - *Partial Days Option:** Half Days

Enable absence entry in Time and Labor by selecting the Allow Entry in Time and Labor field.

See *Time and Labor, "Integration with Absence Management"* for more details.

Absence Approvals on Timesheets

See *Time and Labor, "Integration with Absence Management"* for more details.

Global Payroll Core on Demand Payment Processing Enhancements

Global Payroll provides an improved dashboard to handle customers' Off Cycle/On-Demand absence processing without cumbersome data entry pages. No On Demand configuration is required for Absence Management users.

See Global Payroll Core for more details.

Approval Framework Enhancements for Absence Management

Absence Management 9.0 includes the new Approval Framework features into the absence approval process. The Approval Workflow Engine (AWE) provides capabilities for creating, running, and managing the approval processes. The AWE is a common component that is shared across multiple PeopleSoft Enterprise applications both within HRMS and other product families.

These customizations include:

- Ensuring the approvals framework can resolve the next approval level for a user with multiple jobs.
- Delivering HCM-oriented approval hierarchies such as: by supervisor, by department, and so forth.
- Enhancing the ability to define approval processes based on more than just SetID.
- Providing enhanced "push back" functionality.
- Integrating with the new delegation framework.
- Enhancing error checking for resolving 'active' versus 'inactive' users.
- Enhancing reporting and auditing capabilities.
- Providing a dynamic administrator view and diagnostic tools for troubleshooting or reassigning any transaction in the system.
- Providing enhancements and an upgrade path for Absence Management and Recruiting Solutions.

Approval Workflow and Absence Management

When the originator of an absence event submits the entry, the system checks to see if approvals are being used based on system settings. The initial step in the approval process is to identify the first people to approve the transaction. If the system identifies these people, the system sends a notification telling them there is an absence event needing an approval. The approvers have the option of:

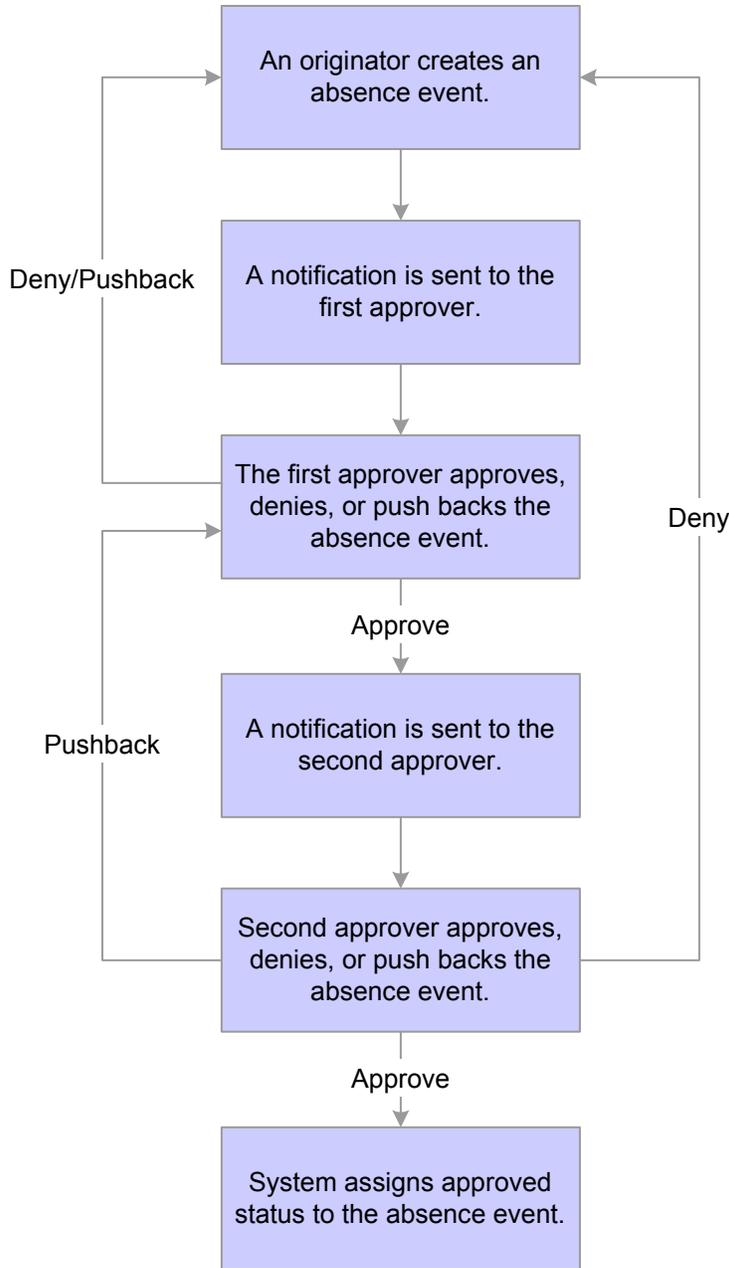
- Approving the absence event.
- Denying the absence event.
- Pushing back the absence event.

Once the initial step in the approval process is complete, it moves to the next step in the approval process, if multiple levels were defined. The following step in the approval process is to identify the next approvers, if one is indicated. If the system identifies the next approvers, the system sends a notification to the approvers telling them there is an absence event needing their approval. The second approvers have the option of:

- Approving the absence event.
- Denying the absence event.
- Pushing back the absence event.

If neither approval steps are met, the system automatically submits a notification to the approval administrator telling the administrator there is an absence event requiring their attention.

The following diagram illustrates the approval process flow having two levels of approvals setup:



Absence Request Approval Process Flow

See *Superior Ownership Experience, "Improved HCM Approvals Workflow"* for more details.

Delegation Enhancements for Absence Management

With release 9.0, PeopleSoft Enterprise Absence Management uses delegation to authorize another person to serve as his or her representative when working with absence transactions. For a manager, the user can delegate their tasks of approving absences, entering employee absences, or entering their own absences to another person due to workload or their own absence from the office. For an employee, the user can delegate the entering of their absences to another person while away from the office.

Delegation Framework

The delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct report or another person in the lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy.

See *Superior Ownership Experience, "Delegation Capabilities"* for more details.

Pay/Bill Management

Staffing end-to-end business processes crosses the boundaries of different software applications in both the Human Capital Management and Financial Management pillars. Ensuring that information flows reliably, accurately, and efficiently from time entry to payroll and to billing is essential for the back office operations of staffing companies. PeopleSoft Enterprise Pay/Bill Management streamlines key back-office functions of staffing organizations. It builds on the functionality found in the PeopleSoft Enterprise Service Automation and core Financials and Human Capital Management applications, such as PeopleSoft Enterprise Project Costing, PeopleSoft Enterprise Contracts, PeopleSoft Enterprise Billing, PeopleSoft Enterprise Accounts Payable, PeopleSoft Enterprise Time and Labor, PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Payroll, and PeopleSoft Enterprise Global Payroll to enable staffing firms to capture time, pay their employees, bill their customers, and manage vendor contractors—faster and easier. By automating these processes and standardizing them across business units, offices, states, and countries, PeopleSoft Enterprise Pay/Bill Management enables you to increase the efficiency of your enterprise and gain real-time visibility into your business.

PeopleSoft Enterprise Pay/Bill Management 9.0 delivers enhancements in the area of Streamlined Time Entry.

Streamlined Time Entry

In the staffing business, labor hours are the key input for paycheck and invoice generation. Capturing this information accurately and in a timely fashion to send to Payroll and Billing is essential to ensuring that employees are paid and customers are billed correctly.

Staffing assignments are typically very dynamic and short-lived. Assignments from the previous week may be closed in the current week, and new assignments in the current week will not have any time to clone. At the same time, agents are typically restricted to a very short period of time when they must enter the vast majority of time cards into the system manually.

Time Entry

PeopleSoft Enterprise Pay/Bill Management introduces new time entry features, aimed at increasing user productivity and enhancing the user experience. The new time reporting enhancements in Time and Labor enable data entry users to copy worked hours from time cards into online timesheets quickly and accurately, thus reducing the number of errors in payroll and billing. This efficiency is accomplished by providing the users with the ability to dynamically select groups of employees for whom timesheets are to be populated. The system then generates lines for all employees with open/active assignments as of the time period specified with all relevant information pre-populated, leaving only the hours to be keyed in by the user. Furthermore, for each assignment line, the user can enter hours for every day of that week.

By reducing the time required to enter hours into timesheets, more resources can be dedicated to recruiting and business development activities.

Superior Ownership Experience

Superior Ownership Experience initiative was introduced with the PeopleSoft HCM 8.8 release and continues to be part of the Application Development process. Superior Ownership Experience transforms the way customers implement, maintain, and use the enterprise software.

Like all PeopleSoft applications, PeopleSoft Enterprise HCM 9.0 and PeopleTools 8.48 have a strong development focus on delivering the best Superior Ownership Experience in the industry. New technology further automates support, increases quality and streamlines upgrades to increase availability and decrease operational costs.

Enterprise HCM 9.0 continues to focus on improving the overall value of your PeopleSoft investment by enhancing application functionality and lowering your total cost of ownership by leveraging latest and greatest technology.

Three common components that will be released in PeopleSoft Enterprise HCM 9.0 include:

- Improved document generation thru XML Publisher.
- Improved HCM approvals workflow.
- Delegation capabilities.

Documentation generation management helps reduce custom documents costs and improve overall organizational brand image with clean, consistent formats across the enterprise. Delegation and Approval Management help keep time-sensitive business processes on track. Escalations thresholds can be defined as rules and automatically carried out so that, after a set amount of time in a queue, a pending approval can go to the next in line, and so forth. Delegation Management also provides improved business flexibility and helps eliminate IT costs associated with customizations. This helps streamline and improve business processes and apply best practices. By having a common, standardized approval process, overall business risk also is reduced.

Improved Document Generation through XML Publisher

Today's HCM applications go far beyond basic data management. Recognizing the organization's needs to rapidly extract, configure and format data in a variety of manners, PeopleSoft Enterprise HCM 9.0 introduces a common document generation solution. Used throughout the PeopleSoft Enterprise HCM suite, the solution leverages Oracle technology known as XML Publisher.

XML Publisher reduces the high costs associated with development, customization and maintenance of business documents while increasing the efficiency of document and reports management.

Utilizing a set of familiar desktop tools, users are able to create and maintain both reports and document layouts in any combination of 185 languages and 244 territories. Seamlessly converting these layouts into industry-standard files, each translation file can be individually modified without impacting translations. With bi-directional and advanced font handling support, XML Publisher provides organizations with a secure, streamlined document system.

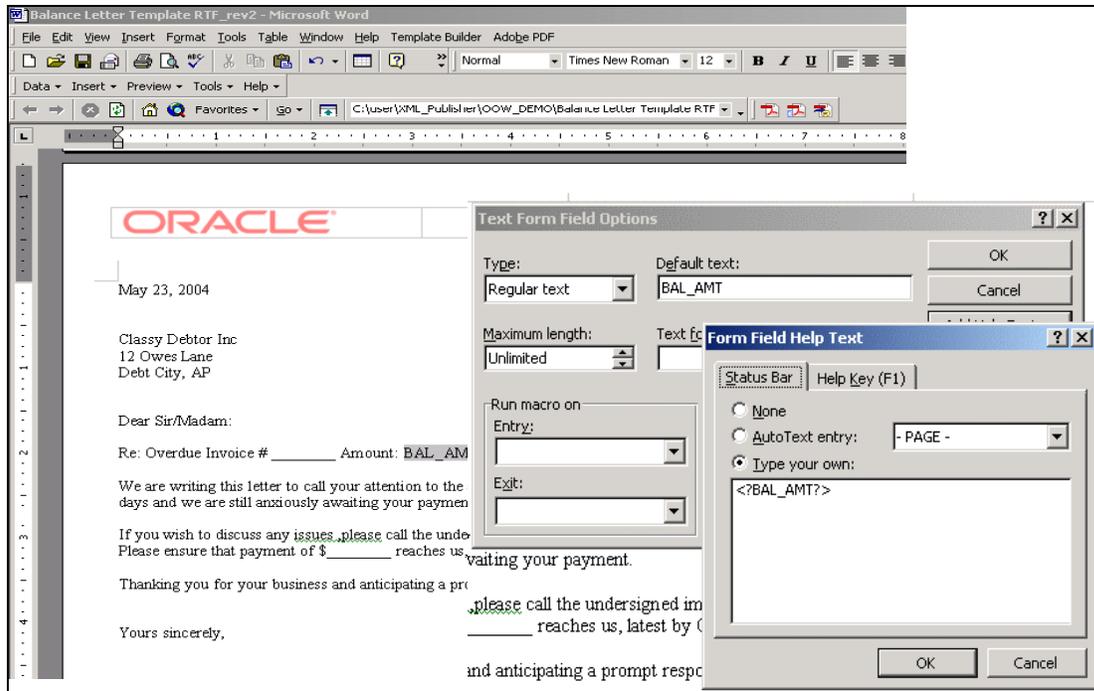
Integration with Enterprise PeopleTools 8.48

XML Publisher, a key component of Fusion Middleware, is tightly integrated with PeopleTools. Business users are able to start with PSQuery as the basis for their reports. More technical users are able to leverage the full power of PeopleCode to create complex XML Publisher reports. In addition, XML Publisher is tightly integrated with Process Scheduler, offering the ability to schedule reports. Finally, by leveraging PeopleTools for template management, the development and production of reports is simplified.

XML Publisher also is built upon the Extensible Stylesheet Language Formatting Objects (XSLFO) standard. This is a standard for separating the layout, content and translation of a report. By leveraging standards, Oracle offers investment protection and reduced risk.

Template Designer

XML Publisher report formats can be designed using Microsoft Word or Adobe Acrobat—tools with which most users are already familiar. There are no proprietary design studio components required, meaning no extra cost and no steep learning curve. Use the interactive template design with the offline Preview function to show you exactly how the report will look. The same engine that generates the preview report offline also is used within the online application. Previews are possible using the Data Source's sample XML data file.



Design custom templates for reports

Document Generation

Defining a report here will store all the metadata and related files so that Tools APIs, app classes and PeopleCode can be used to call the report definition and send appropriate information to the XML Publisher engine to generate output.

Output choices feed into the Process Schedule runtime pages and also can be used by application developers to present or limit choices if they are creating their own pages for running reports.

Report results can be viewed by clicking on a link in Report Manager, Process Monitor, or on an application specific page. It also is possible to view individual document results in real time outside the process scheduler.

By leveraging the full feature function of XML Publisher, business users can create reports leveraging bursting. This enables a single report to be separated into relevant content for hundreds or thousands of recipients. For instance, Paychecks or W2s can be routed to the correct individual.

Definition
Template
Output
Security

Report Name: CUSTOMER_BALANCE_LETTER

General

Report output may be edited

Output Format Options

Format Type	Enabled	Default
HTML	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RTF	<input checked="" type="checkbox"/>	<input type="checkbox"/>
XLS	<input type="checkbox"/>	<input type="checkbox"/>

Output Location

*Location: ▼

Email

Allow recipient address entry at report runtime

Bursting

Generate separate report document files

Burst Field Name:


Page 1 of 3

Vision Operations
5545 Main Street
Jacksonville, FL 32209
US

Dear Sirs/Madam,

According to our records as of 01-JAN-04, we show the following open balances.

Your CAD balance is 31,600.00 made up as follows:

Invoice Number	Date	Trans Amount	Trans Amount Remaining
602444	06-DEC-03	10,125.00	10,125.00
602445	06-DEC-03	12,375.00	12,375.00
10010003	18-NOV-03	132,733.84	132,733.84
10020218	20-NOV-03	71,577.42	71,577.42
10020219	21-NOV-03	89,344.81	89,344.81
602394	20-NOV-03	11,250.00	11,250.00
10020290	24-NOV-03	138,854.99	138,854.99
10020310	25-NOV-03	120,653.20	120,653.20
10020319	26-NOV-03	147,328.21	147,328.21
234	03-DEC-03	53.38	53.38
10020402	04-DEC-03	146,770.07	146,770.07
10020403	04-DEC-03	172,482.48	172,482.48
10020404	04-DEC-03	147,740.25	147,740.25
10020405	04-DEC-03	71,577.42	71,577.42
10020406	04-DEC-03	89,344.81	89,344.81

Private and Confidential

Select from any number of document output choices

Files Repository

You can search for a report using the report's defined search keys to locate one specific bursted file.

An API is also available that enables developers to locate report files by the various search criteria.

XMLP Report Repository Search

[Report Manager](#) [Process Monitor](#)

Report Definition ID: I-9 Bursting

Folder Name: Instance: to

Created On: or Last Days

View Reports Using Search Keys Case Sensitive

SDK_SSN

[Search for a specific file from the bursted reports](#)

Improved HCM Approvals Workflow

With the heightened corporate focus on fraud prevention and fiscal responsibility, companies need stricter approval processes. Companies also need the ability to efficiently setup, manage, track, and report approvals for HCM-oriented transactions. To meet these needs, PeopleSoft Enterprise Human Resources 9.0 offers vastly improved functionality to automatically trigger workflow notifications to inform the next approver in the process of work waiting. This redesigned feature is user-friendly, configurable, easily maintained and upgraded, and consistent across all adopting HCM applications.

The new Approval Workflow Engine (AWE) is the engine that provides capabilities for creating, running, and managing the approval processes. The engine uses a series of database objects combined with application component configuration settings to determine how to process approvals using workflow.

Through a series of easy-to-use pages, users can:

- Approve or deny individual or multiple transactions.
- Include multiple approvers for individual steps.
- Assign additional approvers and reviewers during the approval process.
- Escalate approvals.
- Approve, deny, push back, and delegate approvals.
- Reassign approval tasks to another approver.
- Use Worklist and email notifications.

PeopleSoft Enterprise Human Resources 9.0 delivers many approval transactions that are already configured to work with the AWE. For these transactions, you need only review the delivered transaction data within the application pages to ensure that the data fits your business processes. If necessary, you can easily implement other transactions for use with AWE besides the delivered transactions.

Administrators can use the convenient Approvals Setup Center to access the components necessary to set up transactions for the AWE for PeopleSoft Enterprise HRMS.

Set up transactions for approvals workflow within PeopleSoft Enterprise HRMS.

Administrators also have improved components to manage the self-service aspects of approvals. These components enable the administrator to generate an audit report that provides a complete list of approval transactions that have passed through the AWE based on your run criteria, and search for and view the approval status of transactions associated with them.

In the self-services pages managers can view transactions that are pending their approval, approved, and denied. They can review details of the transactions and take further action in the approval process.

Transaction Name	Submitted By	Submitted For	Submitted On	Transaction Status	
Appraisal Transaction App	Kris Stack	Kris Stack	9/13/2006 - 2:35 AM	Approved	View Details
Delegation	Betty Locherty	Betty Locherty	3/15/2006 - 4:03 AM	Approved	View Details
Non-person profile	Allan Martin	Allan Martin	7/24/2006 - 7:12 AM	Approved	View Details
Non-person profile	Allan Martin	Allan Martin	7/24/2006 - 7:14 AM	Denied	View Details
Non-person profile	Allan Martin	Allan Martin	7/24/2006 - 7:16 AM	Pending	Approve/Deny

Review transactions and take further action for approvals.

Delegation Capabilities

PeopleSoft Enterprise Human Resources 9.0 provides users the ability to authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Users can delegate authority to:

- A direct report or another person lower down in the reporting hierarchy.
- A manager or another person higher up in the reporting hierarchy.
- A peer either within the same division or in a different division within the reporting hierarchy.

When a proxy has delegated authority, the Delegation framework temporarily assigns the proxy a unique role that is specific to the delegated transaction. The role enables the proxy to access the components and pages associated with the delegated transaction. When the proxy no longer has delegated authority, the Delegation framework removes that role and thus prevents the proxy from performing the transaction.

The Delegation solution integrates with the Approvals Workflow Engine (AWE) solution. This integration makes the AWE framework aware of delegated authorities in the system. Internally, the Delegation framework uses the AWE framework to manage the acceptance and rejection of delegation requests.

Delegation administrators can use the convenient Delegation Setup Center to access the components necessary to set up the delegation.



[Administrators can use the Delegation Setup Center to configure delegation settings.](#)

In addition to their setup tasks, delegation administrators can use the administrative components for delegation to add delegation requests, administer delegation, and maintain delegated authorities.

Through HCM self-services pages users can create delegation requests for selected transactions, review their list of active proxies, and manage their delegated authorities.

Manage Delegation

Antonio Smith

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

 [Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

Select *Review My Delegated Authorities* to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

[Review My Delegated Authorities](#)

Users can create delegation requests, review their active proxies, and manage their delegated authorities.

Other SOE Areas of Interest for HCM

The HCM 9.0 and PeopleTools 8.48 releases provide several technology enhancements. For HCM 9.0, some of the enhancements that fall under the category of SOE include:

- Setup Manager.
- Excel to CI.
- Integration Broker enhancements.
- Pagelet wizard enhancement to support WSRP.
- Data Archive Manager.

See the HCM 9.0 Release Notes and PeopleTools 8.48 Release Notes, when available, for more detailed information.

Setup Manager

This includes new implementation wizards and templates designed to lead you through software setup and configuration management.

Excel to CI

This includes Component Interfaces to load high volume reference tables. This tool will help customers throughout the implementation by decreasing data load times for setup data.

Integration Broker Enhancements

Integration Broker provides new, web service architecture for increased integration flexibility and simpler configuration.

See the PeopleTools 8.48 Release Notes, when available, for more detailed information.

Pagelet Wizard Enhancement to Support WSRP

A wider range of PeopleSoft HCM 9.0 content is available for WSRP production, including components, iScripts and pagelets.

Data Archive Manager

Within HCM 9.0, we deliver additional Archiving Templates in the following product areas:

- Time and Labor
- Global Payroll
- Recruiting Solutions
- HR Core

CONCLUSION

Today's business environment calls for Human Capital Management to extend well beyond HR basics in order to enable sophisticated, yet easy-to-use workforce related business processes. Organizations must be able to compete in the global economy and to attract, retain and motivate their top talent. Concurrently, they must maintain regulatory compliance, control costs, and have access to business performance metrics that demonstrate clear ROI.

PeopleSoft Enterprise HCM 9.0 is designed to meet customer needs, industry best practices and thought leadership recommendations. HCM 9.0 is a testament to Oracle's commitment to Applications Unlimited, the customer base, and its own leadership in the HCM arena.



**PeopleSoft Enterprise HCM 9.0 Prerelease Notes
September 2006**

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