



Infor E Series Human Capital Management MVS Installation Guide

Release 25.15
September 2025

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

Information Expert is a registered trademark of Infor.

Publication Information

Release: Infor HCM:E 25.15

Publication date: September 2025

1 Installation Considerations

Chapter Contents

1-1	Introduction
1-2	New Installation or Upgrade
1-3	Functional Definition
1-4	Other Systems
1-5	Installation Requirements
1-9	Installation Considerations
1-14	I.E. Considerations
1-20	DCI Considerations
1-23	CICS Considerations

Introduction

This chapter covers initial considerations for installing Infor E Series Human Capital Management (E Series HCM).

New Installation or Upgrade

Full Installation or Bulletin

The E Series HCM 25.15 Product Update Bulletin can be implemented either as a full installation or as an update bulletin. Knowledge Base KB3628368 is the E Series HCM 25.15 Product Update Bulletin. The files needed to implement this update bulletin are available on the Infor Support portal.

Bulletin Apply

To apply the E Series HCM 25.15 Product Update Bulletin as an update bulletin, you must be at least at the **24.15** level of E Series HCM.

Payroll Standalone or Superbase

Two versions of the source files for a full installation are available. Each version of the source files contains all of the source needed to install the system in one of the following ways:

- Payroll Standalone with Canadian Reporting
- Superbase (Payroll with Canadian Reporting, plus Personnel and all Personnel Modules)

Licensing Agreement

Clients who currently are licensed for the Payroll and Personnel modules, with or without any of the other Personnel modules, will now receive all of the source code and screen data for the system. You can legally use only those modules for which you have a current maintenance contract. Clients who receive Superbase are not legally permitted to use any features that they have not licensed.

Payroll Standalone clients will receive the Payroll source code and screen data for the Payroll system plus the Canadian Reporting system.

Each customer is billed based on the modules purchased or licensed. Superbase delivery will not change your maintenance billing. You will continue to be billed based on your licensing contract, unless you purchase the rights to use any of the additional modules.

Functional Definition

E Series HCM includes the full range of applications required by the payroll, accounting, personnel, compensation, benefits, and employee relations departments. This system can be installed as a Payroll Standalone with Canadian Reporting or as a Superbase, which contains Payroll with Canadian Reporting and Personnel with the following modules: Benefits/ERISA, Position Control, Lost Time Health and Safety, Life-to-Date History, and Employee Labor Relations.

E Series HCM performs the following business functions for your organization:

- Pays earned wages and salaries promptly
- Produces ad hoc paychecks using the online system and allows online viewing of payment history by check date
- Defines a reporting structure to meet your organizational needs
- Designs unique reports
- Maintains complete report control
- Accommodates changes in U.S. and Canadian federal regulations
- Allows online viewing of all U.S. and Canadian regulatory forms
- Produces U.S. and Canadian standard payroll and regulatory reports
- Promptly activates changes in U.S. and Canadian federal, state, provincial, and local taxes
- Combines multiple employee types, pay methods, and pay frequencies within a payroll unit
- Performs Online inquiry, Online entry (to generate transactions), and Realtime update functions
- Maintains an accurate audit trail
- Distributes and reports labor costing, budgeting, and accruals across defined levels of organization
- Interfaces payroll expenses to Infor FMS E Series General Ledger (GL:E) using the General Ledger Interface
- Performs check reversals and check reconciliation
- Tracks earnings history and labor distribution
- Stores and manages comprehensive information about each employee
- Maintains accurate records for seniority rosters, layoffs and recalls, disciplinary actions, union membership, and contract negotiations.

Other Systems

E Series HCM depends on other systems. You must install the following systems before installing E Series HCM, if you have not done so already.

Installation Support Package (ISP)

The Installation Support Package (Release 94.01 or later) provides two utility programs:

- DBSJSG (the Jobstream Generator program) generates the JCL that you use to install the system.
- DBSSMP (the Source Maintenance Program) maintains the delivered source code.

For more information about these utility programs, see the ISP Manual.

Data Communications Interface (DCI)

The Data Communications Interface (01.00 or later) provides communication between E Series HCM and a teleprocessing monitor.

Your version of DCI must be compatible with the version of COBOL you use.

Information Expert (I.E.)

Information Expert® (I.E.) 96.01 or later generates, prints, and manages E Series HCM reports. Install I.E. before you execute the jobs marked Information Expert.

Infor Support Portal

This online tool enables you to log in to the Infor client information network. This capability provides you with online access to the latest information about Infor applications, incidents and KB articles, installation issues, and so on. The Infor Support portal is also a primary delivery mechanism for all E Series HCM tax bulletins and source updates. For more information, consult your account representative.

General Ledger (GL:E)

If you are currently using GL:E, Release 98.01 must be installed.

Installation Requirements

This section describes the hardware, software, and space requirements for installing E Series HCM 25.15.

Hardware

You must have the following computer hardware to install the system:

Hardware	Requirements
CPU	IBM® z800 or other compatible CPU
Tape drive	A minimum of two tape units (optional)
Disk drive	At least one DASD device. Use one disk drive to install the system.
Input-Output devices	A printer and a terminal that has access to a text editor to modify the installation JCL before submission. You need at least one terminal to conduct the Online installation verification. Define the terminal's address to DCI before beginning the Online verification.
Magnetic tapes	If you choose to use physical tape files, the following 3480/3490 cartridges might be needed: ▪ One tape to build your Source Program Library (SPL) ▪ One tape to back up all appropriate E Series HCM libraries ▪ One tape to back up the E Series HCM Employee Master File (sequential or VSAM, or both) ▪ Four tapes to back up the Information Expert (I.E.) system ▪ One scratch tape

System Software

You must have the following software installed before you can install E Series HCM:

Software	Requirements
Operating system	IBM eServer z/OS 2.2.x
Teleprocessing monitor	Transaction Server 5.1.x
Utilities	You must have these standard IBM utilities: ▪ IDCAMS ▪ IEBGENER ▪ IEFBR14 ▪ IEBCOPY ▪ IEBUPDTE ▪ IEHPROGM, if you do not use ICF catalogs
Compiler	IBM Enterprise COBOL 4.2.0
File access method	IBM VSAM
Assembler	IBM Assembler program (IEV90, ASMA90)
Linkage editor	IBM linkage editor (IEWL)
Text editor	TSO/SPF, EDGAR, XEDIT, or other compatible editor with RJE (remote job entry) submission facilities
Compression Utility	IBM TRSMAIN Utility

Virtual Storage Requirements

The Online portion of the system requires 4096 K. Most batch jobs will execute in a region size of 2048 K. Any job that needs more than 2048 K will have a comment in the descriptive area at the beginning of the generated JCL.

Print Lines

Most installation jobs print under 50,000 lines with a maximum of 100,000 lines. Any job that prints more than the average has a comment in the descriptive area at the beginning of the generated JCL. Look for these comments to notify your data center about any special job card requirements.

Time Requirements

Many factors affect the number of CPU seconds needed to run a job. During E Series HCM 25.15 testing, most jobs ran in no more than 50 CPU seconds. The maximum number of CPU seconds needed to run a job was 120. Any job that exceeds 50 CPU seconds has a comment in the descriptive area at the beginning of the generated JCL. Look for these comments to notify your data center about any special job card requirements.

Test Environment

E Series HCM 25.15 was tested on an IBM z800 mainframe with z/OS 3.1. You need to factor the region requirements and time requirements to fit your data center's configuration.

The job that runs DBSJSG is a benchmark for adjusting the estimated requirements. In testing, the job ran in 7 CPU seconds. Compare your results with this benchmark and adjust the expected time requirements.

Space Requirements

The following tables show the space requirements in blocks for the installation and verification of E Series HCM 25.15. During the installation, the libraries are allocated in blocks for efficiency in handling differences in disk devices, with tracks shown in the following tables.

Superbase

Library Space

This table shows the library space requirements for the VSAM/CICS environment.

Component	3390 Tracks
Source (COBOL and Assembler, copybooks and programs)	2,746
Object	633
Linksets	25
Batch Load	283
Online Load	210
Proclib	12
Data	135
JCL	44
Total library space	4,089

Disk Space

This table shows the disk space requirements for the VSAM/CICS environment.

Component	3390 Tracks
Sequential work space	4367
VSAM space	3745
VSAM space for indexed SPL (optional)	3277
Total disk space (without indexed SPL)	8112

Payroll Standalone

Library Space

This table shows the library space requirements for the VSAM/CICS environment.

Component	3390 Tracks
Source (COBOL and Assembler, copybooks and programs)	2021
Object	468
Linksets	19
Batch Load	174
Online Load	288
Proclib	2
Data (80 bytes)	182
JCL	105
Total library space	3259

Disk Space

This table shows the disk space requirements for the VSAM/CICS environment.

Component	3390 Tracks
Sequential work space	2289
VSAM space	650
VSAM space for indexed SPL (optional)	2540
Total disk space (without indexed SPL)	2939

For space requirements related to Information Expert, see the I.E. Considerations section in this guide. For information about the indexed SPL, see the ISP Manual.

The VSAM clusters are defined with minimum space requirements for the installation. Tailor the clusters to suit your production requirements.

Installation Considerations

This section contains additional information about the installation of E Series HCM 25.15.

Jobcat and Stepcat DD Statements

This installation of E Series HCM 25.15 assumes you are using catalog aliases for your VSAM files.

If you use...	Then...
JOB CAT DD statements	Add them to the JOBCARD and TAPE.JOBCARD Deck statement in the Parameter Selection File. Most of the jobs need the catalog that contains the application VSAM files, but several jobs also need the catalog that contains I.E. or DCI files.
STEP CAT DD statements	Edit the generated jobs and insert them as needed.

E Series HCM JCL Procedures

You can use the following methods to access the JCL procedures delivered during the E Series HCM installation. With the first two methods, you select the options LOAD.PROCLIB or INSTREAM.PROCS when you modify the Parameter Selection file. To use the third method, update the JOBCARD Deck statement.

Note: Regardless of the option you select, an application library is allocated and loaded with the application procedures.

LOAD.PROCLIB

The LOAD.PROCLIB option generates a step to load the procedures into your system procedure library. This library should be a test procedure library. You can then run the jobs as usual. If you need to add a JOBPARM statement to your job card to access the procedure library, add it to the JOBCARD Deck statement at the end of the Parameter Selection file.

If you are upgrading your system and you select the LOAD.PROCLIB option, back up the system procedure library that contains the previous release of the HRMS procedures before running the job to load the new HRMS procedures. Enter a value for the variable PROC.PREFIX to ensure that the generated procedures do not overlay your existing procedures.

INSTREAM.PROCS

The INSTREAM.PROCS option causes the Human Resources procedures to be generated as instream procedures. If you select this option, you must still have the DCI and I.E. procedures in a system procedure library.

EasyProclib

If you have EasyProclib, you can add a Proclib DD statement to the JOBCARD Deck statement or add it to each generated job as needed. If you change the JOBCARD information, you can use either an existing procedure library or the library that is created during the installation. Delete the sample Jobparm statement shown because it is not used with EasyProclib.

VSAM Clusters

The following VSAM clusters cannot be defined with the REUSE parameter. The Employee Master File is associated with an alternate index, and the next three files are opened for output during Online Check Calculation processing. All other VSAM files, such as HRMS Tables File, can be defined with the REUSE option.

- EMPMSTRA - the Employee Master File (PWP010)
- SELEMP - the Select Employee File (PWQ500) *
- CKDTL - the Check Detail File (PWQ510) *
- TERMREC - the Terminal Record File (PWQ520) *
- PWK010 - the VSAM Check Reversal Master File used for Payment History (screens 530-536)

* Used with Online Check Calculation

SPL File

A Source Program Library (SPL) file is created during the installation. For more information, see the ISP Manual.

The following members are on your SPL file:

- Source for COBOL and assembler programs
- \$Control - Your DBSSMP filter statement and DBSSMP processing control functions
- E Series HCM provides Installation Audit Control history for individual updates and bulletins maintained on the HRMS Tables File. Each time an update or bulletin is issued, HRMS Tables File T02 transactions are provided. When you apply an individual update or bulletin, these transaction are used to update your HRMS Tables File (PLV100-PLV300). You can print the Installation Audit information (PLV500) for these updates as described in the *Technical Guide*.

You must know the current release or bulletin number of E Series HCM when contacting Customer Support. Depending on your issue, the Source Installation Report or Installation Audit information, or both, might be requested.

- Linksets - Linksets for the programs affected by this release
- DCI screen cards - Data cards used to build the DCI screens for E Series HCM
- Installation data members - Data members used during system installation
- I.E. Source Management members - Information you load into the I.E. Source Management file, such as report source, run statements, dataframe lists, report request lists. and run JCL

- I.E. Dictionary members - Transactions used to update the I.E. dictionary
- E Series HCM processing parameters - Processing controls needed to execute the jobs in the batch verification demonstration

Linkedit

If any linkedit receive condition codes greater than four, correct them before you proceed with the installation.

To correct a linkedit error, complete the following steps:

Step	Action
1	Check the JCL you run to linkedit the program. Ensure that all of the necessary Object libraries are concatenated and that the JCL points to the correct Load and Linksets libraries.
2	Check the compile jobs that were run. Ensure that all of the generated jobs were run, and that they all ran successfully.
3	Check the Object libraries concatenated in the linkedit JCL. Ensure that they have a block size of less than 3200 and contain all the modules loaded when the system was installed. Check the linkset libraries to ensure they have a block size of less than 3200 bytes.
4	Call Customer Support if you cannot resolve the problem.

Compiler Options

All the delivered source code was tested using the IBM MVS Enterprise COBOL 4.2.0 for z/OS with z/OS version 3.1. E Series HCM 25.15 was tested with the compiler options in the following lists. If you do not use these options, E Series HCM might not compile properly.

Enterprise COBOL for z/OS

The following compiler options are required when compiling E Series HCM 25.15 COBOL programs for a z/OS environment. These compiler options are delivered in the data members HROPT3N (no source) and HROPT3S (source) during the installation.

Note: Failing to use these compiler options when compiling will cause unpredictable results.

NODUMP	FLAG(I,E)	NOFLAGSTD
LANGUAGE(EN)	LINECOUNT(60)	LIST or NOLIST
MAP or NOMAP	NONUMBER	NOOFFSET
NOSEQUENCE	SPACE(1)	TERM
NOVBREF	NOWORD	XREF or NOXREF
NOSOURCE or SOURCE	NOADV	APOST
NOAWO	COMPILE	DATA(31)
NODECK	NODYNAM	NOFASTSRT
LIB	NONAME	NUMPROC(MIG)
OBJECT	OPTIMIZE	OUTDD(SYSOUT)
RENT	NOSSRANGE	NOTEST
TRUNC(STD)	ZWB	BUFSIZE(4096)
NOCURRENCY	SIZE(MAX)	

Note: To ensure that the correct parameters are being used, specify HROPT3N or HROPT3S as your compile parameters in your sample compile JCL.

Integrated CICS Translator

The following programs are compiled using the integrated CICS translator available with the Enterprise COBOL for z/OS compiler:

- PPOREL (for more information, see the DCI Considerations section)
- PPQCL2
- PPQOP2
- PPQPRT
- PPQXC2
- PPQ251I
- PPQ251U
- PPQ52I
- PPQ52U
- PPQ55I
- PPQ55U

Note: To ensure that the correct parameters are being used for the integrated translator, specify HROPTCN or HROPTCS as your compile parameters in your compile JCL.

Link Options

All the delivered code was linked using IEWL with the following parameters:

MAP	LET	LIST
XREF	SIZE=(250000, 20000)	AMODE=31
RMODE=ANY	RENT	REUS

Exceptions

PLL550	PL4000	PL5000
All E Series HCM I.E. LIMs (PYSxxx)	PYT800	Many beginning with PYJnnn

To link below the line, change these parameters:

'AMODE=31' to 'AMODE=24'
and
'RMODE=ANY' to 'RMODE=24"

Assembled Modules

Create the Batch and Online object modules for HRMS using the following assembler options:

Assembler IEV90

LOAD	NODECK	SYS Parm=OS/VS
------	--------	----------------

Assembler ASMA90

OBJECT	NODECK	SYS Parm=OS/VS
--------	--------	----------------

I.E. Considerations

This section provides installation information specific to Information Expert (I.E.). Ask your I.E. system administrator to review this section after you read it.

Compiler/Link Options

All E Series HCM I.E. LIMs must be executed below the line. You can compile them above or below the line. To compile below the line, change 'DATA(31)' to 'DATA(24)' in the compiler options.

All E Series HCM I.E. LIMs must be linked below the line. To link below the line, change 'AMODE=31' to 'AMODE=24' and 'RMODE=ANY' to 'RMODE=24'.

I.E. Cataloged Procedures

E Series HCM installation uses I.E. procedures created during the installation of Information Expert. These procedures must be in a system procedure library for the installation and verification of E Series HCM to be successful. The procedures are not generated as instream procedures, even if you choose the option INSTREAM.PROCS.

Upgrade Considerations

During the installation, the Expert Data Dictionary is updated. If you currently have E Series HCM installed, two jobs are generated to do this. The first job deletes all application entities in the Expert Data Dictionary. The second job updates the dictionary with the new dictionary entities. This approach can be hampered by any security that you have placed into the dictionary. For more information, see your *Migration Guide*.

I.E. Data Dictionary Entities

In E Series HCM, all HR I.E. Dictionary transactions are deleted, and a complete set of dictionary transactions is added.

- E Series HCM dictionary delete transactions include deletes for all delivered dataframes, records, groups, and items contained in HRDL* data members:
- E Series HCM dictionary add transactions include adds for all delivered dataframes, records, groups, and items contained in these data members:
 - HREDDICT
 - HREDDIC2
- The dictionary transactions being added include:

	HREDDICT	HREDDIC2	TOTAL
Items	1837	631	2468
Groups	0	116	116

Records	0	215	215
Dataframes	0	87	87
Valuedescs	43	2	45
Total	1880	1051	2931

E Series HCM Security Considerations

If E Series HCM security has been implemented, several delete/add transactions will fail and cause a condition code 0008 (because these items/records are being referenced by E Series HCM security). This is not a problem because no security entities were modified by this release. E Series HCM security is not affected by E Series HCM dictionary maintenance, and it is not necessary to delete and set up E Series HCM security again.

If you have added customized dataframes that reference delivered E Series HCM items, the delete transactions will fail and cause a condition code 0008 because these items are being referenced by your custom dataframes.

If dictionary transactions remain from releases earlier than the release you are migrating from, the delete transactions can fail and cause a condition code 0008 if the old transactions reference any of the transactions being deleted.

Entities Prefix

All of the E Series HCM dictionary entities are prefixed with **HR**, **EMP**, **ORG**, and **POS**. Please ensure that this does not conflict with any non-E Series entities that you have added. Prefixes reserved for E Series can be found by producing the Abbreviation and Prefix Registers using the report series delivered with the I.E. installation.

Update Messages

Any error message displayed during a dictionary update generates the condition code 0008. If you see the message IED-0040 @ IS NOT ON THE DATA DICTIONARY when you enter a DELETE transaction, you can ignore it because the entity specified is not present.

Of the error messages that can occur during a dictionary update, only three require you to take any action. Information about these messages, their explanations, and your responses follow:

Message

IED-0032 NO MORE SPACE IS AVAILABLE IN THE DICTIONARY

Explanation

The dictionary is full.

Your Response

Complete these steps to expand the dictionary:

Step	Action
1	Review the sample job provided in the I.E. installation and change + ???? to specify the additional entities your dictionary requires.
2	Submit the job.
3	Resubmit the update dictionary job.

Message

IED-0033 DEFINITION IS REFERENCED AND CANNOT BE DELETED

Explanation

Either you are using the entity in data entities that you have defined or the entity is secured. If you are using the entity in data entities you have defined, you must delete your data entity before you can continue. If the entity is one of the E Series HCM security entities (listed previously in this document), you do not need to delete these; you can continue with the next step.

Your Response

If you are using the entity in data entities that you have defined, you must delete the reference before you can continue. Complete these steps to continue:

Step	Action
1	Restore the dictionary using the backup taken at the beginning of the installation.
2	Delete other references. If you are still getting IED-0033 or IED-0031 after completing Step 1: If you have added any of the I.E. file definitions supplied only on the Infor Support portal, you need to delete and re-add them. For the delete transactions for these I.E. file definitions, go to the following KB articles:

I.E. File Definition	KB Article
I.E. File Definitions - Check Reversal	KB1047681
I.E. File Definitions - Earnings History	KB1047682
I.E. File Definitions - Labor Distribution	KB1047683
I.E. File Definitions - Life-to-Date History	KB1047684
I.E. File Definition - Valid Transaction	KB1047685

Step	Action
	To find any other user-defined dictionary information, use the IE-GENERATED-CROSS-REF-DOC report. For more information about using this report, see Generating Data Dictionary Documentation on DocLink under E Series, Information Expert, Information Expert 96.01, Expert Data Dictionary Guide, Dictionary Reporting.
3	Complete any updates for the dictionary. Re-add any of the I.E. file definitions deleted in Step 2.
4	Resubmit the update dictionary job.

Message

IED-0129 TOO MANY USER FILES ENTRIES.

Explanation

The maximum number of dataframes has been added to the userfiles member.

Your Response

Complete these steps to continue:

Step	Action
1	Determine which dataframes your organization uses for ad-hoc reporting.
2	Create a change transaction to add only the dataframes that your organization requires.
3	Submit an update dictionary job to apply the change transaction or transactions created in Step 2.

Field Size Considerations

Because of the increase in field size for many of the E Series HCM I.E. fields, you might receive the following message:

****IEL - 1296 EXTRACTED DATA TOO BIG FOR REPORT**

This message indicates that the data extracted for the report request exceeds 4 K. This is the limit for extracted report data. You might have to rework this report or split it into two report series.

Add Source Members

E Series HCM adds or replaces source members in the IEUSER library. For specific information, see the Migration Guide.

These source members are added to the Source file (IEXPSM) during the Add Source to Source Management File job. If this job completes with the condition code 0008 and the last message on the report that lists the status of each submitted source member is IEU-0066 LIBRARY @ IS FULL - CANNOT ADD NEW MEMBERS, the IEUSER library is full. If this is not the last message, the IEUSER library is not full. Call Customer Support.

If the IEUSER library is full, complete these steps to create more space for the report series:

Step	Action
1	Sign on to I.E.
2	Move all report series (except those beginning with GL or IE) from the IEUSER Library to a Public Library.
3	Ensure that the libraries IEUSER, IEUSER2, and IEUSER3 contain no duplicate report series.
4	Sign off of I.E.
5	Resubmit the Add Source to Source Management File job.

If you need to create an IEUSER2 library, be sure that the IEUSER2 Library contains the following items:

- Print-JCL
- Preparation-JCL
- Report-Request-List
- Application-Job-List
- Dataframe-List

Prepare Messages

A Condition Code of 0004 is normal and expected when preparing E Series HCM reports.

Security and IEUSER

E Series HCM depends on IEUSER for the installation. If you have implemented dataframe security or reporting function security, ensure that IEUSER can access all data and can perform all functions.

See the Migration Guide for instructions on removing and reapplying I.E. security.

User 000001

E Series HCM depends on user 000001 for the Online verification demo. User 000001 is created during the installation of E Series HCM 25.15. If you have implemented dataframe security or reporting function security, ensure that user 000001 can access all data and can perform all functions.

IEOL Transaction

The transaction definition for the IEOL transaction must have **DTB = Yes** for dynamic transaction backout to work correctly.

DCI Considerations

This section provides installation information specific to Data Communications Interface (DCI).

DCI Procedures

E Series HCM installation uses the DCI procedures created during the installation of DCI. Make sure they are available when needed.

DCI Operator Numbers

Operator numbers 000001 and 000002 are added during the DCI installation. They must be defined to DCI restrictive security to perform E Series HCM Online/Realtime verification. If they are not, define them in your SYSTEMR member and run the DCI procedures LZEDIT and LZBLDT before beginning the Online/Realtime verification.

Operators 000001 and 000002 must be defined in DCI selective security to have access to system 1 and system 2. If they are not, define them and run the DCI procedure LZ1000.

DCI File Requirements

E Series HCM adds records to four DCI files. These files were initially allocated during the DCI installation. You might have expanded them or reallocated them while installing other E Series applications.

If you do not have enough space in these files to hold additional records, enlarge them before you begin installing E Series HCM. Also, if your files have gone into secondary extents, increase the size of the primary allocation before installing E Series HCM. The primary allocation should be large enough to hold all the records in the file.

To increase the size of a DCI file, complete this procedure:

Step	Action
1	Back up the DCI file.
2	Delete the DCI file.
3	Define the DCI file with increased primary space.
4	Restore the DCI file from the backup made in Step 1.

This table shows the number of records added to the DCI VSAM HELP file when E Series HCM is installed:

Dataset	Records
LKHLPV	2994

Multiple File Processing

Using multiple Employee Master Files for multiple organizations is not as efficient as using a single Employee Master File containing all organizations. Analyze whether processing organizations together or separately is best for your organization. Because Validate (PLP400) and Update (PLP600) process only those employees with activity, processing separate organizations on a multiple organization Employee Master File can be more efficient than processing separate Employee Master Files.

DCI 01.00 provides a multiple database capability that allows one application to access multiple sets of application files.

VSAM/CICS

To implement this feature, VSAM clients must have DCI 01.00, or later, installed. The Defining Multiple Databases topic of the *DCI Administrator's Guide* describes the steps needed to assign operators or groups of operators to different sets of application files. Complete these steps to modify, assemble, and link the LTCCVMDT multiple database table into the DCI nucleus.

Besides the DCI nucleus, the following Online Check Calculation programs that run outside of DCI use the multiple database table:

- PPQCL2
- PPQOP2
- PPQPRT
- PPQXC2

These programs must be relinked to bring in the new copy of the LTCCVMDT table.

Note: Because Online Check Calculation requires the Selected Employees File (PWQ500), Check Detail File (PWQ510), and the Terminal Record File (PWQ520) to be synchronized, it is important to treat these files as a set.

Upgrade Considerations

If you install an upgrade from a previous release of E Series HCM, some records placed in DCI files by older releases are replaced during the installation of the new release.

Online Help Text

The Online help text in LKHLPV is replaced. The DCI procedure LZHELP is used to delete help text for the previous release from this file. This procedure deletes all help text for the E Series HCM system except text with a page number beginning with **9**.

Any help text you have customized and put in LKHLPV should have page numbers beginning with **9**. If it does not, review the control card input to LZHELP, which specifies the first digit of the page numbers to be retained. Documentation explaining this control card can be found in the Help Text Delete section of the DCI Jobs and Procs chapter of the *DCI Administrator's Guide*.

KB591982

KB591982 adds a Product Inquiry screen to the DCI online system that displays the release level of all E Series products installed in your environment.

If you have not applied KB591982 before installing E Series HCM 25.15, the compile of PPOREL ends with a return code of 12 because of a missing DCI copybook, and the link of the PPOREL program ends with a return code of 12 because of the missing PPOREL object.

After installing KB591982, recompile program PPOREL and relink program PPOREL (linkset PYOREL) to complete the E Series HCM changes for displaying the E Series HCM release level.

CICS Considerations

This section contains installation information specific to CICS.

CICS Members

The execution of DBSJSG generates the following CICS-related members.

The HOTHRSDD member contains commented-out DD statements for the Online files as well as a DD statement for the load library containing the Online programs. If you dynamically allocate your CICS files, you do not need to update the CICS start-up deck with the commented-out DD statements. If you do not dynamically allocate files, activate these DD statements and give them to your CICS systems programmer. You must have your CICS system programmer put the DD statement for the load library in the CICS start-up deck whether or not you dynamically allocate files.

Resource Definitions

The HOTHRRSD member contains offline resource definitions for E Series HCM programs, transactions, and files. Give the member to your CICS system programmer to put into the IBM DFHCSDUP utility. The file definition entries are generated with OPENTIME (FIRSTREF), which causes the files to remain closed until an Online program needs them. If you want your files to open as CICS comes up, have your CICS systems programmer change this parameter to OPENTIME (STARTUP).

Local Shared Resources

E Series HCM generally supports Local Shared Resources (LSR). If you want to use LSR with E Series HCM, you must modify your FCT entries delivered by this installation to point to a valid LSR pool.

E Series HCM supports Local Shared Resources (LSR) on all files except the following files:

- PWP010 - the Employee Master File
- PWP01AP - the Employee Master File Alternate Index
- PWP01AS - the Employee Master File SSN Alternate Index
- PWP01A4 - the Employee Master File SSN Last 4 Digit Alternate Index

Do not put these files under Local Shared Resources (LSR).

2 Installation Procedures

Chapter Contents

2-1	Introduction
2-2	Installation Files
2-5	Installation Overview
2-9	Installation Jobstream
2-12	Installation Verification Overview

Introduction

This chapter provides instructions for installing the z/OS version of E Series HCM.

Installation Files

The E Series HCM installation files are delivered electronically as attachments to full installation request incidents on the Infor Support Portal. The E Series HCM installation source files are prepared for electronic delivery by compressing the files using the IBM TERSE utility.

Attached Files

This section lists the files attached to a full installation request incident on the Infor Support portal.

- **hr2515mvs.exe** - a self-extracting file containing the zipped installation files
- **hr2515 source.bin** - the E Series HCM source file
- **bk_MVSInstallationGuide.pdf** - The PDF file for the MVS Installation Guide

Extracted Files

This section lists the dataset and descriptive names of the files extracted to the installation workstation after running the self-extracting .exe files.

Installation Files

The following installation files will be attached to a full installation request incident:

File	Dataset Name	Description	DCB and Space Information
1	hr2515mvs.psf	MVS Parameter File	Record Format = FB Record Length = 80 Block Size = 27920 Number of Tracks = 2
2	hr2515mvs.def	MVS Define File	Record Format = FB Record Length = 80 Block Size = 27920 Number of Tracks = 47

(continued)

File	Dataset Name	Description	DCB and Space Information
3	hr2515hp.txt	Online/Realtime Helptext	Record Format = FB Record Length = 1510 Block Size = 1510 Number of Tracks = 100
4	hr2515dd.txt	Dictionary Documentation	Record Format = FB Record Length = 98 Block Size = 9800 Number of Tracks = 19
5	hr2515x1.txt	Tax Source Data File	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 81
6	hr2515x2.txt	U. S. Tax Reference File	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 6
7	hr2515x3.txt	Canadian Tax Reference File	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 1
8	hr2515x4.txt	U. S. History Tax Reference File	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 44
9	hr2515x5.txt	Canadian History Tax Reference File	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 22
10	hr2515srm.txt	Current Record Map Transactions	Record Format = FB Record Length = 80 Block Size = 6160 Number of tracks = 31

**Superbase Installation
Source File**

This installation source file has the following characteristics:

File	Dataset Name	Description	DCB and Space Information
1	hr2515 source.bin	Superbase Installation Source	Record Format = FB Record Length = 1024 Block Size = 6144 Number of Cylinders = 22

**Payroll Standalone
Installation Source
File**

This installation source file has the following characteristics:

File	Dataset Name	Description	DCB and Space Information
1	hr2515 source.bin	Payroll Standalone Installation Source in FDR format	Record Format = FB Record Length = 1024 Block Size = 6144 Number of Cylinders = 17

Installation Overview

Parameter Selection File

This file is an executable job that generates the jobstreams you use to tailor E Series HCM to your needs as you install it. This file also uses comments to give information about installing E Series HCM.

Load to Disk

To start the installation process, upload the Parameter Selection File (hr2515mvs.psf) downloaded from the Infor Support portal to a PDS member. Also, upload the Define File (hr2515mvs.def) to a sequential disk file. Use the dataset name of the Define File to replace the &DEFINE override in the PSF member as input into the DBSJSG job contained in the Parameter Selection File.

Allocate this file using the space requirements given for the JCL library in the previous space requirements table. Specify an LRECL of 80. You can use the same requirements to allocate a sequential file.

Get to Know the File

The next step in the process is to become familiar with the Parameter Selection File (PSF). It contains options and variables you use to tailor the system to your computer configuration. It also contains the JCL required to run DBSJSG. This program is part of the Installation Support Package (ISP) and generates the jobs to install the system.

Print the Parameter Selection File and read it thoroughly. The DBSJSG options and variables that generate the installation JCL are described in this file. To receive a print of the file, change the SYSUT2 statement in the previous example (IEBGENER) as follows and then execute the job:

```
//SYSUT2 DD SYSOUT=A
```

Modify the PSF

When you are familiar with the Parameter Selection File, use a text editor to modify it to reflect the requirements of your computer system. Follow the instructions in the file carefully. They tell you how to prepare the JCL to run DBSJSG, how to select the options, and how to insert values in the variables that apply to your computer system.

Note: Columns 73 through 80 cannot contain sequence numbers.

After you finish modifying the Parameter Selection File, save it.

Submit the Job

Submit the job containing the Parameter Selection File. The DBSJSG program generates and lists the installation jobstreams. To learn what kinds of jobs are generated, see Installation Jobstream in this guide.

The generated jobs are put into a PDS that you have specified. To generate all the JCL, you must run DBSJSG **twice**. The first run generates all jobs required to load the E Series HCM 25.15 components into your system. The second run generates a 3-pass verification, including an Online test, several sample jobs, and the conversion programs, if you choose one of the migration options in the parameter file.

The INSTALL jobs are numbered between 001 and 199. The VERIFY jobs are numbered between 200 and 399. The CONVERSION jobs can be found at the very end of the VERIFY jobs. The doc member generated with the INSTALL gives specific job numbers.

The total number of generated installation jobs depends on the options chosen in the parameter file.

Check the Document Member

The System Installation Document member (HOTHDOC) is included in the generated JCL and contains a description of the installation jobs. It contains a list of the generated job names, the options and variables selected, and the datasets that were created. Use HOTHDOC to document what occurred during the installation with any changes made to the generated JCL. Update this member during the installation with any changes that are made to the generated JCL.

Read the generated document member (HOTHDOC). Make sure you selected the correct options and entered the right values for the variables before you proceed with the installation. If any error messages are listed, you must correct them in the Parameter Selection File and regenerate the JCL before you can continue. You might also want to print the member and use it as a checklist while submitting the installation jobs.

After the installation, print this member and file it in your project notebook as a reference document along with other project notes. Information related to this installation can serve as a valuable reference for future installations.

Check for Generated Messages

The Errors and Special Considerations member (HOTHERR) is the second member generated and contains messages about the options and variables you chose. The options and variables might cause an error if not used properly.

Example. If you choose the LOAD.PROCLIB option and the INSTREAM.PROCS option, a message appears in HOTHERR stating that these options are mutually exclusive. Choose one or the other, not both.

Read this member carefully before running any generated jobs. If you made any errors in selecting options or filling in variables, you might want to correct them and resubmit the Parameter Selection file.

Upload Installation and Source Files

Upload the installation and source files to your mainframe using the DCB and space information provided in the previous tables. Various jobs in the installation process use these files as input.

The space allocation units are **tracks** for the installation files and **cylinders** for the source files.

The source file you upload to the mainframe **must** be transferred in binary mode, regardless of its format (DSS or FDR).

Allocating Files

To prepare for transferring the installation and source files to the mainframe, allocate the following files on your mainframe.

Installation Files

File	Dataset Name	Description	DCB and Space Information
1	<dataset.nodes>.HP	Online/Realtime Helptext - Input for the Load Help Text job	Record Format = FB Record Length = 1510 Block Size = 1510 Number of Tracks = 100
2	<dataset.nodes>.DD	Dictionary Documentation - Input for the Update IE Extended Dictionary Documentation job	Record Format = FB Record Length = 98 Block Size = 9800 Number of Tracks = 19
3	<dataset.nodes>.X1	Tax Source Data File - Input for the Load Tax SPL job	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 81
4	<dataset.nodes>.X2	U. S. Tax Reference File - Input for the Load Reference File job	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 6
5	<dataset.nodes>.X3	Canadian Tax Reference File - Input for the Load Reference File job	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks =
6	<dataset.nodes>.X4	U. S. History Tax Reference File - Input for the Load US Tax Formula File job	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 44

(continued)

File	Dataset Name	Description	DCB and Space Information
7	<dataset.nodes>.X5	Canadian History Tax Reference File - Input for the Load Canadian Tax Formula File job	Record Format = FB Record Length = 80 Block Size = 4000 Number of Tracks = 22
8	<dataset.nodes>.SRM	Current Record Map Transactions - Input for the Load SRM-SRO Transactions to Disk job	Record Format = FB Record Length = 80 Block Size = 6160 Number of Tracks = 31

Source Files (Superbase or Payroll Standalone)

File	Dataset Name	Description	DCB and Space Information
1	<dataset.nodes>.HR1415.SOURCE.TERSE	Uploaded source file - Input for the Unpack Uploaded Source File job	Record Format = FB Record Length = 1024 Block Size = 6144 Number of Cylinders = 22 (Superbase) 17 (Payroll Standalone)

Submit Jobs

Submit the generated jobs one at a time following the directions in the Installation Jobstream section in this guide. Look through each job before you submit it to verify that the JCL is correct for your environment. If you have to make any changes, keep a record of these changes for future reference. Review all comments within the generated JCL for additional modifications to specific jobs.

Verify the Results

When you submit the generated jobs, check the results from each job **before** you submit the next one. Review all results, not just the condition codes, to ensure that the job ran correctly. The installation jobs include standard IBM and E Series utilities. Check all results of these steps carefully. To check the verification jobs, see Installation Verification Overview in this guide. On certain jobs, you might receive a condition code of **4**. Ensure that these are only warnings.

Installation Jobstream

This section contains information about the jobs generated by DBSJSG.

Job Functions

The E Series HCM installation is divided into two phases:

- Install
- Verify

The jobs generated for each phase are shown in the following lists. You must execute each job in a phase and check its results before you can go on to the next phase. Depending on the options you select, some of these jobs might not be generated. A more complete list of jobs will be available in the generated HOTHDOC member.

The INSTALL Phase

The INSTALL phase generates the following jobs that install E Series HCM:

- Provide a complete list of all CICS table entries and DD statements
- Define all VSAM files
- Allocate libraries
- Build Generation Data Group Indexes
- Load the procedure library
- Unpack the Installation Source file
- Create the Source SPL file
- Tailor the Source SPL file
- Load the source library
- Load libraries from the SPL
- Load the Tax SPL
- Assemble/Compile the system
- Link the system
- Load DCI Files
- Create Online Screens
- Update the I.E. System Files
- Prepare I.E. Reports for E Series HCM
- Print the I.E. Dictionary Documentation.

The VERIFY Phase

The VERIFY phase generates the jobs that perform an installation verification. Depending on the version of E Series HCM you are installing, you might not have all of the jobs listed.

The following functions are performed in the installation verification:

- Pass 1 - Initialize and load files. This is run with a sequential Employee Master File.
- Pass 2 - Run with a VSAM Employee Master File
- Pass 3 - Includes the Online verification using the demonstration script found in this Installation Guide
- Post Verification

A detailed list of the jobs contained in each pass can be found in the Installation Verification Overview section of this chapter. Also, the VERIFY segment generates sample JCL (to perform functions that were not included in the installation verification) and conversion JCL (if you choose one of the migration options in the parameter file). These jobs are described in detail in the Post Verification chapter of this guide.

System Installation Document

The System Installation Document member (HOTHRODOC) contains a jobstream checklist you can use when running the installation jobs.

The checklist contains the following information:

- **Status** - Area for you to check off each job after it has run
- **Member name** - Member name of the job as it appears in the PDS containing the generated jobstreams
- **Job title** - A short job title that also matches the title in the descriptive area in the jobstream
- **Codes** - Specialized codes that reflect the requirements of the job
- **Notes** - Information to help with managing the job

Example

This example shows a jobstream checklist:

Status	Member Name	Job Title	Codes	Notes
_____	HOTHRODOC	Install document		Documentation member
_____	HOTHRRSD	Resource Definitions		Give this member to your CICS systems programmer
_____	HOTH001	Allocate VSAM	R	
_____	HOTH131	Back up I.E. System and Dictionary	C,I,T	

Note: The number of the job depends on the options selected in the Parameter Selection file.

Checklist Codes

This table lists the codes used on the jobstream checklists:

Code	Description
C	Job needs files closed to CICS.
D	Job requires attention of the database administrator (DBA).
I	Job requires attention of the I.E. system administrator.
R	A step in the job gets a return code other than zero.
T	Tape job
X	Exceptional time, lines, or region size

Descriptive Information

The beginning of each generated job has more information to help you understand the purpose of the job and any special requirements for it. Special job requirements are included only if they are relevant to the job.

This sample shows the format of the descriptive area:

```
//*****
//**          J O B   T I T L E                      *
//*****
//**  A brief description of the job's function.        *
//*****
//**  JOB REQUIREMENTS:                                *
//**    - region requirements                          *
//**    - line requirements                            *
//**    - time requirements                            *
//**    - number of tapes and tape drives used        *
//**    - I.E. procedures used                        *
//**    - DCI procedures used                         *
//**    - if files need to be closed to CICS          *
//*****
//**  NOTES:                                           *
//**    - recommendations of dependencies related to this job *
//*****
//**  THIS JOB CONTAINS THE FOLLOWING STEPS:           *
//**    - stepname, program or procedure executed      *
//*****
```

Installation Verification Overview

The E Series HCM installation verification ensures that you have installed E Series HCM properly. The verification is divided into the following stages.

Pass 1

- Load Tables File
- Initialize system Master files and Report files
- Load SRM-SRO transactions to disk
- Load Tax Information
- Initialize Employee Master File
- Load/Validate Transactions
- Update Employee Master File
- Run Payroll Compute Program
- Personnel Control Card Load & Edit
- Print Personnel Reports
- Update Life-To-Date History
- Update Lost Time/Health and Safety and Print Reports
- Print Payroll Reports
- Update Position Control
- Print Position Control
- Update/Print Tables File
- Establish Random Master

Pass 2

- Run Payroll Cycle and Year End Processing
- Run Time Entry Proof
- Update Employee Master File
- Compute Payroll
- Perform Personnel Reporting
- Perform Benefits Reporting
- Update Life-To-Date History and Print Reports
- Update Lost Time/Health and Safety and Print Reports
- Update Position Control and Print Reports
- Extract Payroll Reports
- Perform Check Writer Processing

- Print Payroll Reports
- Generate Regulatory Reports
- Print Regulatory Reports
- Create Regulatory XML Files
- Update Check Reversal and Print Reports
- Update Check Reconciliation and Print Reports
- Print Payroll Earnings History Reports
- Perform General Ledger Interface Processing
- Update Labor Distribution
- Extract Canadian Reports (ROE).

Pass 3

- Initialize Online/Realtime Files
- Perform Online/Realtime Verification
- Run Transaction Load and Validate.

Online Verification

The Online Verification phase ensures that you have installed the Online portion of E Series HCM properly. An Online script is provided to conduct this test.

For more information see Chapter 3, Online Verification.

Post Verification

- Release for Processing
- Run an I.E. Report
- Back Up Libraries
- Back Up I.E. Files.

3 Online/Realtime Verification

Chapter Contents

3-1	Introduction
3-2	Online/Realtime Verification Script
3-3	Online/Realtime Action Codes
3-4	DCI Logical Enqueue
3-5	Online/Realtime System Sign-On
3-12	Data Inquiry and Entry
3-23	Transaction Inquiry and Update
3-28	Realtime Update
3-59	Employee Payment History Inquiry
3-63	Employee W-2 Forms Inquiry
3-67	Extended Product Security
3-79	Benefits Inquiry
3-84	Labor Relations Inquiry
3-87	Online/Realtime System Sign-Off

Introduction

This part of the installation test verifies that the Online and Realtime portion of E Series HCM has been installed correctly.

This demonstration takes you through some of the Online and Realtime screens.

Data entered on Online screens is used to create transactions that will later be released for processing and used as input for the Validation (PLP400) process.

All changes entered on the Realtime screens are updated to the proper file when you press the **Enter** key and receive the message that the file is updated. All changes entered on the Employee Master File Realtime screens update the Employee Master File, and all changes entered on the HRMS Tables File Realtime screens update the HRMS Tables File.

Online/Realtime Verification Script

Complete the following script in sequence and enter the responses exactly as shown.

Make sure that all CICS CSD entries were added to the CICS region before trying to bring up the Online system.

Online verification includes the following stages:

Stage	Description
1	Online/Realtime System Sign-On
2	Data Inquiry and Entry
3	Transaction Inquiry and Update
4	Realtime Update
5	Employee Payment History Inquiry
6	Employee W-2 Forms Inquiry
7	Extended Product Security
8	Benefits Inquiry
9	Labor Relations Inquiry
10	Online/Realtime System Sign-Off

Special Considerations

The Online script was written for clients installing a Superbase system. If you installed a Payroll Standalone system, you are given specific instructions in the Online script.

The Online script uses the Employee Number Shift Feature with space filling. If you did not install the Employee Number Shift Feature (you commented the HR.EMPLNUM.SHIFT option out with an asterisk in the Parameter Selection File) or if you installed Employee Number Shift with the Zero Fill option (you selected both Parameter Selection File HE.EMPLNUM.SHIFT and HR.ZERO.FILL options), you must enter leading spaces when you enter an employee number during the Online installation verification.

Depending on the version of DCI you are using, the appearance of some screens might vary from those shown in this guide. This script was written for a system with KB591982 applied for DCI. The KB591982 update is an enhancement that provides a product release inquiry screen showing the release level of all E Series products installed.

Online/Realtime Action Codes

This table lists the commands you can use in the ACTION field for Online and Realtime screens.

Command	Description
ADD	Initiates the process for adding a new employee (Online only)
ADDW	Overrides warning messages. It tells the system that the warning is acceptable (OK). Use this when you are adding a new employee (Online only).
CF	Returns you to the Central File selection menu
CM	Returns you to the Infor E Series HCM Main Menu
CR	Restarts the current screen
END	Ignores all data entered on the screen. Use this command when you have an error you cannot correct. The system returns you to the previous menu, ignoring any data you have entered on the current screen.
HELP	Accesses Online help text
SO	Signs you off the system and deactivates the Online/Realtime system. Once you have used this command, you must type MSAS to begin another session.
WOK	Overrides warning messages. It tells the system that the warning is acceptable (OK). Use this when you perform maintenance on an existing organization or employee record (not used on Realtime HRMS Tables File screens).

For more information about Online/Realtime processing, see the *Screen Reference Guide*.

DCI Logical Enqueue

DCI Logical Enqueue is a function that prohibits users from accessing a record that is currently being viewed or updated by another user. When you request a record from the Employee Master File, the HRMS Tables File, or the Position Control File on one of the Realtime screens, one of two things can happen:

- The record you requested appears on your screen. That record is automatically locked so other users cannot access the same record while you are working on it.
- You see a message telling you that the record you requested is locked by another user:

Exclusive Lock by XXXX since hh:mm:ss.

where XXXX is the ID of the logical terminal and *hh:mm:ss* is the time the record was locked.

Unlocking

The record is not available to anyone else until you release (unlock) it using one of the following methods:

- Press **Enter** to update the file. As soon as the file is updated, the system returns a message telling you the update was successful. The record remains locked until you change the key.
- Escape from the screen using the ACTION field.
- If you escape from the screen by pressing the **Clear** key, the record is not unlocked. After you press **Clear**, you can unlock the record using one of the following methods:
 - Type **MSAR** to return to the screen on which you were working. Exit the screen using the ACTION field.
 - Type **MSAS** and return to the menu screen. Press **Enter**. Cycling through the menu screen unlocks the record.

Online/Realtime System Sign-On

Begin the Online test by signing on to your CICS region. Then clear the screen and type **MSAS**. Press **Enter** to access the initial DCI Sign-On screen. Type the operator code and password and press **Enter**.

```

      IIIIIIII
      II      n      n  ffffffff  oooooooooo  rrrrrrrrrr
      II      nn     n  ff         oo   oo   rr      rr
      II      n n    n  ffffffff  oo   oo   rrrrrrrrrr
      II      n n n   n  ff         oo   oo   rrrrrr
      II      n   n n  ff         oo   oo   rr      rr
      IIIIIIII  n     nn  ff         oooooooooo  rr      rr

      Welcomes you to the E Series Online Applications

      Operator ID:                Password:

      New Password:              Verify:

      Copyright © 2007 Infor Global Solutions Technology GmbH and/or its affiliates
      and subsidiaries. All rights reserved.

      ACTION                                DCI Release 01.01

```

Enter the following information:

Field Name	Entry	Action
Operator Code	1	
Operator Password	MSA DEMO 1	Press Enter

Note: The password will not appear on the screen as it is typed.

PR	Product Release Inquiry	060
Action: cf		07/29/18 10:54:22
Product	Release	
Accounts Payable	96.01.05	
Accounts Receivable	97.01.02	
Budgetary Control	96.01.05	
Connector Foundation	NOT INSTALLED	
Financial Controller	NOT INSTALLED	
Fixed Assets	NOT INSTALLED	
Foreign Exchange	NOT INSTALLED	
General Ledger	98.01.04	
Human Capital Management	25.15.00	
Inventory	NOT INSTALLED	
Project Tracking	NOT INSTALLED	
Purchasing	96.02.03	

Enter the following information:

Field Name	Entry	Action
Action:	cf	Press Enter .

Select Payroll/Personnel

```

DDDDDDDD      CCCCCCCC      IIIIIIIIII
DD      DD      CC      CC      II
DD      DD      CC      II
DD      DD      CC      II
DD      DD      CC      II
DD      DD      CC      CC      II
DDDDDDDD      CCCCCCCC      IIIIIIIIII

Main Menu

A - Payroll/Personnel
B - Financial Systems
E - Information Expert
I - Product Release Inquiry
N - Display Environment
O - Display Operator Information
P - Change Operator Password
R - Restrictive Security Menu

Enter the option you desire: A

```

Enter the following information:

Field Name	Entry	Action
System Type	A	Press Enter .

DDDDDDDD	CCCCCCCC	IIIIIIIIII
DD DD	CC CC	II
DD DD	CC	II
DD DD	CC	II
DD DD	CC	II
DD DD	CC CC	II
DDDDDDDD	CCCCCCCC	IIIIIIIIII

Payroll/Personnel Systems

01 - Payroll/Personnel

02 - Personnel Modules

11 - International Payroll

Enter the system number you desire: **01**

Action _____ DCI Release 01.01

Enter the following information:

Field Name	Entry	Action
System Selection	01	Press Enter .

Payroll/Personnel Main Menu

This is the Payroll/Personnel Main Menu screen. Before you continue with the Online verification, you will check that the DCI help text file was correctly installed and updated.

Action: *help*

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: ____ Level 1: __ Level 2: __ Employee Number: _____ MRC: _

2: Transaction Inquiry and Update

4: Organization Menu

5: Employee Payroll Menu (U.S. Organizations)

6: Employee Payroll Menu (Canadian Organizations)

7: Employee Personnel Menu

100: Realtime Update Menu

700: Supplemental Address/Dependent/Health Plan Data Menu

900: Installation Audit

Enter the following information:

Field Name	Entry	Action
Action:	help	Press Enter .

View Help Text

You can view the help text by typing a page number or pressing the **Enter** key. To exit the help text, enter **END** in the page number field.

```

                                SYSTEM 01  SCREEN 001  PAGE 100

HR001 - Infor E Series HCM Main Menu

    The online system gives you more timely access to information
    and better control of your employee information.  The system offers
    formatted inquiry, data entry, and combined entry/inquiry screens.

    The main menu offers you a selection of organization information
    screens, special transaction screens or one of the topical menu
    screens for additional selection information.

                                Online Functions                                200

                                How to Perform a Function                        300

                                ENTER NEXT PAGE NO.  BLANK(NEXT PAGE).  ____ 'END' TO TERMINATE HELP
  
```

Enter the following information:

Field Name	Entry	Action
PAGE NO	200	Press Enter .
PAGE NO	300	Press Enter .
PAGE NO	END	Press Enter .

Each time you press the **Enter** key, you see more help text.

Data Inquiry and Entry

You will now perform some Online inquiries and updates using the verification data. First you select an employee, and then you update the information for that employee.

Action:

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: ____ Level 1: ____ Level 2: ____ Employee Number: ***jameson** MRC: _

2: Transaction Inquiry and Update

4: Organization Menu

5: Employee Payroll Menu (U.S. Organizations)

6: Employee Payroll Menu (Canadian Organizations)

7: Employee Personnel Menu

100: Realtime Update Menu

700: Supplemental Address/Dependent/Health Plan Data Menu

900: Installation Audit

If you do not know the level 1-level 2 or employee number for an employee, you can use the alpha-search feature. Enter an asterisk (*) as the first position of the employee number field, followed by the last name of the employee you are looking for. You then see a selection list from which to choose the employee.

Enter the following information:

Field Name	Entry	Action
Employee Number:	*jameson	Press Enter .

This screen displays a selection list for all employees whose names are a phonetic equivalent of the name entered.

Select the employee Arthur P. Jameson.

```

ACTION:          ALPHA-SEARCH & SSN-SEARCH TIE-BREAKER SCREEN
OCCURRENCE NO:   END-OF-FILE - ENTER OCCURRENCE NUMBER      NEXT SCREEN NO: 40
                                     PAYROLL      EMPLOYMENT
EMPLOYEE NAME      L1L2  EMP NUMBER  FREQ CD STAT  CD  DATE
1: JAMESON, ARTHUR P.      C1D1      5      1  1      NH 19650320
2: JOHNSON, EMORY A.      0102      28    2  1      00000000
3:
4:
5:
6:
7:
8:
9:
10:
11:
12:
13:
14:
15:
16:
17:
18:
19:
20:

```

This screen lists the full employee name, level 1-level 2, employee number, pay frequency, pay code, employee status, employment code, and employment date. After reviewing this information, you can determine which employee you need to change.

Enter the following information:

Field Name	Entry	Action
OCCURRENCE NO:	1	Press Enter .

When no screen number is entered on the previous screen for alpha-search, the NEXT SCREEN NO defaults to 40. If you want to go to a screen other than 40, you can change the NEXT SCREEN NO. from 40 to the number of any Online or Realtime screen.

```

Action: CM   Curr: 40   Next: 125
          L1: C1   L2: D1   Empno:           5           Eff Date: _____

                        Basic Employee Information

Last Name: JAMESON                      Suffix:
First Name: ARTHUR                      Middle Name: P.          SSN: 0567891234
Compressed Employee Name: JAMESON, ARTHUR P.
Addr 1: 3545 CHAMBLEE TUCKER ROAD      Addr 2: APARTMENT F
City: DORAVILLE                        St: GA      ZIP: 30340 - 0000

Level 3: P001   Chk Seq: D011           Nrml Hr Rate: 7.5025      CC305 Disablty
Level 4: D011   Ext Dist: DDDDDDD05     Nrml Hours:          40.00      Ind:
Level 5: S021   Pd Thru Bnk:             Nrml Salry:          Date: _____

Pay Freq: 1   Worker Comp: WC01   Last Change: 20131231   Vac Avail: -40.00
Pay Code: 1   Union Code:          Emplmt Code: NH          Sick Avail: 42.00
Emp Stat:     EEO Code:            Emplmt Date: 19650320   Vac Accr:
Chk Code:     W-2 Code:            Term Code:           Sick Accr:
Sex Code:     1099-R Code: Y       Term Date:           Est Code:
Time Crd: ZV   W-2 Pens:           Shift Code: 0          Adj Lbr:
Email:                                     Stat EE:
                                           Non-Res Alien:
                                           ESS Display:

```

Enter the following information:

Field Name	Entry	Action
ACTION:	CM	Press Enter .

Entering CM (central menu) in the ACTION field takes you back to the Payroll/Personnel Main menu.

Action: ____

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: **10** Level 1: C1 Level 2: D1 Employee Number: 5 MRC: 0

- 2: Transaction Inquiry and Update
- 4: Organization Menu
- 5: Employee Payroll Menu (U.S. Organizations)
- 6: Employee Payroll Menu (Canadian Organizations)
- 7: Employee Personnel Menu
- 100: Realtime Update Menu
- 700: Supplemental Address/Dependent/Health Plan Data Menu
- 900: Installation Audit

Enter the following information:

Field Name	Entry	Action
Screen:	10	Press Enter .

The level 1-level 2 and employee number information should be displayed as shown in the preceding screen, which was retained from the previous screen. If not, enter the information as shown.

This screen is a combination inquiry and entry screen. It displays information from the Employee Master File and allows you to make changes to any of the information. When this screen is initially displayed, **11** appears in the NEXT screen field.

ACTION: _____ CURR: 10 NEXT: 11		
L1: C1 L2: D1		EFF DATE: _____
NAME: ATLAS STEEL COMPANY		
SUB-TITLE: DIVISION OF ABC STEEL CORP.		
ADDR-1: 2691 FIRST STREET		
ADDR-2: BOX 3624		
CITY: ATLANTA		
STATE: GA ZIP CODE: 30309 - 0000		
LEVEL DESC NORMAL HOURS		
LEVEL 1: CORPORATE WEEKLY: 40.00		
LEVEL 2: DIVISION BI-WKLY: 80.00		
LEVEL 3: PLANT SEMI-MO: 160.00		
LEVEL 4: DEPARTMENT MONTHLY: 320.00		
LEVEL 5: SECTION VAC: 80.00		
SHIFT-1: 1 200		
SHIFT-2: 1 300		
SHIFT-3: 2 10		
SHIFT-4: 2 15		
ACCR CD- VAC SICK		
WEEKLY: 9 1		
BI-WKLY: 8 0		
SEMI-MO: 7 2		
MONTHLY: 0 3		
BANK DATA		
NAME: FIRST NATIONAL BANK		
ADDR: ATLANTA, GEORGIA		
ROUTING: 361-22 412-01		
CODE:		
LABOR DISTRIBUTION OPTIONS		
GEN TRANS: 4 PRT ADJ MSG: 1		
GEN HDR 2: 2 ADJ DIST OPT: 1		
GEN PR ADJ: 2		
PR ADJ DISTRIBUTION		
GEN FICA: 3 GEN TYPE-H: 3		
GEN FUI: 3 GEN OTH-ER: 3		
GEN SUI: 3		

Enter the following information:

Field Name	Entry	Action
ADDR-2:	BOX 3624	Press Enter .

The message **CB001-W ADDRESS LINE 1 BLANK** appears in lower left portion of screen.

```

ACTION: WOK   CURR: 10   NEXT: 11
      L1: C1  L2: D1                EFF DATE: _____
                                LEVEL DESC   NORMAL HOURS
      NAME: ATLAS STEEL COMPANY      LEVEL 1: CORPORATE   WEEKLY: 40.00
SUB-TITLE: DIVISION OF ABC STEEL CORP.  LEVEL 2: DIVISION   BI-WKLY: 80.00
      ADDR-1: 2691 FIRST STREET      LEVEL 3: PLANT      SEMI-MO: 160.00
      ADDR-2: BOX 3624               LEVEL 4: DEPARTMENT MONTHLY: 320.00
      CITY: ATLANTA                  LEVEL 5: SECTION    VAC: 80.00
      STATE: GA   ZIP CODE: 30309 - 0000

SHIFT-1: 1 200      ACCR CD- VAC SICK      BANK DATA
SHIFT-2: 1 300      WEEKLY: 9 1          NAME: FIRST NATIONAL BANK
SHIFT-3: 2 10       BI-WKLY: 8 0          ADDR: ATLANTA, GEORGIA
SHIFT-4: 2 15       SEMI-MO: 7 2          ROUTING: 361-22 412-01
                                MONTHLY: 0 3      CODE:
                                LABOR DISTRIBUTION OPTIONS
CB001-W ADDRESS LINE 1 BLANK          GEN TRANS: 4   PRT ADJ MSG: 1
                                GEN HDR 2: 2   ADJ DIST OPT: 1
                                GEN PR ADJ: 2
                                PR ADJ DISTRIBUTION
                                GEN FICA: 3   GEN TYPE-H: 3
                                GEN FUI: 3   GEN OTH-ER: 3
                                GEN SUI: 3

```

Enter the following information:

Field Name	Entry	Action
ACTION:	WOK	Press Enter .

Entering **WOK** means that you want to ignore the warning, and the data can be accepted as entered.

```

ACTION: _____ CURR: 11  NEXT: 40  EFF DATE: _____
L1: C1  L2: D1

                                CS-1 Data
    Low Level Total: 2          Balance Time Card:          Bond Register Options
    Low Level Break: 2          Maint Detail List:          Select Accounts:
Total by Pay Code:             Print Rate on Reg:          Select Deductions:
    Print Not Paid:             Delete Term Emps:          Select Purchases:
    Print Inactive:             Delete Inact DOEs:          Select MTD:
    Print Terminatd:          Delete Inact Tax Segs:      Print Empe Address:
    Space Between Emp:          Major Sequence Option:      Print Summary:
    Valid Detail List:          Lowest Level Sequence: 2
    Time Proof Detail:          Minor Sequence Option: 1
    SUI State Options:          Use L1L2 for Tax Auth: N

                                Check Options
    Print Org Headings:          Print YTD:          Print Emp Address:
    Check/Dep Print Seq:          Major Check/Dep Seq: 7      Int Check/Dep Seq:
    Minor Check/Dep Seq: 1        Print Nonzero YTD Amt: *      Print Employer Paid:
    Print Zero Gr/Net Chq:        Print Vac Hours Avail: *      Print Sick Hrs Avail: *
    Print Level Control:          Print Amount in Words:          Print Employer Addr:
    Print Rate w/Earnings: *      Assign Form # by Emp:        Prt Dep Dtl on Split:
    Split SS/Med on Check:        Print Long Name:              Suppress Account #: 1
    Expand 6C/6D Format:          ESS Display: A

```

Enter the following information:

Field Name	Entry	Action
NEXT:	40	

Initially, this screen displays **125** in the NEXT screen field.

Action: _____	Curr: 40	Next: 47	
L1: C1	L2: D1	Empno: 5	Eff Date: _____
Basic Employee Information			
Last Name: JAMESON		Suffix:	
First Name: ARTHUR		Middle Name: P.	
SSN: 0567891234			
Compressed Employee Name: JAMESON, ARTHUR P.			
Addr 1: 3545 CHAMBLEE TUCKER ROAD		Addr 2: APARTMENT D	
City: DORAVILLE		St: GA	ZIP: 30340 - 0000
Level 3: P001	Chk Seq: D011	Nrml Hr Rate: 7.5025	CC305 Disablty
Level 4: D011	Ext Dist: DDDDDDD05	Nrml Hours: 40.00	Ind:
Level 5: S021	Pd Thru Bnk:	Nrml Salry:	Date: _____
Pay Freq: 1	Worker Comp: WC01	Last Change: 20131231	Vac Avail: -40.00
Pay Code: 1	Union Code:	Emplmt Code: NH	Sick Avail: 42.00
Emp Stat:	EEO Code:	Emplmt Date: 19650320	Vac Accr:
Chk Code:	W-2 Code:	Term Code:	Sick Accr:
Sex Code:	1099-R Code: Y	Term Date:	Est Code:
Time Crd: ZV	W-2 Pens:	Shift Code: 0	Adj Lbr:
			Stat EE:
Email:		Non-Res Alien:	
		ESS Display:	

Enter the following information:

Field Name	Entry	Action
NEXT:	47	
ADDR 2:	APARTMENT D	Press Enter .

Time Card Entry

ACTION: _____ CURR: 047 NEXT: **60**
L1: C1 L2: D1 EFF DATE: _____

TIME CARD ENTRY

EMPLOYEE	****	REGULAR	*****	****	OVERTIME	****	SPC	
NUMBER	CD	HOURS	RATE/SAL	HOURS	RATE/SAL	CD	DOE	HR
1: 5	R1	40.00				-	-	-
2: _____	_____	_____	_____	_____	_____	-	-	-
3: _____	_____	_____	_____	_____	_____	-	-	-
4: _____	_____	_____	_____	_____	_____	-	-	-
5: _____	_____	_____	_____	_____	_____	-	-	-

***	LEVELS	***	EXTENDED	WEEKS	NEG						
3	4	5	DIST	CODE	PAID	MO	EARN	STATE	SHIFT	DIFF	CODE
1: _____	_____	_____	_____	_____	_____	-	-	_____	-	_____	-
2: _____	_____	_____	_____	_____	_____	-	-	_____	-	_____	-
3: _____	_____	_____	_____	_____	_____	-	-	_____	-	_____	-
4: _____	_____	_____	_____	_____	_____	-	-	_____	-	_____	-
5: _____	_____	_____	_____	_____	_____	-	-	_____	-	_____	-

MESSAGE

Enter the following information on the first line under the headings EMPLOYEE NUMBER, CD, and REGULAR HOURS.

Field Name	Entry	Action
NEXT:	60	
EMPLOYEE NUMBER	5	Type data as shown on screen
CD	R1	
REGULAR HOURS	40.00	Press Enter .

If you are using Payroll Standalone, enter **002** in the NEXT fields instead of **81**. This screen displays DOE information.

ACTION: _____		CURR: 60	NEXT: 81	
L1: AF	L2: 03	EMPNO: 1486	MRC: 0	EFF DATE: _____ CENTRY CODE: U
----- MAINT -----		----- DOE INQUIRY -----		
DOE: _____	05	07	09	10
METHOD: _____	1	1	1	1
PERIOD: _____	A	A	1	A
TYPE: _____	N	N	A	1
OVERRIDE: _____	STEP MAX: _____			
AMT/PCT: _____	500	300	300	
LMT IND: _____	TBL #: _____			076
LIMIT: _____				
TAX CDS: _____	1111111	1111111	1111111	1111111
DATE CD: _____				
DATE: _____	STRT			
	STOP			
SORT CD: _____				A
CURR-NT: _____	-999999999.99			
ARREARS: _____				
CURR: _____	5.00	3.00	3.00	754.28
MTD: _____	5.00	3.00	3.00	754.28
QTD: _____	5.00	3.00	3.00	754.28
YTD: _____	5.00	3.00	3.00	754.28

Enter the following information:

Field Name	Entry	Action
NEXT:	81	
L1:	AF	
L2:	03	
EMPNO:	1486	Press Enter .

Country Code defaults to **U** (U.S.), but it can be changed to **C** (Canada) programmatically. See the *Technical Guide* for instructions. The character in this field determines tax option editing criteria.

If you are using Payroll Standalone, skip this page and go on to the next one. This screen displays basic employee personnel information.

ACTION: _____ CURR: 81 NEXT: 002

L1: AF L2: 03 EMPNO: 1486 MRC: 0 EFF DATE: _____

SEX: M HEIGHT: _____ BIRTHDATE: 19350408 RELIG PREF: _____

GEN HLTH: _____ WEIGHT: _____ BIRTHPLACE: _____

LAST PHYS: _____ BLOOD TYPE: _____ RES CODE: TYPE: _____ NEW EMPL: _____

NEXT PHYS: _____ HOME PHONE: _____ CITY: FULL/PART: 3

DIS/HNDCP: _____ COUNTY: EEOC: W

CITIZEN: PCT EMPLOY: 075

EMP EXMPT STAT: _____

JOB PREF: _____

GEOG PREF: _____ MARITAL STATUS: 1

WORK LOC: AREA-4 SPOUSE NAME: _____

OFC PHONE: _____ EXT: _____ BIRTH: _____ SSN: _____

SUPERVISOR: U GRANT SEX: _____ MARRIAGE DATE: _____

DATE CURR EMPL: 19700615 VAC ELIG DATE: _____

EMERGENCY NOTIFICATION

NAME: _____ LEVEL-6: SIX VAC HRS: _____

ADDR-1: _____ LEVEL-7: SVN7 SICK HRS: _____

ADDR-2: 00000 - 0000 OTH HRS: _____

REL/PH: _____

Enter the following information:

Field Name	Entry	Action
NEXT:	002	Press Enter .

Transaction Inquiry and Update

In this section, you will inquire about the transactions that you previously created and update them. All pending transactions from the PKO210 file can be viewed by entering **TKEY** in the ACTION field.

After you have executed the Release for Processing function and you have a Selected Transaction File (PKO220), it can be viewed by entering **SKEY** in the ACTION field.

PAYROLL/PERSONNEL TRANSACTION INQUIRY/UPDATE											
ACTION: TKEY		ENTER ACTION CODE AND KEYS						OCCURRENCE NO:			
ACTION CODES: TFIL - TRANSACTION FILE BROWSE											
TKEY - TRANSACTION FILE KEY											
TREC - TRANSACTION FILE SPECIFIC RECORD											
SKEY - SELECTED FILE KEY LIST											
SREC - SELECTED FILE SPECIFIC RECORD											
MORE - CONTINUE KEY LIST											
KEYS: TRANS FILE - L1: ___ L2: ___ EMPNO: _____ SCRNO: ___ RECID: _____											
SELECTED FILE - SEQNO: _____											
OCCNO	L1	L2	EMPNO	SCRNO	RECID	SEQNO	DATE	TIME	EFFDTE	TERM	OPER
1:											
2:											
3:											
4:											
5:											
6:											
7:											
8:											
9:											
10:											
11:											
12:											

Enter the following information:

Field Name	Entry	Action
ACTION:	TKEY	Press Enter .

This takes you to the Transaction Inquiry/Update screen.

This screen lists up to 12 entered transactions at a time. You can view and change any of the data for these entries.

```

                                PAYROLL/PERSONNEL TRANSACTION INQUIRY/UPDATE
ACTION: TREC                      NO ADDITIONAL RECORDS ON FILE  07 OCCURRENCE NO: 1
ACTION CODES: TFIL - TRANSACTION FILE BROWSE
              TKEY - TRANSACTION FILE KEY
              TREC - TRANSACTION FILE SPECIFIC RECORD
              SKEY - SELECTED FILE KEY LIST
              SREC - SELECTED FILE SPECIFIC RECORD
              MORE - CONTINUE KEY LIST
KEYS: TRANS FILE - L1:      L2:      EMPNO:              SCRNO:      RECID:
      SELECTED FILE - SEQNO:

OCCNO L1 L2  EMPNO  SCRNO RECID  SEQNO  DATE      TIME  EFFDTE  TERM  OPER
1: C1 D1              5 040 00001 000000 20130826 142410 00000000 0001 000001
2: C1 D1 0000000000 010 00001 000000 20130826 141227 00000000 0001 000001
3: C1 D1 0000000000 047 00001 000000 20130826 143311 00000000 0001 000001
4:
5:
6:
7:
8:
9:
10:
11:
12:

```

After you find the pending transaction record you want to view, enter **TREC** in the ACTION field. Then enter the OCCURRENCE NO of the record and press **Enter**. If you are viewing the selected transactions, enter **SREC** in the ACTION field and enter the OCCURRENCE NO of the record, and then press **Enter**.

Enter the following information:

Field Name	Entry	Action
ACTION:	TREC	
OCCURRENCE NO:	1	Press Enter .

```

Action: stuf  Curr: 40  Next: ____
      L1: C1  L2: D1  Empno:      5      Eff Date:

                Basic Employee Information

Last Name: _____ Suffix: ____
First Name: _____ Middle Name: _____ SSN: _____
                Compressed Employee Name:
Addr 1: _____ Addr 2: APARTMENT D
City: _____ St: ____ ZIP: ____ - ____

Level 3: ____ Chk Seq: _____ Nrml Hr Rate: _____ CC305 Disablty
Level 4: ____ Ext Dist: _____ Nrml Hours: _____ Ind: _____
Level 5: ____ Pd Thru Bnk: _____ Nrml Salary: _____ Date: _____

Pay Freq: _ Worker Comp: ____ Last Change: _____ Vac Avail: _____
Pay Code: _ Union Code: ____ Emplmt Code: ____ Sick Avail: _____
Emp Stat: _ EEO Code: ____ Emplmt Date: _____ Vac Accr: _
Chk Code: _ W-2 Code: ____ Term Code: ____ Sick Accr: _
Sex Code: _ 1099-R Code: _ Term Date: _____ Est Code: ____
Time Crd: _ W-2 Pens: ____ Shift Code: ____ Adj Lbr: ____
                                                Stat EE: _
EMAIL: _____ Non-Res Alien: _
                                                ESS Display: _

```

Only changed data is displayed on the screen. To see the data for the other fields, use the **STUF** command.

Enter the following information:

Field Name	Entry	Action
ACTION:	STUF	Press Enter .

All fields that were changed are highlighted.

```
Action: ____ Curr: 40 Next: 125
      L1: C1 L2: D1 Empno:      5      Eff Date: _____

      Basic Employee Information

Last Name: JAMESON      Suffix:
First Name: ARTHUR      Middle Name: P.      SSN: 0567891234
      Compressed Employee Name: JAMESON, ARTHUR P.
Addr 1: 3545 CHAMBLEE TUCKER ROAD      Addr 2: APARTMENT D
City: DORAVILLE      St: GA      ZIP: 30340 - 0000

Level 3: P001      Chk Seq: D011      Nrml Hr Rate: 7.5025      CC305 Disablty
Level 4: D011      Ext Dist: DDDDDDD05      Nrml Hours: 40.00      Ind:
Level 5: S021      Pd Thru Bnk:      Nrml Salry:      Date: _____

Pay Freq: 1      Worker Comp: WC01      Last Change: 20131231      Vac Avail: -40.00
Pay Code: 1      Union Code:      Emplmt Code: NH      Sick Avail: 42.00
Emp Stat:      EEO Code:      Emplmt Date: 19650320      Vac Accr:
Chk Code:      W-2 Code:      Term Code:      Sick Accr:
Sex Code:      1099-R Code: Y      Term Date:      Est Code:
Time Crd: ZV      W-2 Pens:      Shift Code: 0      Adj Lbr:
      Stat EE:
Email:      Non-Res Alien:
      ESS Display:
```

Press **Enter**.

This returns you to the Transaction Inquiry/Update main screen (Screen 002).

```

PAYROLL/PERSONNEL TRANSACTION INQUIRY/UPDATE
ACTION: CM          ENTER ACTION CODE AND KEYS          OCCURRENCE NO:
ACTION CODES: TFILE - TRANSACTION FILE BROWSE
              TKEY - TRANSACTION FILE KEY
              TREC - TRANSACTION FILE SPECIFIC RECORD
              SKEY - SELECTED FILE KEY LIST
              SREC - SELECTED FILE SPECIFIC RECORD
              MORE - CONTINUE KEY LIST
KEYS: TRANS FILE - L1:  L2:  EMPNO:  SCRN:  RECID:
      SELECTED FILE - SEQNO:

OCCNO L1 L2  EMPNO  SCRN RECID  SEQNO  DATE    TIME  EFFDTE  TERM  OPER
1:
2:
3:
4:
5:
6:
7:
8:
9:
10:
11:
12:

```

Enter the following information:

Field Name	Entry	Action
ACTION:	CM	Press Enter .

Entering **CM** (central menu) in the ACTION field takes you back to the Payroll/Personnel Main menu.

Realtime Update

In this section, you will add a new employee and update the HRMS Tables File using Realtime Updates.

Action: ____

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: **100** Level 1: ____ Level 2: ____ Employee Number: _____ MRC: 0

2: Transaction Inquiry and Update

4: Organization Menu

5: Employee Payroll Menu (U.S. Organizations)

6: Employee Payroll Menu (Canadian Organizations)

7: Employee Personnel Menu

100: Realtime Update Menu

700: Supplemental Address/Dependent/Health Plan Data Menu

900: Installation Audit

Enter the following information:

Field Name	Entry	Action
Screen:	100	Press Enter .

It is not necessary to enter a level 1-level 2 or employee number. This takes you to the Realtime Update Menu.

Realtime - Employee Master File

```

ACTION: ____
                                Realtime Menu Screen

                                Enter Desired Screen Code and Record Key
                                Code: 200 ____ L1:      L2:      Employee/Operator:

                                200   Employee Master Update
                                300   HRMS Tables File Update
                                450   Tax Constants and Local Authority Rates
                                500   Online Check Calculation and Payment History
                                600   Position Control Update

                                900   Extended Product Security
  
```

Enter the following information:

Field Name	Entry	Action
Code:	200	Press Enter .

This takes you to the Realtime Payroll Menu screen.

```

Action: _____ Realtime Payroll/Personnel Menu Screen

Enter desired screen code and master record key
Screen: 218 L1: AF L2: 03 EmpNo: Demo

Payroll
214 U.S. Employee Tax Maintenance
216 Employee DOE Maintenance
218 New Employee Information
220 Employee Salary Maintenance
221 Employee Basic Info/Payroll Maint
222 Employee Location Maintenance
223 Employee Employment/Termination
224 Employee ACH Bank/CU Services
226 Canadian Employee Tax Maintenance
233 Employee Salary Splits Maintenance
234 Supplemental Address/Dependent/
    Health Plan Data Menu
248 Employee State W-4 Information
250 Regulatory Form/Slip Selection

Position Control Module
228 Employee Position Assignment
229 Employee Level Position Maint

Personnel
201 Emergency Notification Maint
202 Employee Family Data
203 Employee Education
204 Employee Career Planning
205 Employee Skills
206 Employee Basic Benefits
207 Employee Physical Data
208 Employee Service Dates
209 Personal Information Maint
210 Performance Reviews
211 Salary Reviews
212 Employee Organization Property
213 Employee EEO/AAP Maintenance
215 Military Data
230 Employee User/EEA Dates
231 Canadian Employee EEA Data
232 Employee Job Data

```

Enter the following information:

Field Name	Entry	Action
Screen:	218	
L1:	AF	
L2:	03	
EMPNO:	DEMO	Press Enter .

Remember the Employee Number field will shift to the right and blank fill. You must enter the level 1 and level 2 because the organization is checked for Canadian or U.S. so that the correct screen can be presented.

Action: _____ Current: 218 Next: 219
L1: AF L2: 03 Employee No: _____ DEMO ALL HIGHLIGHTED FIELDS MUST BE ENTERED

New Employee Information

Last Name: **PANTEL** _____ Suffix: _____
First Name: **BLAINE** _____ Middle Name: _____

Address: **555 PEACHTREE ROAD** _____
ATLANTA _____ **GA** _____

ZIP Code: _____ - _____

Soc Sec Num: **200559999** _____ Email: _____

Work State: **11** _____ Res State: _____ Work/Res Ind: _____
Pay Freq: **1** _____ Pay Code: **1** _____ Shift Code: _____
Normal Hours: _____ Hourly Rate: _____ Salary: _____
Birthdate: ____/____/____ Sex Code: _____ EEO Code: _____

Emplmnt Code: _____ Emplmnt Date: ____/____/____ Empl Status: _____
Level-3: _____ Level-4: _____ Level-5: _____
Ext Distrib: _____ Form CC305 Disability - Ind: _____ Date: ____/____/____

Note: Leave the second address line blank and put **ATLANTA** in the third address line. Enter **GA** in the two spaces at the end of the third address line.

Enter the following information:

Field Name	Entry	Action/Comments
LAST NAME:	PANTEL	
FIRST NAME:	BLAINE	
ADDRESS (1st line):	555 PEACHTREE ROAD	
ADDRESS (3rd line):	ATLANTA	
ADDRESS (3rd line):	GA	Entered in the two spaces at the end of the third address line
SOC SEC NUM:	200559999	Do not enter any dashes or spaces.
WORK STATE:	11	
PAY FREQ:	1	
PAY CODE:	1	Press Enter .

Superbase only

After you press **Enter**, the following message appears in the upper right portion of the screen: **REQUIRED FIELD MISSING – BIRTHDATE**. The cursor is positioned at the first position of the BIRTHDATE field, but notice that SEX CODE and EEO CODE are also highlighted. This means that these fields are also required.

Action: _____ Current: 218 Next: 219
L1: AF L2: 03 Employee No: DEMO REQUIRED FIELD MISSING - BIRTHDATE

New Employee Information

Last Name: PANTEL _____ Suffix: _____
First Name: BLAINE _____ Middle Name: _____

Address: 555 PEACHTREE ROAD _____
ATLANTA _____ GA
ZIP Code: _____ - _____

Soc Sec Num: 200559999_ Email: _____

Work State: 11 Res State: _____ Work/Res Ind: _____
Pay Freq: 1 Pay Code: 1 Shift Code: _____
Normal Hours: _____ Hourly Rate: _____ Salary: _____
Birthdate: 1976/01/01 Sex Code: M EEO Code: W_____

Emplmnt Code: _____ Emplmnt Date: ____/____/____ Empl Status: _____
Level-3: _____ Level-4: _____ Level-5: _____
Ext Distrib: _____ Form CC305 Disability - Ind: _ Date: ____/____/____

Enter the following information:

Field Name	Entry	Action/Comments
BIRTHDATE:	1976/01/01	You must enter the slash (/) between the year, month, and day.
SEX CODE:	M	
EEO CODE:	W	Press Enter .

This is a new employee, so you must complete the data on screens 218 and 219 before the employee will be added to the Employee Master File.

Superbase and Payroll Standalone

Action: _____ Current: 219 Next: 220
L1: AF L2: 03 Employee No: DEMO

New Employee Payroll Taxing Options

Name: PANTEL, BLAINE

Soc Sec No: 200559999

	Tax Method	Marital Status	Exemptions	Amount/ Percent	Amount of 1 Exemptn	Code
Federal	1	S	000	_____	_____	_____
State	1	S	000	_____	_____	_____
County	—	—	_____	_____	_____	_____
City	—	—	_____	_____	_____	_____

FICA Indicator: A
FUI Indicator: Y
Employer SUI Indicator: A
Employee SUI Indicator: Y
Employee SDI Indicator: A
Spec Tax Handling Ind: —

** W-4 Year **
Federal: **2019**

Enter the following information:

Field Name	Entry	Action
FEDERAL TAX METHOD	1	
FEDERAL MARTIAL STATUS	S	
FEDERAL EXEMPTIONS	000	
STATE TAX METHOD	1	
STATE MARITAL STATUS	S	
STATE EXEMPTIONS	000	
W-4 YEAR FEDERAL	2019	Press Enter .

The message in the upper right portion of the screen indicates that the employee was added to the Employee Master File. The message on the second line applies to Superbase systems.

ACTION: _____ CURRENT: 220 NEXT: **214 EMP MAST UPDTED ORG AF03 EMPL** DEMO

L1: AF L2: 03 EMPLOYEE NO: DEMO **EMPLOYEE NOT ASSIGNED TO A POSITION**

EMPLOYEE SALARY MAINTENANCE

NAME: PANTEL, BLAINE

DATE LAST MAINT: 2013/08/26

PAY FREQUENCY: 1

NORMAL HOURS:

PAY CODE: 1

HOURLY RATE:

EMPLOYEE STATUS: _____

SALARY:

SHIFT CODE: 0

ANNUAL EQUIVALENT:

GUARANTEE CODE: 0

DATE LAST SALARY/RATE: 0000/00/00

GUARANTEE HOURS:

LAST SALARY:

GUAR RATE/SALARY: 0

OR RATE:

Enter the following information:

Field Name	Entry	Action
NEXT:	214	Press Enter .

This takes you to the U.S. Employee Tax Maintenance screen.

Action: _____ Current: 214 Next: **100**
 L1: AF L2: 03 Employee No: DEMO

United States Employee Tax Maintenance

Name: PANTEL, BLAINE Status: *Lock-in Letter*
 Marital Status: _
 Soc Sec No: 200559999 Exemptions: _

		Tax	Marital	*Taxes*		Amount/	Amount of 1	*Indicators*	
	Method	Status	Exemptions	Percent	Exemption	Code	FICA:	A	
Federal	2	S	0	0			FUI:	Y	
State	1	S	0	0			Empr SUI:	A	
County	0	—	0	.0000	.00	0	Empe SUI:	Y	
City	0	—	0	.0000	.00	0	Empe SDI:	A	

Work State: 11
 Res State: 11
 W-2 Establish Code: _____

Reciprocity: _
 Special Tax: 0

** W-4 Year **
 Federal 2019

Other State Reciprocity Indicators

St Ind	St Ind	St Ind	St Ind	St Ind	St Ind	St Ind	St Ind
00 0	00 0	00 0	00 0	00 0	00 0	00 0	00 0

Enter the following information:

Field Name	Entry	Action
NEXT:	100	
FEDERAL TAX METHOD	2	Press Enter .

This entry will change the tax method for federal from **1** to **2** on the Employee Master File. Then, it takes you back to the Realtime Menu screen.

Realtime - HRMS Tables File

CTION: _____

Realtime Menu Screen

Enter Desired Screen Code and Record Key

Code: **300** L1: AF L2: 03 Employee/Operator: DEMO

200 Employee Master Update

300 HRMS Tables File Update

450 Tax Constants and Local Authority Rates

500 Online Check Calculation and Payment History

600 Position Control Update

900 Extended Product Security

Enter the following information:

Field Name	Entry	Action
Code:	300	Press Enter .

ACTION: _____ Realtime Tables File Maintenance
Application Menu Screen
Select an Application By Entering 'S'

S (PAY) Payroll
_ (PMR) Personnel
_ (CAN) Canadian Payroll
_ (RUN) Run Control

300

Field Name	Entry	Action
(PAY) Payroll	S	Press Enter .

Type **S** next to the entry for Payroll.

ACTION: _____

Realtime Tables File Maintenance
Record Type Menu Screen
Select a Record Type By Entering 'S'

—

(PAD)

Banking Services/ACH/Bond Data

—

(PCW)

Check Writer Forms Identification

S—

(PDE)

Organization DOE Information

—

(PRC)

Report Control Options

—

(PRT)

Rate Table

—

(PGD)

U.S. Federal/State/Local Tax Data

—

(PW2)

U.S. Payroll W-2 Data

—

(PTR)

U.S. Regulatory Reporting

—

(PDP)

Supp Addr/Dependnt/Hlth Plan Data

300

Field Name	Entry	Action
(PDE) Organization DOE Information	S	Press Enter .

Type **S** next to the entry for Organization DOE Information.

ACTION: _____
L1: AF L2: 03

ORGANIZATION DOE INFORMATION MENU
(PDE)

S DEDUCTIONS/OTHER EARNINGS	STARTING DOE CODE: ____
_ STEP DOE	STARTING DOE CODE: ____
_ SPECIAL HOURS	STARTING SPECIAL HOURS CODE: ____
_ TABLED AMOUNTS	STARTING TABLE NUMBER: ____

329

Enter the following information:

Field Name	Entry	Action
Deductions/Other Earnings	S	Press Enter .

Type **S** next to the entry for Deductions/Other Earnings. By leaving the STARTING DOE CODE field blank, you see the first six DOEs for this level 1-level 2.

ACTION:

L1: AF L2: 03

NEXT DOE CODE: 06

ORGANIZATION DOE INFORMATION

DOE	TYP	SUB		VAC	***** TAXING OPTIONS *****								** ACH **		
CD	PRTY	CD	TYP	DESCRIPTION	IND	FED	ST	CNTY	CTY	FICA	FUI	SU/DI	IND	TYP	CD
AA	0001	X		HOLIDAY PAY	1	1	1	1	1	1	1	1			
A1	0001	1		DEFCMP SUPPLML	0	0	0	0	0	0	0	0			
02	0002	T		SICK PAY	1	1	1	1	1	1	1	1			
03	0003	X		COMMISS PAY	1	1	1	1	1	1	1	1			
04	0004	X		BONUS PAY	1	1	1	1	1	1	1	1			
05	0005	X		VAC. PAY	1	1	1	1	1	1	1	1			

INSERT NEW DOE CODES:

a2 0000 j _ install doe _ _ _ _ _ _ _ _ _ _

330

Enter these items on the line following INSERT NEW DOE CODES:

Field Name	Entry	Action
DOE CODE	a2	
PRIORITY	0000	
TYPE CODE	j	
DESCRIPTION	install doe	Press Enter .

The message in the upper portion of the screen indicates that your changes were accepted. Type over the **12** in the NEXT DOE CODE field, replacing it with **A1**. If an A1 DOE is found on your HRMS Tables File, it is listed; otherwise, the system displays the next DOE (in alphanumeric order) within this level 1-level 2.

ACTION: _____		ALL CHANGED OR NEW RECORDS WERE SUCCESSFULLY UPDATED													
L1: AF L2: 03															
NEXT DOE CODE: A1															
ORGANIZATION DOE INFORMATION															
DOE	TYP	SUB		VAC	***** TAXING OPTIONS *****						** ACH **				
CD	PRTY	CD	TYP	DESCRIPTION	IND	FED	ST	CNTY	CTY	FICA	FUI	SU/DI	IND	TYP	CD
06	0006	J		MAJOR MEDICAL	1	1	1	1	1	1	1	1			
07	0007	H		DISAB. INS	1	1	1	1	1	1	1	1			
08	0008	J		LIFE IN	1	1	1	1	1	1	1	1			
09	0009	J		DENTAL INS.	1	1	1	1	1	1	1	1			
10	0010	J		CREDIT UNION	1	1	1	1	1	1	1	1			
11	0011	J		PENSION	1	1	1	1	1	1	1	1			
INSERT NEW DOE CODES:															
330															

Enter the following information:

Field Name	Entry	Action
NEXT DOE CODE:	A1	Press Enter .

ACTION: **END**
L1: AF L2: 03

NEXT DOE CODE: A1

ORGANIZATION DOE INFORMATION

DOE	TYP	SUB		VAC	***** TAXING OPTIONS *****								** ACH **		
CD	PRTY	CD	TYP	DESCRIPTION	IND	FED	ST	CNTY	CTY	FICA	FUI	SU/DI	IND	TYP	CD
A1	0001	1		DEFCMP SUPPLML		0	0	0	0	0	0	0			
A2	0000	J		INSTALL DOE		1	1	1	1	1	1	1			
02	0002	T		SICK PAY		1	1	1	1	1	1	1			
03	0003	X		COMMISS PAY		1	1	1	1	1	1	1			
04	0004	X		BONUS PAY		1	1	1	1	1	1	1			
05	0005	X		VAC.. PAY		1	1	1	1	1	1	1			

INSERT NEW DOE CODES:
____ _

330

Enter the following information:

Field Name	Entry	Action
ACTION:	END	Press Enter .

This takes you back to the Organization DOE Information Menu.

ACTION: **END**
L1: AF L2: 03

ORGANIZATION DOE INFORMATION MENU
(PDE)

☐ DEDUCTIONS/OTHER EARNINGS	STARTING DOE CODE:
☐ STEP DOE	STARTING DOE CODE:
☐ SPECIAL HOURS	STARTING SPECIAL HOURS CODE:
☐ TABLED AMOUNTS	STARTING TABLE NUMBER:

329

Enter the following information:

Field Name	Entry	Action
ACTION:	END	Press Enter .

This takes you back to the Realtime Tables File Maintenance Menu.

ACTION: _____

Realtime Tables File Maintenance
Record Type Menu Screen
Select a Record Type By Entering 'S'

— (PAD) Banking Services/ACH/Bond Data

— (PCW) Check Writer Forms Identification

— (PDE) Organization DOE Information

— (PRC) Report Control Options

— (PRT) Rate Table

— (PGD) U.S. Federal/State/Local Tax Data

S (PW2) U.S. Payroll W-2 Data

— (PTR) U.S. Regulatory Reporting

— (PDP) Supp Addr/Dependnt/Hlth Plan Data

300

Enter the following information:

Field Name	Entry	Action
(PW2) U.S. Payroll W-2 Data	S	Press Enter .

Type **S** next to the entry for U.S. Payroll W-2 Data.

```

Action: _____
L1: AF L2: 03
                                U.S. Federal, State, Local Tax Data
                                U.S. Payroll W-2 Data

    Electronic W-2 Reporting
S (PW2) Federal EFW2 File Submitter Information

    Federal Information
    _ (PW2) Federal W-2 Employer Information      Starting EIN: _____
    _ (PW2) W-2 Self-Mailer Information
    _ (PW2) W-2 DOE Definition Data
    _ (PGD) Federal Taxing Information

    U.S. State and Local Information
    _ (PW2) State W-2 Reporting Information
    _ (PW2) State Annual Reporting Information    Starting State: ____
    _ (PGD) State Name and Tax Reporting Info    Starting State: ____
    _ (PGD) County Name and Tax Reporting Info    Starting County: ____
    _ (PGD) City Name and Tax Reporting Info      Starting City: ____

    U.S. Hours Indicators
    _ (PGD) EEO-1/State Quarterly Hours Indicators Starting Code: ____

```

400

Enter the following information:

Field Name	Entry	Action
(PW2) Federal EFW2 File Submitter Information	S	Press Enter .

Type **S** next to the entry for Federal EFW-2 File Submitter Information.

ACTION: _____

ADDR DFLTS TO US - ENTER 1 IN FOREIGN ADDRESS TO CHANGE
Federal EFW2 File Submitter/Company Information

Submitter Information

Name: ACGE TAPE SUBMITTER INC

EIN: 98123 PIN: P9925

Preferred Notification: 1

Contact Name: FARMER JOHN SMITH

Email: JOHN.SMITH@ACGE.COM

Foreign Address Indicator:

Location Address: 43 PERIMETER CENTER N

Delivery Address: PO BOX 433

City: ATLANTA

Preparer Code: P Software Code: 99

Resub WFID: _____

Phone: 4041111000 Ext: 12345

Fax: 4041011000

State: GA ZIP: 43326 - 1234

Company Information

Company Name: **anyco personnel** _____

Foreign Address Indicator: -

Location Address: 3445 PEACHTREE CIRCLE

Delivery Address: 12TH FLOOR

City: DUNWOODY

State: **ga** ZIP: **30003 - 1234**

403

Enter the following information:

Field Name	Entry	Action
Company Name	Anyco Personnel	
State	GA	
ZIP	30003	
ZIP Extension	1234	Press Enter .

ACTION: **end** ALL CHANGED OR NEW RECORDS WERE SUCCESSFULLY UPDATED

Federal EFW2 File Submitter/Company Information

Submitter Information

Name: ACGE TAPE SUBMITTER INC
 EIN: 98123 PIN: P9925 Preparer Code: P Software Code: 99
 Preferred Notification: 1 Resub WFID: _____
 Contact Name: FARMER JOHN SMITH Phone: 4041111000 Ext: 12345
 Email: JOHN.SMITH@ACGE.COM Fax: 4041011000

Foreign Address Indicator:
 Location Address: 43 PERIMETER CENTER N
 Delivery Address: PO BOX 433
 City: ATLANTA State: GA ZIP: 43326 - 1234

Company Information

Company Name: ANYCO PERSONNEL
 Foreign Address Indicator:
 Location Address: 3445 PEACHTREE CIRCLE
 Delivery Address: 12TH FLOOR
 City: DUNWOODY State: GA ZIP: 30003 - 1234

403

Enter the following information:

Field Name	Entry	Action
ACTION	end	Press Enter .

This takes you back to the U.S. Federal, State, Local Tax Data and U.S. Payroll W-2 Data Menu.

Action: **end**
L1: AF L2: 03

U.S. Federal, State, Local Tax Data
U.S. Payroll W-2 Data

Electronic W-2 Reporting
_ (PW2) Federal EFW2 File Submitter Information

Federal Information
_ (PW2) Federal W-2 Employer Information
_ (PW2) W-2 Self-Mailer Information
_ (PW2) W-2 DOE Definition Data
_ (PGD) Federal Taxing Information

U.S. State and Local Information
_ (PW2) State W-2 Reporting Information
_ (PW2) State Annual Reporting Information
_ (PGD) State Name and Tax Reporting Info
_ (PGD) County Name and Tax Reporting Info
_ (PGD) City Name and Tax Reporting Info

U.S. Hours Indicators
_ (PGD) EEO-1/State Quarterly Hours Indicators Starting Code:

Starting EIN:
Starting State:
Starting State:
Starting County:
Starting City:

400

Enter the following information:

Field Name	Entry	Action
ACTION	end	Press Enter .

This takes you back to the Realtime Tables File Maintenance Menu.

3-48

September 2025

MVS Installation Guide

ACTION: _____ Realtime Tables File Maintenance
 Record Type Menu Screen
 Select a Record Type By Entering 'S'

- (PAD) Banking Services/ACH/Bond Data
- (PCW) Check Writer Forms Identification
- (PDE) Organization DOE Information
- (PRC) Report Control Options
- (PRT) Rate Table
- (PGD) U.S. Federal/State/Local Tax Data
- (PW2) U.S. Payroll W-2 Data
- S** (PTR) U.S. Regulatory Reporting
- (PDP) Supp Addr/Dependnt/Hlth Plan Data

300

Enter the following information:

Field Name	Entry	Action
(PTR) U.S. Regulatory Reporting	S	Press Enter .

Type **S** next to the entry for U.S. Regulatory Reporting.

ACTION: _____

U.S. Regulatory Reporting Menu
(PTR)

Report ID: **002** Key1: _____ Key2: _____ Group: _____
Record Type: **arec** Version Year: **2018**

_ (PTF) U.S. Regulatory File/Form Indicators
S (PRM) Report Record Map Entry
_ (PRP) U.S. Regulatory Parameter Control

334

Enter the following information:

Field Name	Entry	Action
Report ID:	002	
Record Type:	AREC	
Version Year:	2018	
(PRM) Report Record Map Entry	S	Press Enter .

ACTION: **end**_

REPORT RECORD MAP SELECTION

NEXT:	REPORT	KEY1	KEY2	REC TYPE	VER YEAR
	003	00	_____	335*	2016
CMD	REPORT	KEY1	KEY2	REC TYPE	VER YEAR
—	002	00	_____	****	2018
—	002	00	_____	AREC	2018
—	002	00	_____	EREC	2018
—	002	00	_____	FREC	2018
—	002	00	_____	OREC	2018
—	002	00	_____	TREC	2018
—	002	00	_____	UREC	2018
—	002	00	_____	WREC	2018
—	003	00	_____	****	2016
—	003	00	_____	335*	2016
INSERT:	REPORT	KEY1	KEY2	REC TYPE	VER YEAR
	_____	—	_____	_____	_____

357

Enter the following information:

Field Name	Entry	Action
ACTION:	end	Press Enter .

ACTION: _____

U.S. Regulatory Reporting Menu
(PTR)

Report ID: 002 Key1: 00 Key2: Group:
Record Type: AREC Version Year: 2018

_ (PTF) U.S. Regulatory File/Form Indicators
_ (PRM) Report Record Map Entry
S (PRP) U.S. Regulatory Parameter Control

334

Enter the following information:

Field Name	Entry	Action
(PRP) U.S. Regulatory Parameter Control	S	Press Enter .

ACTION: ____

U.S. REGULATORY PARAMETER CONTROL MENU
(PRP)

REPORT ID: 002 AUTHORITY: 00 LOCAL: GROUP:
 RECORD TYPE: AREC VERSION YEAR: 2018 SORT SEQ:

_ REPORT GENERATE CONTROL
 _ REPORT PRINT CONTROL
 _ REPORT FORMS ASSIGNMENT
 _ SORT SEQUENCE SELECTION & CONTROL
 _ DEFINE STATE GROUP
 _ DEFINE LOCAL GROUP
S DEFINE L1 L2 GROUP
 _ LOCAL AUTHORITY SELECTION & ASSIGNMENT

335

Enter the following information:

Field Name	Entry	Action
DEFINE L1 L2 GROUP	S	Press Enter .

ACTION: ____

END OF GROUP ENTRIES

L1L2 REPORT GROUP SELECTION

NEXT GROUP: ____

GROUP

GROUP

INSERT L1L2 GROUP:
DMO

356

Enter the following information:

Field Name	Entry	Action
INSERT L1 L2 GROUP	DMO	Press Enter

ACTION: _____

END OF GROUP ENTRIES

GROUP: DMO

DEFINE LEVEL 1-LEVEL 2 GROUP

NEXT L1L2: _____

CMD	L1L2	CMD	L1L2
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____

INSERT: L1L2

AF03

L1L2

C1D1

350

Enter the following information:

Field Name	Entry	Action
INSERT L1L2 (1st)	AF03	
INSERT L1L2 (2nd)	CID1	Press Enter .

If you using Payroll Standalone, enter **CM** in the ACTION field instead of completing following the instructions. Then skip to the Employee Payment History Inquiry section.

Instead of always going back to the Main Menu, if you know the application code (the code in the parentheses on the Realtime Tables File Menu), you can enter the application code in the ACTION field as a short cut to the screen.

ACTION: MCT		GROUP UPDATES COMPLETE	
		END OF GROUP ENTRIES	
GROUP: DMO			
DEFINE LEVEL 1-LEVEL 2 GROUP			
NEXT L1L2: _____			
CMD	L1L2	CMD	L1L2
—	AF03	—	_____
—	C1D1	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
—	_____	—	_____
INSERT:	L1L2		L1L2
	_____		_____

350

Enter the following information:

Field Name	Entry	Action
ACTION:	MCT	Press Enter .

ACTION: _____

GROUP UPDATES COMPLETE

STARTING CODE VALUE: _____

PERSONNEL CODE TRANSLATION MENU
(MCT)

S DEGREE

— FIELD OF STUDY

— GENERAL HEALTH

— GEOGRAPHIC PREFERENCE

— GROUP HEALTH INSURANCE

— LEAVE OF ABSENCE

— PROFICIENCY LEVEL

— PROMOTIONAL READINESS

— REHIRE CONSIDERATION

— RELIGIOUS PREFERENCE

— RESIDENCE TYPE

— SALARY CHANGE REASON

— SKILLS

— TERMINATION

— TRANSFER REASON

301

Enter the following information:

Field Name	Entry	Action
DEGREE	S	Press Enter .

ACTION: **CM**_____

NEXT CODE VALUE: _____

DEGREE CODE TRANSLATIONS

CODE	TRANSLATION
AA	ASSOCIATE ARTS
BA	BACHELOR ARTS
BBA	BACHELOR BUS ADMIN
BS	BACHELOR SCIENCE
DPL	DATA PROCESSING LIC
EE	BACHELOR ENGINEERING
HS	HIGH SCHOOL DIPLOMA
JD	DOCTOR JURISPRUDENCE
MBA	MASTER BUSINESS ADM
PGR	PROGRAMMER
PHD	DOCTOR PHILOSOPHY
RN	REGISTERED NURSE
00	NONE
132	BACHELOR EDUCATION

INSERT NEW CODE TRANSLATION:

302

Enter the following information:

Field Name	Entry	Action
Action	CM	Press Enter .

Employee Payment History Inquiry

In this section you will view employee payment history.

Action: _____

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: **530** Level 1: **C1** Level 2: **D1** Employee Number: **5** MRC:

2: Transaction Inquiry and Update

4: Organization Menu

5: Employee Payroll Menu (U.S. Organizations)

6: Employee Payroll Menu (Canadian Organizations)

7: Employee Personnel Menu

100: Realtime Update Menu

700: Supplemental Address/Dependent/Health Plan Data Menu

900: Installation Audit

Enter the following information:

Field Name	Entry	Action
SCREEN	530	
LEVEL 1	C1	
LEVEL 2	D1	
EMPLOYEE NUMBER	5	Press Enter .

```

ACTION: _____ CURRENT: 530 NEXT: 530
L1: C1 L2: D1 EMPNO:          5 NO MORE RECORDS AVAILABLE
NEXT DATE:          NO:          NAME: JAMESON, ARTHUR P.
                                ESS: A
SELECT                EMPLOYEE PAYMENT SELECTION
DTL OTH SUP           DATE      CHECK/DEP. NO.  PAYMENT AMOUNT  IND  FMT
S                    20181231      13196        703.47    0    C
-                    20181231      13197        250.53    0    C

```

Enter the following information:

Field Name	Entry	Action
DTL (for Date 20181231 and CHECK NO. 13196)	S	Press Enter .

This screen lists the payment history for an employee. Checks are displayed in descending date order. From this screen you can select to view check detail information, other information (such as vacation and sick hours and ACH bank information), and supplemental check record information (if used).

```

ACTION: _____ CURRENT: 531 NEXT: 530
L1: C1 L2: D1 EMPNO: 5
DATE: 20181231 CHK/DEP#: 13196 NAME: JAMESON, ARTHUR P.

NET PAY 703.47 NET PAY YTD 703.47 PAY FORMAT: C
S EARNINGS/HOURS RATE HOURS CURRENT YTD
REGULAR 4.5000 10.00 45.00
REGULAR 4.7500 5.00 23.75
REGULAR 7.5025 25.00 187.56 256.31
CONS OVERTIME 20.00 196.30
TIPS 20% 100.00 754.28
D/OE 20% 2.00 384.50
CONS EARNINGS 80.00 530.80 2,882.37
TOTAL GROSS 1,085.41 1,085.41

TAXES DEDUCTIONS
FEDERAL 137.16 137.16 TIPS 20% 100.00 754.28
FICA/MED 78.98 78.98 D/OE 20% 2.00 384.50
COUNTY 105 2.00 2.00 ANN 3.00 3.00
CALIFORNIA .00 15.00 UNI 3.00 3.00
SDI TAX .00 12.00 TIPS W/R .00 295.40
SUI TAX .00 36.88 UNITED FUN 4.00 4.00
COLORADO .00 15.00 PEN 5.13 5.13
CONS TAX .00 368.28 CONS DEDUC 46.67 46.67
TOT TAX 218.14 665.30 TOT DED 163.80 163.80

```

Enter the following information:

Field Name	Entry	Action
EARNINGS/HOURS selection field	S	Press Enter .

This screen lists the payment history summary for an employee payment. Earnings, deductions, and taxes are displayed for the check. If the employee had more earnings, deductions, or taxes than can be displayed on Screen 531, the last line of earnings, deductions, or taxes is a consolidated line. To see the full detail, select the appropriate EARNINGS/HOURS, TAXES, or DEDUCTIONS selection field.

ACTION: **CM** CURRENT: 532 NEXT: 532
 L1: C1 L2: D1 EMPNO: 5 MORE EARNINGS AVAILABLE...PRESS ENTER
 DATE: 20181231 CHK/DEP#: 13196 NAME: JAMESON, ARTHUR P.

EARNINGS	RATE	HOURS	CURRENT	YTD
REGULAR	4.5000	10.00	45.00	
REGULAR	4.7500	5.00	23.75	
REGULAR	7.5025	25.00	187.56	256.31
OVERTIME	3.7513	5.00	18.76	
OVERTIME	4.5000	5.00	22.50	
OVERTIME	9.5000	2.50	23.75	
OVERTIME	11.2538	2.50	28.13	
OVERTIME	18.7563	2.50	46.89	
OVERTIME	22.5075	2.50	56.27	196.30
TIPS 20%			100.00	754.28
D/OE 20%			2.00	384.50
EARNING20%			.20	216.25
VAC 20%	2.0000	10.00	20.00	
VAC 20%	10.0000	40.00	400.00	550.57
VAC W/REG	2.0000	30.00	60.00	199.52
HOLIDAY			.60	.60
BONUS			50.00	468.05
TIPS W/REG			.00	295.40
SICK W/REG			.00	672.81

Enter the following information:

Field Name	Entry	Action
ACTION	CM	Press Enter .

If the employee has more earnings than can be displayed on one screen, a message states that more earnings are available. You can press **Enter** to scroll through the available earnings to the last earnings line. At the end of the earnings lines, Screen 531 is displayed again.

Employee W-2 Forms Inquiry

In this section you will view employee W-2 information.

Action: _____

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: **250** Level 1: **C1** Level 2: **D1** Employee Number: **10** MRC:

2: Transaction Inquiry and Update

4: Organization Menu

5: Employee Payroll Menu (U.S. Organizations)

6: Employee Payroll Menu (Canadian Organizations)

7: Employee Personnel Menu

100: Realtime Update Menu

700: Supplemental Address/Dependent/Health Plan Data Menu

900: Installation Audit

Enter the following information:

Field Name	Entry	Action
Screen	250	
Level 1	C1	
Level 2	D1	
Employee Number	10	Press Enter .

Action: _____ Current: 250 Next: 250
 L1: C1 L2: D1 EmpNo: 10

Employee Regulatory Form/Slip Inquiry Selection

Year: **2018** Report ID: **001**

Report IDs - Description	Screen
001 - Federal W-2 Form Inquiry	251
003 - Federal 1099-R Form Inquiry	252
007 - Puerto Rico W2-PR Form Inquiry	253
200 - Canadian T4 Form Inquiry	254
202 - Canadian T4A Form Inquiry	255
300 - Quebec Releve 1 Form Inquiry	256
301 - Quebec Releve 2 Form Inquiry	257

Enter the following information:

Field Name	Entry	Action
Year	2018	
Report ID	001	Press Enter .

Note: If a year value is not entered, the current tax year form will be displayed on the next screen. The current tax year is determined by the current system year minus 1. If screens 251-257 are navigated to from any screen other than 250, the current tax year form will be displayed.

```

Action: _____ Current: 251 Next: 251 MORE W-2 FORMS - PF7/PF8 TO SCROLL
L1: C1 L2: D1 Emp No: 10
Control Number: 6
Employer EIN 12-3456789 Employee SSN 012-34-5678
Federal Wages 3674.11 Federal Income Tax 611.81
Social Security Wages 3674.11 Social Security Tax 227.79
Medicare Wages 3674.11 Medicare Tax 53.27
Employer's Name, Address
ATLAS STEEL COMPANY
2691 FIRST STREET
BOX 2999
ATLANTA GA 30309
Social Security Tips Allocated Tips
Advance EIC Payment Dependent Care

Employee's Name, Address Statutory Retirement X Nonqualified Plans
LAMONT B ORMOND Third-Party Sick
2628 NORTHEAST EXPRESSWAY
APARTMENT L13 Box 12 Other
ATLANTA GA 30329

State Employer State ID State Wages State Tax
VA 4700004747 3674.11 156.51
Local Wages Local Tax Local Name
2018 Wage and Tax Statement

```

Press the **PF8** key.

If the employee has multiple W-2 forms (because the employee worked in multiple states or had more than 3 Other Earnings), you can press **PF8** and **PF7** to scroll through the available W-2 forms. When you reach the last form, the following message is displayed: **END OF W-2 FORMS**. Pressing **PF8** takes you back to the first W-2 form.

Action: **CM** Current: 251 Next: 251 MORE W-2 FORMS - PF7/PF8 TO SCROLL
 L1: C1 L2: D1 Emp No: 10
 Control Number: 7 Federal Wages Federal Income Tax
 Employer EIN Employee SSN
 12-3456789 012-34-5678 Social Security Wages Social Security Tax

 Employer's Name, Address Medicare Wages Medicare Tax
 ATLAS STEEL COMPANY
 2691 FIRST STREET Social Security Tips Allocated Tips
 BOX 2999
 ATLANTA GA 30309 Advance EIC Payment Dependent Care

 Employee's Name, Address Statutory Retirement X Nonqualified Plans
 LAMONT B ORMOND Third-Party Sick
 2628 NORTHEAST EXPRESSWAY
 APARTMENT L13 Box 12 Other
 ATLANTA GA 30329

 State Employer State ID State Wages State Tax CASDI 12.00
 CA 0500000505 450.00 15.00 36.88
 Local Wages Local Tax Local Name

 2018 Wage and Tax Statement

Enter the following information:

Field Name	Entry	Action
ACTION:	CM	Press Enter .

Extended Product Security

In this section you will set up extended product security.

Action: _____

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: **900** Level 1: **C1** Level 2: **D1** Employee Number: _____ MRC: _____

2: Transaction Inquiry and Update

4: Organization Menu

5: Employee Payroll Menu (U.S. Organizations)

6: Employee Payroll Menu (Canadian Organizations)

7: Employee Personnel Menu

100: Realtime Update Menu

700: Supplemental Address/Dependent/Health Plan Data Menu

900: Installation Audit

Enter the following information:

Field Name	Entry	Action
Screen	900	
Level 1	C1	
Level 2	D1	Press Enter .

ACTION: _____

HCM E Screen Security
Main Menu

Enter Desired Screen Code and Record Key
Code: **901** Operator: **2** L1: C1 L2: D1

HCM E Security Screens
901 Global/Menu Security
902 Tables File Application Security
903 Screen Range Security
904 Individual Screen Security

Enter the following information:

Field Name	Entry	Action
Code	901	
Operator	2	Press Enter .

Action: _____HCM E Screen Security

Operator: 000002Secure Global/By Menu

L1: C1 L2: D1ADD NEW SECURITY FOR OPERATOR

Option

iGlobal SecurityDelete Global Security: _

Online Screens

(2) Transaction Inquiry and Update_ (4) Organization Menu

(5) Employee Payroll Menu (U.S.)_ (6) Employee Payroll Menu (Canada)

(7) Employee Personnel Menu

(700) Supplemental Address/Dependent/Health Plan Data Menu

Realtime Screens

(200) Employee Master Update

(234) Supplemental Address/Dependent/Health Plan Data Menu

(250) Employee Regulatory Form/Slip Inquiry Menu

(300) HRMS Tables File Update

(400) U.S. Federal, State, Local Tax Data/W-2 Data

(450) U.S. Tax Constants and Local Authority Rates

(500) Online Check Calculation_ (600) Position Control Update

(900) Operator Security Update

Delete Menu Security: _

Option => I=Inquiry Only, N=Not Allowed, Blank=No Restrictions901

Enter the following information:

Field Name	Entry	Action
Option - Global Security	i	Press Enter .

The global option makes all E Series HCM screens inquiry only for operator 2, Level 1 C1, Level 2 D1. Operator 2 has full access to all screens for any other Level 1, Level 2.

```

Action: end                                HCM E Screen Security
Operator: 000002                            Secure Global/By Menu
L1: C1 L2: D1                            ADD NEW SECURITY FOR OPERATOR
Option
  I   Global Security                      Delete Global Security: _

                                     Online Screens
  _   (2) Transaction Inquiry and Update   _   (4) Organization Menu
  _   (5) Employee Payroll Menu (U.S.)     _   (6) Employee Payroll Menu (Canada)
  _   (7) Employee Personnel Menu
  _   (700) Supplemental Address/Dependent/Health Plan Data Menu

                                     Realtime Screens
  _   (200) Employee Master Update
  _   (234) Supplemental Address/Dependent/Health Plan Data Menu
  _   (250) Employee Regulatory Form/Slip Inquiry Menu
  _   (300) HRMS Tables File Update
  _   (400) U.S. Federal, State, Local Tax Data/W-2 Data
  _   (450) U.S. Tax Constants and Local Authority Rates
  _   (500) Online Check Calculation       _   (600) Position Control Update
  _   (900) Operator Security Update
                                     Delete Menu Security: _

Option => I=Inquiry Only, N=Not Allowed, Blank=No Restrictions          901

```

Enter the following information:

Field Name	Entry	Action
ACTION:	end	Press Enter .

ACTION: _____

HCM E Screen Security
Main Menu

Enter Desired Screen Code and Record Key
Code: **904** Operator: **2** L1: **c1** L2: **d1**

HCM E Security Screens
901 Global/Menu Security
902 Tables File Application Security
903 Screen Range Security
904 Individual Screen Security

Enter the following information:

Field Name	Entry	Action
Code	904	
Operator	2	
Level 1	c1	
Level 2	d1	Press Enter .

904

Field Name	Entry	Action
Option	n	
Screen	011	Press Enter .

ACTION: **so**

HCM E Screen Security

Operator: 000002

Secure by Screen

L1: C1 L2: D1

UPDATE INDIVIDUAL SCREEN SECURITY FOR OPERATOR

Option	Screen	Option	Screen	Option	Screen	Option	Screen	Option	Screen
N	011	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---
-	---	-	---	-	---	-	---	-	---

Delete Screen Security: _

Option => I=Inquiry Only, N=Not Allowed, Blank=No Restrictions

904

Enter the following information:

Field Name	Entry	Action
ACTION:	so	Press Enter .

Continue the Online test by clearing the screen and typing **MSAS**. Press **Enter** to access the initial DCI Sign-On screen. Type the operator ID and password and press **Enter**.

IIIIIIII

II

n

n

ffffff

ooooooo

rrrrrrrr

II

nn

n

ff

oo

oo

rr

rr

II

n

n

n

ffffff

oo

oo

rrrrrrrr

II

n

n

n

ff

oo

oo

rrrrr

II

n

n

n

ff

oo

oo

rr

rr

IIIIIIII

n

nn

ff

ooooooo

rr

rr

Welcomes you to the E Series Online Applications

Operator ID:

2

Password:

New Password:

Verify:

Copyright © 2007 Infor Global Solutions Technology GmbH and/or its affiliates and subsidiaries. All rights reserved.

ACTION

DCI Release 01.01

Enter the following information:

Field Name	Entry	Action
Operator ID	2	
Operator Password	MSA DEMO 2	Press Enter .

```

DDDDDDDD      CCCCCCCC      IIIIIIIIII
DD      DD      CC      CC      II
DD      DD      CC      II
DD      DD      CC      II
DD      DD      CC      II
DD      DD      CC      CC      II
DDDDDDDD      CCCCCCCC      IIIIIIIIII

Main Menu

A - Payroll/Personnel
B - Financial Systems
E - Information Expert
I - Product Release Inquiry
N - Display Environment
O - Display Operator Information
P - Change Operator Password
R - Restrictive Security Menu

Enter the option you desire: 1

```

Enter the following information:

Field Name	Entry	Action
Enter the option you desire:	1	Press Enter .

You can go directly to System 1 by entering **1** in the option field and pressing **Enter**.

Action: _____

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: **11** Level 1: **c1** Level 2: **d1** Employee Number: _____ MRC: _

2: Transaction Inquiry and Update

4: Organization Menu

5: Employee Payroll Menu (U.S. Organizations)

6: Employee Payroll Menu (Canadian Organizations)

7: Employee Personnel Menu

100: Realtime Update Menu

700: Supplemental Address/Dependent/Health Plan Data Menu

900: Installation Audit

Enter the following information:

Field Name	Entry	Action
Screen	11	
Level 1	c1	
Level 2	d1	Press Enter .

Action: SCREEN IS NOT ALLOWED FOR OPERATOR

Infor HCM E Series Main Menu

Enter the desired screen number, organization and employee number

Screen: **125** Level 1: C1 Level 2: D1 Employee Number: **5** MRC: 0

2: Transaction Inquiry and Update

4: Organization Menu

5: Employee Payroll Menu (U.S. Organizations)

6: Employee Payroll Menu (Canadian Organizations)

7: Employee Personnel Menu

100: Realtime Update Menu

700: Supplemental Address/Dependent/Health Plan Data Menu

900: Installation Audit

Enter the following information:

Field Name	Entry	Action
Screen	125	
Employer Number	5	Press Enter .

```

Action: CF    Curr: 125  Next: 41    SCREEN IS INQUIRY ONLY FOR OPERATOR
      L1: C1  L2: D1  Empno:      5      Eff Date: _____
Name: JAMESON, ARTHUR P.

      Employee Tax Information

                                **Lock-in Letter**
                                Marital Status:
                                Number Exempt:

      Tax      Marital      Number      Amt/Pct
      Method   Status      Exempt
Federal:    4      S      4      500
State:      1      S      2      10
County:     3      M      200
City:       0

                                Amount      Local
                                One Exempt  Code
                                105

      ** W-4 Year **
Work State:  11      Federal:
Resident State: 11

SALTA Type:  _  SCC:  _  Unit Code:  _
TAS1:  _  TAS2:  _  TAS3:  _  TAS4:  _

      *** Other State Reciprocity Indicators ***
      ST  Ind      ST  Ind      ST  Ind      ST  Ind
1: 47  1    2: 23  0    3:    0    4:    0
5:    0    6:    0    7:    0    8:    0

                                ** Indicators **
                                FICA: A
                                FUI: Y
                                Empr SUI: D
                                Empe SUI: Y
                                Empe SDI: B
                                Reciprocity: 3
                                Special Tax:

```

Enter the following information:

Field Name	Entry	Action
ACTION:	cf	Press Enter .

Benefits Inquiry

Note: If you are not using the Benefits module, skip this section.

In this section, you will perform an inquiry using the Benefits screens.

DDDDDDDDCCCCCCCCIIIIIIIIII
DDDDDDDDCCCCCCCCIIIIIIIIII
DDDDDDDDCCCCCCCCIIIIIIIIII
DDDDDDDDCCCCCCCCIIIIIIIIII
DDDDDDDDCCCCCCCCIIIIIIIIII
DDDDDDDDCCCCCCCCIIIIIIIIII
DDDDDDDDCCCCCCCCIIIIIIIIII
DDDDDDDDCCCCCCCCIIIIIIIIII

Main Menu

A - Payroll/Personnel
B - Financial Systems
E - Information Expert
I - Product Release Inquiry
N - Display Environment
O - Display Operator Information
P - Change Operator Password
R - Restrictive Security Menu

Enter the option you desire: 2

Action _____DCI Release 01.01

You can bypass the Payroll/Personnel Systems menu and access the Personnel Modules menu directly by entering System 2 as your selection. System 2 contains the Personnel, Benefits, and Labor Relations Modules.

Enter the following information:

Field Name	Entry	Action
Enter the option you desire:	2	Press Enter .

```

                                PERSONNEL MODULES
ACT: _____
                                ENTER THE DESIRED SCREEN CODE AND MASTER RECORD KEY
                                CODE: 101  L1: AF  L2: 03  EMPNO: 7104_____

                                -----  FUNCTION SCREEN  -----

                                2: TRANSACTION INQUIRY/UPDATE FUNCTION SCREEN

                                -----  PERSONNEL MODULES  -----

                                101: BENEFITS/ERISA MENU SCREEN

                                201: LABOR RELATIONS MENU SCREEN

```

If you have installed the system without the Employee Number Shift Feature, or if you selected the Zero Fill Option, you must enter leading spaces before you enter the employee number.

Enter the following information:

Field Name	Entry	Action
CODE:	101	
L1:	AF	
L2:	03	
EMPNO:	7104	Press Enter .

PERSONNEL BENEFITS

ACTION: ENTER THE DESIRED SCREEN CODE AND MASTER RECORD KEY
CODE: **115** L1: AF L2: 03 EMPNO: 7104 MRC:
ENTER THE SPECIFIC ID'S DESIRED OR AN * TO BROWSE THRU THE RECORDS
DEFERRED PLAN ID'S:
*
NONDEFERRED PLAN ID'S:
ACCUMULATOR ID'S:
BENEFICIARY ID'S:
ACCUMULATOR YEAR RANGE:

----- ORGANIZATION DATA -----

110 C-ORGANIZATION OPTIONS
111 C-PLAN IDENTIFIERS
112 C-ADDITIONAL PLAN IDENTIFIERS

----- EMPLOYEE DATA -----

113 I-EMPLOYEE PLAN MENU
114 I-PLAN/BENEFICIARY/ACCUMULATOR
115 C-NONPLAN BENEFITS/SOC. SEC. DATA

----- EMPLOYEE DATA -----

116 C-DEFERRED COMPENSATION PLANS
117 C-DOCUMENT & SOC. SEC. DATA
118 C-NONDEFERRED PLANS/DOCUMENT
119 C-BENEFICIARY DATA
120 C-HOUR/EARNING ACCUMULATORS
121 I-ELAPSED TIME DATA
122 E-ELAPSED TIME ENTRY
123 C-SECTION 89 INFORMATION

Enter the following information:

Field Name	Entry	Action
CODE:	115	
DEFERRED PLAN ID'S	*	Press Enter .

Enter the asterisk in the first space of the line below DEFERRED PLAN ID's.

```
ACTION: _____ CURR: 115  NEXT: 116
      L1: AF  L2: 03  EMPNO:      7104  MRC: 0  EFFDT: _____

USER DEF FIELDS      SPOUSE EMPLOYED:      DOC REQ: 0
1:      SPOUSE DATE OF DEATH:      LAST REQ:
2:      EMPLOYEE DATE OF DEATH:      PROFILE IND:
3:      ANNUAL BEN RPT ID:      VESTED TERM RPT ID:
4:

COMPUTE VESTING:      COMPUTE ACTUARIAL:
```

Press **Enter**.

Field Name	Entry	Action
ACTION	CM	Press Enter .

Labor Relations Inquiry

Note: If you are not using the Labor Relations module, skip this section.

In this section, you will perform an inquiry using the Labor Relations screens.

PERSONNEL MODULES	
ACT: _____	ENTER THE DESIRED SCREEN CODE AND MASTER RECORD KEY
	CODE: 201 L1: AF L2: 03 EMPNO: 7104 _____
----- FUNCTION SCREEN -----	
2: TRANSACTION INQUIRY/UPDATE FUNCTION SCREEN	
----- PERSONNEL MODULES -----	
101: BENEFITS/ERISA MENU SCREEN	
201: LABOR RELATIONS MENU SCREEN	

If you installed the system without the Employee Number Shift Feature, or if you selected the Zero Fill Option, you must enter leading spaces before you enter the employee number.

Enter the following information:

Field Name	Entry	Action
CODE:	201	
L1:	AF	
L2:	03	
EMPNO:	7104	Press Enter .

ACTION: _____

EMPLOYEE/LABOR RELATIONS

ENTER THE DESIRED SCREEN CODE, ORGANIZATION AND EMPLOYEE NUMBER

CODE: **206** L1: AF L2: 03 EMPLOYEE NO: _____ 7104

-----ORGANIZATION OPTIONS-----

202: C REPORT GENERATE OPTIONS

REPORT PRINT OPTIONS

203: C DISCIPLINE REPORT OPTIONS

UNION REPORT OPTIONS

GRIEVANCE REPORT OPTIONS

LABOR RELATIONS PROFILE OPTION

204: C SENIORITY ROSTER OPTIONS

SENIORITY PROCESSING OPTIONS

-----EMPLOYEE DATA-----

205: C CURRENT SENIORITY DATA

206: C LAYOFF AND RECALL DATA

207-216: C EMPLOYEE GRIEVANCE DATA

217-218: C EMPLOYEE DISCIPLINE DATA

219: C EMPLOYEE UNION DATA

220-223: I HISTORICAL JOB SENIORITY INQUIRY

224: E HISTORICAL JOB SENIORITY ENTRY

Enter the following information:

Field Name	Entry	Action
CODE	206	Press Enter

ACTION: **CF** CURRENT: **206** NEXT: **207**
L1: **AF** L2: 03 EMPLOYEE NO: **7104**
EFF DATE: _____ EMPLOYEE LAYOFF AND RECALL DATA

EMPLOYEE NAME: **FOGLE, FRANK H.**

CURRENT EMPLOYMENT INFORMATION

POSITION NUMBER **STN1210001** JOB STATUS 1
JOB TITLE **STENOGRAPHER**
JOB LOCATION **ATLANTA** EMPLOYMENT DATE 19731215

CURRENT LEVELS -L3- -L4- -L5-
FA ATL TECH

LAYOFF STATUS

LAYOFF DATES FULLY LAID OFF: 00000000
POSITION LAYOFF: 00000000
LOCATION LAYOFF: 00000000

RECALLABLE INFORMATION
SET RECALLABLE INFO.: _
POSITION NUMBER:
-L3- -L4- -L5-
LEVEL:

Enter the following information:

Field Name	Entry	Action
ACTION:	CF	Press Enter

Online/Realtime System Sign-Off

End the session (exit E Series HCM) by typing **SO** in the ACTION field and pressing **Enter**.

DDDDDDDD	CCCCCCCC	IIIIIIIIII
DD DD	CC CC	II
DD DD	CC	II
DD DD	CC	II
DD DD	CC	II
DD DD	CC CC	II
DDDDDDDD	CCCCCCCC	IIIIIIIIII
Main Menu		
A - Payroll/Personnel		
B - Financial Systems		
E - Information Expert		
I - Product Release Inquiry		
N - Display Environment		
O - Display Operator Information		
P - Change Operator Password		
R - Restrictive Security Menu		
Enter the option you desire: __		
Action _SO_	DCI Release 01.01	

All Online verification activities for the Online Payroll/Personnel system are complete.

4 I.E. Online Verification

Chapter Contents

4-2	Introduction
4-2	Checking Results
4-3	Sign On I.E. 96.01
4-4	Set Report Options
4-14	Merge Members
4-21	Check Merged Members
4-30	Expert Reporting
4-32	Give the Report Series a Name
4-33	Select a Dataframe
4-34	Give the Report a Name
4-35	Give the Report a Width
4-36	Selection Criteria
4-37	Specify Selection Criteria
4-38	Specify Selection Values
4-39	Exclusion Criteria
4-40	Specify Exclusion Items
4-41	Specify Exclusion Values
4-42	Define the Order for the Report
4-43	Define Calculations for Report
4-44	Define Page Headings
4-45	Select Items to Appear on the Report
4-46	Position Items to be Printed on the Report
4-47	Select Items to be Totaled for the Report
4-48	Select Levels for Totals
4-49	Prepare, Run, and View Report
4-52	HR Expert Reporting Test
4-53	Sign Off

Introduction

This part of the installation demonstrates the use of the I.E. Online Support Facility. You complete the following steps during verification.

Step	Action
1	Sign on Information Expert.
2	Set report options.
3	Display a member list.
4	Delete entries (upgrade only).
5	Merge members.
6	Check merged members.
7	Expert Reporting
8	HR Reporting Test
9	Sign off.

Each step is described in this chapter.

Checking Results

You must complete each step of this verification before you proceed to the next step. You will use your normal job query techniques to determine if you ran a job correctly. Because you cannot do this from I.E., the verification may be more convenient if you have two terminals. If you do not have two terminals and must leave I.E. to determine job status or to open and close files, sign on to I.E. and return to where you were.

Sign On I.E. 96.01

To begin the I.E. Online Verification for HCM:E, log on to your CICS system with a valid user ID.

Type the **IEEX** command and press **Enter** to get the initial Information Expert screen. The default System ID and Data Dictionary ID (IERR) are displayed. Overtyping **IEXP** after the default System ID and the Data Dictionary ID.

```

====>                                Information Expert  Exception Signon      MSA.SIGNONE
                                         08/02/18      14:45:54
                                         Release IE960101

-----
                I I I I I I I I      E E E E E E E E      Information
                  I I I      E E E      Expert
                  I I I      E E E
                  I I I      E E E E E E E E
                  I I I      E E E
                  I I I      E E E
                I I I I I I I I      E E E E E E E E

User ID   ieuser      Password      Group ID   msagroup

New Password      New Password Verify
System ID         iexp      Data Dictionary ID   iexp

Copyright 2007 Infor. All rights reserved. The word and design marks set forth
herein are trademarks and / or registered trademarks of Infor and / or related
affiliates and subsidiaries. All rights reserved. All other trademarks listed
herein are the property of their respective owners.  www.infor.com
                                         Release 96.01

```

Enter the following information.

Field Name	Entry	Action
User ID	ieuser	
Password	ie	
Group ID	msagroup	
System ID	iexp	
Data Dictionary ID	iexp	Press Enter

Note: The password will not appear on the screen as you type it.

Set Report Options

====> 2

INFORMATION EXPERT MENU

MSA.MENU
08/02/2018 17:41:59

Select

Menu

1 Information Access Facility

2 User Profile Maintenance

3 System Administration

Release 96.01

Enter the following information:

Field Name	Entry	Action
Command Line	2	Press Enter

```
===== 3                                USER PROFILE MAINTENANCE                                IE.UPMENU
                                           08/02/2018  17:43:21

-----

      Select  Title
          1    PF Key Settings
          2    General Options
          3    Date/Time Display Options
          4    Numeric Field Display Options
          5    Reporting Options
          6    Starting Help Level
          7    Monochrome (Base Color) Terminal Display Options
```

Enter the following information:

Field Name	Entry	Action
Command Line	3	Press Enter

```

                                DATE/TIME DISPLAY OPTIONS
                                IE.UPDTD
===> .update                    08/02/2018 17:43:22
You are in Inquiry mode; change RSC to see another record.

-----

Display Date and Time  X  Yes      No      Separator Characters
                        /   Date Separator Character
                        :   Time Separator Character

----- Date Formats -----
yyddd      yy-ddd
mmdyy      yyyy-ddd
ddmmyy     mm-dd-yy
yymdd      dd-mm-yy
yyyddd      yy-mm-dd
mmdyyyy    x mm-dd-yyyy
ddmmyyyy    dd-mm-yyyy
yyyymmdd    yyyy-mm-dd
yyyddmm     yyyy-dd-mm

----- Time Formats -----
hhmmss am/pm  X  hhmmss 24hr
hhmm am/pm    hhmm 24hr
```

Enter the following information:

Field Name	Entry	Action
Command Line	.update	Press Enter

```

                                DATE/TIME DISPLAY OPTIONS
=====>                                IE.UPDTD
                                08/02/2018  17:43:23
You are in Update mode; make changes or enter a command.

-----

Display Date and Time  X  Yes      No      Separator Characters
                        /   Date Separator Character
                        :   Time Separator Character

----- Date Formats -----
yyddd      yy-ddd
mmddy      yyyy-ddd
ddmmy      mm-dd-yy
yymdd      dd-mm-yy
yyyddd     yy-mm-dd
mmddyddd   X  mm-dd-yyyy
ddmmyddd   dd-mm-yyyy
yyyymmdd   yyyy-mm-dd
yyyddmm    yyyy-dd-mm

----- Time Formats -----
hhmmss am/pm  X  hhmmss 24hr
hhmm am/pm    hhmm 24hr

```

Enter the following information:

Field Name	Entry	Action
MM-DD-YYYY	Any non-blank character	Press Enter

DATE/TIME DISPLAY OPTIONS

IE.UPDTD

08/02/2018 17:43:24

===>

Your Update completed successfully; you are in Inquiry mode.

Display Date and Time

X

Yes

No

Separator Characters

/ Date Separator Character

: Time Separator Character

----- Date Formats -----

yyddd

mmddy

ddmmyy

yyymmdd

yyyyddd

mmddyyyy

ddmmyyyy

yyyyymmdd

yyyyddmm

yy-ddd

yyyy-ddd

mm-dd-yy

dd-mm-yy

yy-mm-dd

mm-dd-yyyy

dd-mm-yyyy

yyyy-mm-dd

yyyy-dd-mm

----- Time Formats -----

hhmmss am/pm

hhmmss 24hr

hhmm am/pm

hhmm 24hr

Enter the following information:

Field Name	Entry	Action
None	None	Press PF3 key

```
===== 5                                USER PROFILE MAINTENANCE                                IE.UPMENU
                                           08/02/2018  17:43:21

-----

      Select  Title
           1   PF Key Settings
           2   General Options
           3   Date/Time Display Options
           4   Numeric Field Display Options
           5   Reporting Options
           6   Starting Help Level
           7   Monochrome (Base Color) Terminal Display Options
```

Enter the following information:

Field Name	Entry	Action
Command Line	5	Press Enter

```
                                REPORTING OPTIONS                                IE.UPRRO
===> .update                                08/02/2018  17:50:15
You are in Inquiry mode; change RSC to see another record.

-----

Default Library  IEUSER                Default User Group  MSAGROUP

    Procedure Map
    Data Map
    Debug Mode
    Warn on Truncation

    View Reports
    Spool Reports
    Banner Page
    Terminal Option
```

Enter the following information:

Field Name	Entry	Action
Command Line	.update	Press Enter

```

                                REPORTING OPTIONS                                IE.UPRRO
=====>                                08/02/2018  17:50:59
You are in Update mode; make changes or enter a command.

-----

Default Library  IEUSER                                Default User Group  MSAGROUP

    Procedure Map
    Data Map
    Debug Mode
    Warn on Truncation

X  View Reports
    Spool Reports
    Banner Page
X  Terminal Option

```

Enter the following information:

Field Name	Entry	Action
Default Library	IEUSER	
Default User Group	MSAGROUP	
View Reports	Any non-blank character	
Terminal Option	Any non-blank character	Press Enter

View Reports allows you to view I.E. reports using the Report Viewing Facility. Terminal Option allows you to view your preparation output using the Report Viewing Facility.

To select the options, type any non-blank character in the designated fields and press **Enter**. If these options are already set up, skip to the next step of this demo.

After you press **Enter**, the message **YOUR UPDATE COMPLETED SUCCESSFULLY; YOU ARE IN INQUIRY MODE** appears if you have made changes to the reporting options.

```

                                REPORTING OPTIONS
                                IE.UPRRO
====> osf.pm                                08/02/2018 17:51:19
Your Update completed successfully; you are in Inquiry mode.
-----

Default Library  IEUSER              Default User Group  MSAGROUP

      Procedure Map
      Data Map
      Debug Mode
      Warn on Truncation

X   View Reports
    Spool Reports
    Banner Page
X   Terminal Option

```

Enter the following information:

Field Name	Entry	Action
Command Line	osf.pm	Press Enter

Type **osf.pm** in the Command Line and press **Enter**.

Merge Members

Follow these instructions to merge HCM:E I.E. members into the I.E. Online Support Facility's required members. After you merge the members, verify that the merger was successful.

```

D B S  INFORMATION EXPERT  -----  PRIMARY OPTION MENU  PM

      ENTER SELECTION BELOW:

      ER - EXPERT REPORTING
      SM - SOURCE MANAGEMENT
      JS - JOB PREPARATION & SUBMISSION
      RV - REPORT VIEWING
      SA - SYSTEM ADMINISTRATION
      MR - EXPERT MANAGEMENT REPORTING
      EN - END THE SESSION

      SELECTION ===>  _
      LIBRARY ===> IEUSER

ACTION: SMUT _____

PRESS:      ENTER Process          PF1 Help      PF3 End Session

```

Enter the following information:

Field Name	Entry	Action
ACTION	SMUT	Press Enter

The Source Management Utilities screen will be displayed.

Follow these instructions to merge HCM:E I.E. members into the I.E. Online Support Facility's required members. After you merge the members, verify that the merger was successful.

D B S INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES SMUT

SELECTION OPTION === **M**

C - COPY MEMBER

D - DELETE MEMBER

R - RENAME MEMBER

M - MERGE MEMBERS

BLANK - DISPLAY MEMBER LIST

PF3 - RETURN TO PREVIOUS MENU

PF1 - HELP

INFORMATION EXPERT LIBRARY:

MEMBER NAME ==> _____

NEW MEMBER NAME ==> _____

LIBRARY NAME ==> IEUSER

IF COPYING TO ANOTHER LIBRARY:

NEW LIBRARY NAME ==> _____

NOTE: Library entered here will be used
as the default target library in
copying members if the DISPLAY MEMBER
LIST option is selected above.

ACTION: _____

Enter the following information:

Field Name	Entry	Action
Selection Option	m	Press Enter

The Merge Source Member Utility Screen is displayed.

```

D B S  INFORMATION EXPERT ----- MERGE SOURCE MEMBERS UTILITY  JSMMRG
INTO:

  MEMBER NAME: dataframe-list_____
    LIBRARY: IEUSER
    AFTER LINE: 999999

MERGE:

  MEMBER NAME: HR-dataframe-list_____
    LIBRARY: IEUSER
    FROM LINE: 000000
    THRU LINE: 999999

NOTE: Line 0 indicates Top
      Line 999999 indicates Bottom

PRESS:  ENTER Merge members   PF1 Help   PF3 Cancel

ACTION: _____

```

Enter the following information:

Field Name	Entry	Action
Into Member Name	dataframe-list	
Merge Member Name	hr-dataframe-list	Press Enter

After you press the **Enter** key, the message **HR-DATAFRAME-LIST MERGED INTO DATAFRAME-LIST** is displayed.

Type over the information displayed in the fields indicated and press **Enter**

D B S INFORMATION EXPERT ----- MERGE SOURCE MEMBERS UTILITY JSMMRG
HR-DATAFRAME-LIST MERGED INTO DATAFRAME-LIST
INTO:

MEMBER NAME: **report-request-list** _____
LIBRARY: IEUSER
AFTER LINE: 999999

MERGE:

MEMBER NAME: **HR-report-request-list** _____
LIBRARY: IEUSER
FROM LINE: 000000
THRU LINE: 999999

PRESS: ENTER Merge members PF1 Help PF3 Cancel

ACTION: _____

NOTE: Line 0 indicates Top
Line 999999 indicates Bottom

Enter the following information:

Field Name	Entry	Action
Into Member Name	report-request-list	
Merge Member Name	HR-report-request-list	Press Enter

Type over the information displayed in the fields indicated and press **Enter**. Then the message **HR-REPORT-REQUEST-LIST MERGED INTO REPORT-REQUEST-LIST** is displayed.

```

D B S  INFORMATION EXPERT ----- MERGE SOURCE MEMBERS UTILITY  JSMMRG
HR-REPORT-REQUEST-LIST MERGED INTO REPORT-REQUEST-LIST
INTO:

    MEMBER NAME: run-jcl
          LIBRARY: IEUSER
          AFTER LINE: 999999

MERGE:                                     NOTE: Line 0 indicates Top
                                           Line 999999 indicates Bottom

    MEMBER NAME: HR-run-jcl
          LIBRARY: IEUSER
          FROM LINE: 000000
          THRU LINE: 999999

PRESS:  ENTER Merge members   PF1 Help   PF3 Cancel

ACTION: _____

```

Enter the following information:

Field Name	Entry	Action
Into Member Name	run-jcl	
Merge Member Name	hr-run-jcl	Press Enter

Type over the information displayed in the fields indicated and press **Enter**. Then the message **HR-RUN-JCL MERGED INTO RUN-JCL** should be displayed.

Type over the information displayed in the fields indicated and press **Enter**.

D B S INFORMATION EXPERT ----- MERGE SOURCE MEMBERS UTILITY JSMMRG
HR-RUN-JCL MERGED INTO RUN-JCL
INTO:

MEMBER NAME: **application-job-list**____
LIBRARY: IEUSER
AFTER LINE: 999999

MERGE:

MEMBER NAME: **HR-application-job-list**_____
LIBRARY: IEUSER
FROM LINE: 000000
THRU LINE: 999999

PRESS: ENTER Merge members PF1 Help PF3 Cancel

ACTION: ____

NOTE: Line 0 indicates Top
Line 999999 indicates Bottom

Enter the following information:

Field Name	Entry	Action
INTO MEMBER NAME	APPLICATION-JOB-LIST	
MERGE MEMBER NAME	HR-APPLICATION-JOB-LIST	Press Enter

Type over the information displayed in the fields indicated and press **Enter**. Then the message **HR-APPLICATION-JOB-LIST MERGED INTO APPLICATION-JOB-LIST** should be displayed.

D B S INFORMATION EXPERT ----- MERGE SOURCE MEMBERS UTILITY JSMMRG
HR-APPLICATION-JOB-LIST MERGED INTO APPLICATION-JOB-LIST
INTO:

MEMBER NAME: APPLICATION-JOB-LIST
LIBRARY: IEUSER
AFTER LINE: 999999

MERGE:

MEMBER NAME: HR-APPLICATION-JOB-LIST
LIBRARY: IEUSER
FROM LINE: 000000
THRU LINE: 999999

PRESS: ENTER Merge members PF1 Help PF3 Cancel

ACTION: **SMLS** _____

NOTE: Line 0 indicates Top
Line 999999 indicates Bottom

Enter the following information:

Field Name	Entry	Action
ACTION	SMLS	Press Enter

Press **PF8** until **Dataframe-List** appears as an entry in the list.

Enter the following information:

Field Name	Entry	Action
Dataframe-List	s	Press Enter

The Dataframe List displayed should include the following dataframes near the end of the member. Press **PF8** to page forward to the bottom of the list to verify these entries.

HRADDR	HRBASIC	HRCANDOE	HRCANTAX
HRCHECK	HRCNTRY	HRCTRLS	HRDEGREE
HRDEPREL	HRDEPSTA	HRDISCPL	HRDISCR
HRDOES	HREEA	HREMP	HREMPBEN
HREMPHRE	HREMPLR	HREMPPLN	HREMPREL
HREVS1	HREVS2	HREVS3	HREVS4
HREVS5	HREVS6	HREVS7	HREVS8
HREVSR	HRFNCT	HRGEOG	HRGRIEV
HRGRPINS	HRHEALTH	HRHPCOVG	HRHPDEP
HRHPORG	HRHPPLAN	HRHPSTAT	HRIECNV
HRINDSCT	HRLVABS	HROCCGRP	HRORGDOE
HRORGSPH	HRORGSTP	HRORGTAB	HRPERS
HRPNODOE	HRPOSAUD	HRPOSDDL	HRPOSHDR
HRPOSHTD	HRPOSMT	HRPOSNAR	HRPOSNO
HRPOSORG	HRPOSTBL	HRPRBASC	HRPROFC
HRPROM	HRPYRL	HRREHIRE	HRRELG
HRRESTYP	HRRESULT	HRRPTUNT	HRSEALARY
HRSFNCT	HRSLRY	HRSTUDY	HRTBENCR
HRTBLBEN	HRTBLDOC	HRTEACUM	HRTERM
HRTHACUM	HRTRANS	HRTRAN2	HRTRNSFR
HRTSPANS	HRTVCRED	HRTVESTS	HRUSDOE
HRUSTAX	HRVIOLT	HRXREF	

Verify that the first two dataframes (HRADDR and HRBASIC) for Payroll/Personnel are included. Then, verify that the last dataframes (HRVIOLT and HRXREF) are included.

Press **PF3** to leave the member and redisplay the Source Management Directory Listing Screen.

D B S INFORMATION EXPERT ----- SOURCE MANAGEMENT DIRECTORY LISTING SMLS

LIBRARY: IEUSER

NUMBER OF MEMBERS: 0209 MAXIMUM: 0225

FIND: _____

MEMBER NAME	TYPE	LAST UPDATE	INFO	NBR RECDS
IE-MEMBER-SELECT	SUBROUTINE	02/11/1998	IEUSER	1
IE-PREFIX-REGISTER	RPT SERIES	02/11/1998	IEUSER	2
IE-PREFIX-REGISTER-RUN	RUN STATEMTS	02/11/1998	IEUSER	1
IE-REPORT-REQUEST-LIST	MISC TEXT	02/11/1998	IEUSER	1
IE-RUN-JCL	MISC TEXT	02/11/1998	IEUSER	1
IE-UNSECURE-SECURE-ENTITIES	RPT SERIES	02/11/1998	IEUSER	1
PREPARATION-JCL	MISC TEXT	02/11/1998	IEUSER	1
PRINT-JCL	MISC TEXT	02/11/1998	IEUSER	1
S REPORT-REQUEST-LIST	MISC TEXT	08/02/2018	IEUSER	2
RUN-JCL	MISC TEXT	02/11/1998	IEUSER	1
SI-PRINT-133-CHAR-DOC	RPT SERIES	02/11/1998	IEUSER	1
SI-PRINT-133-CHAR-DOC-RUN	RUN STATEMTS	02/11/1998	IEUSER	1
**** END OF DIRECTORY ****				

NOTES: ENTER S to select member.

Change library by entering new library name

ACTION: _____ PF1 Help PF3 End PF6 Top PF7 Pg Bwd PF8 Pg Fwd

Press **PF8** until **Report-Request-List** appears as an entry in the list. Enter the following information:

Field Name	Entry	Action
Report-Request-List	S	Press Enter

The **Report-Request-List** displayed should include the following reports near the end of the member. Press **PF8** to page forward to the bottom of the list to verify these entries.

HR-ACCUM-PLAN-EARNINGS-RPT	HR-EEA-FORM-6-PART-A	HR-PRE1987-401K-REPORT
HR-ADDRESS-LIST	HR-EEA-FORM-6-PART-B	HR-PRINT-CHECK-REPORT
HR-AWARDS-REPORT	HR-EEA-FORM-6-PART-C	HR-PROHIBITED-GROUP-REPORT
HR-BIRTHDAY-LIST	HR-EMP-BEN-BENEFICIARY-RPT	HR-QUALIFIED-COVERAGE-TEST
HR-COBRA-STATEMENTS	HR-EMP-DOE-DESCRIPTION-REPORT	HR-RECOMMENDED-POSITIONS-RPT
HR-CONVERT-IE-DOC	HR-EMP-LAYOFF-RECALL-REPORT	HR-SALARY-CHANGE-REASON-REPORT
HR-COUNTRY-TRANSLATION-RPT	HR-EMP-PLAN-RPT	HR-SALARY-COMPARISON-REPORT
HR-CROSS-REF-PRINT	HR-EMP-SKILLS-INVENTORY-REPORT	HR-SALARY-REVIEW-REPORT
HR-DEP-REL-TRANSLATION-RPT	HR-EMPLOYEE-DOE-REPORT	HR-SECTION-89-50-PCT-TEST
HR-DEP-STAT-TRANSLATION-RPT	HR-EMPLOYEE-GRIEVANCE-REPORT	HR-SECTION-89-75-PCT-TEST
HR-DEPENDENT-INFO-RPT	HR-EMPLOYEE-PCT-VESTED-RPT	HR-SECTION-89-80-PCT-TEST
HR-DEPENDENT-LIST	HR-HEALTH-PLAN-RPT	HR-SECTION-89-90-50-PCT-TEST
HR-DOCUMENT-WARNING-REPORT	HR-HIGH-LOW-COMPENSATION	HR-SEPH-REPORT
HR-DOE-TOTALS-BY-COLUMNS	HR-INSTALLATION-TEST-REPORT	HR-SPLIT-POSITION-REPORT
HR-EEA-FORM-1	HR-JOB-SENIORITY-REPORT	HR-SUP-ADDRESS-RPT
HR-EEA-FORM-2-PART-A	HR-MINIMUM-COVERAGE-TEST	HR-TERMINATED-EMPLOYEES-RPT
HR-EEA-FORM-2-PART-B	HR-OPEN-POSITIONS-REPORT	HR-UNION-ROSTER-REPORT
HR-EEA-FORM-2-PART-C	HR-PC-AUDIT-REPORT	HR-VIOLATION-DISCIPLINE-REPORT
HR-EEA-FORM-3-PART-A	HR-PERFORMANCE-REVIEW-DESC-RPT	HR-1987-401K-REPORT
HR-EEA-FORM-3-PART-B	HR-PERFORMANCE-REVIEW-REPORT	HR-401K-ADP-ALT-ADP-TEST-RPT
HR-EEA-FORM-3-PART-C	HR-PHONE-LIST	HR-401K-AVG-BEN-TEST-REPORT
HR-EEA-FORM-4-PART-A	HR-PLAN-CARRIER-RPT	HR-401K-DOE-LIMIT-CALCULATIONS
HR-EEA-FORM-4-PART-B	HR-PLAN-COVG-TRANSLATION-RPT	HR-401K-MINIMUM-CVRG-TEST-RPT
HR-EEA-FORM-4-PART-C	HR-PLAN-DEMOGRAPHIC-REPORT	HR-401K-PERCENTAGE-TEST-RPT
HR-EEA-FORM-5-PART-A	HR-PLAN-PARTICIPATION-RPT	HR-401K-RATIO-TEST-RPT
HR-EEA-FORM-5-PART-B	HR-PLAN-STAT-TRANSLATION-RPT	
HR-EEA-FORM-5-PART-C	HR-POSITION-EVALUATION-RPT	

```
EDIT MISC TEXT: REPORT-REQUEST-LIST                                COLUMNS 001 072
COMMAND INPUT ==>                                                SCROLL ==> HALF
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7--
008100 HR-SUP-ADDRESS-RPT                SUPPLEMENTAL ADDRESS
008200 HR-TERMINATED-EMPLOYEES-RPT        TERMINATED EMPLOYEES BY DATE
008300 HR-UNION-ROSTER-REPORT             EMPLOYEE UNION MEMBERSHIP
008400 HR-VIOLATION-DISCIPLINE-REPORT     VIOLATION/DISCIPLINE BY EMPLOYEE
008500 HR-1987-401K-REPORT                MODEL 401 (K) ADP TEST
008600 HR-401K-ADP-ALT-ADP-TEST-RPT      MODEL 401 (K) ADP/ALTERNATE ADP TEST
008700 HR-401K-AVG-BEN-TEST-REPORT       MODEL 401 (K) AVERAGE BENEFITS TEST
008800 HR-401K-DOE-LIMIT-CALCULATIONS    MODEL 401 (K) CONTRIB LIMIT TEST
008900 HR-401K-MINIMUM-CVRG-TEST-RPT     MODEL 401 (K) MINIMUM COVERAGE TEST
009000 HR-401K-PERCENTAGE-TEST-RPT       MODEL 401 (K) PERCENTAGE TEST
009100 HR-401K-RATIO-TEST-RPT            MODEL 401 (K) RATIO TEST
***** ***** BOTTOM OF DATA *****

ACTION: _____      1 Help    3 End    5 Find    6 Change    7 Pg Bwd    8 Pg Fwd
```

Verify that the first two report series (HR-ACCUM-PLAN-EARNINGS-RPT and HR-ADDRESS-LIST) for the HCM:E are present. Then, verify that the last two reports (HR-401K-PERCENTAGE-TEST-RPT and HR-401K-RATIO-TEST-RPT) are present.

Press **PF3** to leave the member and redisplay the member directory.

Press **PF8** until RUN-JCL appears as an entry in the list.

```

D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS

LIBRARY: IEUSER                      NUMBER OF MEMBERS: 0218  MAXIMUM: 0225
FIND: _____

MEMBER NAME                          TYPE                LAST UPDATE INFO    NBR RECDS
-----
REPORT-REQUEST-LIST                 MISC TEXT           02/11/1998 IEUSER           2
s RUN-JCL                          MISC TEXT           08/02/2018 IEUSER           3
SI-PRINT-133-CHAR-DOC               RPT SERIES          02/11/1998 IEUSER           1
SI-PRINT-133-CHAR-DOC-RUN           RUN STATEMTS        02/11/1998 IEUSER           1
****      END OF DIRECTORY      ****

NOTES: ENTER S to select member.  Change library by entering new library name
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd

```

Enter the following information:

Field Name	Entry	Action
RUN-JCL	s	Press Enter

Type **s** next to RUN-JCL and press the **Enter** key.

The RUN-JCL that is displayed should include the following DD statements near the end of the member. Press **PF8** to page forward to the bottom of the member to verify these entries.

```

EDIT MISC TEXT: RUN-JCL                                COLUMNS 001 072
COMMAND INPUT ==>                                       SCROLL ==> HALF
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7--
000900 //                               DISP=SHR
001000 //HRFMEMR DD DSN=MG8PC.YR2.VSAM.AT02S.EMPMSTRA,
001100 //                               DISP=SHR
001200 //HRFMGPR DD DSN=MG8PC.YR2.VSAM.AT02S.EMPMSTRA,
001300 //                               DISP=SHR
001400 //HRFMXAR DD DSN=MG8PC.YR2.VSAM.AT02S.EMPMSTRA,
001500 //                               DISP=SHR
001600 //HRFMXBR DD DSN=MG8PC.YR2.VSAM.AT02S.EMPMSTRA,
001700 //                               DISP=SHR
001800 //HRFMTAR DD DSN=MG8PC.YR2.VSAM.AT02S.TABLES.FILE,
001900 //                               DISP=SHR
002000 //HRFMCDR DD DSN=MG8PC.YR2.VSAM.AT02S.CKDTL,
002100 //                               DISP=SHR
002200 //HRFMSESR DD DSN=MG8PC.YR2.VSAM.AT02S.SELEMP,
002300 //                               DISP=SHR
002400 //HRFLPCR DD DSN=MG8PC.YR2.VSAM.AT02S.PCAUDIT,
002500 //                               DISP=SHR
002600 //HRFMPCR DD DSN=MG8PC.YR2.VSAM.AT02S.POSMSTRA,

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd

```

Depending on the DBSJSJG options that you selected, some of the DD statements shown may not appear in your RUN-JCL.

The DD statements shown are for you to verify the DD names only. The dataset names are specific to your site and reflect standard installation naming conventions. There are no DD statements for tape files.

Press the **PF3** key to leave the member and redisplay the member directory.

Press the **PF7** key until the APPLICATION-JOB-LIST appears as an entry in the list.

```

D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS

LIBRARY: IEUSER                      NUMBER OF MEMBERS: 0209  MAXIMUM: 0225
FIND: _____

MEMBER NAME                        TYPE                LAST UPDATE INFO  NBR RECDS
-----
s APPLICATION-JOB-LIST             MISC TEXT          08/02/2018 IEUSER      1
DATA-VIEW-LIST                    MISC TEXT          08/02/2018 IEUSER      1
DATAFRAME-LIST                    MISC TEXT          08/02/2018 IEUSER      2
HR-ACCUM-PLAN-EARNINGS-RPT        RPT SERIES         08/02/2018 IEUSER      3
HR-ACCUM-PLAN-EARNINGS-RUN        RUN STATEMTS       08/02/2018 IEUSER      1
HR-ADDRESS-LIST                   RPT SERIES         08/02/2018 IEUSER      1
HR-ADDRESS-LIST-RUN               RUN STATEMTS       08/02/2018 IEUSER      1
HR-APPLICATION-JOB-LIST           MISC TEXT          08/02/2018 IEUSER      1
HR-AWARDS-REPORT                  RPT SERIES         08/02/2018 IEUSER      1
HR-AWARDS-REPORT-RUN              RUN STATEMTS       08/02/2018 IEUSER      1
HR-BIRTHDAY-LIST                  RPT SERIES         08/02/2018 IEUSER      1
HR-BIRTHDAY-LIST-RUN              RUN STATEMTS       08/02/2018 IEUSER      1
HR-COBRA-STATEMENTS               RPT SERIES         08/02/2018 IEUSER      4
HR-COBRA-STATEMENTS-RUN           RUN STATEMTS       08/02/2018 IEUSER      1
HR-COUNTRY-TRANSLATION-RPT        RPT SERIES         08/02/2018 IEUSER      1
NOTES: ENTER S to select member.  Change library by entering new library name
ACTION: _____ PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd

```

Press **PF7** until **APPLICATION-JOB-LIST** appears as an entry in the list.

Enter the following information:

Field Name	Entry	Action
APPLICATION-JOB-LIST	S	Press Enter

Type **s** next to application-job-list and press the **Enter** key.

The APPLICATION-JOB-LIST that is displayed should include the following item near the end of the member. Use the **PF8** key to page forward to the bottom of the member to verify the entry.

```
EDIT MISC TEXT: APPLICATION-JOB-LIST                COLUMNS 001 072
COMMAND INPUT ==>                                SCROLL ==> HALF
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7--
***** ***** TOP OF DATA *****
001500 HR-ONLINE-CHECK-CALC-JCL          HR ONLINE CHECK CALC JCL
***** ***** BOTTOM OF DATA *****

ACTION: _____  1 Help   3 End   5 Find   6 Change   7 Pg Bwd   8 Pg Fwd
```

Verify that the HR-ONLINE-CHECK-CALC-JCL job is present.

Press the **PF12** key to return to the PRIMARY OPTION MENU.

Expert Reporting

You will now design a report using Expert Reporting. In this report, you will list all workers who were hired within a specified period of time. You will also count these employees for each level 2. The report will list employees by employee number and will show level 1-level 2, employee number, employee name, and employment date.

Follow these instructions to create a report from the information presented in the report scenario using Expert Reporting. If you make a mistake on any screen, press the **PF3** key until you return to the last correct screen.

```

D B S  INFORMATION EXPERT  -----  PRIMARY OPTION MENU  PM

      ENTER SELECTION BELOW:

      ER - EXPERT REPORTING
      SM - SOURCE MANAGEMENT
      JS - JOB PREPARATION & SUBMISSION
      RV - REPORT VIEWING
      SA - SYSTEM ADMINISTRATION
      MR - EXPERT MANAGEMENT REPORTING
      EN - END THE SESSION

      SELECTION ===> ER
      LIBRARY ===> IEUSER

ACTION: _____

PRESS:      ENTER Process          PF1 Help      PF3 End Session
  
```

Enter the following information:

Field Name	Entry	Action
SELECTION	ER	Press Enter

```
D B S  INFORMATION EXPERT  ---  BUILD / CHANGE REPORTS                ER

This function will take you through a step by step process to build a
report or series of reports (Report Series). Listed below are the steps:

1 - Give the Report Series a Name
2 - Select a Dataframe
3 - Give your Report a Name
4 - Define Selection/Exclusion Criteria
5 - Define how report is to be sequenced
6 - Define any Calculations required
7 - Define Page Headings
8 - Select Data to be displayed
9 - Define how Data is to be totalled
10 - Repeat steps 3-9 for the Next Report

Your Reports will be stored in Library IEUSER

PRESS:      ENTER Begin      PF1 Help      PF3 Return to Primary Option Menu

ACTION _____
```

This screen explains the 10 steps to follow to build a report. After you carefully read through the process, press the **Enter** key to continue. Follow the instructions for each screen that appears.

Give the Report Series a Name

If you see a screen that lists existing I.E. reports instead of this screen, press **Enter** again. This will take you to the following screen.

```
JSBESN

STEP 1 -- ENTER A NAME FOR YOUR REPORT SERIES: HR-EXPERT-REPORTING-TEST_____

PRESS:      ENTER Continue      PF1 Help      PF3 Previous Step

ACTION _____
```

Enter the following information:

Field Name	Entry	Action
REPORT SERIES NAME FIELD	HR-EXPERT- REPORTING-TEST	Press Enter

The name of the Report Series that you are creating is HR-EXPERT-REPORTING-TEST. It will be stored in the private library IEUSER.

Select a Dataframe

STEP 2 -- SELECT A DATAFRAME FOR YOUR REPORTS

JSBSDV

DATAFRAME	DESCRIPTION OF DATAFRAME	NOTES:
-----	-----	
HRPOSNAR	POSITION NARRATIVE DATA	Place S or L beside desired Dataframe & press the Enter key
HRPOSNO	LR POSITION NUMBER STRUCTURE	
HRPOSORG	POSITION ORGANIZATION DATA	
HRPOSTBL	ORGANIZATION SALARY TABLE DATA	
S HRPRBASC	EMPLOYEE BASIC PAYROLL DATA	S - Use Dataframe L - List Contents
HRPROFC	SKILL PROFICIENCY DESCRIPTIONS	
HRPROM	PROMOTIONAL READINESS DESC	Press the PF3 key to cancel this function & return to the pre- vious step.
HRPYRL	ALL PAYROLL INFORMATION	
HRREHIRE	REHIRE CONSIDERATION DESC	
HRRELG	RELIGIOUS PREFERENCE DESC	
HRRESTYP	RESIDENCE TYPE DESCRIPTIONS	
HRRESULT	LR SETTLEMENT RESULT DESC	
HRRPTUNT	REPORTING UNIT INFORMATION	
HRXSALARY	EMPLOYEE SALARY INFORMATION	
HRXSFNCT	SKILL SUBFUNCTION DESCRIPTIONS	
HRXSLRY	SALARY CHANGE REASON DESC	
HRXSTUDY	FIELD OF STUDY DESCRIPTIONS	
PRESS:	ENTER Process PF1 Help PF6 Top PF7 Page Bwd PF8 Page Fwd	
ACTION	_____	

Enter the following information:

Field Name	Entry	Action
HRPRBASC	S	Press Enter

Press **PF8** to page forward until you see the dataframe HRPRBASC. Type **S** next to HRPRBASC and press the **Enter** key.

Give the Report a Name

```
JSBERF

STEP 3A -- ENTER THE NAME OF YOUR FIRST REPORT: HRTEST__

PRESS:      ENTER Continue      PF1 Help      PF3 Previous Step

ACTION _____
```

Enter the following information:

Field Name	Entry	Action
Report Name Field	HRTEST	Press Enter

Give the Report a Width

STEP 3B -- SET THE WIDTH OF YOUR REPORT: **132**JSBWID

NOTE: The width must be greater than zero and less than 255.

ACTION _____ PRESS: ENTER Continue PF1 Help PF3 Previous Step

Enter the following information:

Field Name	Entry	Action
WIDTH FIELD	132	Press Enter

You have to enter **132** only if it is not shown. If **132** is shown, press **Enter**.

Selection Criteria

JSBPSL

STEP 4A - DEFINE SELECTION CRITERIA FOR REPORT HRTEST

This step allows you to choose items whose values will be used to select a portion of the data base to be processed by this report.

Once you have chosen the items, you will be presented with a screen for each item. On these screens you enter values to be used to select specific records for this report.

PRESS: ENTER Continue PF1 Help PF3 Previous Step PF4 Skip This Step

ACTION _____

Enter the following information:

Field Name	Entry	Action
Press Enter		

For this report, you will be selecting employees hired between 2000 and 2009.

Specify Selection Criteria

JSBSDN

STEP 4A -- PLACE AN S BESIDE THE ITEMS TO BE USED TO SELECT RECORDS

EMP-PAY-CODE

EMP-SEX-CODE

EMP-UNION-CODE

EMP-LEVEL-1

EMP-NUMBER

HR-EMP-MASTER-RECORD-ID

EMP-STATUS-2-IND

EMP-EXTENDED-DISTRIBUTION-CD

EMP-TERMINATION-DATE

EMP-PAYROLL-EEOC-CODE

EMP-GUARANTEE-PAY-IND

EMP-GUARANTEED-RATE

EMP-GUARANTEED-SALARY

EMP-SICK-HOURS-AVAILABLE

EMP-EMPLOYMENT-CODE

EMP-CAN-BIRTHDATE

EMP-CAN-LANGUAGE-PREFERENCE

EMP-CAN-EI-LAST-DAY-PAID

EMP-CAN-EMPLOYMENT-CODE-1

EMP-CAN-TERMINATION-CODE

EMP-STATUS-1-IND

EMP-WORKER-COMPENSATION-CODE

EMP-RECORD-CHANGE-DATE

EMP-LEVEL-2

EMP-MULTIPLE-RECORD-CODE

EMP-LAST-MASTER-RECORD-IND

EMP-RATE-SALARY-CHANGE-DATE

S EMP-EMPLOYMENT-DATE

EMP-CHECK-SEQUENCE-CODE

EMP-SHIFT-CODE

EMP-GUARANTEED-HOURS

EMP-GUARANTEED-AMT

EMP-VACATION-HOURS-AVAILABLE

EMP-FEDERAL-ESTABLISHMENT-CD

EMP-TERMINATION-CODE

EMP-CAN-JOB-TITLE

EMP-CAN-EI-FIRST-DAY-WORKED

EMP-HOSPITAL-INSURANCE-NO

EMP-CAN-EMPLOYMENT-CODE-2

EMP-CAN-TERM-REASON-CODE

ACTION PRESS ENTER Return PF1 Help PF6 Top PF7 Pg Bwd PF8 Pg Fwd

Enter the following information:

Field Name	Entry	Action
EMP-EMPLOYMENT-DATE	S	Press Enter

Press **PF8** to page forward until you see the item EMP-EMPLOYMENT-DATE. Type an **S** next to it and press the **Enter** key. This item will be used to select the information to appear on the report.

Specify Selection Values

```
STEP 4A -- DEFINE SELECTION CRITERIA FOR REPORT HRTEST  
ENTER SELECTION VALUES BELOW FOR EMP-EMPLOYMENT-DATE  
  
FROM VALUE      THRU VALUE  
20000101      20091231  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
_____  
  
PRESS:  ENTER Continue  PF1 Help  PF3 Previous Step  PF5 Select Data  
ACTION _____
```

Enter the following information:

Field Name	Entry	Action
FROM VALUE	20000101	
THRU VALUE	20091231	Press Enter

Exclusion Criteria

JSBPXL

STEP 4B - DEFINE EXCLUSION CRITERIA FOR REPORT HRTEST

This step allows you to choose items whose values will be used to exclude a portion of the data base from being processed.

Once you have chosen the items, you will be presented with a screen for each item. On these screens you enter the values to be used to exclude records from being processed by this report.

PRESS: ENTER Continue PF1 Help PF3 Previous Step PF4 Skip This Step

ACTION _____

Enter the following information:

Field Name	Entry	Action
Press Enter		

For this report, you want to exclude inactive, deceased, and terminated employees.

Specify Exclusion Items

```

JSBSDN
STEP 4B -- PLACE AN S BESIDE THE ITEMS TO BE USED TO EXCLUDE RECORDS

EMP-PAY-CODE                      S EMP-STATUS-1-IND
EMP-SEX-CODE                      EMP-WORKER-COMPENSATION-CODE
EMP-UNION-CODE                    EMP-RECORD-CHANGE-DATE
EMP-LEVEL-1                      EMP-LEVEL-2
EMP-NUMBER                       EMP-MULTIPLE-RECORD-CODE
HR-EMP-MASTER-RECORD-ID         EMP-LAST-MASTER-RECORD-IND
EMP-STATUS-2-IND                EMP-RATE-SALARY-CHANGE-DATE
EMP-EXTENDED-DISTRIBUTION-CD    EMP-EMPLOYMENT-DATE
EMP-TERMINATION-DATE            EMP-CHECK-SEQUENCE-CODE
EMP-PAYROLL-EEOC-CODE           EMP-SHIFT-CODE
EMP-GUARANTEE-PAY-IND           EMP-GUARANTEED-HOURS
EMP-GUARANTEED-RATE             EMP-GUARANTEED-AMT
EMP-GUARANTEED-SALARY           EMP-VACATION-HOURS-AVAILABLE
EMP-SICK-HOURS-AVAILABLE        EMP-FEDERAL-ESTABLISHMENT-CD
EMP-EMPLOYMENT-CODE             EMP-TERMINATION-CODE
EMP-CAN-BIRTHDATE              EMP-CAN-JOB-TITLE
EMP-CAN-LANGUAGE-PREFERENCE     EMP-CAN-EI-FIRST-DAY-WORKED
EMP-CAN-EI-LAST-DAY-PAID        EMP-HOSPITAL-INSURANCE-NO
EMP-CAN-EMPLOYMENT-CODE-1       EMP-CAN-EMPLOYMENT-CODE-2
EMP-CAN-TERMINATION-CODE        EMP-CAN-TERM-REASON-CODE
ACTION _____ PRESS ENTER Return PF1 Help PF6 Top PF7 Pg Bwd PF8 Pg Fwd

```

Enter the following information:

Field Name	Entry	Action
EMP-STATUS-1-IND	S	Press Enter

September 2025

MVS Installation Guide

Field Name	Entry	Action
FROM VALUE	N	
THRU VALUE	T	Press Enter

Define the Order for the Report

JSBORD

STEP 5 -- LISTED BELOW IS THE ORDER FOR REPORT HRTEST

1 #REPORTID	Renumber to change the order of the list.
2 EMP-LEVEL-1	
3 EMP-LEVEL-2	To remove an item from the list, blank
4 EMP-NUMBER	out the number next to the item.
5 EMP-MULTIPLE-RECORD-CODE	

To select additional data, press the
PF5 key.

Press the Enter key to process changes
or continue to the next step.

PRESS: ENTER Process PF1 Help PF3 Previous Step

ACTION _____

Enter the following information:

Field Name	Entry	Action
Press Enter		

The order for the report HRTEST does not need to be changed. Press **Enter** to bypass this step.

Define Calculations for Report

JSBPAS

STEP 6 -- DEFINE CALCULATIONS FOR REPORT HRTEST

This step allows you to define calculations for the report. A selection list is presented showing all numeric & date fields. Once you have chosen the items to be used, a screen is presented letting you define your calculations.

PRESS: ENTER Continue PF1 Help PF3 Previous Step PF4 Skip This Step

ACTION _____

Enter the following information:

Field Name	Entry	Action
Press PF4		

This report does not require any calculations. Therefore, this section will be skipped.

Define Page Headings

```
JSBPGH

STEP 7 -- BUILD PAGE HEADINGS FOR REPORT HRTEST

DATE FOR THE REPORT:  __ / __ / __      (Default is Today's Date)

FIRST  HEADING LINE: PAYROLL/PERSONNEL_____
SECOND HEADING LINE: I.E. ONLINE VERIFICATION_____

PRESS:      ENTER Process      PF1 Help      PF3 Previous Step

ACTION _____
```

Enter the following information:

Field Name	Entry	Action
FIRST HEADING LINE	PAYROLL/PERSONNEL	
SECOND HEADING LINE	I.E. ONLINE VERIFICATION	Press Enter

Select Items to Appear on the Report

JSBSDN

STEP 8 -- PLACE AN S BESIDE THE ITEMS TO BE PRINTED ON THIS REPORT

#REPORTID

S

EMP-LEVEL-2

ORG-NAME

ORG-LEVEL-1-DESCRIPTION

ORG-LEVEL-3-DESCRIPTION

ORG-LEVEL-5-DESCRIPTION

ORG-FILE-CONTROL-TIME

ORG-EMP-POS-DATA-UPDT-TIME

ORG-RUN-DATE

ORG-WK-BIWEEKLY-CHECK-DATE

ORG-MO-SEMI-MO-CHECK-DATE

ORG-BIWEEKLY-PAY-PERIOD-IND

ORG-MONTHLY-PAY-PERIOD-IND

ORG-PAY-PERIOD-START-IND

ORG-DOE-CLEARANCE-EXCPT-CODE

S

EMP-NUMBER

EMP-NAME-LAST-NAME-FIRST

EMP-SOCIAL-SECURITY-NUMBER

EMP-LEVEL-4

EMP-PAY-FREQUENCY

S

EMP-LEVEL-1

HR-EMP-MASTER-RECORD-ID

ORG-SUBTITLE

ORG-LEVEL-2-DESCRIPTION

ORG-LEVEL-4-DESCRIPTION

ORG-FILE-CONTROL-DATE

ORG-EMP-POS-DATA-UPDT-DATE

ORG-COUNTRY-CODE

ORG-WK-BIWK-PERIOD-END-DATE

ORG-MO-SEMI-MO-PER-END-DATE

ORG-WEEKLY-PAY-PERIOD-IND

ORG-SEMI-MO-PAY-PERIOD-IND

ORG-PAY-PERIOD-END-IND

ORG-ACCUM-CLEAR-TO-DATE-IND

ORG-PERS-STNDLN-PER-END-DATE

EMP-MULTIPLE-RECORD-CODE

S

EMP-NAME-FIRST-NAME-FIRST

EMP-LEVEL-3

EMP-LEVEL-5

EMP-PAY-CODE

ACTION PRESS ENTER Return PF1 Help PF6 Top PF7 Pg Bwd PF8 Pg Fwd

Enter the following information:

Field Name	Entry	Action
EMP-LEVEL-1	S	
EMP-LEVEL-2	S	
EMP-NUMBER	S	
EMP-NAME-FIRST-NAME-FIRST	S	
EMP-EMPLOYMENT-DATE	S	Press Enter

Use these PF keys to page through the items:

- **PF7** – page backward
- **PF8** – page forward

After your selection is complete, press the **Enter** key to continue.

Position Items to be Printed on the Report

The report order, from the left to right, is determined by the numeric assignments specified. Verify that the following listed items are in the correct order. If they are, press **Enter** to continue. If not, renumber them, and press **Enter** twice.

```

STEP 8 -- POSITION ITEMS TO BE PRINTED ON REPORT HRTEST          JSBLST

Items listed below will be printed from left to right

 1 EMP-LEVEL-1                      Renumber to change the order of the
 2 EMP-LEVEL-2                      list.
 3 EMP-NUMBER
 4 EMP-NAME-FIRST-NAME-FIRST       To remove an item, blank out the number
 5 EMP-EMPLOYMENT-DATE             next to the name of the item.

                                   To select additional data, press the
                                   PF5 key.

                                   Press the Enter key to process changes
                                   or to continue to the next step

PRESS:  ENTER Process  PF1 Help  PF3 Previous Step  PF5 Select Data
ACTION _____

```

Enter the following information:

Field Name	Entry	Action
EMP-LEVEL-1	1	
EMP-LEVEL-2	2	
EMP-NUMBER	3	
EMP-NAME-FIRST-NAME-FIRST	4	
EMP-EMPLOYMENT-DATE	5	Press Enter

Select Items to be Totaled for the Report

For this report, the number of employees in each Level 2 will be totaled.

STEP 9 -- SELECT ITEMS TO BE TOTALED FOR REPORT HRTEST

JSBTOT

EMP-LEVEL-1

EMP-LEVEL-2

S EMP-NUMBER

EMP-NAME-FIRST-NAME-FIRST

EMP-EMPLOYMENT-DATE

Enter an S beside items to be totaled.

Press the ENTER key to process selections & continue to the next step.

PRESS: ENTER Process PF1 Help PF3 Previous Step

ACTION _____

Enter the following information:

Field Name	Entry	Action
EMP-NUMBER	S	Press Enter

Type **S** next to the item indicated and press the **Enter** key.

Select Levels for Totals

For this report, the number of employees in each level 2 will be totaled.

STEP 9 -- SELECT LEVELS FOR THE TOTALS ON REPORT HRTEST

JSBTBY

TOTAL FOR REPORT
EMP-LEVEL-1
S EMP-LEVEL-2
EMP-NUMBER
EMP-MULTIPLE-RECORD-CODE

Enter an S beside the levels at
which totals are to be taken.

Press the ENTER key to process
selections & continue to the next
step.

PRESS:

ENTER Process

PF1 Help

PF3 Previous Step

ACTION

Enter the following information:

Field Name	Entry	Action
EMP-LEVEL-2	S	Press Enter

Type **S** next to the item indicated and press the **Enter** key.

Prepare, Run, and View Report

Type **8** in the selection field and press the **Enter** key to prepare, run, and view the report.

```
JSBNXR

STEP 10 -- REPORT HRTEST COMPLETED FOR SERIES HR-EXPER-REPORTING-TEST

ENTER SELECTION BELOW:

1 - Save this Series & Exit
2 - Save this Series & Return
3 - Review/Change this Series
4 - Build another Report
5 - View the IE Commands
6 - Prepare this Series
7 - Prepare,Run and Print Reports
8 - Prepare,Run and View Reports
9 - Cancel this Function & Exit

====> 8

PRESS:      ENTER Process          PF1 Help   PF3 Previous Step
ACTION _____
```

Enter the following information:

Field Name	Entry	Action
SELECTION FIELD	8	Press Enter

A message appears informing you that the job has been submitted. Check your operating system batch job queues to determine when the job ends. When it ends, you can proceed as follows.

Step	Action
1	Press the Enter key again to return to STEP 1 of Expert Building.
2	Press PF12 to return to the Primary Option Menu.
3	Type RVLS in the Action Field and press Enter to access the Report Viewing Directory.

```

D B S  INFORMATION EXPERT  -----  REPORT VIEWING DIRECTORY  RVLS

LIBRARY: IEUSER                      NUMBER OF MEMBERS: 0004  MAXIMUM: 0225
FIND:
SERIES NAME                          TYPE                LAST UPDATE INFO  LAST VIEWED
-----
S HR-EXPERT-REPORTING-TEST          RPT SERIES        08/02/2018 IEUSER
****      END OF DIRECTORY      ****

```

```

ENTER S to view or P to print member.  Key over library to change libraries.
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd

```

Enter the following information:

Field Name	Entry	Action
HR-EXPERT-REPORTING-TEST	S	Press Enter

Type **S** next to report series name and press **Enter**.

D B S INFORMATION EXPERT ----- REPORT REQUEST DIRECTORY JSVRDI

REPORT SERIES: HR-EXPER-REPORTING-TEST

DATE PREPARED: 08/02/2018 15:01:11

DATE RUN: 08/02/2018 15:01:12

LIBRARY: IEUSER

OWNER: IEUSER

NUMBER REPORTS: 001

REPORT WIDTH PAGES

----- ----- -----

S HRTEST 132 1

END

NOTES:

Place an S beside the report to
be viewed & press the ENTER key.

Place a P beside the report to
be printed & press the ENTER key.

ACTION: PF1 Help PF3 End PF6 Top PF7 Pg Bwd PF8 Pg Fwd

Enter the following information:

Field Name	Entry	Action
HRTEST	S	Press Enter

Compare the report you created to the report shown on the next page. Use these PF keys to help you review the report:

- **PF7** - page backward
- **PF8** - page forward
- **PF10** - page right
- **PF11** - page left.

HR Expert Reporting Test

INFORMATION EXPERT		VIEW A REPORT JSVRS	
SERIES: HR-EXPER-REPORTING-TEST	REPORT: HRTST	PAGE 00001	LINE 001
COMMAND INPUT ==>		COLUMNS 001	079
-----1-----2-----3-----4-----5-----6-----7-----			
DATE: 08/02/2018		PAYROLL/PERSONNEL	
I.E. ONLINE VERIFICATION			

LEVEL 1	LEVEL 2	EMPLOYEE NUMBER	EMPLOYEE NAME
AF	03	7104	FRANK H. FOGLE
		8358	MILT FAMY
		9465	ANGELA DAWSON
		26312	JOHN JR. WALTON
		43645	ROBERTA LEE
		=====	
		5	
A1	B1	0000001007	EUGENE A. MONDOUX
		0000001008	SIDNEY F. HUGHES
		0000001015	JEAN D. PIERRE
		0000001016	JACQUES F. ETOILE

ACTION: _____ PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg

The report generated should be similar to the preceding report. If you have installed the Payroll Standalone system, the data listed in the report may be different.

Sign Off

All Online verification activities for Information Expert are complete. Sign Off and continue with the Post Online portion of the verification.

INFORMATION EXPERT MENU	MSA.MENU	08/02/2018 17:41:59
===>		

Select	Menu	
1	Information Access Facility	
2	User Profile Maintenance	
3	System Administration	
		Release 96.01

Press **PF12** or **PF13**, or both, as needed to exit I.E.

5 Post Verification

Chapter Contents

5-1	Introduction
5-2	Post Online Verification Process
5-3	Backing Up Libraries and Files
5-4	Sample JCL
5-6	Conversion JCL
5-7	Finishing the Installation

Introduction

This chapter contains information about the following subjects:

- Post Online Verification Process
- Backing up Libraries and Files
- Sample JCL
- Conversion JCL
- Finishing the Installation

Post Online Verification Process

After you have completed the HCM:E I.E. Online verification, sign off CICS and sign on to your text editor. Execute the next group of generated jobs, which are described in the following sections.

Release for Processing

This job performs the Release for Processing function. This job should be executed after you have completed the Online Verification process. The OB transaction, input for PPO710, controls the selection of records from the Pending Transaction File to the Selected Transaction File. The Format program (PPO720) reads the Selected Transaction File and reformats the records into the 120-character transactions. See the *Technical Guide* for more information on the Release for Processing function. This job contains the following steps:

- PPO710 - Online Release To Batch
- PPO720 - Online Release To Batch Reformat

Run Load/Validate Pass 3

This job runs the Transaction Load and Validate programs after Online Processing to process the random (VSAM) Employee Master File. This job requires a region size of 2048K or larger. This job contains the following steps:

- PLP200 - Transaction Load
- SORT - Sort Loaded Transaction File
- PLP400 - Transaction Validation
- SORT - Sort Valid Transaction File

Run an I.E. Report

This job runs an I.E. Installation Audit Report. This job requires a region size of 2048K or larger.

Backing Up Libraries and Files

The Back Up Libraries and Back Up I.E. Files jobs will back up the HCM:E libraries and the I.E. System and Dictionary files to tape.

Back Up Libraries

This job runs IEBCOPY to back up the following HCM:E libraries:

- Source Library
- Object Library
- Load Library
- Linkset Library
- Data Library
- Proclib Library
- JCL Library

Back Up I.E. Files

This job will back up the I.E. system and dictionary files. The tapes created in this job should be saved. Before you run this job, you must close the I.E. system and dictionary files to CICS.

When you reach the job titled CONGRATULATIONS, you have finished the installation.

Sample JCL

The members generated after the CONGRATULATIONS comment job are sample jobs. These jobs are not to be executed as part of the installation. They are provided as a starting point for building your production jobstreams. These jobs will require that some of the JCL statements be changed before being executed.

You should review the job descriptions. You may need to refer to these jobs later.

These jobs contain sample JCL and require modification before execution. These jobs are not intended to be compatible with the files as they exist at this point in the installation.

Job	Function
DELETE WORK FILES	This job deletes all of the state regulatory report files and W2 files created by PL4000 (Payroll Regulatory Report Print). This job is optional.
EMPLOYEE TRANSFER	This job executes the Employee Transfer program, P1P99M.
PAYROLL REPORTING DETAIL FILE EXTRACT	This job extracts organizations from the Payroll Reporting Detail File, P1PEXT.
PAYROLL REPORTING DETAIL FILE MERGE	This job executes the Payroll Reporting Detail File Merge program, PLPMRG.
EMPLOYEES NOT PAID	This job executes the Employees Not Paid program, PLPENP.
CANADIAN AUDIT PROGRAM	This job executes the Canadian Audit program, PLR900.
CANADIAN REGULATORY PRINT to generate XML files for T4A, RL1, and RL2	These jobs execute PL6000 to produce XML files.
CONVERT CANADIAN ROE DUPLICATE HISTORY FILE	This job converts the Canadian ROE Duplicate History File using PLC900.
UPDATE SPL WITH NEW SCREEN PROGRAMS	This job updates your SPL tape with new or changed screen edit programs, if new combined, entry screens are created, or existing screens are changed. Before executing this job, change the xxxxxx to the screen edit program name. This job executes program PPO630. You must sort the PKO130, which was output from PPO600, file on positions 1 – 6, ascending order, before executing PPO630.
RESTORE PENDING TRANSACTION FILE	This job restores your Pending Transaction File (PKO210) from the SELECT.PKO210 file created in PPO710, but executing PPO730.
BACKUP AUDIT DATABASE	This job copies the Realtime Audit Database to a backup sequential file using PLQ200.
RESTORE AUDIT DATABASE	This job restores the Realtime Audit Database from a sequential file using PLQ250.

(continued)

Job	Function
PRINT EMPLOYEE MASTER AUDIT REPORT	This job prints the Employee Master Audit Report and generates transactions using PLQ100. If you want to override any of the default values on the audit transaction, enter the override in the DD statement PWQ06S. For more information about the Audit Database, see the <i>Technical Guide</i> .
RECOVER TABLES FILE	This job recovers the tables file using the audit database. Create PXT08S to enter the RECOV transaction. This is a required control transaction for program PLT908.
PRINT TABLES FILE AUDIT REPORT	This job prints the HRMS Tables File Audit Report and executes PLT918 and PLT920.
ONLINE CHECK CALC FILE MAINTENANCE	This job purges records from the Selected Employees File and Check Detail File by executing PLQCCM.
ONLINE CHECK CALC AUDIT FILE MAINTENANCE	This job purges check image records from the Realtime Audit Database File by executing PLQCMA.
POSITION CONTROL RECOVERY LOAD	This job loads transactions for Position Control recovery. This job contains the following steps: ▪ PLJ600 ▪ PLJ610
BACK UP POSITION CONTROL AUDIT DATABASE	This job executes PLJ620 to perform the position control utility functions.
EMPLOYEE POSITION DATA UPDATE	This job updates employee position data. This job contains the following steps: ▪ IDCAMS ▪ PLJ630 ▪ PLJ640

Conversion JCL

Some or all of the conversion jobs listed in the following table will be generated depending on whether you are running a Superbase or Payroll installation.

Job	Function
EMPLOYEE MASTER FILE AND HRMS TABLES FILE CONVERSION COMMENT	Before you begin the process of converting your Employee Master File and HRMS Tables File, you must verify that the Employee Master File has been balanced. Otherwise, the converted Employee Master File will be corrupt and cannot be restored except from a previous backup.
CONVERT HRMS TABLES FILE	This job converts the HRMS Tables File from Release 98.20 to 01.15 (200115ALL). The record length of the output file increases to 150.
CONVERT EMPLOYEE MASTER FILE	This job converts the Employee Master File from release 98.20 or later to release 01.15 (200115ALL).
UPDATE TABLES FILE WITH CONVERSION TRANSACTIONS	This job updates the Tables File with the following transactions created from the Field Expansion conversion: ▪ DOESTP ▪ DOESTP ▪ DOETAB
CONVERT POSITION CONTROL MASTER FILE	This job converts the Position Control Master File using PLJ900.
CONVERT LIFE-TO-DATE HISTORY FILE	This job converts the Life-To-Date History File using PLH900.
CONVERT CHECK REVERSAL MASTER FILE	This job converts the Check Reversal Master File using PLK900.
CONVERT CHECK REVERSAL MASTER FILE - QPIP	This job converts the Check Reversal Master File using PLK901 for Canadian organizations.
CONVERT CHECK RECONCILIATION MASTER FILE	This job converts the Check Reconciliation Master File using PLN900.
CONVERT EARNINGS HISTORY MASTER FILE	This job converts the Earnings History Master File using PLE900.
CONVERT LABOR DISTRIBUTION MASTER FILE	This job converts the Labor Distribution Master File using PLL900.
CONVERT LOST TIME, HEALTH, SAFETY MASTER FILE	This job converts the Lost Time, Health and Safety Master File using MLT900.
CONVERT EMPLOYEE NUMBER FOR MASTER FILES	This job converts the employee number to a new value based on parameters supplied for 8 system master files using PLP920.

Finishing the Installation

- Update your project notebook with information about the installation.
- Print the System Installation Document member (HOTHDOC) and save it for future reference.
- Collect, label, and save all installation printouts for future reference.
- Ensure that HCM:E has been properly backed up before beginning any disk cleanup activities. Save all tapes created in the installation.
- After you complete the installation, you can reallocate the libraries and VSAM files to make them more efficient.
- Make the VSAM files approximately the same size as when they were allocated during the installation, but allocate them in cylinders, instead of records
- The libraries have been allocated large enough so that they can hold the batch and Online installation components. If you do not have the Online portion of the system, or if you intend to use separate Online libraries, you can reduce the size of the libraries. Leave yourself enough room for future compiles and link edits. If you do resize the libraries, you can reallocate the libraries in tracks instead of blocks.

