Infor E Series
Human Capital Management
MVS Installation Guide

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Contents

About This Guide

Introduction

This *Installation Guide* explains how to install the z/OS version of Infor E Series Human Capital Management (E Series HCM) in VSAM/CICS environments. Use this guide and the appropriate installation files to complete the installation.

The following information is provided in this guide:

- Functional definition of E Series HCM
- Other systems you must install before installing E Series HCM
- Computer hardware and software you must have
- The amount of disk space required to install E Series HCM
- Special installation considerations
- Step-by-step instructions for installing E Series HCM
- Instructions to verify that you have installed the system correctly.

1 Installation Considerations

Chapter Contents

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...
JOBCAT 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.
STEPCAT 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

Linkedits

If any linkedits 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 (PYS*xxx*)	PYT800	Many beginning with PYJ*nnn*

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	SYSPARM=OS/VS

Assembler ASMA90

OBJECT	NODECK	SYSPARM=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

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 (HOTHRDOC) 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 HOTHRDOC 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 (HOTHRDOC). 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 (HOTHRERR) 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 HOTHRERR 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 HOTHRDOC 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 (HOTHRDOC) 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
______	HOTHRDOC	Install document		Documentation member
______	HOTHRRSD	Resource Definitions		Give this member to your CICS systems programmer
______	HOTHR001	Allocate VSAM	R	
______	HOTHR131	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

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  oooooooo  rrrrrrrrr
               II      nn    n  ff        oo    oo  rr     rr
               II      n n   n  ffffffff  oo    oo  rrrrrrrrr
               II      n  n  n  ff        oo    oo  rrrrrr
               II      n   n n  ff        oo    oo  rr    rr
            IIIIIIII   n    nn  ff        oooooooo  rr     rr


            Welcomes you to the E Series Online Applications

              Operator ID:            Password:

             New Password:              Verify:




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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.

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: I


 Action ____                                           DCI Release 01.01
```

Enter the following information:

Field Name	Entry	Action
System Type	**I**	Press **Enter**.

```
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

Action ____                                          DCI Release 01.01
```

Enter the following information:

Field Name	Entry	Action
System Type	**A**	Press **Enter**.

```
                        DDDDDDDD       CCCCCCCC    IIIIIIIII
                         DD    DD     CC      CC       II
                         DD     DD   CC                II
                         DD     DD   CC                II
                         DD     DD   CC                II
                         DD    DD     CC      CC       II
                        DDDDDDDD       CCCCCCCC    IIIIIIIII

                            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: DDDDDDDD05  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
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: ________
                                                    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
                                             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: DDDDDDDD05  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: ________ CNTRY 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
OVRRIDE:  _ 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
  JOB PREF:                                                 EMP EXMPT STAT:
  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: __________  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:	**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:            SCRN:     RECID:
       SELECTED FILE - SEQNO:

 OCCNO L1 L2   EMPNO   SCRN 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 Salry: ____________  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: DDDDDDDD05  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: 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: __________  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                                   Personnel
214   U.S. Employee Tax Maintenance      201   Emergency Notification Maint
216   Employee DOE Maintenance           202   Employee Family Data
218   New Employee Information           203   Employee Education
220   Employee Salary Maintenance        204   Employee Career Planning
221   Employee Basic Info/Payroll Maint  205   Employee Skills
222   Employee Location Maintenance      206   Employee Basic Benefits
223   Employee Employment/Termination    207   Employee Physical Data
224   Employee ACH Bank/CU Services      208   Employee Service Dates
226   Canadian Employee Tax Maintenance  209   Personal Information Maint
233   Employee Salary Splits Maintenance 210   Performance Reviews
234   Supplemental Address/Dependent/    211   Salary Reviews
           Health Plan Data Menu         212   Employee Organization Property
248   Employee State W-4 Information     213   Employee EEO/AAP Maintenance
250   Regulatory Form/Slip Selection     215   Military Data
                                         230   Employee User/EEA Dates
        Position Control Module          231   Canadian Employee EEA Data
228   Employee Position Assignment       232   Employee Job Data
229   Employee Level Position Maint
```

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   Marital                Amount/      Amount of
               Method  Status    Exemptions  Percent      1 Exemptn     Code
      Federal     1      S          000      __________
      State       1      S          000      __________
      County      _      _          ___      __________   __________    ___
      City        _      _          ___      __________   __________    ____


      FICA Indicator:          A              ** W-4 Year **
      FUI Indicator:           Y              Federal: 2019
      Employer SUI Indicator:  A
      Employee SUI Indicator:  Y
      Employee SDI Indicator:  A
      Spec Tax Handling Ind:  __
```

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:    __
                            *Taxes*
          Tax   Marital              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
                                                                 Reciprocity: _
Work State: 11                                                  Special Tax:  0
Res State:  11
W-2 Establish Code: ____                                         ** 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 **I**nformation.

```
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
  A1  0001  1      DEFCMP SUPPLML      0   0   0   0    0   0    0
  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:
  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
 07  0007  H       DISAB. INS         1   1   1   1    1   1    1
 08  0008  J       LIFE    IN         1   1   1   1    1   1    1
 09  0009  J       DENTAL INS.        1   1   1   1    1   1    1
 10  0010  J      CREDIT UNION        1   1   1   1    1   1    1
 11  0011  J      PENSION             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            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
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       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
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
   _ (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             L1L2
                                 AF03             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                 REV  PAY
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        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                  Federal Wages   Federal Income Tax
Employer EIN  Employee SSN                        3674.11               611.81
12-3456789    012-34-5678          Social Security Wages  Social Security Tax
                                                  3674.11               227.79
Employer's Name, Address                     Medicare Wages         Medicare Tax
ATLAS STEEL COMPANY                              3674.11               53.27
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
 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: 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
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**.

```
ACTION: ____                  HCM E Screen Security
Operator: 000002                Secure by Screen
L1: C1  L2: D1         ADD 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
Option	**n**	
Screen	**011**	Press **Enter**.

Operator 2 is denied access to Screen 11 for C1D1, but the operator still has inquiry access to all other screens because the global option is set to **I** (Inquiry).

```
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  ffffffff  oooooooo  rrrrrrrrr
                II      nn    n  ff        oo    oo  rr     rr
                II      n n   n  ffffffff  oo    oo  rrrrrrrrr
                II      n  n  n  ff        oo    oo  rrrrrr
                II      n   n n  ff        oo    oo  rr    rr
             IIIIIIII   n    nn  ff        oooooooo  rr     rr


             Welcomes you to the E Series Online Applications

               Operator ID:  2          Password:

              New Password:               Verify:



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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    IIIIIIIII
                         DD    DD     CC      CC       II
                         DD     DD   CC                II
                         DD     DD   CC                II
                         DD     DD   CC                II
                         DD    DD     CC      CC       II
                        DDDDDDDD       CCCCCCCC    IIIIIIIII

                                      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


 Action ____                                              DCI Release 01.01
```

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:
           Tax      Marital     Number                       Number Exempt:
          Method    Status      Exempt      Amt/Pct
Federal:    4          S          4        500          Amount      Local
State:      1          S          2        10         One Exempt    Code
County:     3          M                   200                       105
City:       0

                          ** W-4 Year **
Work State:     11        Federal:                            ** Indicators **
Resident State: 11                                                   FICA: A
                                                                      FUI: Y
SALTA Type: _  SCC: ____   Unit Code: ___                        Empr SUI: D
TAS1: ____   TAS2: __   TAS3: __________   TAS4: ______          Empe SUI: Y
                                                                 Empe SDI: B
 *** Other State Reciprocity Indicators ***                   Reciprocity: 3
  ST  Ind       ST  Ind       ST  Ind       ST  Ind           Special Tax:
1: 47   1    2: 23   0    3:      0    4:      0
5:      0    6:      0    7:      0    8:      0
```

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.

```
                        DDDDDDDD       CCCCCCCC    IIIIIIIII
                         DD    DD     CC      CC       II
                         DD     DD   CC                II
                         DD     DD   CC                II
                         DD     DD   CC                II
                         DD    DD     CC      CC       II
                        DDDDDDDD       CCCCCCCC    IIIIIIIII

                                      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  ----         ------  EMPLOYEE DATA  ------
  110 C-ORGANIZATION OPTIONS              116 C-DEFERRED COMPENSATION PLANS
  111 C-PLAN IDENTIFIERS                  117 C-DOCUMENT & SOC. SEC. DATA
  112 C-ADDITIONAL PLAN IDENTIFIERS       118 C-NONDEFERRED PLANS/DOCUMENT
                                          119 C-BENEFICIARY DATA
  ----  EMPLOYEE DATA  ----               120 C-HOUR/EARNING ACCUMULATORS
  113 I-EMPLOYEE PLAN MENU                121 I-ELAPSED TIME DATA
  114 I-PLAN/BENEFICIARY/ACCUMULATOR      122 E-ELAPSED TIME ENTRY
  115 C-NONPLAN BENEFITS/SOC. SEC. DATA   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**.

```
ACTION: CM__   CURR: 116   NEXT: 117
    L1: AF  L2: 03  EMPNO:       7104  MRC: 0  EFF DATE: ________

ENTER DESIRED PLAN ID OR AN * TO BROWSE THRU DEFERRED PLANS
  DEFERRED PLAN ID: *    BENEFICIARY ID:      ACCUMULATOR ID'S:

      ----------  DEFERRED COMPENSATION PLANS  ----------
  DEFERRED PLAN ID: ABC    PLAN STATUS: 1     MEMBER NBR:             FORMAT: _
   PART DATES:          -            BENEFICIARY:       BEN OPTION:
   PCT VESTED: 00            EARN/INT:                  WITHDRWL:
   EMP CONT:                 JS OPTION: Y               WITHDRWL DT:
   CO  CONT:                 RULE OF PARITY:            HOURS / HIRE:
   YRS NO CONTR:             PART ELIG: 20080000        PART CR DT: 20070705
   VEST SVC:                 PART SVC:
   SVC BRKS:                 BENEFIT SVC:               VEST SCHED ID:
   PART COMP METHOD:         PART SVC ADJ:              VEST CREDIT ID:
   VEST COMP METHOD:         VEST SVC ADJ:              BENF CREDIT ID:
   BENF COMP METHOD:         BENF SVC ADJ:              HOUR ACCUM ID:
   MAINTENANCE CODE: _       ADJUST CODE: _             EARN ACCUM ID:
   UNIT1 PUR:                VAL PER UNIT1:             UNIT PURC: _____ #: _
   UNIT2 PUR:                VAL PER UNIT2:             VAL/UNIT: __________
```

Enter the following information:

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                            RECALLABLE INFORMATION
         FULLY LAID OFF: 00000000               SET RECALLABLE INFO.: _

        POSITION LAYOFF: 00000000               POSITION NUMBER:
                                                          -L3- -L4- -L5-
        LOCATION LAYOFF: 00000000                  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    IIIIIIIII
                         DD    DD     CC      CC       II
                         DD     DD   CC                II
                         DD     DD   CC                II
                         DD     DD   CC                II
                         DD    DD     CC      CC       II
                        DDDDDDDD       CCCCCCCC    IIIIIIIII

                                      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

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. Overtype **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

------------------------------------------------------------------------------
                          IIIIIII     EEEEEEEE               Information
                            III       EEE                    Expert
                            III       EEE
                            III       EEEEEEEE
                            III       EEE
                            III       EEE
                          IIIIIII     EEEEEEEE


   User ID   ieuser       Password                   Group ID  msagroup

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

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                                                            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

```
                            INFORMATION EXPERT MENU          MSA.MENU
===> 2                                               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**

```
                              USER PROFILE MAINTENANCE           IE.UPMENU
===> 3                                                      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 --------              -------- Time Formats ----------
   yyddd            yy-ddd
   mmddyy           yyyy-ddd                   hhmmss am/pm   X  hhmmss 24hr
   ddmmyy           mm-dd-yy
   yymmdd           dd-mm-yy                   hhmm am/pm        hhmm 24hr
   yyyyddd          yy-mm-dd
   mmddyyyy       x mm-dd-yyyy
   ddmmyyyy         dd-mm-yyyy
   yyyymmdd         yyyy-mm-dd
   yyyyddmm         yyyy-dd-mm
```

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 --------              -------- Time Formats ----------
   yyddd            yy-ddd
   mmddyy           yyyy-ddd                   hhmmss am/pm   X  hhmmss 24hr
   ddmmyy           mm-dd-yy
   yymmdd           dd-mm-yy                   hhmm am/pm        hhmm 24hr
   yyyyddd          yy-mm-dd
   mmddyyyy      X  mm-dd-yyyy
   ddmmyyyy         dd-mm-yyyy
   yyyymmdd         yyyy-mm-dd
   yyyyddmm         yyyy-dd-mm
```

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 --------              -------- Time Formats ----------
   yyddd            yy-ddd
   mmddyy           yyyy-ddd                   hhmmss am/pm   X  hhmmss 24hr
   ddmmyy           mm-dd-yy
   yymmdd           dd-mm-yy                   hhmm am/pm        hhmm 24hr
   yyyyddd          yy-mm-dd
   mmddyyyy      X  mm-dd-yyyy
   ddmmyyyy         dd-mm-yyyy
   yyyymmdd         yyyy-mm-dd
   yyyyddmm         yyyy-dd-mm
```

Enter the following information:

Field Name	Entry	Action
None	**None**	Press **PF3** key

```
                            USER PROFILE MAINTENANCE          IE.UPMENU
===> 5                                                 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          BLANK - DISPLAY MEMBER LIST
  D - DELETE MEMBER        PF3   - RETURN TO PREVIOUS MENU
  R - RENAME MEMBER        PF1   - HELP
  M - MERGE  MEMBERS

INFORMATION EXPERT LIBRARY:

  MEMBER     NAME ===> ______________________________
  NEW MEMBER NAME ===> ______________________________
  LIBRARY    NAME ===> IEUSER

IF COPYING TO ANOTHER LIBRARY:    NOTE: Library entered here will be used
                                        as the default target library in
  NEW LIBRARY NAME ===> ________        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

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

    MEMBER NAME: HR-dataframe-list_____________
        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	**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

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

     MEMBER NAME: HR-report-request-list________
         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	**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

                                          NOTE: Line 0 indicates Top
MERGE:                                          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

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

    MEMBER NAME: HR-application-job-list_______
        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	**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

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

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


 PRESS:  ENTER Merge members   PF1 Help   PF3 Cancel

 ACTION: SMLS____
```

Enter the following information:

Field Name	Entry	Action
ACTION	**SMLS**	Press **Enter**

Check Merged Members

```
 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
  ------------------------------   ------------ ------------------- --------
  APPLICATION-JOB-LIST             MISC TEXT    08/02/2018 IEUSER          1
  DATA-VIEW-LIST                   MISC TEXT    08/02/2018 IEUSER          1
s 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 **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	HRPOSDTL	HRPOSHDR
HRPOSHTD	HRPOSMST	HRPOSNAR	HRPOSNO
HRPOSORG	HRPOSTBL	HRPRBASC	HRPROFC
HRPROM	HRPYRL	HRREHIRE	HRRELG
HRRESTYP	HRRESULT	HRRPTUNT	HRSALARY
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-ADDRESS-LIST
HR-AWARDS-REPORT
HR-BIRTHDAY-LIST
HR-COBRA-STATEMENTS
HR-CONVERT-IE-DOC
HR-COUNTRY-TRANSLATION-RPT
HR-CROSS-REF-PRINT
HR-DEP-REL-TRANSLATION-RPT
HR-DEP-STAT-TRANSLATION-RPT
HR-DEPENDENT-INFO-RPT
HR-DEPENDENT-LIST
HR-DOCUMENT-WARNING-REPORT
HR-DOE-TOTALS-BY-COLUMNS
HR-EEA-FORM-1
HR-EEA-FORM-2-PART-A
HR-EEA-FORM-2-PART-B
HR-EEA-FORM-2-PART-C
HR-EEA-FORM-3-PART-A
HR-EEA-FORM-3-PART-B
HR-EEA-FORM-3-PART-C
HR-EEA-FORM-4-PART-A
HR-EEA-FORM-4-PART-B
HR-EEA-FORM-4-PART-C
HR-EEA-FORM-5-PART-A
HR-EEA-FORM-5-PART-B
HR-EEA-FORM-5-PART-C
HR-EEA-FORM-6-PART-A
HR-EEA-FORM-6-PART-B
HR-EEA-FORM-6-PART-C
HR-EMP-BEN-BENEFICIARY-RPT
HR-EMP-DOE-DESCRIPTION-REPORT
HR-EMP-LAYOFF-RECALL-REPORT
HR-EMP-PLAN-RPT
HR-EMP-SKILLS-INVENTORY-REPORT
HR-EMPLOYEE-DOE-REPORT
HR-EMPLOYEE-GRIEVANCE-REPORT
HR-EMPLOYEE-PCT-VESTED-RPT
HR-HEALTH-PLAN-RPT
HR-HIGH-LOW-COMPENSATION
HR-INSTALLATION-TEST-REPORT
HR-JOB-SENIORITY-REPORT
HR-MINIMUM-COVERAGE-TEST
HR-OPEN-POSITIONS-REPORT
HR-PC-AUDIT-REPORT
HR-PERFORMANCE-REVIEW-DESC-RPT
HR-PERFORMANCE-REVIEW-REPORT
HR-PHONE-LIST
HR-PLAN-CARRIER-RPT
HR-PLAN-COVG-TRANSLATION-RPT
HR-PLAN-DEMOGRAPHIC-REPORT
HR-PLAN-PARTICIPATION-RPT
HR-PLAN-STAT-TRANSLATION-RPT
HR-POSITION-EVALUATION-RPT
HR-PRE1987-401K-REPORT
HR-PRINT-CHECK-REPORT
HR-PROHIBITED-GROUP-REPORT
HR-QUALIFIED-COVERAGE-TEST
HR-RECOMMENDED-POSITIONS-RPT
HR-SALARY-CHANGE-REASON-REPORT
HR-SALARY-COMPARISON-REPORT
HR-SALARY-REVIEW-REPORT
HR-SECTION-89-50-PCT-TEST
HR-SECTION-89-75-PCT-TEST
HR-SECTION-89-80-PCT-TEST
HR-SECTION-89-90-50-PCT-TEST
HR-SEPH-REPORT
HR-SPLIT-POSITION-REPORT
HR-SUP-ADDRESS-RPT
HR-TERMINATED-EMPLOYEES-RPT
HR-UNION-ROSTER-REPORT
HR-VIOLATION-DISCIPLINE-REPORT
HR-1987-401K-REPORT
HR-401K-ADP-ALT-ADP-TEST-RPT
HR-401K-AVG-BEN-TEST-REPORT
HR-401K-DOE-LIMIT-CALCULATIONS
HR-401K-MINIMUM-CVRG-TEST-RPT
HR-401K-PERCENTAGE-TEST-RPT
HR-401K-RATIO-TEST-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 //HRFMSER  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 DBSJSG 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
   HRPOSNO    LR POSITION NUMBER STRUCTURE              desired Dataframe &
   HRPOSORG   POSITION ORGANIZATION DATA                press the Enter key
   HRPOSTBL   ORGANIZATION SALARY TABLE DATA
 S HRPRBASC   EMPLOYEE BASIC PAYROLL DATA               S - Use Dataframe
   HRPROFC    SKILL PROFICIENCY DESCRIPTIONS            L - List Contents
   HRPROM     PROMOTIONAL READINESS DESC
   HRPYRL     ALL PAYROLL INFORMATION
   HRREHIRE   REHIRE CONSIDERATION DESC                 Press the PF3 key to
   HRRELG     RELIGIOUS PREFERENCE DESC                 cancel this function
   HRRESTYP   RESIDENCE TYPE DESCRIPTIONS               & return to the pre-
   HRRESULT   LR SETTLEMENT RESULT DESC                 vious step.
   HRRPTUNT   REPORTING UNIT INFORMATION
   HRSALARY   EMPLOYEE SALARY INFORMATION
   HRSFNCT    SKILL SUBFUNCTION DESCRIPTIONS
   HRSLRY     SALARY CHANGE REASON DESC
   HRSTUDY    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-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         S 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-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**

Specify Exclusion Values

```
STEP 4B -- DEFINE EXCLUSION CRITERIA FOR REPORT HRTEST

ENTER EXCLUSION VALUES BELOW FOR EMP-STATUS-1-IND

 FROM VALUE THRU VALUE
 N          T
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _
 _          _

PRESS:    ENTER Continue   PF1 Help   PF3 Previous Step   PF5 Select Data
 ACTION ________
```

Enter the following information:

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-1
 S EMP-LEVEL-2                            HR-EMP-MASTER-RECORD-ID
   ORG-NAME                               ORG-SUBTITLE
   ORG-LEVEL-1-DESCRIPTION                ORG-LEVEL-2-DESCRIPTION
   ORG-LEVEL-3-DESCRIPTION                ORG-LEVEL-4-DESCRIPTION
   ORG-LEVEL-5-DESCRIPTION                ORG-FILE-CONTROL-DATE
   ORG-FILE-CONTROL-TIME                  ORG-EMP-POS-DATA-UPDT-DATE
   ORG-EMP-POS-DATA-UPDT-TIME             ORG-COUNTRY-CODE
   ORG-RUN-DATE                           ORG-WK-BIWK-PERIOD-END-DATE
   ORG-WK-BIWEEKLY-CHECK-DATE             ORG-MO-SEMI-MO-PER-END-DATE
   ORG-MO-SEMI-MO-CHECK-DATE              ORG-WEEKLY-PAY-PERIOD-IND
   ORG-BIWEEKLY-PAY-PERIOD-IND            ORG-SEMI-MO-PAY-PERIOD-IND
   ORG-MONTHLY-PAY-PERIOD-IND             ORG-PAY-PERIOD-END-IND
   ORG-PAY-PERIOD-START-IND               ORG-ACCUM-CLEAR-TO-DATE-IND
   ORG-DOE-CLEARANCE-EXCPT-CODE           ORG-PERS-STNDLN-PER-END-DATE
 S EMP-NUMBER                             EMP-MULTIPLE-RECORD-CODE
   EMP-NAME-LAST-NAME-FIRST             S EMP-NAME-FIRST-NAME-FIRST
   EMP-SOCIAL-SECURITY-NUMBER             EMP-LEVEL-3
   EMP-LEVEL-4                            EMP-LEVEL-5
   EMP-PAY-FREQUENCY                      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                       Enter an S beside items to be totaled.
   EMP-LEVEL-2
 S EMP-NUMBER                        Press the ENTER key to process selections
   EMP-NAME-FIRST-NAME-FIRST         & continue to the next step.
   EMP-EMPLOYMENT-DATE











 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                      Enter an S beside the levels at
   EMP-LEVEL-1                           which totals are to be taken.
 S EMP-LEVEL-2
   EMP-NUMBER                            Press the ENTER key to process
   EMP-MULTIPLE-RECORD-CODE              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           LIBRARY:   IEUSER
 DATE PREPARED:  08/02/2018  15:01:11              OWNER:     IEUSER
 DATE RUN:       08/02/2018  15:01:12              NUMBER REPORTS: 001

   REPORT     WIDTH    PAGES              NOTES:
   --------   -----    -----
 S HRTEST      132         1               Place an S beside the report to
   **END**                                 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 JSVRPS
SERIES:  HR-EXPER-REPORTING-TEST         REPORT: HRTEST    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     LEVEL     EMPLOYEE
                           1         2        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

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 *Technical Guide*.
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 (HOTHRDOC) 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.