



Infor Infinium HCM Human Resources Guide to Controls

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About This Guide

This section focuses on the following information:

- Purpose of this guide
- Conventions used in this guide

Intended Audience

The *Infinium Human Resources Guide to Controls* is written for all users of Infinium Human Resources (Infinium HR) including:

- those who are responsible for setting up system controls during the initial implementation of Infinium HR
- those who maintain Infinium HR controls
- those who perform Infinium HR processing, administrative and reporting activities
- Human Resources and Payroll managers
- System administrators that provide technical support to Infinium HR users

Purpose of This Guide

The purpose of this guide is to provide you with an in-depth explanation of how to set up and maintain controls required to implement Infinium HR. This guide is intended to be used as a supplement during classroom training and as a reference guide after training is complete. This guide will show you how to use Infinium HR to set up controls to accomplish human resources management, administrative and reporting activities.

Organization of This Guide

This guide is task-oriented. Related tasks are grouped into topics. Topics are grouped into parts. Each topic contains overview information and step-by-step instructions to lead you through the tasks.

Conventions Used in This Guide

This section describes the following conventions we use in this guide:

- Fonts and wording
- Function keys
- Character-based and graphical-based screens
- Prompt and selection screens
- Promptable fields
- Infinium applications and abbreviations

Fonts and Wording

| Convention | Description | Example |
|---------------------------------|--|---|
| <i>Italic typeface</i> | Menu options and field names The guide uses the same abbreviations as the screen. | <i>Master Files</i> Use <i>Max Lnth</i> to specify the maximum length of alpha user fields. |
| Bold standard typeface | Used for notes, cautions and WARNINGS | Caution: You must ensure that all Infinium PY users are signed off before reorganizing and purging. If there are jobs in the queue, those files will not be reorganized. |
| Bold monospaced typeface | Characters that you type and messages that are displayed | Type Infinium PY in the <i>System</i> field. The following message is displayed: Company not found |
| F2 through F24 | Keyboard function keys used to perform a variety of commands. | Press F2 to display a list of available function keys. |
| F13 through F24 | Function keys higher than F12 require you to hold down the Shift key and press the key that has the number you require minus 12. | Press F16 to update the journal. |

| Convention | Description | Example |
|-------------|---|--|
| Select | Choose a menu option or choose a record or field value after prompting. | Select <i>Employer Controls</i> . Select a record. From the <i>List</i> menu, select <i>Display</i> . |
| Press Enter | Provide information on a screen and when you have finished, press Enter to save your entries and continue. | Press Enter to save your changes and continue. |
| Exit | Exit a screen or function, usually to return to a prior selection list or menu. May require exiting multiple screens in sequence. | Press F3 to return to the main menu. |
| Cancel | Cancel the work at the current screen or dialog box, usually to return to the prior screen. | Press F12 to cancel your entries. |
| Help | <p>To access online help for the current context (menu option, screen or field), press Help (or the function key mapped for help).</p> <p>To move through the other applicable levels of help, press Enter at each help screen. To return directly to the screen from which you accessed help, exit the help screen by clicking Exit or by pressing F3.</p> | Press Help for more information about the current field. |

| Convention | Description | Example |
|---------------------|--|--|
| [Quick Access Code] | <p>Quick access codes provide direct access to functions. Most quick access codes in Infinium Payroll consist of the first letter of each word of the menu option name.</p> <p>Quick access codes are listed on the Menu Tree and in the path for each task next to the executable function.</p> | Select <i>Update Employer Controls</i> [UCO]. |
| Publication titles | Unless otherwise stated, titles refer to Infinium applications and use standard name and abbreviations. | <i>Infinium Training Administration Guide to Setup and Processing</i> is referred to as <i>Infinium TR Guide to Setup and Processing</i> . |

Function Keys

Infinium AM function keys and universal Infinium PY function keys for the IBM AS/400 or iSeries are described in the following table. All Infinium PY function keys are identified at the bottom of each screen.

| Function Key | Name | Description |
|--------------|---------------|---|
| F1 | Help | Displays help text |
| F2 | Function keys | Displays window of valid function keys |
| F3 | Exit | Returns you to the main menu |
| F4 | Prompt | Displays a list of values from which you can select a valid entry |
| F10 | Quick Access | Enables you to access another function from any screen |

| Function Key | Name | Description |
|--------------|-----------|---|
| F12 | Cancel | Returns you to the previous screen |
| F22 | Delete | Deletes selected item(s) |
| F24 | More keys | Displays additional function keys at the bottom of the screen |

Character-based and Graphical-based Screens

The sample screens in this guide may be either character-based or graphical-based. Samples of both are included below.

```

2/17/98 13:01:49      Personnel Actions Update      PEGMTR      PEDMTR
Employer . . . . : ZUS      SAMPLE US COMPANY
Employee . . . . : 80038    GREEN,KELLY
  SC                      Salary Change
-----
SC Effective Date _____ Position . . . . 110140 +
SC Reason . . . .  _____ + Job Code . . . . 140_ +
SC Base Rate . . . . _____ -or- Increase % . . . . _____
Updt Payroll Rate 1 (0->4) Payroll Rate . . . . _____
Pay Grade . . . . _____ + Scheduled Pay Pds 26
Regular Hours . . . . 80.00
Pay Type . . . . $ Bonus? . . . . 0 (0=No 1=Yes)
SC Base Frequency A_ Comp Ratio . . . : 23.8000
Pay Frequency . . B_ Salary Quartile : 1
Prev. Frequency . A_ Prev. Base Rate . 50,000.0000
Comment . . . . . Description . . . _____

2=Change 4=Delete
Opt Date Reasn Positn Job Base Rate Incr% Incr. Amt. Comp
_ 1/01/1998 MERIT 110140 S 140 50,000.0000 6.0220 2,840.0000 23.80
_ 8/20/1995 ADJST 110140 S 140 47,160.0000 13.3653 5,560.0000 23.58

F3=Exit F4=Prompt F8=Calculate F10=Access F12=Previous
    
```

Figure 1: Sample character-based screen for Infinium HR suite

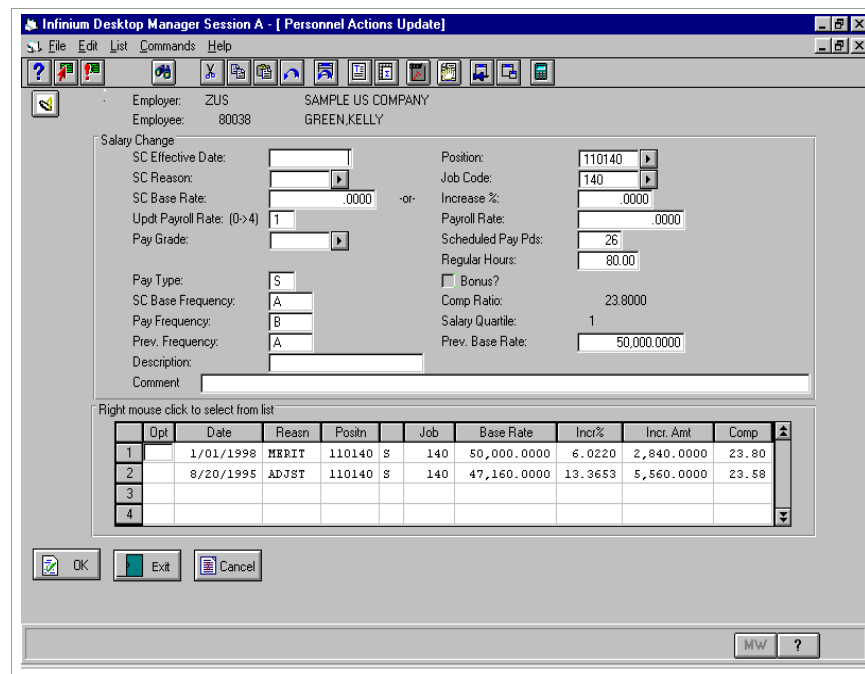


Figure 2: Sample graphical-based screen for Infinium HR suite

Prompt and Selection Screens

A prompt screen, similar to Figure 3, is the screen in which you type information to access a record or a subset of records in a file.

A selection screen, similar to Figure 4, is the screen from which you select a record or records to perform an action.

When we first explain a task in this guide, we fully document how you access a prompt and selection screen. If a related task uses that prompt or selection screen, we include the prompt and selection steps in that task. However, we do not include the screen(s) again.

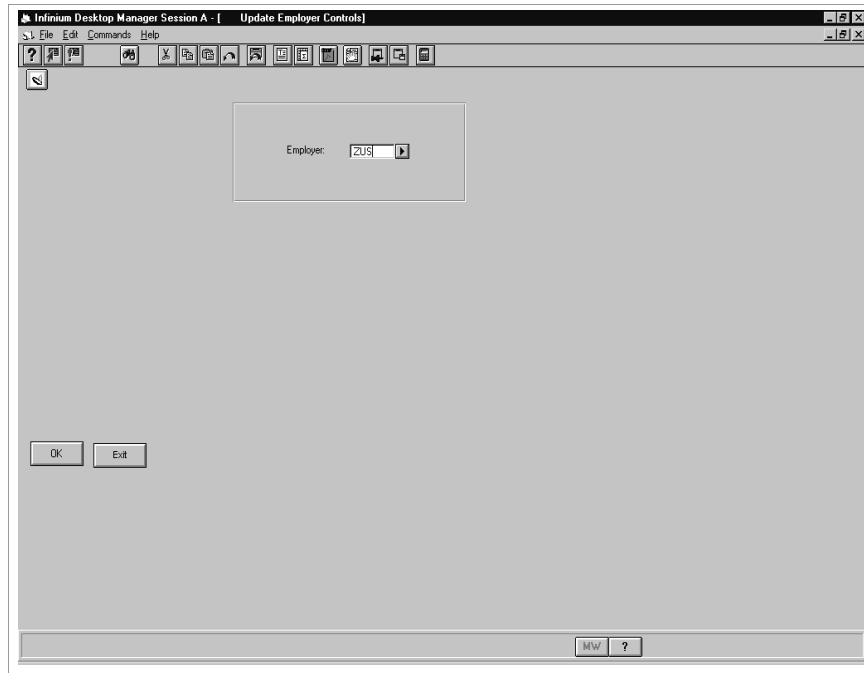


Figure 3: PY prompt screen

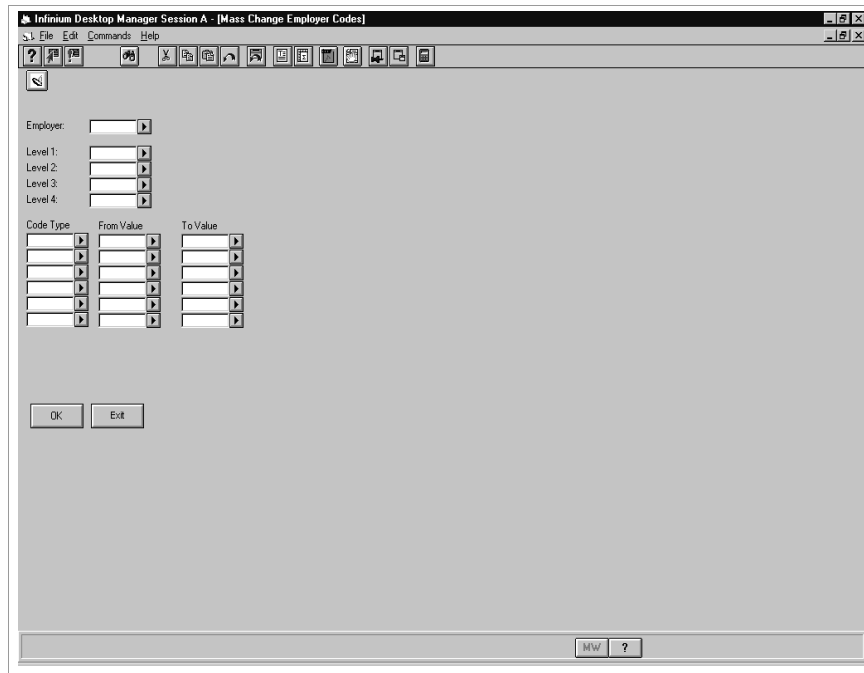


Figure 4: PY selection screen

Promptable Fields

A plus sign displayed next to a field indicates that you can choose your entry from a list of possible values. Place the cursor in the field and press F4 to display a list of values.

To select an entry perform one of the following:

- Position the cursor at the desired value, type 1 and press Enter.
- Type the value in the appropriate field.

Infinium Applications and Abbreviations

The following table lists Infinium names and the corresponding product abbreviations that are associated with this product.

| Application | Abbreviation |
|--|---------------------|
| Infinium Application Manager | Infinium AM |
| Infinium Application Manager Extended | Infinium AM/X |
| Infinium Query | Infinium QY |
| Infinium Query Extended | Infinium QY/X |
| Infinium Financial Management Suite | Infinium FM |
| Infinium General Ledger | Infinium GL |
| Infinium Payables Ledger | Infinium PL |
| Infinium Project Accounting | Infinium PA |
| Infinium Human Resources Suite | Infinium HR |
| Infinium Flexible Benefits | Infinium FB |
| Infinium Human Resources | Infinium HR |
| Infinium Human Resources/Payroll | Infinium HR/PY |
| Infinium Payroll | Infinium PY |
| Infinium Training Administration | Infinium TR |

Related Documentation

For additional information about Infinium HR, refer to the following:

- *Infinium Human Resources Guide to Processing*
 - *Infinium Human Resources Guide to Management Functions*
-

- *Infinium Human Resources Guide to Setup and Processing for Benefits Administration*
- *Infinium Human Resources/Payroll Technical Guide*
- *Infinium Human Resources/Payroll Conversion Workbook*
- *Infinium Human Resources Menu Tree*
- *Infinium Human Resources/Payroll Reports Book*
- *File/Field Descriptions*
- *Database Relations*
- Online help

Installation instructions and release notes are available on Infor365.

Notes

Chapter 1 Infinium HR: An Overview

1

Infinium HR is a comprehensive human resources management system that allows you to manage employee information and perform human resources reporting and administrative activities. It is fully integrated with Infinium PY. Together, Infinium HR and Infinium PY make up the product referred to as Infinium Human Resources/Payroll (HR/PY).

In addition to Infinium PY, Infinium HR also shares information with Infinium FB and Infinium TR. Each of these products uses core employee information contained in Infinium HR to avoid redundancy and duplicate maintenance of basic employee data.

Infinium HR/PY Overview

The flowchart on the following page identifies key components of both Infinium HR and Infinium PY. Information that is shared between the two systems is positioned in the middle of the chart. Information that is unique to Infinium HR or Infinium PY is shown in the lower portion of the chart under each product heading. A brief description of the main Infinium HR components follows the overview chart.

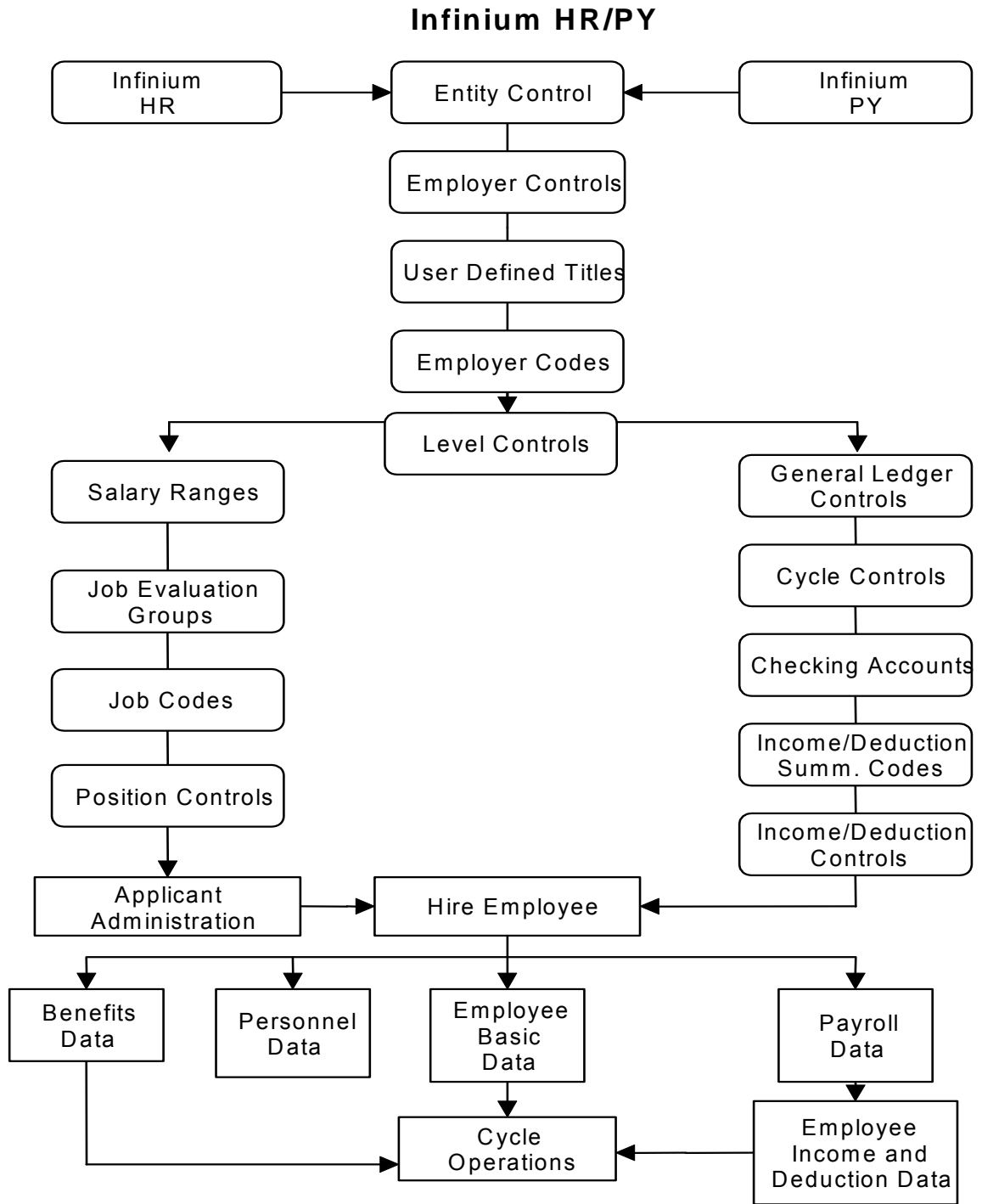


Figure 1-1: Infinium HR/PY Overview

Terminology and Concepts

This section contains Infinium and Infinium HR terminology that you should understand before you continue to the detail topics. These concepts are used throughout the entire Infinium HR system.

Understanding Shared Controls

Shared controls are files of information that are used by both Infinium HR and Infinium PY for processing. Shared controls can be defined and modified by either Infinium HR or Infinium PY users. You must set up all of the shared files listed below except employer groups and user defined titles, which are optional. You must set up job controls on Infinium HR; however, you do not maintain job controls on Infinium PY unless you want to associate pay rates or general ledger account numbers with jobs.

In most cases the same fields appear on the update screens for shared controls on both systems. In some cases, however, the update screens of shared files contain different information. When the fields on the screens are different, both Infinium HR and Infinium PY users must enter shared control information.

The following table lists the controls that are shared between Infinium HR and Infinium PY. It also indicates whether the screens you use to enter the controls on Infinium HR are the same or different from the screens you use to enter these controls on Infinium PY.

| Shared Control | Is This Control Required to Implement Infinium HR? | Are the Infinium HR and Infinium PY update screens the same? |
|---------------------|--|--|
| Entity Control | Yes | Same |
| Employer Control | Yes | Different |
| User Defined Titles | No | Same |
| Employer Codes | Yes | Same |
| Employer Groups | No | Same |
| Reporting Levels | Yes | Different |
| Job Controls | Yes | Different |

Entity Control

The entity control governs how you assign numbers to employees. It also displays current release numbers and allows you to identify the related

Infinium products that are installed on your system. You define the entity control once regardless of the number of employers you define on your system.

Employer Control

The employer control groups employees together for processing and reporting. You define controls for each employer and hire employees into an employer. You must specify an employer to perform most processing activities in Infinium HR and Infinium PY. Generally, you set up an employer for each federal tax identification number in your organization. There are certain exceptions that are discussed in “Setting up the Entity and Employer Controls” chapter of this guide.

Employer Code Types and Code Values

Code types are pre-defined three-character designators the system uses to categorize information and ensure that your employee data is consistent and reliable. For each code type, you develop a list of code values that suit your business and reporting requirements. Some code types have a standard list of code values. For example, you use code type **STA** to enter the state or province in which each employee resides. You define standard code values for this code type, such as **NY** for New York, **CA** for California, and **ON** for Ontario.

Infinium has defined many code types for Infinium HR/PY. You must define code values for fewer than twenty code types to perform basic processing on Infinium HR.

Employer Groups

Employer groups collect employees assigned to different companies together for certain processing and reporting activities.

Level Controls

Levels define the organizational structure of each employer. You can establish up to four levels for each employer. Each employee is assigned to a set of levels within an employer. Infinium HR and Infinium PY use levels for processing, reporting, security and general ledger number resolution.

Personnel Controls

Personnel controls are files of information that you set up and maintain only in Infinium HR. Personnel controls include salary ranges, job evaluation groups, position controls and pay grades.

Salary Ranges

Salary ranges provide upper and lower boundaries for employee base pay rates. The system automatically verifies that each employee's base pay rate is greater than the minimum and less than the maximum of his or her assigned salary range. The system also uses salary ranges to compute a salary quartile and comp ratio for each employee.

Job Evaluation Groups

Job evaluation groups and factors identify attributes you use to assess the value or worth of jobs in your organization. You do not use job evaluation groups and factors to evaluate individual employee performance. You use them to rank jobs in order of significance or importance in your organization. You can define a dummy job evaluation group without associated factors if you do not use job evaluation in your organization.

Job Controls

Job controls define classes or types of work performed in your organization. You can establish very broadly defined jobs, such as clerk or manager, or more specific jobs, such as senior payroll administrator or recruiting supervisor. Employees in different parts of your organization can be assigned to the same job code. In Infinium PY, you can associate pay rates and general ledger account numbers to jobs.

Position Controls

Position controls identify where jobs are performed in your organization. You must set up at least one position for each job and associate it with levels to specify where the work is performed in the employer.

Pay Grades

Pay grades are used in step-in-grade processing to automate the pay rate progression of employees based on their length of service, hours worked, or a combination of both factors. You typically use step-in-grade processing to administer pay rates of union and public sector employees.

Applicant Tracking

You can use Infinium HR to track applicant information including skills, interviews and recruitment costs. You can utilize several convenient displays and reports including the Applicant Log. If you hire an applicant, you can use his or her applicant information to expedite the hire process.

Hiring Employees

You can hire employees using Infinium HR or Infinium PY. Regardless of which system you use, you enter the same essential information that the system requires to establish and pay employees including the following:

- Basic Data
- Personnel Data
- Payroll Data
- Income Data
- Deduction Data

Maintaining Employee Information

You use the *Enter Personnel Actions* function in Infinium HR to update basic employee information and create unlimited on-line history transactions. You can use employee history displays and reports to analyze trends and better manage your employees.

Infinium HR Reporting

Infinium HR has a wide variety of standard reports that you can run at any time. Typically, you specify certain key selection criteria and press Enter to generate a report. You can also develop your own reports using Infinium QY.

Infinium HR also contains several statutory reports including the EEO-1 information, the EEO-4 information, and the Applicant Log. You can use Infinium HR to store and print US I-9 information and to create a file of information that you can download to a personal computer for Canadian employment equity reporting.

Administering Employee Benefits

Infinium HR contains a module that allows you to set up and track employee benefit enrollments. Since Infinium HR and Infinium PY are integrated, you can pass benefits enrollment information from Infinium HR to Infinium PY so that the correct benefit deductions are withheld from employee paychecks

and employer liabilities are tracked. Infinium PY can pass benefit costs to Infinium GL for inclusion in your organization's financial reports.

Conventions Used in Infinium HR

There are several conventions that are used throughout Infinium HR including those listed below.

Understanding System Names

In this guide and others, Infinium HR is sometimes referred to as **PE**. Infinium PY is sometimes referred to as **PY**. The combination of Infinium HR and Infinium PY is referred to as **HR**.

Using Update Functions

Throughout Infinium HR, you use options that begin with *Update* to add, change or delete information in the system.

Using Display Functions

Throughout Infinium HR, you use options that begin with *Display* to view information in the system. You cannot use display options to add, change or delete information.

Using List Functions

Throughout Infinium HR, you use options that begin with *List* to generate standard reports of information in the system. You generally use a selection screen to identify the information you want to include on the report.

You use options on various operating system screens to view and print your reports. For example, you can press F14 from the Infinium HR main menu to access the Work with Submitted Jobs screen. You use options on this screen to display and print the spooled files that contain your reports. Refer to information about your operating system for detailed instructions on how to view and print your reports.

Understanding Defaults

A default is a value that the system automatically assigns or an action that the system automatically takes. Some default values and actions are pre-

defined by Infinium; others are defined by users as they set up Infinium HR. Default values are generally entered on control screens.

Using Quick Access

On most screens in Infinium products, including Infinium HR, you can press F10 to display a pop-up window that allows you to go to another function without first returning to the product's main menu or desktop. You enter a pre-defined Quick Access code for the function that you want to access. This timesaving feature allows you to move rapidly to functions in the systems to which you are authorized.

You can use Quick Access codes to move to functions within Infinium HR or to a function in any other system to which you are authorized. Quick Access codes are displayed in brackets following all menu functions listed in this guide.

Prompting for Values

Throughout all Infinium products, including Infinium HR, when you place your cursor on any field that displays +, you can press F4 button to display a list of valid values for that field. You can select a value from the list by typing any character in the *Opt* field next to the value you want to use, then pressing Enter. The system returns to the field your cursor was in when you prompted and automatically fills it with the value you selected.

Using System Help

Infinium provides four levels of help for all products including Infinium HR. You can press Help on any field in Infinium HR. The system first displays field help for the specific field your cursor was in when you accessed the help system.

If you press Enter on the Field Help screen, the system next displays screen help. Screen help provides you with information concerning the purpose of the screen you are completing.

If you press Enter on the Screen Help screen, the system next displays function key help. Function key help provides you with an overview of the functions performed by function keys for the screen you are using.

If you press Enter on the Function Key Help screen, the system next displays function help. Function help provides you with an overview of the entire function you are using.

If you press Enter again, the system returns to the field from which you accessed Help.

In addition to the four levels of standard system help text, you can also enter up to four levels of your own user defined help text. When you enter your own help text, the system displays it before it displays standard system help text. See the *Application Manager Navigational Guide* for details.

Working with Sub-files

At the bottom of some screens in Infinium HR, the system displays one or more lines of information that has been previously entered for the control or employee with which you are working. The area of the screen in which the system displays these records is called a sub-file. You can review, modify, or, in some cases, delete records from the sub-file. The system displays one line of key information for each record in the sub-file. To review all of the information associated with a sub-file record, you must retrieve it from the sub-file.

The system displays an unlimited number of records in each sub-file. If the number of sub-file records exceeds the space available at the bottom of the screen, the system displays + in the lower right-hand corner of the screen. Press PageDown to scroll through additional sub-file records.

The top half of a sub-file screen contains input fields. You can use this portion of the screen to type new information or to make changes to existing records that you have retrieved from the sub-file. When you type new information, the system stores it in a new record in the sub-file when you press Enter to save your work. When you modify the information in an existing record that you have retrieved from the sub-file, the system updates the existing sub-file record when you press Enter to save your work.

For example, when you access the Update Workforce Levels screen to enter new budget information for a position control, the system displays each budget period you have previously set up for that position in separate records in the sub-file. You can review, modify or delete one or more of the prior budget periods defined for that position. You can also enter a new budget period for the position.

To review or modify information in a sub-file record, type 2 in the *Opt* field adjacent to the record. The system moves the information to the input area in the top portion of the screen, where you can review or update it. Press Enter to return the record to the sub-file.

To delete a record from the sub-file, type 4 in the *Opt* field adjacent to the record. When you press Enter, the system displays **DELETED** in place of

that line in the sub-file. It removes the deleted record completely when you press F3 to exit from the sub-file screen.

You must press F3 to exit from sub-file screens. When you press F3, the system makes your sub-file additions, changes or deletions permanent. You can press F12 to exit from the screen without saving your additions, changes or deletions.

Identifying Required Fields

On most screens in Infinium HR, there are one or more fields in which you must make an entry to update a record, display information or generate a report. These fields are identified as required fields in this guide. There are additional optional fields on most screens that you can use to enter discretionary information or to identify specific information to view or include in a report.

When you use Infinium Human Resources, the system identifies required fields with a green underscore. The system highlights all of the required fields and displays an error message at the bottom of the screen that reminds you to make an entry in the required fields.

Notes

Chapter 2 Setting up the Entity and Employer Controls

2

This chapter describes the tasks you perform to establish the first two of the major high-level system controls that are shared between Infinium HR and Infinium PY. You must set up these controls before you can establish controls exclusive to Infinium HR. You must establish both shared controls and Infinium PY controls before you can enter and maintain employee information.

The chapter consists of the following topics:

| Topic | Page |
|--|-------------|
| Overview of the Entity and Employer Controls | 2-2 |
| Establishing the Entity Control | 2-4 |
| Setting up the Employer Control | 2-19 |
| Summary of the Entity and Employer Controls | 2-50 |

Overview of the Entity and Employer Controls

Objectives

After you complete this chapter, you should be familiar with how to use Infinium HR to establish the entity and employer controls, which are shared between Infinium HR and Infinium PY. You should be familiar with performing the following essential activities to implement and maintain Infinium HR:

- Set up, maintain, display and print the entity control
- Set up, maintain, display and print the employer control

Understanding the Entity Control

The entity control governs how you assign numbers to employees. It also displays current release numbers and allows you to identify which related Infinium products are installed on your system. You can also establish sensitive data access levels for employee tax ID and bank information. It is the first control you establish when you begin your implementation of Infinium HR.

You only establish one entity control on your system regardless of the number of employers you define.

Understanding the Employer Control

The employer control groups employees together for processing and reporting. You define controls for each employer and hire employees into an employer. You must specify an employer to perform most processing activities in Infinium HR and Infinium PY.

You set up an employer control for each organization that possesses a unique federal tax identification number, except when:

- You plan to use multiple tax identification processing for a U.S. organization that possesses more than one federal tax ID. See the *Infinium Payroll Guide to Multiple Tax ID Processing* for information on
-

whether this approach is appropriate for your organization and for details on how to implement multiple tax ID processing.

- You are defining a Canadian employer that has more than one unemployment rate and account number. See the *Infinium Payroll Guide to Controls* for details on how to establish multiple unemployment tax rates and accounts for an employer.

Establishing the Entity Control

The entity control is a record that governs how the system assigns employee numbers and contains other high-level information such as the current Infinium HR and Infinium PY release numbers and other Infinium products installed on your system. It is the first control you define when you implement Infinium HR.

Since the entity control is shared between Infinium HR and Infinium PY, you can define the entity control using either system. Since the entity control affects both systems, personnel and payroll users should agree on the choices made with this control.

You use the entity control record to enter high level information that affects all of the employers you establish in Infinium HR. You define only one entity control record regardless of how many employers you define on your system.

The most significant choice you make using the entity control concerns the way you want to assign employee numbers in Infinium HR. The three options are described on the following page.

The entity control record also has system-related information. You use the entity control record to indicate which other Infinium products are installed on your system. The entity control record automatically displays the number of the most current major release of Infinium HR installed on your system.

Learning about the Entity Control

After you complete this topic, you should be familiar with the following:

- How the system assigns employee numbers
 - How to set up the entity control
 - How to display the entity control
 - How to change the entity control
-

Assigning Employee Numbers

One of the key decisions you make when you implement Infinium HR is how you want to assign employee numbers. Each employee must be assigned a unique number within his or her employer. The system uses this number along with the employer code to locate an employee when you update, display, or print his or her information. You typically set up an employer for each federal tax identification number in your organization.

You can choose one of the three methods listed below to assign employee numbers in Infinium HR. You can use the same method for all employers or you can use a different method for each employer.

- System-assigned
- Tax Identification Number

Only employers who used this method before Release 11.0 can use this method. This method is not supported for new employers as of Release 11.0.

- User-defined

You use the entity control to indicate that you are using the system-assigned method of assigning employee numbers. You use the employer control to indicate that you are using the tax identification number as the employee number. You do not specify that you are using the user-defined method on any particular control record; you simply type the employee number when you use the *Enter New Hire* function.

The employee number must be unique within each employer. However, you can assign the same number to more than one employee if each employee works for a different employer. For example, you can assign number **100** to only one employee in company ABC. However, you can also assign employee number **100** to one employee in company DEF and one employee in company GHI. You use the *Ed EE only in ER?* field on the employer control to specify whether you will allow the system to assign the same number to employees in different employers after you go live on Infinium HR.

If you frequently transfer employees between employers, it is preferable to assign each employee a unique number. When you transfer an employee from one employer to another and his or her number has already been assigned to someone else in the new employer, the system requires you to change the transferring employee's number as part of the transfer transaction.

For example, you try to transfer employee number 100 from Company A to Company B. When you press Enter to complete the transfer transaction, the system immediately checks to see if there is an employee whose number is

100 in Company B. If there is, you must assign a new number to the transferring employee or you cannot complete the transfer transaction.

When an employee's information is stored under more than one employee number, you cannot easily view or print the employee's complete history across employers using standard system options. If you completed the transfer described in the preceding paragraph, the system would store the transferring employee's history under different employee numbers in two different employers. If it was stored under the same employee number, you could use the *Display Employee History* function to display cross-employer information.

Using the System-assigned Employee Number Method

When you use the system-assigned employee number method, the system automatically assigns each new employee a number during the hiring process based on the value in the *Next Employee #* field on the entity control. You enter a starting value in the *Next Employee #* field when you implement Infinium HR and the system automatically retrieves the number from this field for each new employee, then increments the field by one for the next new employee.

The system assigns only sequential numeric employee numbers; it cannot automatically assign employee numbers that include blanks or alphabetical characters. To use numbers that include blanks or alphabetical characters, you must assign employee numbers manually during the *Enter New Hire* function.

For example, you enter **1000** into the *Next Employee #* field on the entity control during your system setup. When you hire the first new employee, the system assigns him or her **1000**. The next employee you hire is assigned employee number **1001**.

When you use this method, the system assigns unique numbers sequentially across all employers and does not duplicate numbers among employers. In the preceding example, you hire the first new employee into company ABC. You hire the second new employee into company XYZ.

The system never assigns the same number twice and checks for duplicate numbers before assigning a number to a new employee. It is especially helpful and efficient to have Infinium HR assign employee numbers in organizations where employees transfer between employers.

Note: It is possible for users to manually assign the employee number during the *Enter New Hire* function even though you have entered a value in the *Next Employee #* field on the entity control.

Using the Employee Tax Identification Number Method

When you use the employee tax identification number method, you manually enter the employee's tax identification number (Social Security number in the United States and Social Insurance number in Canada) as the employee's number during the hiring process. The system automatically copies this number from the *Employee* field on the Enter New Hire prompt screen to the *Tax ID* field found on the employees basic data record. Both the employee number and tax identification number fields display the same number for each employee. The system appropriately inserts hyphens in the tax identification number based on employee's home country.

When you use this method, you leave the *Next Employee #* field blank on the entity control and type 1 in the *Tax ID for EE#?* field on the employer control record.

To provide enhanced security for employee tax ID numbers, as of Release 11.0, you can no longer change the value in the *Tax ID for EE#?* field. If, when you defined your employer control you specified 1 in the *Tax ID for EE#?* field, the system continues to process the value, but the system places 0 in this field for all new employer controls.

Using the User-defined Employee Number Method

The user-defined employee number method allows you to assign your own number to each new employee. To assign your own number, you normally leave the *Next Employee #* field blank on the entity control. When you hire a new employee, you manually type the employee number on the prompt screen for the *Enter New Hire* function.

Finding Additional Information

The system-assigned employee number method is explained in this section. Refer to the "Setting up the Employer Control" topic in this guide and the "Entering New Hires" chapters in the *Infinium Human Resources Guide to Processing* for additional information on the other methods.

Establishing the Entity Control

Follow the steps below to establish the entity control.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
-

- 3 Select *Update Entity Controls* [UN]. Press Enter to display the Update Entity Controls selection screen shown in Figure 2-1.

```
1/16/09 13:38:53 Update Entity Controls PRGMEN PRDMEN

Type options, press Enter
2=Change

Option Attribute
= Base Data
- Installed Systems
- Shop Floor
- Sensitive Data Access

F3=Exit F10=QuikAccess
```

Figure 2-1: Update Entity Controls selection screen

- 4 Type 2 next to the attribute to update and press Enter. The system displays the appropriate screen.

Update Base Data

```

6/21/12 12:25:29 Update Entity Controls PRGMEN PRDMEN
Base Data

Description . . . . . INFINIUM SOFTWARE INC

Next Employee Number . . . . 000034837

Next Non-Employee Number . . 233

Date Format . . . . . MDY

New Hire Custom Fields? . . 1 (0=No 1=Yes)

Next Preferred Provider Num: 80
HR/400 Release . . . . . : 11.0
PY/400 Release . . . . . : 11.0

Calculate Deduction Maximum: 10

F3=Exit F10=QuikAccess F12=Cancel

```

Figure 2-2: Update Entity Controls Base Data screen

- 5 Use the following information to complete the fields on this screen:

Description

Type a description of your overall organization. The system does not print this description on any standard reports. The system uses the description for informational purposes only. This is a 30-character alpha-numeric field.

Next Employee #

To have the system assign employee numbers, type the number that the system should assign to the next employee whom you hire. You cannot type letters in this field nor can you type spaces between the numbers. The system increments this field by one after it assigns the number to an employee. You can update this field manually at any time.

Leave this field blank to:

- Allow users to manually assign employee numbers, or
- Use the employee's tax identification number as the employee number

If you converted employee numbers from your previous system during your implementation of Infinium HR, be sure to update this field before you begin using Infinium as your production system. You can enter a starting number

that immediately follows converted employee numbers or is different from your old employee numbers.

Next Non-Employee #

Type the number for the system to assign to the next non-employee whom you add to the system. The system increments this field by one for each subsequent non-employee whom you add to the system. You can update this field manually at any time.

You cannot type letters in this field nor can you type spaces between the numbers.

Leave blank to allow users to assign non-employee numbers manually.

Date Format

To ensure that the system can access Infinium PY tax tables during pay cycle processing, you must type **MDY** in this field. **MDY** designates the month, day, year date format (MMDDYYYY). The system does not use this field to verify the way you enter dates into the system, it uses the date format you specify for each employer.

You specify the date format for each employer on the employer control. In addition to the **MDY** format, there are two other date formats available on the employer control:

DMY Day, Month, Year (DDMMYYYY)

YMD Year, Month, Day (YYYYMMDD)

The system uses the date format you specify on the employer control to verify that you enter information correctly into date fields in Infinium HR. You can select a different date format for each employer. For example, you can use the **YMD** format for a Canadian employer and the **MDY** format for a U.S. employer, or you can select the **YMD** format for both employers.

The system automatically converts all dates to an eight digit format (MM/DD/YYYY) even though you can enter them using only six digits (MM/DD/YY).

New Hire Custom Fields

Use this field only when processing for localized situations, for example, Macau. See the *Guide to Localized Setup and Processing* for more information.

Next Preferred Provider Num

The number displayed here is the next number to be assigned to a preferred provider record when you create it by using *Update Preferred Providers*.

HR/400 Release #, PY/400 Release #

The system automatically updates these fields with the Infinium HR (formerly Infinium HR 2000) and Infinium PY (formerly Payroll 2000) release numbers when you install a new release. These fields are protected; you cannot change the information displayed in these fields. Both fields should display the same release number.

Calculate Deduction Maximum

The system displays the maximum number of times that deduction amounts are recalculated when a check contains insufficient funds.

- 6 Press F3 to exit and save your updates and return to the Update Entity Control selection screen.

Update Entity Controls Installed Systems Screen



Figure 2-3: Update Entity Controls Installed Systems screen

- 7 Use the information below to complete the fields on this screen.

Self Service Installed?, FB/400 Installed?, TR/400 Installed?, PL/400 Installed?

Specify yes if the Infinium application is installed on your system. Leave the field blank or type **0** next to the Infinium applications that are not installed. Some of these fields affect interfaces between Infinium HR and the other Infinium applications.

TM Interface Active?

Specify yes to activate the Infor HCM Talent Management interface, which allows the transfer of employee data from Infinium HR/PY to Infor HCM Talent Management. Otherwise, specify no.

PA Interface Active?

Use this field to activate the project accounting interface, which allows the transfer of project-related timesheet data from Infinium PY to Infinium PA.

Valid values are:

- 0** Do not activate the PA Interface.
- 1** Activate the PA Interface for Infinium PA Release 11.2 APC-A or earlier.
- 2** Activate the PA Interface for Infinium PA Release 12.0 or later.

GL Interface Option

Specify the GL interface the system uses when payroll information is closed to general ledger. Valid values are:

- 0** General ledger interface is not specified.
- 1** Use the Infinium General Ledger interface.
- 2** Use the Infor ERP_{LX} General Ledger interface.
- 3** Use the Infor FMS Masterpiece General Ledger interface.

LM Interface Active

Specify whether to activate the Learning Management interface, which allows the transfer of employee data from Infinium HR/PY to Learning Management.

Specify the GL interface the system uses when payroll information is closed to general ledger. Valid values are:

- 0 Do not activate the Learning Management interface.
 - 1 Activate the Learning Management interface.
- 8 Press F3 to exit and save your updates and return to the Update Entity Control selection screen.

Update Entity Control Shop Floor Screen

```

1/16/09 13:55:55 Update Entity Controls PRGMEN PRDMEN
Shop Floor

Shop Floor Interface? . . . 1 (0=No 1=Yes)

Shop Floor Clock Number Used S Blank=Not used
                          P=PY Clock Number
                          S=ERP LX Clock Number

Shop Floor Clock Exit Pgm. . _____

Last Shop Floor Clock Number 00000177

F3=Exit F10=QuikAccess F12=Cancel

```

Figure 2-4: Update Entity Controls Shop Floor screen

- 9 Use the information below to complete the fields on this screen.

Shop Floor Interface?

Specify yes if you are using the Infor ERP _{LX} shop floor interface. Otherwise, specify no.

Caution: After you specify that you are using the Infor ERP _{LX} shop floor interface, you cannot change the value in the *Shop Floor Interface?* field from **1** to **0**.

Shop Floor Clock Number Used

Specify whether the system uses the clock number information in the *PY Clock Number* field or the *ERP LX Clock Number* field in the *Update Basic Data* function to process a shop floor employee's payroll information. Valid values are:

- P** Use the value in the *PY Clock Number* field.
- S** Use the value in the *ERP LX Clock Number* field.
- Blank** You are not using the Infor ERP _{LX} interface.

If you previously used the *PY Clock Number* field for employees' clock numbers and you are now using Infor ERP _{LX}, you can use the *PY Clock Number* field by typing **P** in this field. If you use the *PY Clock Number* field for another purpose and you are using the Infor ERP _{LX} interface, type **S**.

If you specify yes in the *Shop Floor Interface?* field, you must type **P** or **S** in this field. After you enter **P** or **S** here, you cannot change that value.

Shop Floor Clock Exit Pgm

If you use a custom program to generate clock numbers, enter the custom program name in this field. The program must already exist.

Last Shop Floor Clock Number

This is the most recently system-generated clock number.

- 10 If you specify yes in the *Shop Floor Interface?* field, press Enter to display the Income Payment Prioritization window. Otherwise, press F3 to exit and save your updates and return to the selection screen.

If you specify yes in the *Shop Floor Interface?* field, the system displays a message informing you that you cannot change **1** to **0** in the *Shop Floor Interface?* field after you exit the Update Entity Controls screen.

The system also displays the ERP _{LX} Income Payment Prioritization window shown in Figure 2-5.

Figure 2-5: ERP LX Income Payment Prioritization window

- 11 Specify the priority sequence for incomes associated with the employee's clock number and shop floor information. Priority sequence determines the shop floor information the system uses to calculate pay. Use the information

below to complete the fields on this window. The lower the number in the sequence, the higher the priority.

Employee/Clock #

Type the priority level, 1 to 4, for incomes associated with the employee's clock number.

Work Center

Type the priority level, 1 to 4, for incomes associated with the work center in Infor ERP_{LX}.

Class

Type the priority level, 1 to 4, for incomes associated with the class of items produced in Infor ERP_{LX}.

Item

Type the priority level, 1 to 4, for incomes associated with the item that is produced in Infor ERP_{LX}.

- 12 Press F3 to exit and save your updates and return to the Update Entity Control Shop Floor screen. Press F3 to exit to the Update Entity Controls selection screen.
-

Update Entity Controls Sensitive Data Access Screen

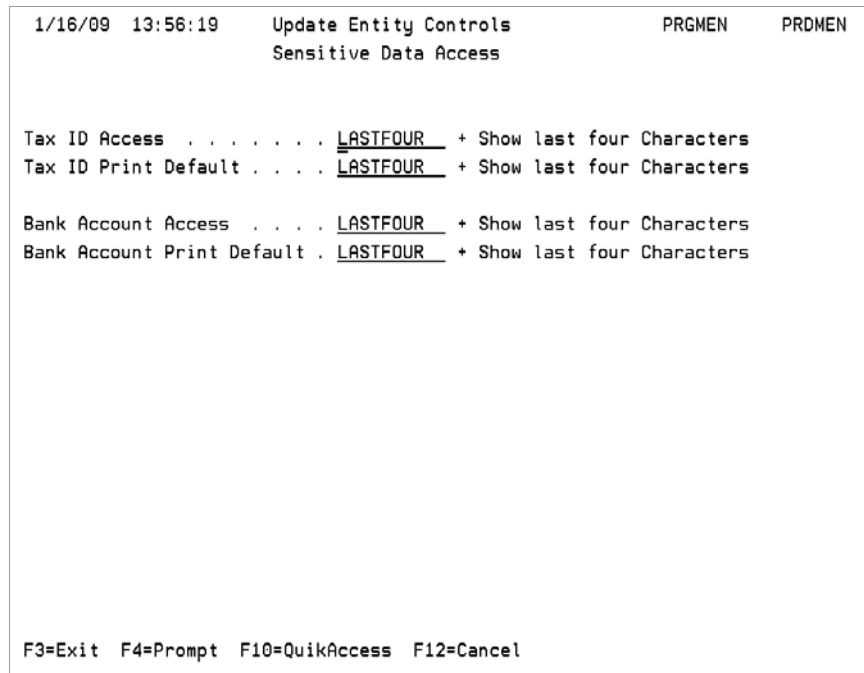


Figure 2-6: Update Entity Controls Sensitive Data screen

- 13 Use the information below to complete the fields on this screen.

Tax ID Access

Specify the code that identifies the access allowed for the *Tax ID* field when viewing or changing employee data. This is an Infinium AM code. Valid values:

| | |
|------------------|--|
| SHOWALL | Show all characters |
| MASKALL | Hide all characters |
| LASTFOUR | Show the last four characters only |
| FIRSTFOUR | Show the first four characters only |
| FANDLFOUR | Show the first and last four characters and show asterisks for all characters in between |

Tax ID Print Default

Specify the code that identifies the access allowed for the *Tax ID* field when you print employee data.

Bank Account Access

Specify the code that identifies the access allowed for the *Bank Account* field when you view or change employee data.

Bank Account Print Default

Specify the code that identifies the access allowed for the *Bank Account* field when you print employee data.

- 14 Press F3 to exit and save your updates and return to the Update Entity Controls Sensitive Data Access screen.
- 15 Press F3 to exit to the main menu.

Displaying the Entity Control

After you establish the entity control record, you can view it on line. The display functions with Infinium HR allow you to view information only. You cannot use a display function to make changes to information.

Follow these steps to display the entity control record.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Display Master Files*.
 - 3 Select *Display Entity Controls [DEN]*. The system displays the Display Entity Controls selection screen.
-

```
1/16/09 14:21:49      Display Entity Controls      PRGDEN2  PRDDEN2

Type options, press Enter
5=Display

Option  Attribute
=      Base Data
-      Installed Systems
-      Shop Floor
-      Sensitive Data Access

F3=Exit  F10=QuikAccess
```

Figure 2-7: Display Entity Controls selection screen

- 4 Type 2 next to the entity control information do display. The system displays selected entity control information on this screen.
- 5 Press Enter or F3 to exit from this screen after you finish viewing the entity control information.

Changing the Entity Control

You use the *Update Entity Controls* function to make changes to the information you entered on the entity control. You can update all of the fields except the two that are listed below; these fields are on the Update Entity controls Base Data screen and are maintained by the system when your technical staff installs new releases.

- *HR/400 Release*
- *PY/400 Release*

Setting up the Employer Control

The employer control is a record of basic information about each organization that has its own federal tax identification number. You can define as many employers as necessary on the system.

The employer control record is shared between Infinium HR and Infinium PY; however the system displays somewhat different screens for personnel users than for payroll users. For this reason, the employer control must be set up in both Infinium HR and Infinium PY.

Since the choices made on the employer control affect both systems, personnel and payroll users should agree on the information that is entered on this control. One of the most critical shared decisions that you make when you establish an employer concerns the way you define the company's organizational structure.

You enter global descriptions for up to four of the employer's major organizational groupings on the employer control. Then you set up level controls to identify specific locations for each group. This is discussed in more detail on the following page and in the topic entitled "Defining Level Controls" in this guide.

The Infinium HR employer control record also contains the following information:

- Employer name, address and telephone number
- Employer tax identification number
- Various defaults you can assign to save time when entering new employees into the system
- Accrual category names

Learning about the Employer Control

You learn the following about this topic:

- Decisions you must make before you set up the employer control
 - How to set up the employer control
 - How to change the employer control
 - How to delete the employer control
-

- How to display the employer control
- How to generate the employer control report

Making Preliminary Decisions about the Employer Control

The most critical decision you make when you implement Infinium HR is how you define your employers. You generally create one employer for each federal tax identification number assigned to your organization. However, there are two exceptions to this rule that are discussed in the two paragraphs immediately below.

Using U.S. Multiple Tax ID Processing

If you are setting up a U.S. employer and want to use multiple tax identification number processing, you follow a different procedure. Multiple tax ID processing allows you to define one employer and create tax companies within it. This is especially useful for organizations that operate under the common paymaster arrangement. An Infinium Professional Services Consultant can assist you with this type of setup. Refer to the *Infinium Payroll Guide to Multiple Tax ID Processing* for additional information.

Setting up Canadian Unemployment Accounts

If you are establishing a Canadian employer who has more than one federal tax identification number due to multiple unemployment tax rates, you do not need to establish more than one employer. You can enter up to ten reduced unemployment factors and employer tax identification numbers for each Canadian employer. Infinium PY automatically generates a separate T-4 form for each unemployment tax account associated with an employee during the calendar year.

Defining Level Descriptions

After you decide how you will define employers, your next most critical decision concerns levels. You use levels to represent the employer's organizational structure. You enter a general description of up to four levels within an employer on the employer control record. Later, you identify each specific level location using the *Update Reporting Levels* function.

Before you establish an employer, you should consult with the Infinium PY users in your company to agree upon the level descriptions and locations. Levels work best when you consider the needs of both personnel and payroll

users. If an organization chart exists for the employer, you may find it a helpful tool to use when analyzing the organizational hierarchy.

The levels represent a hierarchical structure. You can define up to four tiers or breakdowns. You must define at least level 1 for each employer. You use level 1 to identify the broadest organizational groupings in the employer; within each level 1, you can identify level 2 groupings. Within each level 2, you can define level 3 groupings and within each level 3, you can define level 4 groupings.

For example, within a particular employer level 1 can represent divisions; level 2 can represent regions within each division; level 3 can represent departments within each region; level 4 can represent cost centers within each department.

Levels describe and define the organizational structure of your employer. You also use levels for:

- **Processing:** levels allow you to select employees for processing and group employees for data entry.
- **Reporting:** levels allow you to extract information for displays and reports; you can use levels to sort and group employees together on reports and to generate sub-totals in standard reports.
- **Security:** levels allow you to restrict user access to employee information based on specific areas in your organization.
- **General Ledger Accounts:** Infinium PY uses levels to generate general ledger accounts to charge labor expense and employer liabilities to your general ledger system.

The level descriptions you type on the employer control become the level headings for the employer on screens throughout the system. The system also prints these headings on standard system reports.

See the topic entitled “Establishing Level Controls” in this guide for more details.

Setting up the Employer Control

Follow the steps below to set up an employer control record.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
-

- 3 Select *Update Employer Controls* [UC]. The system displays the Employer Update prompt screen.
- 4 Type a value that identifies your employer. You can use any combination of up to three alphanumeric characters to represent an employer. You will use this value each time you access data pertaining to this employer, including the records of employees assigned to this employer.

To save you keying time, your system security administrator can set up your user profile to default a particular employer's code into the *Employer* field on most screens. Depending on your security restrictions, you can override this default to access information for other employers.

Note: It is common to set up a sample employer for testing during your initial implementation of Infinium HR. If you later want to transfer the information to a different employer code for additional testing or to create a live employer, you can use a special utility function to copy the employer's information and change the sample employer's code to another code. Refer the technical member of your implementation team to the *Infinium HR Guide to Setting Up and Using HRUTILITY* for details.

- 5 Press Enter to display the Employer Update screen 1 of 3 shown in Figure 2-8.

The screenshot shows the 'EMPLOYER UPDATE' screen with the following data entered:

| EMPLOYER UPDATE | | Page 1 of 3 | |
|---------------------------|--------------------------|-------------------|------------|
| Employer | ZUS | | |
| Name | SAMPLE US COMPANY | | |
| Address Line 1 | 2010 MAIN STREET | | |
| Address Line 2 | HTTP://INFO.INFINIUM.COM | | |
| City/Town | ANYTOWN | | |
| State/Province | MA | Postal Code | 92111 |
| Telephone | 714-555-1212 | Canada SBRN | |
| Federal Tax ID | 10-12121234 | State/Local 69# | |
| Level Descriptions | | | |
| Level 1 | Area | Level 2 | Division |
| Level 3 | Department | Level 4 | Cost Centr |
| Employer Defaults | | | |
| Country | USA | State/Province | MA |
| Location | 15 | Retirement Age | 65.00 |
| Shift | | Pay Frequency | |
| Exempt Annual Hrs | | Non-Exmpt Ann Hrs | |

Figure 2-8: Employer Update screen 1 of 3

- 6 Use the following information below to complete the fields on this screen.

Coordinating with Payroll Users

You use this screen to enter identifying information about the employer. If an Infinium PY user has already defined the employer control for this employer in Infinium PY, the system displays the information he or she entered on this screen. You can make any necessary changes, which will then update the Infinium PY employer control.

Name

Type the employer's legal name. The system uses this name on personnel reports, such as the EEO-1 and EEO-4 forms, and payroll reports, such as W-2 and T-4 forms. This is a required 30-character alphanumeric field.

Address Line 1

Type the employer's mailing address. The system uses this address on personnel reports, such as the EEO-1 and EEO-4 forms, and payroll reports, such as W-2 and T-4 forms. This is a required 30-character alphanumeric field.

Address Line 2

Type the second line of the employer's mailing address. The system does not use this field for personnel reporting, however it is used in payroll reports such as the W-2 and T-4 forms. This is an optional 30-character alphanumeric field.

City/Town

Type the name of the city or town in which the employer's main office or headquarters is located. The system uses this address on personnel reports, such as the EEO-1 and EEO-4 forms, and payroll reports, such as W-2 and T-4 forms. This is a required 30-character alphanumeric field.

State/Province

Type the standard abbreviation for the state or province in which the employer's main office or headquarters is located. This is a required 2-character alphanumeric field. You should use standard alphabetical abbreviations such as **MA** for Massachusetts or **ON** for Ontario. Employers in the province of Nunavut must type **NU** in the field.

Postal Code

Type the postal code or zip code of the employer. This is a required 10-character alphanumeric free-form field. You can enter letters, numbers, dashes and spaces as appropriate.

Telephone

Type the telephone number for your employer. This is a required 19-character free-form field. You can include the area code or other international codes; if you do, you can use any character (such as parentheses or dashes) to separate the codes from the rest of the telephone number.

For example, you can type 508-555-1212 or (508) 555-1212 for U.S. and Canadian telephone numbers.

Canada SBRN

Use this field to update or display the Canadian SBRN number. The number must be in the format of 123456789XXxxxx, where XX represents the type of account and xxxx represents the suffix for more than one account. The valid values for type of account are:

| | |
|-----------|------------------------------|
| RT | Goods and services tax (GST) |
| RC | Corporate income tax |
| RP | Payroll deductions |
| RM | Import and export |

Federal Tax ID

Type the current federal tax identification number for this employer. The system uses this number on various tax forms and tapes. This is a required 11-character free-form field. Type the number exactly as it should print on tax forms and reports.

Effective as of 1998, this number is no longer required for Canadian employers. Instead you should enter the SBRN number in the *Canada SBRN* field.

State/Local 69#

If you have a state or local 69 number, type it here. The 69 number is typically used by municipal and county employers.

Level Descriptions

You use the four level fields to define the organizational structure of the employer. You can define a maximum of four levels for each employer. You must type at least one level description for each employer that you establish.

The level descriptions you type in this field become the level headings for this employer on screens throughout the system. You can use both upper and lower case letters to complete these fields.

If you are implementing Infinium IH along with Infinium HR, you should ensure that the levels you define in Infinium HR are useful for reporting and processing in Infinium IH.

Employer Defaults

The system uses the employer default values that you type on this screen to fill in the corresponding fields for new employees during the hiring process. You can override these defaults during the new hire process, if necessary. All of these fields are optional.

You should fill in only the fields for which a standard value is correct for most of the new employees who are hired in the employer. For example, if all but a few employees in a particular employer live in California, you can type **CA** in the *State/Province* field. You have to override this value only when you hire an employee who lives in a different state.

You can also enter defaults on level controls. Those defaults override the defaults you enter on the employer control. Continuing the previous example, if the few employees who live in Oregon are associated with a particular cost center, you can enter **OR** in the *State/Province* field on the level control for that cost center.

You must establish valid code values for the employer default fields marked with + before you enter information into them on this screen. For example, before you can enter a value in the *Country* field, you must define valid code values for this field using code type **CTR**. Leave the code-validated fields blank when you are entering a new employer into the system. After you establish the code values, you can update the code-validated employer default fields.

You use the *Update Employer Codes* function to define code values. See the topic entitled “Defining Employer Code Values” in this guide for details.

Country

If you want the system to default a code value into the *Country* field for each new employee during the hiring process, type the default code value in this field. The system uses this field to identify the home residence country of each employee for the employee address. You define code values for this field using code type **CTR**. Leave this field blank if you want to manually enter a code value in the *Country* field of the address during the hiring process.

State/Province

If you want the system to default a code value into the *State/Province* field for each new employee during the hire process, type a valid state or province code value in this field. The system uses this field to identify the home residence state or province of each employee for the employee address. You define code values for this field using code type **STA**. Leave this field blank to manually enter a code value in the *State/Province* field of the address during the hiring process.

Location

You do not normally enter a default value into this field. Instead, the system defaults the value in the *Location* field associated with each employee's hiring position into the *Location* field in the new employee's record. The system uses this field to identify his or her work location. This field is used in U.S. employers for EEO reporting. You define values for this field using code type **LOC**.

Retirement Age

Type the standard retirement age for employees in this employer. The system uses this field to identify employees who will reach this age during a date range you specify on the selection screen for the *Display Projected Retirement* function and the List Projected Retirement report within the *Benefits Administration* option.

When you use the *Update Employee Data* method to hire new employees, the system uses the value you type in this field to fill in the *Retirement Age* field in the employee's basic data record. It does not use this default when you use the *Enter New Hire* method of hiring new employees.

Shift

If you want the system to default a code value into the *Shift* field for each new employee during the hire process, type a valid code value in this field. The system uses this field to identify the employee's normal shift assignment during pay cycle processing. You define code values for this field using code type **SFT**. On Infinium PY, you can associate each shift code with a shift premium that is automatically generated during pay cycle processing.

Leave this field blank if you want to manually enter a code value in the *Shift* field during the hiring process, or if you do not use shift processing.

Pay Frequency

If you want the system to default a value into the *Pay Frequency* field for each new employee during the hire process, type a valid value in this field. The system uses this field to identify how often an employee is scheduled to

be paid. The system can compare the value in the *Pay Frequency* field of each new employee with the pay frequency value associated with his or her pay cycle to ensure that each employee is assigned to the correct pay cycle.

Valid values are:

| | |
|-----------|-----------------------------------|
| D | Daily |
| W | Weekly |
| B | Biweekly |
| S | Semimonthly |
| M | Monthly |
| 10 | Ten pay periods per year |
| 13 | Thirteen pay periods per year |
| 22 | Twenty-two pay periods per year |
| 27 | Twenty-seven pay periods per year |
| 53 | Fifty-three pay periods per year |

Leave this field blank if you want to manually enter a value in the *Pay Frequency* field during the hiring process.

Exempt Annual Hrs

Type a value in this field that represents the standard number of hours worked per year by employees who are exempt from overtime pay. This field is for informational purposes only.

Non-Exmpt Ann Hrs

Type a value in this field that represents the standard number of hours worked per year by employees who are eligible for overtime pay. This field is for informational purposes only.

- 7 Press Enter to display the Employer Update screen 2 of 3 shown in Figure 2-9.
-

| 8/23/13 12:19:18 | | Employer Update | | PEGMCO | PEDMCO |
|--|------------------------|--------------------|-------------------|---------------|--------|
| | | | | Page 2 of 3 | |
| Employer . . . : ZUS SAMPLE US COMPANY | | | | | |
| <u>Employer Details</u> | | | | | |
| Affirm. Act. Goal | <u>0</u> | Affirm. Act. Model | <u>0</u> | (0->3) | |
| Tax ID for EE#? | <u>0</u> (0=No 1=Yes) | Posit. File Used? | <u>1</u> | (0=No 1=Yes) | |
| Check for Dup ID? | <u>2</u> (0->2) | Date Format . . . | <u>MDY</u> | | |
| | | EEO Unit Control | <u>0</u> | (0->2) | |
| <u>Accrual Category Names</u> | | | | | |
| Category 1 . . . | <u>Vacation</u> | Category 2 . . . | <u>Sick</u> | | |
| Category 3 . . . | <u>Personal</u> | Category 4 . . . | <u>FMLA</u> | | |
| Category 5 . . . | <u>Category 5</u> | Category 6 . . . | <u>Category 6</u> | | |
| FMLA Category . . | <u>4</u> (0->6) | FMLA Leave Year . | <u>1</u> | (1->5) | |
| <u>Additional Employer Flags</u> | | | | | |
| Ed EE only in ER? | <u>1</u> (0->1) | Act Self Service . | <u>1</u> | (0=No, 1=Yes) | |
| Del. Future Trans | <u>1</u> (0->2) | Act Self Srv Rout | <u>1</u> | (0=No, 1=Yes) | |
| Position Default . | <u>2</u> (0->2) | Point In Time Rpt | <u>1</u> | (0=No, 1=Yes) | |
| NAICS Code | <u>713990 +</u> | Act Talent Mgmt. . | <u>1</u> | (0=No, 1=Yes) | |
| Edit Inact Levels | <u>0</u> (0->2) | Edit Inact Pos . . | <u>0</u> | (0->2) | |
| Inact Lvl Rpt Dft | <u>0</u> (0, 1) | Edit Wrkfrnc Lvl . | <u>0</u> | (0->2) | |
| Transfer User Def | <u>1</u> (0=No, 1=Yes) | Reqr Postal Code? | <u>0</u> | (0->2) | |
| Transfer Payroll . | <u>0</u> (0=No, 1=Yes) | Act Learning Mgmt. | <u>1</u> | (0=No 1=Yes) | |
| F3=Exit F10=Access F12=Previous | | | | | |

Figure 2-9: Employer Update screen 2

8 Use the information below to complete the fields on this screen.

Affirm. Act. Goal

This field is for future use. Use the default value of **0** at this time.

Affirm. Act. Model

This field is for future use. Type **0** in this field at this time.

Tax ID for EE #?

To provide enhanced security for employee tax ID numbers, as of Release 11.0, you can no longer change the value in the *Tax ID for EE#?* field. If, when you defined your employer control you specified **1** in the *Tax ID for EE#?* field, the system continues to process the value, but the system places **0** in this field for all new employer controls.

Use this field to indicate that you want to use the employee's tax identification number (Social Security number in the U.S. or Social Insurance number in Canada) as the employee number.

When you hire a new employee, the system uses the number you enter in the *Employee* field on the prompt screen for the *Enter New Hire* function to automatically fill in the employee's *Tax ID* field on screen 1 of the *Enter New Hire* function. After the employee is hired, the *Employee* and *Tax ID* fields will

both display the same 9-digit number; however, the system automatically inserts dashes into the *Tax ID* field based on the employee's payroll country.

Valid values are:

- 0** You do not want to use the employee's tax identification number as his or her employee number.
- 1** You want to use the employee's tax identification number as his or her employee number.

For each employer, you can select one of three methods to assign employee numbers. Refer to the "Establishing Entity Controls" topic in this guide for more information.

Posit. File Used?

Use this field to indicate that the system should default information from position and job controls into employee records during the hiring process and when you use the *Enter Personnel Actions* function to maintain their information. Jobs identify a general work classification or category, such as clerk; positions are a further definition of a job, such as accounting clerk or payroll clerk.

When you type **1** in this field, the system prevents users from manually updating certain fields in the employee basic data and personnel data records. The system maintains these fields by using information from the employee's assigned position and job. It automatically updates the protected fields when you hire new employees and when you use the *Enter Personnel Actions* function to transfer, promote, demote and rehire employees. The fields the system prevents you from manually updating are listed below.

When you allow the system to maintain key fields in the employee's records, you are assured of current, accurate and consistent employee data at all times. In addition, since many system functions require the use of positions you are strongly urged to define and use them.

If you do not want to use positions, type **0** in the *Posit. File Used?* field. Even if you do not set up specific jobs and positions, you must define generic positions in order to use in the *Enter New Hire* and *Enter Personnel Actions* options. You must manually update the fields listed below. In addition, you cannot use the following Infinium HR functions:

- *FTE Operations functions*
 - *Salary Planning functions*
-

Using Positions with Basic Data

The system maintains the following fields in the employee basic data records when you enter 1 in the *Posit. File Used?* field:

- *Level 1, Level 2, Level 3, Level 4*
- *Location*
- *Position*
- *Position Title*
- *Job Code 1*
- *Seniority Date*
- *EEO Category*
- *EEO-4 Function*
- *PE Benefit Group (only during the hiring process)*
- *Union*
- *Shift*
- *Workers Comp.*
- *Labor Category*
- *Security Group*
- *Pay Grade*
- *Salary Range*
- *Salary Quartile*
- *Comp Ratio*

Using Positions with Personnel Data

The system maintains the following fields in the employee personnel data record when you enter 1 in the *Posit. File Used?* field:

- *Position Level*
 - *Season*
 - *Levels (Previous)*
 - *Level Change Date*
 - *Position (Previous)*
 - *Job Code (Previous)*
 - *Job Change Date*
-

- *Employer (Previous)*
- *Employee (Previous)*

Using Positions with Payroll Data

The system maintains the *PY Authorization Group* field in the employee payroll data record only during the hire process when you enter 1 in the *Posit. File Used?* field.

Using Positions in Infinium HR Advanced

You must use positions to hire employees using the *Quick Hire* function in Infinium HR Advanced. Ensure that you enter 1 in the *Posit. File Used?* field for all employers you set up if you use Infinium HR Advanced.

Defining Generic Positions

If you choose not to use positions to update employee information but still want to use the *Enter New Hire* and *Enter Personnel Action* functions, you must define generic positions. This procedure allows you to use the *Enter New Hire* option and the transfer, promotion, demotion and rehire transactions in the option *Enter Personnel Actions*.

The system creates employee history for each personnel action you enter. However, when you type 0 in the *Posit File Used?* field you must manually update the fields listed above to ensure that employee basic data and personnel data records contain current information.

You can manually maintain most of the fields listed above. The six fields that you cannot manually are:

- *Position*
- *EEO Category*
- *Pay Grade*
- *Salary Range*
- *Salary Quartile*
- *Comp Ratio*

The system automatically updates the *EEO Category* and *Salary Range* fields when you manually change the value in the *Job Code 1* field in employee basic data. You can use the *Update Salary Ranges* or *Mass Update Employee Positions* functions to update the *Salary Quartile* and *Comp Ratio* fields. However, you cannot use any standard system functions to update the *Pay Grade* and *Position* fields. The *Position* field always

displays the value representing the generic position to which you assigned each employee during the new hire process.

Check for Dup ID?

Use this field to indicate whether you want the system to check for duplicate employee tax identification numbers; if you do, you can indicate whether the system should check for duplicate numbers within an employee's current employer or across all employers.

The system performs the check for duplicate tax identification numbers during the *Enter New Hire* function and when you use the *Update Basic Data* function to display or update employee information.

If during the hiring process the system locates another employee within the hiring employer who has the same tax identification number as the new employee, it displays an error message that identifies the employee number of the person with the duplicate tax identification number. You cannot complete the hire transaction.

If during the hiring process the system locates another employee in another employer who has the same tax identification number as the new employee, it displays a warning message that identifies the employer and employee number of the person with the duplicate tax identification number. Depending on the value in the *Check for Dup ID?* field of both employers, you may or may not be able to complete the hire transaction.

If the value in the *Check for Dup ID?* field for both employers is **2**, the system does not allow you to hire a new employee with the same tax identification number as an existing employee. If the value in the *Check for Dup ID?* field of the hiring employer is **2** but the value in the *Check for Dup ID?* field of the other employer is **0** or **1**, the system presents a warning message during the new hire function but allows you to complete the hire transaction.

To prevent users from hiring employees with duplicate tax identification numbers, you should ensure that the value in the *Check for Dup ID?* field is **2** for all employers on your system.

Valid values are:

- 0** Do not check for duplicate tax identification numbers.
 - 1** Check for duplicate tax identification numbers only within the employer you are establishing.
 - 2** Check for duplicate tax identification numbers across all employers set up on Infinium HR.
-

Date Format

Type the date format for this employer. The date format governs the way you must enter dates on screens as well as the way the system prints dates on reports and stores dates in files for this employer.

For example, if you type **YMD** (year/month/day) in this field, you must enter all dates in the year-month-day format for this employer. To avoid inconsistencies in reports and in files, do not change the date format once you begin processing functions within an employer.

The format you specify should match the date format of other systems that interface with Infinium HR, such as Infinium GL.

WARNING: You should not change the date format once you enter information for an employer. You will have great difficulty reading date information on reports if you have a mix of different date formats stored in employee history.

EEO Unit Control

Use this field to indicate if you want to produce EEO unit reports and on which control you want to maintain the *EEO Category* field. EEO unit reports track employment activity (including applicants, new hires, terminations and promotions) by employee gender, ethnicity and EEO unit. Each EEO unit identifies a work location for EEO reporting purposes. You associate each EEO unit with one or more position control records.

You generally maintain the *EEO Category* field on the job control record, however when you type **2** in this field, you maintain the *EEO Category* field on the position control record. In either case, the system defaults the EEO code value from the job or position control record to the basic data record of assigned employees.

The EEO category identifies each employee's classification for U.S. EEO-1 or EEO-4 forms or Canadian Employment Equity reports.

Valid values are:

- 0** You do not want to generate EEO Unit reports.
 - 1** You want to generate EEO unit reports and you want to maintain the *EEO Category* field on the job control record.
 - 2** You want to generate EEO unit reports and you want to maintain the *EEO Category* field on the position control record.
-

Accrual Category Names

You can track up to six categories of paid-time-off for each employee. Type a description for each general category of paid time off within this employer. The system uses the names you type on this screen as field labels for the paid time off information section of employee basic data records.

You can define an unlimited number of specific programs within each broad accrual category. For example, you use category 1 for vacation; within the vacation category, you can define different vacation plans for salaried employees, union employees, part-time employees and so on.

You use code type **ACR** within the *Update Employer Codes* option to define code values for specific paid-time-off accrual programs. You then use the *Update Accrual Controls* option to specify the way each accrual is calculated. See the *Infinium Payroll Guide to Management Functions* for more information on defining and maintaining paid-time-off accrual information.

For FMLA processing, you can specify that the code value for the accrual code type, ACR, is an FMLA accrual code. See the *Infinium HR Guide to Management Functions* for information about FMLA processing.

FMLA Category

Specify the paid time off category that represents FMLA leave. When you use the *Calculate Benefit Accruals* function, the system excludes the FMLA leave category from standard processing and does not update the accrued and earned amounts. The system updates the FMLA accrued and earned amounts when you use the *Calculate FMLA Accruals* function.

Valid values are:

- | | |
|----------|---|
| 0 | Not applicable, none of the categories represents the FMLA leave. |
| 1 | Accrual category 1 represents FMLA leave. |
| 2 | Accrual category 2 represents FMLA leave. |
| 3 | Accrual category 3 represents FMLA leave. |
| 4 | Accrual category 4 represents FMLA leave. |
| 5 | Accrual category 5 represents FMLA leave. |
| 6 | Accrual category 6 represents FMLA leave. |
-

FMLA Leave Year

Specify the 12-month period during which the employee can use the allowed FMLA leave.

Valid values are:

- | | |
|--------------|---|
| Blank | Not applicable |
| 1 | The year is based on a fixed 12-month period such as calendar, fiscal, or other year required by law. |
| 2 | The year is based on the employee's date of hire. |
| 3 | The year is based on the employee's adjusted date of hire. |
| 4 | The year is based on the first time the employee took FMLA leave. |
| 5 | The year is a twelve month period that looks back from the date an employee uses FMLA leave. |

Additional Employer Flags

Ed EE only in ER?

Type a value that indicates whether you can assign the same number to employees in different employers. If you type **1** in this field, when you use the *Enter New Hire* function the system allows you to assign a number to a new employee that has already been assigned to an existing employee in a different employer.

The system generates a warning message during the *Enter New Hire* function when you type a number that has already been assigned to another employee. If you type **0** in this field, you cannot proceed with the hire transaction unless you assign a different number to the new employee. If you type **1** in this field, you can override the warning message and proceed with the hire transaction using the duplicate employee number.

Valid values are:

- | | |
|----------|--|
| 0 | Edit the number for a new employee across all employers. |
| 1 | Edit the number for a new employee only within the employer to which the employee is being assigned. |
-

Act Self Service

Indicate if you want to activate Infinium HR Self Service for a specific company within the organization.

Valid values are:

- 0** No, do not activate Infinium HR Self Service.
- 1** Yes, activate Infinium HR Self Service.

This field is write-protected if the *Self Service Installed* field is set to **0** on the Entity Control screen.

Del. Future Trans

Type the value that indicates how you want the system to process the deletion of a terminated employee's future-dated personnel transactions.

Valid values are:

- 0** Do not delete future-dated personnel transactions
- 1** Allows you to delete future-dated personnel transactions on the Personnel Actions Update Termination screen
- 2** Decide on a case by case basis

The system-specified value appears in the *Delete Future Trans* field on the Personnel Actions Update Termination screen with the exception of the value **2**, which appears as a blank. You can override any of these values when terminating an employee.

Act Self Service Routing

Specify **Yes** to activate e-mail notification routing within Infinium HR Self Service for a specific employer. Otherwise, specify **No**.

Position Default

Specify how you want the system to use the position defaults file, PRPDF, when you use the *Enter New Hire* and *Enter Personnel Actions* functions.

Valid values are:

- 0** Do not use position defaults.
 - 1** Use position defaults only when you use the *Enter New Hire* function.
-

- 2** Use position defaults when you use the *Enter New Hire* function and the *Update Personnel Actions* function for transaction types hire (HI), transfer (TR), promotion (PR), demotion (DM) and rehire (RH).

Use the *Update Position Defaults* function to create and maintain position defaults.

Point In Time Rptng

Specify **Yes** to authorize this employer to use point-in-time reporting. Otherwise, specify **No**.

You use point-in-time reporting to display audit or historical information for an employer, an employee, or a group of employees for a specific point in time.

For information on initializing, activating, and using point-in-time reporting, refer to the “Displaying Employee Information” chapter in the *Infinium HR Guide to Processing*.

NAICS Code

Specify the value that represents the NAICS code (North American Industry Classification Code System) associated with this employer control. This value is used only for Wyoming unemployment reporting. The system uses the following hierarchy to retrieve the NAICS code for Wyoming unemployment reporting:

- a Position control
- b Level 4 control
- c Level 3 control
- d Level 2 control
- e Level 1 control
- f Employer control

Act Talent Mgmt

Specify yes to activate the interface to Infor Talent Management for this specific employer within the organization.

You can activate the interface to Infor Talent Management for an employer only if you specify yes in the *TM Interface Active?* field on the Update Entity Controls screen.

Edit Inact Levels

Indicate whether a warning or an error is displayed when the user tries to deactivate a level set with active employees or if the user tries to hire, rehire, transfer, promote, demote, or perform a status change for an employee with a position where the *Active/Inactive?* field on the level set associated with the position is set to 1 for inactive.

Valid values are:

- 0** Warning
- 1** Error
- 2** No edits occur

Edit Inact Pos

Use this field to indicate whether a warning or an error is displayed when the user tries to deactivate a position with active employees or if the user tries to hire, rehire, transfer, promote, demote, or perform a status change for an employee with a position where the *Active/Inactive?* field on the position is set to 1 for inactive.

Valid values are:

- 0** Warning - the user can use F21 to override.
- 1** Error - the user cannot override the message.
- 2** No edits occur.

Inact Lvl Rpt Dft

Specify the default value to use for reports to indicate if you want to include inactive levels. Valid values are:

- 0** Do not include inactive levels in the report.
- 1** Include inactive levels in the report.

You can override the default value by pressing F15 when you run a report that allows you to include or omit inactive levels.

Edit Wrkfrc Lvl

Use this field to indicate whether a warning or an error is displayed when the user tries to hire, rehire, transfer, promote, or demote an employee into a position that causes the workforce level to be exceeded.

Valid values are:

- 0** Warning - the user can use F21 to override.
- 1** Error - the user cannot override the message.
- 2** No edits occur.

Transfer User Def

Specify whether to copy user-defined data for employees transferred into this company when performing an intercompany transfer.

Valid values are:

- 0** No, do not include user-defined data.
- 1** Yes, include user-defined data.

Reqr Postal Code?

Specify whether the postal code is required for the employee address when you use *Update Basic Data*, *Enter New Hire*, or the *Enter Personnel Actions Personal Change* transaction.

Valid values are:

- 0** Show an error message with no override allowed.
- 1** Show an error message with override allowed.
- 2** Do not show an error message.

Transfer Payroll

Specify whether to copy payroll data for employees transferred into this company when you perform an intercompany transfer. Payroll data includes the payroll master data, income data, and deduction data. The employee is initially authorized to the incomes and deductions from the new PY authorization group.

Valid values are:

- 0** No, do not include payroll data.
 - 1** Yes, include payroll data.
-

Act Learning Mgmt

Specify whether to activate the interface to Learning Management for this employer. Valid values are:

- 0** No, do not activate the interface to Learning Management.
- 1** Yes, activate the interface to Learning Management.

You must set the *LM Interface Active* field to yes on the Update Entity Controls/Installed Systems screen before you can activate the interface for a specific employer.

- 9 Press Enter to display the Employer Update screen 3 of 3 shown in Figure 2-10.

The screenshot shows the 'EMPLOYER UPDATE' window for employer 'ZUS SAMPLE US COMPANY'. The window title is 'EMPLOYER UPDATE' and the page number is 'Page 3 of 3'. The window contains several sections of input fields:

- Custom Transaction Programs to Call:** A grid of fields for Blood Donations, New Hire, Promotion, Re-Hire, Status Change, and Transfer.
- Demotions, Personal Change, Performance Review, Salary Change, Termination, Work Action:** A grid of fields for these actions.
- Custom Exit Programs to Populate Locality Data:** A grid of fields for New Hire, Promotion, and Transfer, all containing the value 'PEGEXITLC'.
- Rehire, Demotion, Personal Change:** A grid of fields for these actions, all containing the value 'PEGEXITLC'.

Figure 2-10: Employer Update screen 3

- 10 Use the information below to complete the fields on this screen.

Using Custom Programs

You use the fields on this screen to specify custom programs that the system should execute when you hire a new employee into this employer or enter a personnel action transaction to maintain the data of current employees. You can also specify custom programs that update state, locality, user data and home tax company data when you enter a personnel action.

If you have a custom program in the Custom Transaction Programs to Call section, and you enter a personnel action transaction that is effective immediately, the system executes your custom program just before it

updates information in the employee basic data record. If you enter a personnel action that is effective in the future, the system can execute your custom program when you enter the transaction and when you run the *Mass Update Personnel Actions* function to activate the pending transaction.

The system executes a custom program associated with the new hire transaction as soon as you complete the Enter New Hire screens.

If you have a custom program in the Custom Exit Programs to Populate Locality Data section, the system only executes the custom program when you press F8. These custom programs enter values in the applicable fields and give you the ability to modify the values, as needed, before the transaction is processed.

See the *Infinium Human Resources Guide to Processing* for details on how to enter new employees and enter personnel actions.

All of the fields on this screen are optional. If you do not need to specify custom programs, press Enter to exit from this screen and save the information on the preceding two screens of the employer control record.

Programs for PE Actions

Blood Donations

Use this field to type the name of a custom program that the system should execute when you enter a blood donation transaction.

Demotion

Use this field to type the name of a custom program that the system should execute when you enter a demotion transaction.

New Hire

Use this field to type the name of a custom program that the system should execute when you hire a new employee.

Personal change

Use this field to type the name of a custom program that the system should execute when you enter a personal change transaction. You use the personal change transaction to update an employee's name, address, telephone number, marital status and/or spouse's name.

Promotion

Use this field to type the name of a custom program that the system should execute when you enter a promotion transaction.

Performance Review

Use this field to type the name of a custom program that the system should execute when you enter a performance review transaction.

Rehire

Use this field to type the name of a custom program that the system should execute when you enter a rehire transaction.

Salary Change

Use this field to type the name of a custom program that the system should execute when you enter a salary change transaction.

Status Change

Use this field to type the name of a custom program that the system should execute when you enter a status change transaction. You use the status change transaction to record when an employee moves from one employment category to another, such as from part-time to full-time.

Termination

Use this field to type the name of a custom program that the system should execute when you enter a termination transaction.

Transfer

Use this field to type the name of a custom program that the system should execute when you enter a transfer transaction.

Work Action

Use this field to type the name of a custom program that the system should execute when you enter a work action transaction. You use the work action transaction to track miscellaneous employment events such as service awards, special recognition awards, grievances, arbitrations, disciplinary actions and so on.

State, Locality, User Fields and Home Tax Company Data

New Hire

Type the custom program to run to complete fields in the PE transaction record when you use the *Enter Personnel Actions* function to enter a hire transaction. The system calls this program instead of using standard processing to determine the values. When the PE transaction is processed, the transaction values are used to update the matching values on the employee basic data and payroll master record.

The system updates the following fields in the basic data file:

- *User Field 1*
- *User Field 3*

The system updates the following fields in the payroll master file:

- *Current County*
- *Home County*
- *Current City*
- *Home City*
- *Curr School Dist*
- *Home School Dist*
- *Current Misc Loc*
- *Home Misc. Loc*
- *Current State*
- *Home State*
- *SUTA State*
- *Home Tax Co (multi-tax only)*

When you use the *Enter Personnel Actions* function to enter or update a hire (HI) transaction, you access these fields by pressing F6 to display the Personnel Trans. More Info Window. To run the custom program, press F8 on the Personnel Trans. More Info Window.

The sample program you can use to develop the custom program is PEGEXITLC.

Rehire

Type the custom exit program to run to complete fields in the PE transaction record when you use the *Enter Personnel Actions* function to enter a rehire transaction. The system calls this program instead of using standard processing to determine the values. When the PE transaction is processed, the transaction values are used too update the matching values on the payroll master record.

The system updates the following fields in the payroll master file:

- *Current County*
 - *Current City*
 - *Curr School Dist*
-

- *Current Misc Loc*
- *Current State*
- *SUTA State*
- *Home Tax Co* (for multi-tax employers)

When you use the *Enter Personnel Actions* function to enter a rehire (RH) transaction, you access these fields by pressing F6 to display the Personnel Trans. More Info Window. To run the custom program, press F8 on the Personnel Trans. More Info Window.

The sample program you can use to develop the custom program is PEGEXITLC.

Promotion

Type the custom exit program to run to complete fields in the PE transaction record when you use the *Enter Personnel Actions* function to enter a promotion transaction. The system calls this program instead of using standard processing to determine the values. When the PE transaction is processed, the transaction values are used to update the matching values on the payroll master record.

The system updates the following fields in the payroll master file:

- *Current County*
- *Current City*
- *Curr School Dist*
- *Current Misc Loc*
- *Current State*
- *SUTA State*
- *Home Tax Co* (for multi-tax employers)

When you use the *Enter Personnel Actions* function to enter a promotion (PR) transaction, you access these fields by pressing F6 to display the Personnel Trans. More Info Window. To run the custom program, press F8 on the Personnel Trans. More Info Window.

The sample program you can use to develop the custom program is PEGEXITLC.

Demotion

Type the custom exit program to run to complete fields in the PE transaction record when you use the *Enter Personnel Actions* function to enter a demotion transaction. The system calls this program instead of using

standard processing to determine the values. When the PE transaction is processed, the transaction values are used to update the matching values on the payroll master record.

The system updates the following fields in the payroll master file:

- *Current County*
- *Current City*
- *Curr School Dist*
- *Current Misc Loc*
- *Current State*
- *SUTA State*
- *Home Tax Co* (for multi-tax employers)

When you use the *Enter Personnel Actions* function to enter a demotion (DM) transaction, you access these fields by pressing F6 to display the Personnel Trans. More Info Window. To run the custom program, press F8 on the Personnel Trans. More Info Window.

The sample program you can use to develop the custom program is PEGEXITLC.

Transfer

Type the custom exit program to run to complete fields in the PE transaction record when you use the *Enter Personnel Actions* function to enter a transfer transaction. The system calls this program instead of using standard processing to determine the values. When the PE transaction is processed, the transaction values are used to update the matching values on the payroll master record.

The system updates the following fields in the payroll master file:

- *Current County*
- *Current City*
- *Curr School Dist*
- *Current Misc Loc*
- *Current State*
- *SUTA State*
- *Home Tax Co* (for multi-tax employers)

When you use the *Enter Personnel Actions* function to enter a transfer (TR) transaction, you access these fields by pressing F6 to display the Personnel

Trans. More Info Window. To run the custom program, press F8 on the Personnel Trans. More Info Window.

The sample program you can use to develop the custom program is PEGEXITLC.

Personal Change

Type the custom exit program to run to complete fields in the PE transaction record when you use the *Enter Personnel Actions* function to enter a personal change transaction. The system calls this program instead of using standard processing to determine the values. When the PE transaction is processed, the transaction values are used to update the matching values on the employee basic data and the payroll master record.

The system updates the following fields in the basic data file:

- *User Field 1*
- *User Field 3*

The system updates the following fields in the payroll master file:

- *Home County*
- *Home City*
- *Home School Dist*
- *Home Misc. Loc*
- *Home State*

When you use the *Enter Personnel Actions* function to enter a personal change (PC) transaction, you access these fields by pressing F6 to display the Personnel Trans. More Info Window. To run the custom program, press F8 on the Personnel Trans. More Info Window.

The sample program you can use to develop the custom program is PEGEXITLC.

- 11 Press Enter to update the employer control record. The system returns you to the prompt screen for the employer control.
 - 12 Repeat steps 4 through 11 to set up additional employers.
 - 13 Press F3 to exit from this option and return to the Infinium HR main menu.
-

Changing the Employer Control

You can use the *Update Employer Control* function to change almost any of the information on the employer control with one exception. You should not change the *Date Format* field after you begin processing in an employer because date information that prints on reports for that employer will be inconsistent.

For example, if you initially store dates for a particular employer in the month-day-year format and then later change to year-month-day format, the system does not convert previously stored date information. Reports that span both periods of time print both date formats.

Deleting an Employer

You can delete an employer control if you have not set up any additional controls for it and it does not contain any assigned employees. The system does not permit you to delete the employer control record of an employer to which active or terminated employees are assigned.

If you want to completely remove an employer and all associated controls and employees from your system, you can use the *Purge Selected Employers* functions on Infinium HR and Infinium PY. You typically use these options only to remove test employers from your system. See the *Infinium Human Resources Guide to Management Functions* for details on purging employers.

Follow the steps below to delete an employer control record.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Employer Controls* [UC]. The system displays the Employer Update prompt screen.
 - 4 Type the value that identifies the employer you want to delete.
 - 5 Press Enter. The system displays the Employer Update screen shown in Figure 2-11.
-

```

2/08/00 13:21:30      Employer Update      PEGMCO  PEDMCO
                               Page 1 of 3

Employer . . . . : ZUS
Name . . . . . : SAMPLE US COMPANY
Address Line 1 . : 2010 MAIN STREET
Address Line 2 . : HTTP://INFO.INFINIUM.COM
City/Town . . . . : ANYTOWN
State/Province . : CA          Postal Code . . . : 92111
Telephone . . . . : 714-555-1212  Canada SBRN . . . : _____

Federal Tax ID . : 10-12121234   State/Local 69# . : _____

Level Descriptions
Level 1 . . . . . : Area          Level 2 . . . . . : Division
Level 3 . . . . . : Department   Level 4 . . . . . : Cost Centr

Employer Defaults
Country . . . . . : USA +          State/Province . : AZ +
Location . . . . . : _____ +    Retirement Age . : 65.00
Shift . . . . . : _____ +       Pay Frequency . . : _____
Exempt Annual Hrs : _____        Non-Exmpt Ann Hrs : _____

F3=Exit  F4=Prompt  F10=Access  F12=Previous  F22=Delete

```

Figure 2-11: Employer Update screen 1 of 3

- 6 Press F22 to delete the employer control record.
- 7 Press F3 to return to the Infinium HR main menu.

Displaying the Employer Control

After you establish the employer control record, you can view it on line. The display functions within Infinium HR allow you to view information only; you cannot use a display function to make changes to information. The employer control display includes both Infinium HR and Infinium PY employer control information.

Follow these steps to view the employer control record.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Display Master Files*.
- 3 Select *Display Employer Controls* [DC]. The system displays the Employer Controls Display prompt screen.

- 4 Specify the value that represents your employer and press Enter. The system displays the Employer Controls Display screen 1 of 4 with employer summary information, level descriptions, and employer defaults.
- 5 Press Enter to display the Employer Controls Display screen 2 of 4 with employer details and general ledger information. Most of the information on this screen is from the Infinium PY employer control.
- 6 Press Enter to display the Employer Controls Display screen 3 of 4 with accrual category names, custom transaction programs, and custom exit programs.
- 7 Press Enter to display the Employer Controls Display screen 4 of 4 with additional employer control settings.
- 8 Press Enter to exit the screen. The system displays the prompt screen for the *Employer Controls Display* function on which you can specify the value that identifies another employer whose information you want to display or press F3 to return to the Infinium HR main menu.

Generating the Employer Control Report

After you establish the employer control record, you can print out all of the employer control information in a report. The report includes both Infinium HR and Infinium PY employer control information. Follow these steps to generate the employer control report:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *List Master Files*.
 - 3 Select *List Employer Controls [LC]*. The system displays the List Employer Controls prompt screen.
 - 4 Specify either the employer or employer group for which you want to print employer control information.
 - 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu:

Building submission request . . .
 - 6 The system uses batch processing to generate the employer controls report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.
-

Summary of the Entity and Employer Controls

In summary, you became familiar with how to set up the following controls:

- Entity control

You use the entity control to assign numbers to your employees. The entity control displays current release numbers and allows you to identify which related Infinium products are installed on your system. You define the entity control once regardless of the number of employers you define on your system and you can make changes to it at any time.

- Employer control

The employer control groups employees together for processing and reporting. You define controls for each employer and hire employees into an employer. You must specify an employer to perform most processing activities on Infinium HR and Infinium PY. You generally set up an employer for each federal tax identification number in your organization, with two exceptions that are discussed in this chapter.

Infinium HR/PY user-defined data options provide you with the ability to create and record various types of user-defined information. This functionality allows you to track information specific to your organization that is not included in the standard Infinium HR/PY. Infinium provides the following menu options where you can create user-defined data:

- *Update User-defined Titles*
- *Update User Field Controls*

The system does not automatically update information you store in your user-defined data fields, however, you can manually update your data or automate updates through a custom program.

The chapter consists of the following topics:

| Topic | Page |
|--|-------------|
| Overview of User-defined Titles | 3-2 |
| Using User-defined Titles | 3-4 |
| Assigning User-defined Titles | 3-5 |
| Establishing User-defined Code Values | 3-8 |
| Entering User-defined Titles for Employees | 3-9 |
| Updating User Field Controls | 3-12 |
| Displaying User Field Controls | 3-19 |
| Printing User Field Controls | 3-21 |

Overview of User-defined Titles

Objectives

After you complete this chapter, you should be familiar with the three steps involved in creating and using user-defined data.

- Assign user-defined titles
- Establish code values for user-defined codes
- Assign appropriate values to employees

Understanding User-defined Titles

Infinium HR/PY has seven categories of user-defined fields as shown in the following table. You must assign specific descriptions or titles to user-defined fields before you can use them to enter employee information. You use the *Update User Defined Titles* function to assign descriptions and the *Update User Defined Data* function to enter employee information into the fields that you described.

The Figure No. column below indicates on which screen within the *Update User Defined Titles* and *Update User Defined Data* functions each category of user-defined information is found.

| User-defined Data Category | Description of Fields | Figure No. |
|----------------------------|--|------------|
| User-defined Codes | Ten fields that validate against Code Types UC1, UC2, UC3, UC4, UC5, UC6, UC7, UC8, UC9, UCX. | 3-1 |
| User-defined Dates | Ten fields that accept dates. | 3-1 |
| User-defined Amounts | Ten 10-character numeric fields with two decimal places that accept numbers up to 9,999,999.99. | 3-1 |

| User-defined Data Category | Description of Fields | Figure No. |
|-----------------------------------|--|-------------------|
| User-defined Hours | Ten 8-character numeric fields with two decimal places that accept numbers up to 99,999.99. | 3-2 |
| User-defined Character Fields | Twenty 20-character fields that accept any combination of letters or numbers. | 3-2 |
| User-defined Numeric Fields | Ten 11-character numeric fields without decimal places that accept numbers up to 99,999,999,999. | 3-3 |
| User-defined Comment Field | One 100-character free-form field that accepts letters or numbers. | 3-3 |

Using User-defined Titles

You create and implement the use of user-defined data in three steps.

1 Assign user-defined titles.

You assign a title or label to one or more of the 71 user fields that you want to use to track employee information that is unique to your organization.

You can assign up to ten titles each for the code, amount, date, hours, and numeric categories and up to twenty titles for the character description category, in addition to a single large comment field.

2 Establish code values for user-defined codes.

For each title you describe in the user-defined code category, you must establish corresponding code values. For example, if you create a user-defined code title called safety equipment, you can establish code values to represent safety shoes, hard hats and goggles.

You must define code values only for the 10 fields in the user-defined code category. You do not need to predefine code values to enter information in the other 61 user-defined fields found in the amounts, dates, hours, numbers, or free form character categories.

3 Assign the appropriate values to employees through the *Update Employee Data* option. You can enter information for each employee using the user-defined titles and values you created.

Assigning User-defined Titles

Complete the following steps to update the user-defined title fields for each employer:

- 1 From the Infinium PY or Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select the *Update User Defined Titles* [UUDTO for Infinium PY or UDT for Infinium HR]. The system displays the Employer Titles Update prompt screen.
- 4 Type the value that identifies your employer. Press Enter.

The system displays the first Employer Titles Update screen shown in Figure 3-1.

```

8/01/02 15:36:16      Employer Titles Update      PRGMOU  PRDMOU
                                           Page 1 of 3
Employer . . . : ZUS SAMPLE US COMPANY

User Defined Codes
Type 1 Name . . . SAFETY EQUIPMENT  Type 2 Name . . . UNIFORMS
Type 3 Name . . . STOCK OPTION . . . Type 4 Name . . .
Type 5 Name . . .                    Type 6 Name . . .
Type 7 Name . . .                    Type 8 Name . . .
Type 9 Name . . .                    Type 10 Name . . .

User Defined Dates
Date 1 Name . . . 111                Date 2 Name . . . 222
Date 3 Name . . .                    Date 4 Name . . . 444
Date 5 Name . . . 555                Date 6 Name . . . 666
Date 7 Name . . . 777                Date 8 Name . . . 888
Date 9 Name . . . 999                Date 10 Name . . . 101010

User Defined Amounts
Amount 1 Name . . FSE TEST           Amount 2 Name . .
Amount 3 Name . .                    Amount 4 Name . .
Amount 5 Name . .                    Amount 6 Name . .
Amount 7 Name . .                    Amount 8 Name . .
Amount 9 Name . .                    Amount 10 Name . .

F3=Exit  F10=Access  F22=Delete
    
```

Figure 3-1: Employer Titles Update screen 1 of 3

- 5 Assign a unique title or label to as many of the user-defined fields as you require.

User Defined Codes

Create a title for each user-defined code you want to utilize. Later, you can define code values for each title you created.

User Defined Dates

Create a title for each type of date information you want to record.

User-defined Amounts

Create a title for each type of information you want to record that can be represented by a dollar amount. This field accommodates a two-decimal format.

- 6 Press Enter once you complete creating user-defined titles on this screen. The system displays the screen shown in Figure 3-2.

You can exit and save your entries on this screen without proceeding to the next screen, by pressing F3.

```

8/01/02 15:37:01      Employer Titles Update      PRGMOU   PRDMOU
                                           Page 2 of 3
Employer . . . : ZUS SAMPLE US COMPANY

User Defined Hours
Hours 1 Name . . . UNION HOURS      Hours 2 Name . . . _____
Hours 3 Name . . . _____          Hours 4 Name . . . _____
Hours 5 Name . . . _____          Hours 6 Name . . . _____
Hours 7 Name . . . _____          Hours 8 Name . . . _____
Hours 9 Name . . . _____          Hours 10 Name . . . _____

User Defined Character Fields
Character 1 Name _____ Character 2 Name _____
Character 3 Name _____ Character 4 Name _____
Character 5 Name _____ Character 6 Name _____
Character 7 Name _____ Character 8 Name _____
Character 9 Name _____ Character 10 Name _____
Character 11 Name _____ Character 12 Name _____
Character 13 Name _____ Character 14 Name _____
Character 15 Name _____ Character 16 Name _____
Character 17 Name _____ Character 18 Name _____
Character 19 Name _____ Character 20 Name _____
F3=Exit  F10=Access  F12=Previous

```

Figure 3-2: Employer Titles Update screen 2 of 3

- 7 Assign a unique title or label to as many user-defined fields as you require.

User Defined Hours

Create a title for each type of information you want to record that can be represented in hours.

User Defined Character Fields

Create a title for each type of information you want to record that can be represented by alpha numeric characters.

- 8 Press Enter once you complete creating user-defined titles on this screen. The system displays the screen shown in Figure 3-3.

You can exit and save your entries on this screen, without proceeding to the next screen, by pressing F3.

```

8/01/02 15:37:26      Employer Titles Update      PRGMOU      PRDMOU
                                           Page 3 of 3
Employer . . . : ZUS SAMPLE US COMPANY

User Defined Numeric Fields
Numeric 1 Name . . TEST 2      Numeric 2 Name . . UNION DUES
Numeric 3 Name . . _____  Numeric 4 Name . . _____
Numeric 5 Name . . _____  Numeric 6 Name . . _____
Numeric 7 Name . . _____  Numeric 8 Name . . _____
Numeric 9 Name . . _____  Numeric 10 Name . . _____

User Defined Comment Field
Large Field Name . _____

F3=Exit  F10=Access  F12=Previous

```

Figure 3-3: Employer Titles Update screen 3 of 3

- 9 Assign a unique title or label to as many user fields as you require.

User-defined Numeric Fields

Create a title for each type of information you want to record that can be represented numerically.

User-defined Comment Field

Create a title for this field that indicates the type of comments or memo text you want to record in this field.

- 10 Press Enter once you complete creating user-defined titles on this screen. The system returns you to the Employer Titles Update prompt screen.

Establishing User-defined Code Values

You must establish code values for only the user-defined codes to which you assigned titles. You do not establish code values for the other user-defined types such as dates, amounts or hours.

To establish code values for a user-defined code title, you specify the user-defined code type that corresponds to the field you want to use and create as many code values as you require.

Each of the ten fields in the user-defined codes category corresponds to a standard Infinium HR/PY code type. When you want to use fields in the user-defined codes category, you first type a description for the user-defined code field, and then use the corresponding Infinium HR/PY code type to set up code values.

The following table shows the relationship between field names associated with your user-defined code titles and the standard Infinium HR/PY code types.

| User-defined Code Field Name | Infinium HR Code Type |
|------------------------------|-----------------------|
| <i>Type 1 Name</i> | UC1 |
| <i>Type 2 Name</i> | UC2 |
| <i>Type 3 Name</i> | UC3 |
| <i>Type 4 Name</i> | UC4 |
| <i>Type 5 Name</i> | UC5 |
| <i>Type 6 Name</i> | UC6 |
| <i>Type 7 Name</i> | UC7 |
| <i>Type 8 Name</i> | UC8 |
| <i>Type 9 Name</i> | UC9 |
| <i>Type 10 Name</i> | UCX |

For detailed steps on establishing code values, refer to the “Setting Up and Maintaining Employer Codes” chapter in this guide.

Entering User-defined Titles for Employees

Once you create user-defined titles and any applicable user-defined code values, you can use these fields to record and track information about your employees.

The user-defined titles you created display as field names on the *Employee User Data* screen. To enter information in these fields for an employee:

- For user-defined code fields, you can press F4 to select a code value or type a code value directly into the field;
- For other categories of user-defined data, you can type a date, dollar amount, number of hours, characters, numbers or alpha numeric comments as appropriate.

Complete the following steps to update user-defined data for an employee:

- 1 From the Infinium PY or Infinium HR main menu select *Employee Data*.
 - 2 Select *Update Employee Data*.
 - 3 Select *Update Employee Data [UZZ]*. The system displays the Employee Update prompt screen.
 - 4 Type the value that identifies your employer and the number that represents the employee for whom you want to record user-defined data. Press Enter. The system displays the first Employee Update available options selection screen.
 - 5 Scroll to the second Employee Update available options selection screen
 - 6 From the available options, double-click *User Defined Data* (or type any character next to *User Defined Data*). Press Enter. The system displays the Employee User Data screen shown in Figure 3-4.
-

```

8/01/02 15:39:08      Employee User Data      PRGUDM2  PRDUDM
                                     Page 1 of 3
Employer . . . : ZUS SAMPLE US COMPANY
Employee . . . : 80005 ACCURATE,ALAN N
Code Description      Value      Code Description      Value
1. SAFETY EQUIPMENT  HAT +      2. UNIFORMS           _____ +
3. STOCK OPTION . . .  _____ +

Amount Description      Amount
1. FSE TEST             _____ .00

Date Description      Date      Date Description      Date
1. 111                2011998    2. 222                2011998
5. 555                2011998    4. 444                2011998
7. 777                2011998    6. 666                2011998
9. 999                2011998    8. 888                2011998
10. 101010           2011998
F3=Exit  F4=Prompt  F10=Access  F22=Delete

```

Figure 3-4: Employee User Data screen 1 of 3

7 Use the following information to work with this screen:

Type the appropriate information in the entry field next to each title or description that applies to this employee.

For fields in the user-defined code section at the top of the screen, you can press F4 to view a list of valid code values. You can select a value from this list and return to the Employee User Data screen, or you can type a code value directly into this field.

You need only enter information into fields that are applicable to this employee, although the system displays all of the user-defined titles that you created for your employer.

8 When you have completed the applicable information on this screen, press Enter to proceed to the next Employee User Data screen.

Complete the information that is applicable to this employee on each of the two remaining Employee User Data screens. Press Enter each time you complete a screen.

9 When you press Enter from the Employee User Data screen 3 of 3, the system returns you to the Employee Update prompt screen.

To exit immediately and save your data from any of the Employee User Data screens, exit the screen, display the Exit Options window and select saving your data.

Updating User Field Controls

Overview

User Field Controls provides a centralized function for configuring user fields. It is not used for all user fields. For example, those user fields in Employee User Defined Data must be maintained using *Update User Defined Titles*.

Use *Update User Field Controls* to establish user-defined titles or label text for your company's user fields. These controls are based upon Infinium-supplied user field controls for the files below.

- Employee benefits enrollment (PRPBE)
- Benefit enrollment history of changes (PRPBL)
- Codes master file (PRPCD)
- Employee root master file (PRPMS)
- Additional position information (PRPOP)
- The project accounting workfile (PYPPA)

Employee Benefits Enrollment

Use *Update User Field Controls* to define the text for the *User Flag Field* field on the second Employee Benefit Enrollment under *Update Employee Enrollments* under *Update Benefit Data* under *Benefits Administration*.

Benefit Enrollment History of Changes

Use *Update User Field Controls* to define the text for the *User Flag Field* field on the second Employee Benefit Enrollment screen, which is accessed when you press F8 or select **History** from **Actions** on the Web on the Update Benefit Enrollment screen and then type 5 next to the record to display. Access the Employee Benefit Enrollment screen by selecting *Benefits Administration*, then selecting *Update Benefit Data* and then selecting *Update Employee Enrollments*.

Codes Master File

Use *Update User Field Controls* to define the text for the user fields on the Update Employer Codes screen under *Update Employer Codes* under *Update Master Files* under *Master Files*. You can define text for *User Field 1*, *User Flag1*, *User Field 2* and *User Flag 2*.

Employee Root Master File

Use *Update User Field Controls* to define the text for the user fields on the first Update Employee Basic Data screen under *Update Basic Data* under *Update Employee Data* under *Employee Data*. You can define text for *User Field 1* and *User Field 3*.

Additional Position Information

Use *Update User Field Controls* to define the text for the user fields on the second Update Additional Positions page under *Update Add'l Positions* under *Update Employee Data* under *Employee Data*. You can define text for *User Code 1*, *User Amount 1* and *2*, *User Rate 1* and *2*, *User Hours 1* and *2* and *User Date 1* and *2*.

Project Accounting Workfile

Use *Update User Field Controls* to define the text used on reports for the information in these user fields:

- *User Code*
- *User Data*
- *User Amount*

These fields are on the pages below and are sent to Infinium PA when you use *Close to Project Accounting* under *Project Accounting Operations*:

- *Timesheet Entry – Incomes*
- *On-Demand Checks – Incomes*
- *Update Daily Time*
- *Update Checks*

These fields are sent to the user fields below in Infinium PA.

- *Alpha User Field 1*
 - *Date User Field 1*
 - *Numeric User Field 1*
-

Infinium provides standard text that is displayed on the appropriate page for each of these user-defined fields. The standard text, such as *User Amount 1*, may not be meaningful for your company. To create meaningful text for your company's user fields, you can either copy or change information related to the user-defined control.

When you copy information you can specify the employer, display or printer file, format and field label which is displayed on the screen for the field. This provides you with the ability to use different field label text for a field for different employers or to use a different field label when printing the field than when displaying the field on the page.

When you change information, you can specify the field label that is displayed on the screen for the field.

You can only delete those user field controls that you create or copy for your company. You cannot delete the Infinium-supplied user field controls. You cannot create new user field controls.

Use the menu path below.

- ▶ Infinium PY or Infinium HR
- ▶ *Master Files*
- ▶ *Update Master Files*
 - ▼ *Update User Field Controls [USERFLDUPD]*

Selecting the User Field File

On the Select User Field File page, you can select the file with user-defined field information to display. Only files with user fields are available for selection.

```
7/13/04 15:55:37      Select User Field File      PRGUFM05  PRDUFM05

Type options, Press Enter
1=Select

Opt File      Description
=  PRPBE      Employee benefits enrollment
-  PRPBL      Benefit enrollment history of changes
-  PRPCD      Codes Master File
-  PRPMS      Employee Root Master File
-  PRPOP      Additional Position File
-  PYPPA      Project Accounting workfile

Bottom

F3=Exit  F10=QuikAccess
```

Figure 3-5: Select User Field File page

How Do I...

Select the user field file to display Type 1 in *Opt* and press Enter.

Selecting the User Field to Update

On the Update User Field Controls page, you can select the field information to copy, change or delete. You can only delete user fields that were entered by your company. You cannot delete the Infinium-defined user fields.

```

5/31/02 13:02:51 Update User Field Controls PRGUFM10 PRDUFM10

File Description . : Additional Position File

Search . . . . . _____ (Enter word or known characters)
Type options, Press Enter
  2=Change 3=Copy 4=Delete

Opt File      Field      Er Text                      Reqd? DSPF/PRTF  Format
- PRPOP      OPUA01      User Amount 1 . . . . . 0
- PRPOP      OPUA01      User Amt 1 . . . . . 0 PYTPOP
- PRPOP      OPUA01      AM1 Call-in Bonus . . . 0
- PRPOP      OPUA01      AM1 Call Bonus . . . . 0 PYTPOP
- PRPOP      OPUA01      BAT user test . . . . . 0 PYTPOP
- PRPOP      OPUA01      COB my amount . . . . . 0
- PRPOP      OPUA02      User Amount 2 . . . . . 0
- PRPOP      OPUA02      User Amt 2 . . . . . 0 PYTPOP
- PRPOP      OPUA02      AM1 Sunday Bonus . . . . 0
- PRPOP      OPUA02      AM1 Sun. Bonus . . . . . 0 PYTPOP
- PRPOP      OPUC01      User Code 1 . . . . . 0
- PRPOP      OPUC01      User Code 1 . . . . . 0 PYTPOP

More...

F3=Exit F6=Create F10=QuikAccess F12=Cancel

```

Figure 3-6: Update User Field Controls page

How Do I...

| | |
|---------------------------------|--|
| Select the user field to change | Type 2 in <i>Opt</i> next to the information to change and press Enter. |
| Select the user field to copy | Type 3 in <i>Opt</i> next to the information to change and press Enter. |
| Select the user field to delete | Type 4 in <i>Opt</i> next to the information to change and press Enter. |

Changing or Copying User Field Information

Depending upon whether you specified to copy or change user field controls on the Update User Field Controls page, you can copy or change user field information. If you are copying a user field control, you can specify the employer, the display file and printer file that will use the new label and the label to be used on the appropriate page. If you are changing the user field information, you can specify the label for the field on the appropriate page.

```

5/28/02 15:57:52      Update User Field Controls      PRGUFM20  PRDUFM20
File Name . . . . . : PRPOP
Field Name . . . . . : OPUA01
Employer Code . . . . . ___ +      (leave blank for all employers)
Display/Printer File . _____
Format Name . . . . . _____
Maximum Text Length . . 17
Standard Text for Label User Amount 1 . . . _____
User Text for Label . . _____
Required Entry? . . . . 0 (0=No, 1=Yes)
Employer Code Type. . . ___ +
F3=Exit F4=Prompt F10=QuikAccess F12=Cancel F16=Last Update

```

Figure 3-7: Update User Field Controls copy page

Use the information below to complete this page.

Employer Code

For copying user field information, specify the employer to whom you are copying this user field information. Leave blank for all employers.

For updating user field controls, this is the employer whose information you are updating.

Display/Printer File

If you are copying this user field control, specify the display or printer file to be used only for this user field for the specified display or report. Leave blank to use for all display file or printer file formats.

For updating user field controls, this is the display or printer file whose information you are updating. For Infinium-supplied controls, this field is blank. if this applies to all displays and reports.

Format Name

If you are copying this user field control, specify the format of the display or printer file. Leave blank to use for all display file or printer file formats.

For updating user field controls, this is the format whose information you are updating. For Infinium-supplied controls, this field is blank if this applies to all displays and reports.

Maximum Text Length

This is the maximum size for this field.

Standard Text for Label

This is the Infinium-defined text for this field.

User Text for Label

Specify the text to be used for this field on the appropriate page. The system uses this text for this field.

Required Entry?

This indicates whether this field is required.

Employer Code Type

This is the code type associated with this user field. This is for information only.

How Do I...

| | |
|---|-------------------------------------|
| Copy user field controls to another employer | Complete this page and press Enter. |
| Change user field controls | Complete this page and press Enter. |
| View information about the last update to this page | Press F16. |

Displaying User Field Controls

Overview

Use *Display User Field Controls* to view user field information.

Use the menu path below.

- ▶ Infinium PY or Infinium HR
- ▶ *Master Files*
- ▶ *Display Master Files*
 - ▼ *Display User Field Controls [USERFLDDSP]*

Selecting the User Field File to Display

On the *Select User Field File* page, you can select the file to display.

How Do I...

| | |
|--------------------------------------|---------------------------------------|
| Select the user field file to update | Type 1 in <i>Opt</i> and press Enter. |
|--------------------------------------|---------------------------------------|

Selecting the User Field to Display

On the *Display User Field Controls* page, you can select the file and text to display.

How Do I...

| | |
|----------------------------------|---|
| Select the user field to display | Type 5 in <i>Opt</i> next to the information to change and press Enter. |
|----------------------------------|---|

Displaying User Field Information

On the Display User Field Controls page, you can view information about the specified user control.

How Do I...

| | |
|---|------------|
| View information about the last update to this page | Press F16. |
|---|------------|

Printing User Field Controls

userfldprt_help

Overview

Use *Print User Field Controls* to generate a list of user field information.

Use the menu path below.

- ▶ Infinium PY or Infinium HR
- ▶ *Master Files*
- ▶ *List Master Files*
 - ▼ *List User Field Controls* [USERFLDLST]

Generating the User Field File List

On the List User Field Controls page, you can generate the User Field Controls Report.

How Do I...

| | |
|---|--------------|
| Generate the User Field Controls Report | Press Enter. |
|---|--------------|

Notes

Chapter 4 Setting up and Maintaining Employer Code Values

4

The chapter consists of the following topics:

| Topic | Page |
|--|-------------|
| Overview of Employer Codes | 4-2 |
| Understanding Required Code Types and Standard Code Values | 4-8 |
| Entering Code Values | 4-14 |
| Mass Changing Code Values | 4-19 |
| Copying Employer Code Values | 4-23 |

Overview of Employer Codes

Objectives

After you complete this topic, you should be familiar with the following:

- How employer code types and code values work
- What code types are required to implement Infinium HR and Infinium PY
- What standard code values are
- How to set up user defined code types
- How to enter code values
- How to change code values
- How to delete code values
- How to change code values from active to inactive
- How to mass change code values
- How to copy code values from one employer to another

Understanding Employer Code Values

Infinium uses employer code types and their associated values to validate information for accuracy and consistency while processing and reporting information.

You use employer code types to categorize and maintain information in Infinium HR and Infinium PY. A code type is a three-character designator assigned by Infinium.

For each code type, you can define an unlimited number of code values that address your business and reporting requirements. Code values allow you to customize Infinium HR and Infinium PY to comply with requirements and terminology specific to your organization. Code values ensure that all users enter valid, consistent field information when setting up controls, entering employee information into the system, and processing and reporting information.

Infinium HR and Infinium PY define many code types, but to perform basic processing, you can define values for as few as 20 code types. You must define values for several code types, such as state, province and country code values, to set up essential controls on Infinium HR and Infinium PY. Refer to the “Understanding Required Code Types and Standard Code Values” section in this chapter for information about required code types.

You use the *Update Employer Codes* function to define and maintain code values. For each code type, you build a separate table of code values. You access this table from any number of functions whenever you are completing fields that require consistently maintained information. For each code value that you define, you enter a description that the system uses on displays and reports.

You can use the *Display Employer Codes* function to view existing code values, and you can use the *List Employer Codes* function to generate a report of existing employer code values and descriptions.

Sharing Code Types

The employer code tables are shared by Infinium HR and Infinium PY. Some code types such as **GRP** for job evaluation group are used exclusively for Infinium HR functions, and some code types such as code type **APG** for auto pay group are used only in Infinium PY functions. Other code types such as **STA** for home state/province are used by both systems. Infinium HR and Infinium PY users must agree upon the code values that meet the needs of both departments.

Some code types in Infinium HR are also shared with Infinium TR and Infinium FB. These code types are used primarily in Infinium TR or Infinium FB. Users of these applications normally set up their own code values. You can press F4 in Infinium HR to display and select code values for shared code types that have been established by users of other systems.

Developing Code Values

Define code values that are easy to understand. Use any combination of up to ten letters and numbers to define the code values. The maximum number of characters permitted for a code value varies for each code type.

One code type for which you must set up values when you implement Infinium HR and Infinium PY is **STS**, representing employment status. You

use this code type to identify each employee’s active employment situation. The table below illustrates sample code values for this code type.

| Code Value - Example | Code Description - Example |
|----------------------|----------------------------|
| FULL | Full time employee |
| PART | Part time employee |
| SEAS | Seasonal employee |
| TEMP | Temporary employee |

Entering Code Values in Fields

After you build code values for a code type, you can select from the values to enter information in fields that reference the code type. The system displays + after all code-validated fields. After you place your cursor in the code-validated field, you can press F4 to display the Code Values screen shown in Figure 4-1.

```

5/10/02 10:11:18          Code Values          PRGDCC  PRDDCC
                                Include Inactive? 0
Employer . . . . : ZUS  SAMPLE US COMPANY
Type . . . . . : STA  PERSONNEL STATES/PROVINCES
Search For . . . : _____ (Enter word or known characters)
Value   Opt Description      Value   Opt Description
AB      _ ALBERTA           GU      _ GUAM
AK      _ ALASKA            HI      _ HAWAII
AL      _ ALABAMA           IA      _ IOWA
AR      _ ARKANSAS          ID      _ IDAHO
AS      _ AMERICAN SAMOA    IL      _ ILLINOIS
AZ      _ ARIZONA           IN      _ INDIANA
BC      _ BRITISH COLUMBIA  KS      _ KANSAS
CA      _ CALIFORNIA        KY      _ KENTUCKY
CO      _ COLORADO          LA      _ LOUISIANA
CT      _ CONNECTICUT       MA      _ MASSACHUSETTS
DC      _ DISTRICT OF COLUMBIA
DE      _ DELAWARE          MD      _ MARYLAND
DS      _ DREAM STATE        ME      _ MAINE
FL      _ FLORIDA           MI      _ MICHIGAN
GA      _ GEORGIA           MN      _ MINNESOTA
                                +
F3=Exit

```

Figure 4-1: Code Values screen

This sample screen displays a table of values defined for code type **STA**. To select a value, type any character in the *Opt* field next to the value and press Enter. The system enters the value in the field on the screen from which you pressed F4.

On the Code Values screen you can also specify whether to include inactive code values with the active values in the table. Refer to the “Changing Code Values from Active to Inactive” section in this chapter for information about inactive code values.

Setting up Code Values for Multiple Employers

If you are setting up more than one employer, consider your cross-employer reporting requirements as you establish code values. When you include employees from different employers on a standard system report or in a report that you develop in Infinium QY, set up code values that are consistent for all employers.

For example, as you implement Infinium HR, you must set up code values for code type **STS**, which represents status, for all employers. If you set up the code value **FTR** to represent full time regular employees in all companies, you can easily select and group employees of similar status together on reports.

You can set up code values for each employer separately, set them up using employer groups, or use the *Copy Employer Codes* function to copy code values from one employer to another. Refer to the “Setting up Employer Groups” section in this chapter for details on how to establish employer groups. Refer to the “Copying Employer Codes” section in this chapter for more information on copying codes from one employer to another.

Assigning Default Code Values on the Employer Control

Infinium HR and Infinium PY allow you to use default code values for the fields listed below to ensure consistency and efficiency when you create new employee records during the hiring process.

| Field Name | Associated Code Type |
|-----------------------|----------------------|
| <i>Country</i> | CTR |
| <i>State/Province</i> | STA |
| <i>Shift</i> | SFT |

After you define values for these code types, you can use the *Update Employer Controls* function to enter a default value for each associated field. Refer to the “Setting up Entity and Employer Controls” chapter for details on how to update the employer control record.

Using Code Values in Infinium QY

You can plan your code values to take advantage of the wild card feature in Infinium QY that allows you to select information for reports. You use an asterisk (*), which is the designated wildcard character, to mask a chapter of a code value to select employees who have similar but not identical code values.

For example, to identify all full time employees on Infinium QY reports, you set up the code values listed below for the Status code type.

| | |
|------------|------------------------------|
| FTR | Full time regular employee |
| FTT | Full time temporary employee |
| PTR | Part time regular employee |
| PTT | Part time temporary employee |

You can use the wild card feature to select employees whose code value for code type **STS** is **FT***. The system selects all employees whose code values begin with **FT**.

Understanding User-Defined Code Types

Infinium HR and Infinium PY allow you to use user-defined fields to track information that the system does not otherwise maintain. You set up your own titles or labels for these fields. After you set up a title for a user-defined code type, you must set up one or more code values before you can enter employee information into the user-defined code type fields. The system validates information that you enter in these fields against code values you set up with user-defined code types.

The user-defined code types are listed below.

| Code Type | Code Type |
|------------------|------------------|
| UC1 | UC6 |
| UC2 | UC7 |
| UC3 | UC8 |
| UC4 | UC9 |

| Code Type | Code Type |
|------------------|------------------|
| UC5 | UCX |

Refer to the “Implementing User Defined Data” chapter in this guide for information on how to set up and use user-defined codes.

Understanding Required Code Types and Standard Code Values

When you use Infinium HR or Infinium PY to hire an employee, you use code values to identify an employee's ethnicity, employment status, home and work state or province, and home and work country. Therefore, when implementing Infinium HR and Infinium PY, you must define at least one value for each of the code types listed below. When you later define your job and position controls and assign a new employee a position during the hiring process, the system assigns the employee the required code values associated with the position.

| Code Type | Code Description | Comments |
|------------|---------------------------------------|--|
| CTR | Country | Valid values for payroll processing are USA and CAN . Define additional values to track the home countries of employees or ex-employees not living in the US or Canada. |
| EEO | Equal Employment Opportunity Category | Groups employees for EEOC reporting in the US or Employment Equity reporting in Canada. Standard values, established by the US and Canadian federal governments, are listed on the following pages. |
| ETH | Ethnic Identification | Groups employees by ethnicity for EEO or Employment Equity reporting. Standard values, established by the US and Canadian federal governments, are listed on the following pages. |
| LOC | Personnel Location | Groups employees by physical work location for EEO-1 reporting only, for example, code value CLIN for employees located in a clinic separate from a main hospital building. Use the <i>Update EEO Location Address</i> function to set up addresses for location code values for EEO and EEA reporting. Refer to the <i>Infinium HR Guide to Management Functions</i> for details. |
| STA | Personnel State/Province | Specifies the state or province where an employee lives. Use the two-character postal code for the state or province, such as OH for Ohio or ON for Ontario. |

| Code Type | Code Description | Comments |
|------------|------------------------|--|
| STP | Payroll State/Province | Specifies the state or province where an employee works. Use the two-character postal code for the state or province, such as OH for Ohio or ON for Ontario. |
| STS | Status | Represents the active employment status of an employee, for example, code value FULL for a full-time employee. |

Working with Standard Code Values

Standard code values are mandatory values that you must define to generate statutory reports. For the required code types below, you must define specific standard code values.

- **CTR** - Country
- **EEO** - Equal Employment Opportunity Category
- **ETH** - Ethnic Identification
- **STA** - Personnel State/Province
- **STP** - Payroll State/Province

The US and Canadian federal governments define standard values that you must use for statutory reporting. Infinium HR uses the **EEO** and **ETH** code types when generating Equal Employment Opportunity reports for US employers and a file of Employment Equity Act data for Canadian employers.

For Canadian EEA reporting, in addition to the **EEO** and **ETH** code types, you must set up values for the code types listed below.

- **CNT** - Census Metropolitan Area
- **HDC** - Handicap Code
- **NOC** - National Occupational Group
- **SIC** - Standard Industrial Classification
- **STS** - Status

Infinium HR includes these values in the file of data you extract for Canadian Employment Equity reporting. The values you define for code types **CNT**, **NOC**, **SIC** and **STS** must match the standard values defined by the Canadian federal government.

Locating Information on EEO and EEA Reporting

Refer to the following parts in the *Infinium Human Resources Guide to Management Functions* for details about EEO and EEA reporting:

- For US employers, the “Producing Statutory EEO Reports” chapter describes how to generate statutory EEO reports including the EEO-1 and EEO-4 reports.
- For Canadian employers, the “Employment Equity Reporting - Canada” chapter describes how to set up standard code values and employee records for EEA reporting. This chapter also provides details on generating a file of data that you can import into a PC program for Employment Equity or Federal Contractor reporting.

Defining Standard Values for US Employers

Code Type EEO

The table below lists the standard values for code type **EEO** that US private sector employers must use for EEO-1 reporting and US public sector employers must use for EEO-4 reporting.

| US EEO-1 Reporting | | US EEO-4 Reporting | |
|--------------------|---|--------------------|------------------------|
| Value | Description | Value | Description |
| 1.1 | Executive/Senior Level Officials and Managers | 1 | Officials and Managers |
| 1.2 | First/Mid-level Officials and Managers | | |
| 2 | Professionals | 2 | Professionals |
| 3 | Technicians | 3 | Technicians |
| 4 | Sales Workers | 4 | Protective Services |
| 5 | Administrative Support Workers | 5 | Paraprofessionals |
| 6 | Craft Workers | 6 | Adm/Support |
| 7 | Operatives | 7 | Skilled Craft |
| 8 | Laborers and Helpers | 8 | Service/Maintenance |
| 9 | Service Workers | | |

EEO Sub-Categories

You can establish sub-categories within each standard EEO category to sort employees into smaller groupings for analysis and non-statutory reporting.

For example, to review the ethnic and gender distribution of employees in EEO category 2, professionals, by technical and non-technical job functions, set up code values **2A** for technical professionals and **2B** for non-technical professionals. The statutory EEO reports, such as the EEO-1 and EEO-4, sort only by the first character of the EEO code value. Therefore, Infinium HR sorts all professional employees into EEO category 2. The optional Infinium HR EEO reports, including EEO unit reports, sort by all five characters of the EEO code value and allow you to analyze smaller groups of employees. You can also use the full EEO code values in reports that you develop with Infinium QY.

Refer to the “Producing Affirmative Action Reports” and “Generating EEO Unit Reports” parts in the *Infinium Human Resources Guide to Management Functions* for details on generating non-statutory EEO reports.

Code Type ETH

The table below lists the standard values for code type **ETH** that US employers must use for EEO reporting.

| Value | Description |
|-------|--|
| 0 | White |
| 1 | Black or African American |
| 2 | Asian |
| 3 | American Indian or Alaskan Native |
| 4 | Hispanic or Latino |
| 5 | Native Hawaiian or Other Pacific Islander |
| 6 | Two or More Races (not Hispanic or Latino) |

Defining Standard Values for Canadian Employers

Code Type EEO

The table below lists the standard values for code type **EEO** that Canadian employers must use for EEA reporting.

| Value | Description |
|-------|--|
| NA | Not Applicable |
| 1 | Senior Managers |
| 2 | Middle and Other Managers |
| 3 | Professionals |
| 4 | Semi-professionals and Technicians |
| 5 | Supervisors |
| 6 | Supervisors: Crafts and Trades |
| 7 | Administrative & Senior Clerical Personnel |
| 8 | Skilled Sales and Service Personnel |
| 9 | Skilled Crafts and Trades Workers |
| 10 | Clerical Personnel |
| 11 | Intermediate Sales & Service Personnel |
| 12 | Semi-Skilled Manual Workers |
| 13 | Other Sales and Service Personnel |
| 14 | Other Manual Workers |

Code Type ETH

The table below lists the standard values for code type **ETH** that Canadian employers must use for EEA reporting.

| Value | Description | Visible Minority? | Aboriginal? |
|-------|---|-------------------|-------------|
| 0 | Caucasian | | |
| 1 | Black | yes | |
| 2 | Asian/Arab/Pacific Islander/ Indo-Pakistani | yes | |
| 3 | Indians | | yes |
| 4 | Hispanics | yes | |
| 5 | Inuits | | yes |
| 6 | Metis | | yes |

Infinium HR uses the ethnic values to identify employees as aboriginal or visible minorities in the employment equity file. You export this file to the

appropriate PC reporting program to generate employment equity or federal contractor reports.

Entering Code Values

Follow the steps below to create code values.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Employer Codes [UCC]*. Press Enter. The system displays the screen shown in Figure 4-2.

```
7/13/04 14:19:19 Update Employer Codes PRGMCD PRDMCD
-----
Employer . . . . . __ + -or- Employer group . . . ____ +
Code type . . . . . __ +
Code value . . . . . _____ +

-----
F3=Exit F4=Prompt F10=QuikAccess F18=Message line F21=Override
```

Figure 4-2: Update Employer Codes prompt screen

- 4 Use the following information to complete the fields on this screen:

Employer

Specify the value that identifies the employer for which you want to define code values.

Employer group

Specify the value that identifies a group of employers for which you want to define code values. The system saves the values you enter in all of the employers associated with the specified employer group.

You use code type **ERG** to name employer groups; you use the *Update Employer Groups* function to assign employers to the employer group. Refer to the “Setting Up Employer Groups” chapter for more information. You can also use the *Copy Employer Codes* function to copy code values from one employer to another. Refer to the “Copying Employer Codes” section in this chapter for more information.

Code type

Specify the three-character code that identifies the code type for which you want to define values.

Code value

Type a value for this code type. The value can contain up to ten alphanumeric characters. You can use any combination of letters or numbers to define a code value. The maximum number of characters permitted for a code value varies for each code type. When you prompt on the *Code type* field, the resulting Code Types screen displays a column to the left of the Description column that indicates the maximum length permitted for a code value for each code type. You can define an unlimited number of code values for each code type.

If your processing and reporting circumstances do not require you set up values for a required code type, leave this field blank and continue with the steps to set up the code value. When you define a blank value for a required code type, Infinium HR does not require you to enter information in a field that otherwise validates against a required code type.

- 5 Press Enter. The system displays the screen shown in Figure 4-3.
-

```

8/02/04  13:59:59      Update Employer Codes      PRGMCD  PRDMCD
-----
Employer . . . . . : ZUS  SAMPLE US COMPANY
Code type . . . . . : EEO  EEO CATEGORY
Code value . . . . . : 4
Description . . . . . : SALES WORKERS
-----

Active/Inactive . . . 0 (0=Act./1=Inact)

User Field 1 . . . .  _____      User Flag 1 . . . . . _
User Field 2 . . . .  _____      User Flag 2 . . . . . _
-----

F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel  F24=More keys

```

Figure 4-3: Update Employer Codes screen

6 Use the information below to complete this screen.

Description

Type a description of up to thirty characters for the code value that you typed on the previous screen. The system uses this description in reports and displays.

HIPAA Relat. Code

This field is displayed and used only for HIPAA cross reference code values. Type the code value that represents the HIPAA cross reference code value to be used in 834 EDI transmission. See the “Working with HIPAA Information for EDI Transmission” chapter in the *Infinium HR Guide to Setup and Processing for Benefits Administration* for more information.

Active/Inactive

Specify **0** to indicate that the code value is active. Specify **1** to indicate that the code value is inactive.

By default, the system displays only active values when you prompt on the *Code value* field on the Update Employer Codes prompt screen shown in Figure 4-2 or when you prompt on any code validated field throughout the system. Use the *Include Inactive?* field on the Code Values screen shown in Figure 4-1 to indicate that the system should include an inactive code value in the list of valid values.

Refer to the “Changing Code Values from Active to Inactive” section in this chapter for more information about inactive code values.

User Field 1

Type a value for use with custom programming.

User Flag 1

Type a value for use with custom programming.

User Field 2

Type a value for use with custom programming.

User Flag 2

Type a value for use with custom programming.

- 7 Press Enter. The system saves the new code value and description and returns you to the Update Employer Codes prompt screen.
- 8 Repeat steps 4 through 7 to create additional values.
- 9 After you define your code values, press F3 to exit this function and return to the Infinium HR main menu.

Changing Code Values

You can change the description associated with a code value, but you cannot change an existing code value. Using the *Update Employer Codes* function, you must delete the code value and then create a new code value. You can then use the new code value to maintain employee information, but the system does not update existing employee records with the new code value.

You can manually update the code value in the existing records, or for certain code types you can use the *Mass Change Employer Codes* function to mass update the records. Refer to the “Mass Changing Code Values” section in this chapter for more information about the *Mass Update Employer Codes* function.

Deleting Code Values

You can delete a code value from the system by pressing F22 on the Update Employer Codes screen of the *Update Employer Codes* function, shown in Figure 4-3.

If you delete a code value currently in use by Infinium HR, when you access a record that uses the value, the system requires you to replace the invalid value.

Changing Code Values from Active to Inactive

Rather than deleting a code value, you can change the status of the value from active to inactive. When a value is inactive, the system retains the value in all records that use the value. Maintaining inactive values is useful for tracking and reporting historical data.

To change a value from active to inactive, you use the *Active/inactive* field on the Update Employer Codes screen shown in Figure 4-3.

To include inactive code values in the value tables displayed when you prompt on any code-validated field, type 1 in the *Include Inactive?* field on the Code Values screen. To differentiate between active and inactive values, the system highlights the active values.

You cannot use the *Employer group* field on the Update Employer Codes prompt screen to change values to inactive for multiple employers. You must change the value to inactive within each employer that uses the code value.

Mass Changing Code Values

You use the *Mass Change Employer Codes* function to change code values associated with certain code types in the employee basic data, personnel data, and automobile data records. The *Mass Change Employer Codes* function replaces the current code values in the employee record with new code values and applies the changes to multiple employees.

When you use the *Mass Change Employer Codes* function, Infinium HR generates a report listing all employees to whom the code value change is applied. The system does not, however, create a history transaction of the changes nor does it make changes in existing employee history records.

For example, for code type **HIR**, representing hire source, you use the *Mass Change Employer Codes* function to change the value **02** to **AD/N**. The system changes the value in the *Hire Source* field in the basic data records of all employees assigned the value **02** during the *Enter New Hire* function to **AD/N**. The system does not update this value in the employee's new hire history transaction.

Because this function does not update employee history, you typically use it to correct code values entered or converted in employee records during the testing stage of your implementation of Infinium HR.

Some code types that you can change with this function are associated with job or position controls. You normally do not need to use this function to update values for most of these code types. When you update most code values on job or position control records, Infinium HR updates the values in the corresponding fields of employees assigned to the affected job or position. Refer to the *Infinium HR Guide to Processing* for information on how the system uses job and position controls to update employee information.

If you use the *Mass Change Employer Codes* function to change values for code types associated with job or position controls, update the values on job or position controls with which the code type is associated. Infinium HR enters default code values from jobs or positions in employee records when you hire employees and maintain their information.

The table below lists the code types that you can update with the *Mass Change Employer Codes* function, notes the location of each code type in employee data, and indicates with what control record the code type is associated.

| Code Type | Description | Location in Employee Data | Associated Control Record |
|------------------|--------------------------|----------------------------------|----------------------------------|
| BEN | Retirement Benefit | Basic data | |
| BLD | Blood Type | Personnel data | |
| CLA | Class | Basic data | Position |
| EDU | Education | Basic data | |
| ETH | Ethnic Identification | Basic data | |
| HDC | Handicap | Personnel data | |
| HIR | Hire Source | Basic data | |
| JOB | Job Code | No longer used | |
| LAB | Labor Category | Basic data | Position |
| LOC | Personnel | Basic data | Position |
| LOT | Parking Lot | Automobile data | |
| LVC | Leave Code | Basic data | |
| MAI | Mail Group | Basic data | |
| MDC | Military Discharge Type | Personnel data | |
| MIL | Military Status | Personnel data | |
| MLB | Military Branch | Personnel data | |
| PGR | Pay Grade | No longer used | |
| RAT | Performance Rating | Basic data | |
| REC | Rehire Eligibility | Basic data | |
| SRG | Salary Range | No longer used | |
| SFT | Shift Code | Basic data | Position |
| STA | Personnel State/Province | Basic data | Employer, Level |
| STS | Status | Basic data | |
| TRM | Termination | Basic data | |
| UNI | Union Code | Basic data | Position |
| VIA | Visa Type | Personnel data | |
| WCC | Worker's Compensation | Basic data | Position |
| WRE | Work Restrictions | Personnel data | |

Refer to the “Defining Job Controls” and “Establishing Position Controls” parts in this guide for more information. Refer to the parts on hiring new employees in the *Infinium HR Guide to Processing* for information on how Infinium HR uses jobs and positions to enter default code values in employee records.

To mass change employer codes, complete these steps:

- 1 From the Infinium HR main menu select *System Operations*.
- 2 Select *Personnel Init. Functions*.
- 3 Select *Employer Codes*.
- 4 Select *Mass Change Employer Codes [MCEC]*. Press Enter. The system displays the screen shown in Figure 4-4.

Figure 4-4: Mass Change Employer Codes screen

You use this screen to mass change code values.

- For values of up to five characters, you can change one value each for up to six different code types or six different values for one code type.
- For values from six to ten characters, you use the last row of fields to change a value for one code type.

- 5 Use the following information to complete the fields on this screen.

Employer

Specify the value that identifies the employer for whom you want to change code values.

Level 1 through 4

Use this field to restrict the code value change to employees assigned to specific levels.

For example, if your level 1 represents location, you could apply the code value change to only employees working at a specific location. Refer to the “Establishing Level Controls.” chapter in this guide for information on setting up and using levels.

Code Type

Specify the code types whose values you want to change in employee records.

From Value

Specify the code value that you want to replace.

To Value

Specify the new code value to replace the value specified in the *From Value* field.

- 6 Press Enter. The system returns you to the Infinium HR main menu.

Infinium HR uses batch processing to apply the specified code value changes to the appropriate employees. The system also generates a report identifying the name and number of employees with changed code values.

- 7 To change additional code values, repeat steps 1 through 6.
-

Copying Employer Code Values

You use the *Copy Employer Codes* function to copy code values from one employer to a new employer or to re-use previously defined values from the existing employer. If you maintain more than one employer, sharing code values simplifies your reporting and analysis.

You can add unique values to the new employer after you use the *Copy Employer Codes* function, or you can change or delete the copied values.

To copy code values from one employer to another, complete these steps:

- 1 From the Infinium HR main menu select *System Operations*.
- 2 Select *Personnel Init. Functions*.
- 3 Select *Employer Codes*.
- 4 Select *Copy Employer Codes [CCE]*. Press Enter. The system displays the screen shown in Figure 4-5.

```
5/10/02 14:15:40          Copy Employer Codes          PRGCDC  PRDCDC

From Employer . . ZUS +
To Employer . . . ZC1 +
Code Type . . . . ALL + Enter ALL to copy all code types.
Copy Inactive?. . 0      (0=No 1=Yes)

F3=Exit  F4=Prompt  F10=Access
```

Figure 4-5: Copy Employer Codes screen

- 5 Use the following information to complete the fields on this screen:

From Employer

Specify the value for the employer from which you want to copy code values.

To Employer

Specify the value for the employer to which you want to copy code values.

Code Type

Specify the code type of the values to copy. To copy values for all code types, type **ALL**.

Copy Inactive?

Specify **0** to copy only active values. Specify **1** to copy active and inactive values.

- 6 Press Enter.
- 7 To copy additional code values, repeat steps 5 and 6.
- 8 Press F3 to exit this function and return to the Infinium HR main menu.

The system does not generate an audit report when you copy employer code values. You can use the *Display Employer Codes* function or use the *List Employer Codes* function to generate a report for the *To Employer* field to verify the copied values.

The employer group is an optional control that you can define to gather employees from two or more employers together for processing, reporting and security. You can define one or more employer groups if you have set up more than one employer on your system. A particular employer can be associated with one or more employer groups.

The chapter consists of the following topics:

| Topic | Page |
|------------------------------|-------------|
| Overview of Employer Groups | 5-2 |
| Setting up an Employer Group | 5-4 |
| Summary of Employer Groups | 5-13 |

Overview of Employer Groups

Objectives

In this chapter you learn how to set up and use employer groups. When you complete this topic, you should be familiar with the following:

- How to use employer groups
- How to set up an employer group
- How to change an employer group
- How to delete an employer group
- How to display an employer group
- How to print a report of employer group information

Understanding Employer Groups

Employer groups are an optional control on Infinium HR and Infinium PY. You do not need to establish employer groups unless you want to gather employees from multiple companies together for processing or reporting or you want to restrict Infinium HR and Infinium PY users from accessing the records of employees assigned to certain employers.

Since employer groups are shared by Infinium HR and Infinium PY, both groups of users should work together to define groupings that are useful for Infinium HR and Infinium PY processing, reporting and security.

Using the Employer Group in Processing and Reporting

You can enter the code value that represents an employer group on any screen in Infinium HR or Infinium PY that has an *Employer Group* field. The system includes employees from all employers assigned to the group in the processing or reporting associated with that screen. When you use an employer group, it saves you time because you do not have to repeat processing activities that affect employees assigned to more than one employer.

For example, you set up four employers on Infinium HR. For audit purposes, you need to generate a listing of company property assigned to employees in all companies on a quarterly basis. You set up an employer group called **ALL** and include all four companies in it. You can then use the employer group to generate the List Employees Property standard report. The system includes employees from all four companies in the report and automatically sorts them by employer.

You can also use employer groups as you set up controls during your initial implementation of Infinium HR. For example, you can use the employer group to set up code values across employers. Refer to the “Setting up and Maintaining Employer Code Values” chapter for details.

The employer group is used on a relatively small number of screens in Infinium HR and Infinium PY at this time. Screens that permit you to use an employer group generally also allow you to process by employer.

Using the Employer Group for Security

Your system security administrator defines a security control record for each user of Infinium HR or Infinium PY. The administrator can assign the user to an employer group, which restricts the user to accessing the records of only those employees working for the employers associated with his or her employer group. See the *Infinium Human Resources Guide to Management Functions* for more information.

Setting up an Employer Group

You must complete the two steps listed below to set up an employer group.

- 1 Establish the name of the Employer Group utilizing code type **ERG** in the *Update Employer Codes* function.
- 2 Assign employers to the group using the *Update Employer Groups* function.

Establishing Employer Groups

Naming the Employer Group

Follow the steps below to define a name for an employer group.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Employer Codes* [UCC]. Press Enter. The system displays the screen shown in Figure 5-1.
-


```

5/10/02  16:12:36      Update Employer Codes      PRGMCD  PRDMCD
-----
Employer . . . . . __ +      -or-  Employer group . . . ____ +
Code type . . . . . ERG +
Code value . . . . . GRP1 +

-----
F3=Exit  F4=Prompt  F10=QuikAccess  F18=Message line  F21=Override

```

Figure 5-1: Update Employer Codes screen 1 of 2

- 4 Use the following information to fill in the fields on this screen:

Employer

Leave this field blank.

Employer group

Leave this field blank.

Code type

Type **ERG** in this field, which represents the Employer Group code type.

Code value

Type any combination of up to five letters or numbers. After you establish the employer group, you type this code value in the *Employer Group* field on Infinium HR and Infinium PY screens to identify the employer group.

- 5 Press Enter. The system displays the screen shown in Figure 5-2.

```
5/10/02 16:13:34 Update Employer Codes PRGMCD PRDMCD
-----
Employer . . . . . :
Code type . . . . . : ERG EMPLOYER GROUP
Code value . . . . . : GRP1
Description . . . . . : EMPLOYER GROUP 1
-----
Active/Inactive . . . . 0 (0=Act./1=Inact)
-----
F3=Exit F10=QuikAccess F12=Cancel F18=Message line F22=Delete
```

Figure 5-2: Update Employer Codes screen 2 of 2

- 6 Use the following information to fill in the field on this screen.

Description

Type one or more words that describe the employer group. This field is 30 characters in length. This description prints on reports that use employer groups for selection and sorting.

- 7 Press Enter. The system saves the employer group name and displays the Infinium HR main menu or desktop.

Assigning Employers to an Employer Group

Follow the steps below to assign employers to an employer group.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Employer Groups [UEG]*. Press Enter. The system displays the screen shown in Figure 5-3.



Figure 5-3: Update Employer Groups screen 1 of 2

- 4 Use the following information to fill in the field on this screen:

Employer Group

Type the code value that represents the employer group that you are establishing. Press F4 to display a list of valid employer group code values.

- 5 Press Enter. The system displays the screen shown in Figure 5-4.

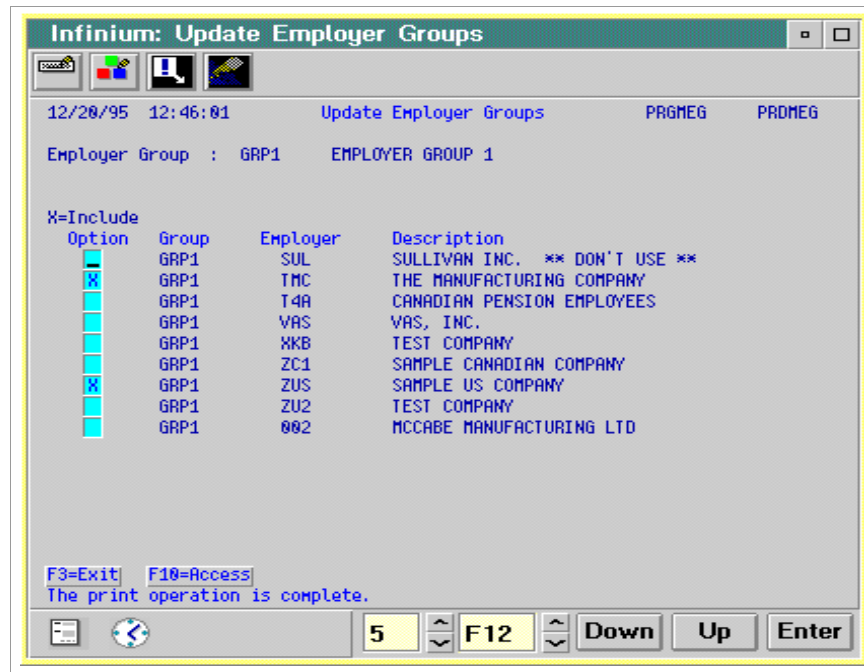


Figure 5-4: Update Employer Groups screen 2 of 2

In the column under the *Group* field on this screen, the system displays the code value representing the employer group you specified on the preceding screen for all employers. However, employers are not part of the group until you select them using the method described below.

- Use the following information to fill in the field on this screen:

Opt

Type any character next to the employers that you want to include in the specified employer group. After you press Enter, the system replaces the character that you typed with X.

- Press Enter. The system displays the Update Employer Groups screen 1 of 2. You can update another Employer Group or press F3 to return to the Infinium HR main menu.

Changing Employer Groups

You can use the *Update Employer Groups* function at any time to add new employers to an existing employer group or remove employers previously assigned to an employer group.

Follow the steps in the preceding section to add a new employer to an existing employer group.

To remove an employer from an employer group, follow the steps in the preceding section to display the screen shown in Figure 5-5. Position your cursor on the *Opt* field adjacent to the employer that you want to remove. Press SpaceBar or FieldExit or Delete to remove the X from the *Opt* field next to the employer. Press Enter to exit from this screen and save your change to the employer group.

Deleting Employer Groups

To delete an employer group, you must first remove all employers from the group. Follow the steps described above.

After all employers are removed from the employer group, follow the steps in the preceding section to display the screen shown in Figure 5-1. Type the code value that represents the employer group you want to delete on this screen. Then press Enter. The system displays the screen shown in Figure 5-2. Press F22 to delete the employer group code value from your system.

Displaying an Employer Group

Follow the steps below to display an employer group.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Display Master Files*.
 - 3 Select *Display Employer Groups* [DEG]. Press Enter. The system displays the screen shown in Figure 5-5.
-

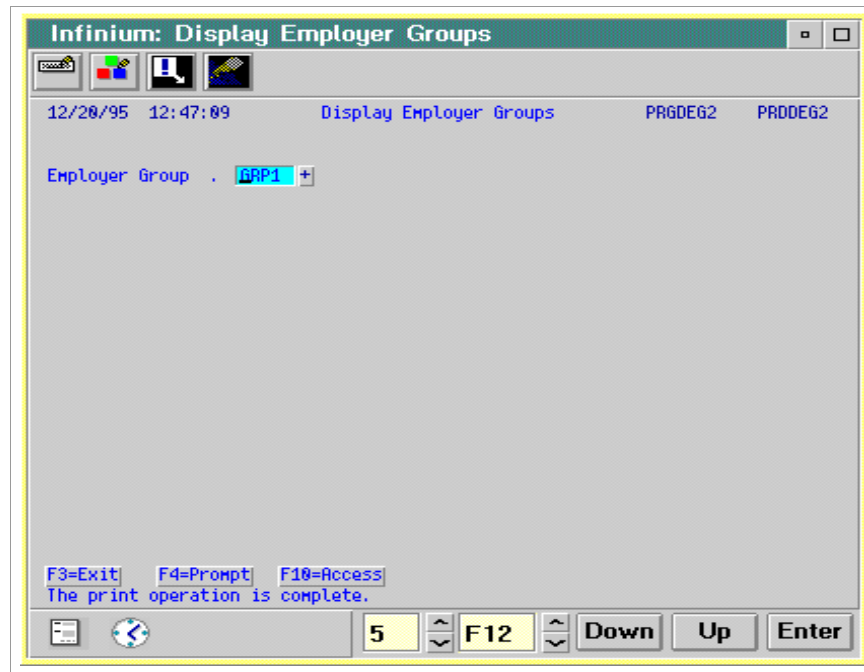


Figure 5-5: Display Employer Groups screen 1 of 2

- 4 Use the following information to fill in the field on this screen:

Employer Group

Type the code value that identifies the employer group you want to display.
Press F4 to display a list of valid employer groups.

- 5 Press Enter. The system displays the screen shown in Figure 5-6.

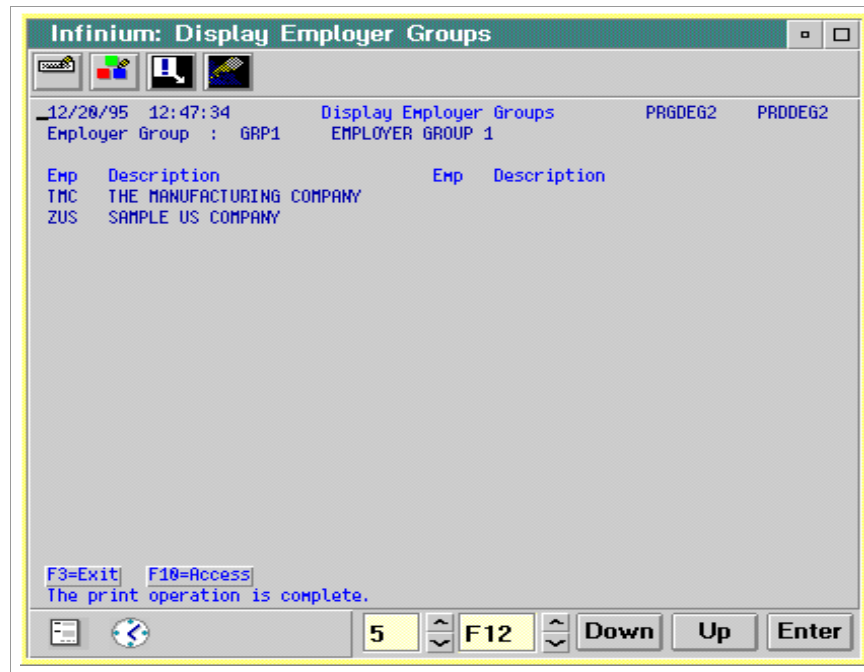


Figure 5-6: Display Employer Groups screen 2 of 2

The system displays the code values and descriptions of employers assigned to the specified employer group.

- 6 Press Enter to exit from this screen and return to the screen shown in Figure 5-5. You can type the code value that represents another employer group or press F3 to exit from this screen and return to the Infinium HR main menu.

Generating the Employer Group Report

Follow the steps below to generate a report of employer groups.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *List Master Files*.
- 3 Select *List Employer Groups* [LEG]. Press Enter. The system displays the screen shown in Figure 5-7.



Figure 5-7: List Employer Groups screen

- 4 Use the following information to fill in the field on this screen:

Employer Group

To generate a report of employers associated with a particular employer group, type the code value that represents that group. Leave this field blank to generate a report of the employers assigned to all employer groups.

- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main men:

Building submission request . . .

The system uses batch processing to generate the Employer Groups report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.

Summary of Employer Groups

In summary, you have become familiar with how to set up, display and report on employer groups. You are also familiar with why you would define employer groups and how to use them on selection screens in Infinium HR.

Notes

Infinium HR enables you to define the unique structure of your organization through the use of levels. You use levels to represent organizational or functional areas within your organization, such as division, department or cost center.

You must establish level controls for each employer that you define in your Infinium HR database. The system uses levels to process information about your organization and its employees.

The chapter consists of the following topics:

| Topic | Page |
|---------------------------|-------------|
| Overview of Levels | 6-2 |
| Setting up Level Controls | 6-16 |
| Summary of Levels | 6-31 |

Overview of Levels

Objectives

You use levels to define your organization's structure. After completing this chapter, you should be familiar with the following:

- How levels work
- How to enter Level 1 controls
- How to enter Level 2-4 controls
- How to change level controls
- How to delete level controls
- How to display level controls
- How to print level control information

Understanding Levels

Infinium HR enables you to define the unique structure of your organization through the use of levels. You use levels to represent organizational or functional areas within your organization, such as division, department or cost center.

The level controls are shared by Infinium HR and Infinium PY; therefore, both groups of users should work together to define an organizational structure that is useful for Infinium HR and Infinium PY processing.

The system displays a somewhat different Level Control screen for Infinium HR users than for Infinium PY users; the Payroll Level Control screen includes fields for general ledger numbers which are not visible on the Personnel Level Control screen. Both groups of users should review the level controls during implementation and when new levels are added after Infinium HR is in production.

Levels describe and define the organizational structure of your employer. Each employee is assigned to a set of levels during the hiring process so that he or she can be located within the organization. You also use levels for the following activities:

- Processing: levels allow you to select employees for system processing or group employees for data entry.
- Reporting: levels allow you to extract information for displays and reports; you can use levels to sort and group employees together on reports and to generate sub-totals in standard reports.
- Implementing security: levels allow you to restrict user access to the information of specific employees based on where the employees work in your organization.
- Generating general ledger Accounts: on Infinium PY, levels allow you to generate general ledger account numbers to charge labor expense and employer liabilities to your general ledger system, as well as to pass headcount information to the general ledger.

These functions are described more fully below.

The levels represent a hierarchical structure within an employer. You can define up to four tiers or breakdowns. You must define at least level 1 for each employer. You use level 1 to identify the broadest organizational groupings in the employer; within each level 1, you can identify level 2 groupings. Within each level 2, you can define level 3 groupings and within each level 3, you can define level 4 groupings.

For example, within a particular employer level 1 can represent divisions; level 2 can represent regions within each division; level 3 can represent departments within each region; level 4 can represent cost centers within each department. Each level 2 record is tied to a specific level 1 record; likewise, each level 3 record is tied to a specific level 2 record and each level 4 record is tied to a specific level 3 record. You use various level combinations to identify where employees work in a particular employer.

When you are designing your level structure, it is helpful to refer to your employer's organization charts to identify key organizational components. The following figure provides an example of how an organization chart can relate to levels in Infinium HR.

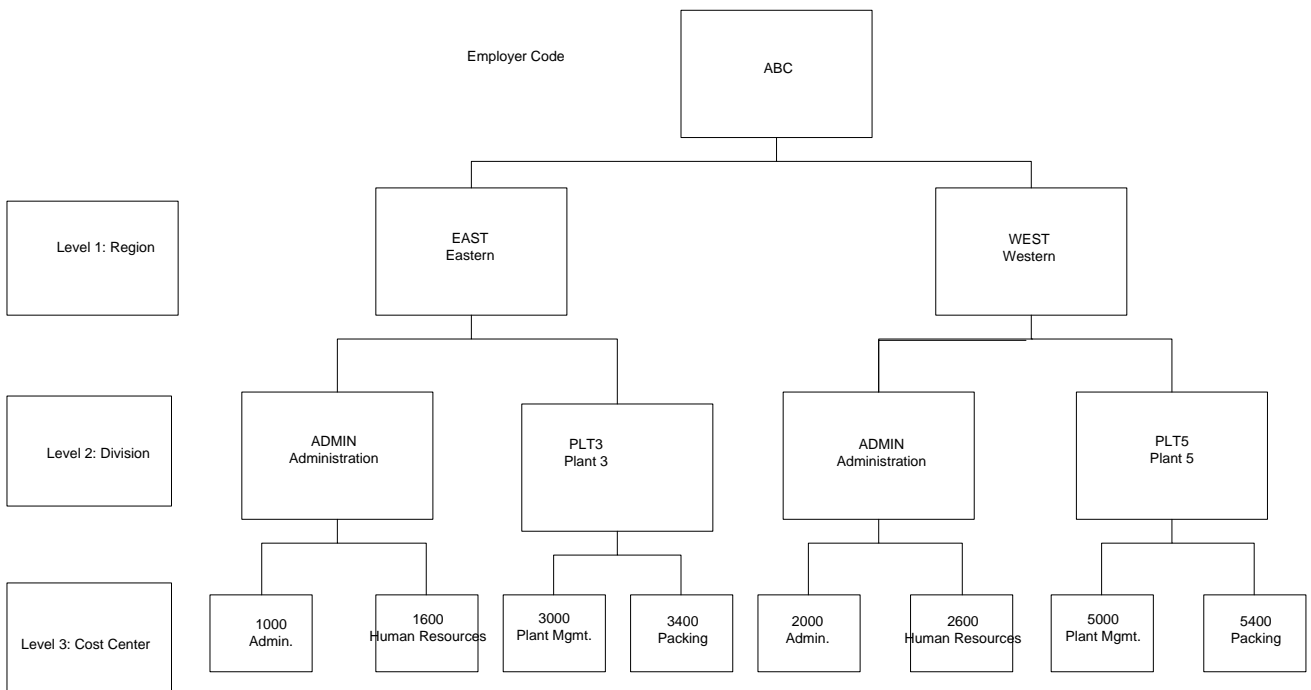


Figure 6-1: Organization Chart Example

In the example shown above, regions are the broadest grouping within the ABC employer. Within each region, divisions are the next major grouping. Within each division, cost centers are the essential groups. In this example, level 4 is not used.

Using Levels

The system uses levels for three basic functions within Infinium HR and Infinium PY: processing, reporting and security. Levels allow Infinium HR and Infinium PY users to update records of employees based on their level assignment, generate reports for specific areas, locations or functions within an employer, group employees within reports and produce report subtotals. Levels also allow Personnel and Payroll departments to restrict users to the records of employees assigned to one or more specified levels. For example, Infinium HR and Infinium PY users at a particular location can be restricted to working with the records of only employees assigned to that location.

Infinium PY has a fourth use for levels: they can be used to cost payroll expenses to the general ledger. Payroll users can store part or all of a labor expense account and/or liability account number on each level control record. The system uses this information during pay cycle processing and closing to

the general ledger to build account numbers and pass payroll expenses to a general ledger system.

Using Level Controls for Security

You can use level controls to restrict users to accessing only the records of employees in certain parts of the organization. For example, you define the two major divisions of your organization, East and West, using level 1 controls. You then use level security to restrict Infinium HR and Infinium PY users in the eastern area so that they can update, display and report on only employees assigned to the eastern area. Similarly, you restrict western area Infinium HR and Infinium PY users to accessing only the records of employees assigned to the western area.

See the *Infinium Human Resources Guide to Management Functions* for details on how to implement level security.

Assigning Employees to Levels

You can use the *Enter New Hire* function in Infinium HR or Infinium PY to hire new employees onto the system. Regardless of which system you use, you assign each new employee to a position during the hire process. Since you associate each position with a specific level location, when you hire an employee he or she is automatically assigned to the set of levels linked to his or her hiring position. These levels are referred to as the employee's home levels. They identify where the employee normally works in the organization.

For example, you establish three levels within company ABC: level 1 is region, level 2 is plant and level 3 is department. If you hire a new packing clerk into company ABC to work in plant 6 in the eastern region, then the new employee would be assigned to the following levels:

| Level | Level Description | Sample Level Locations |
|---------|-------------------|------------------------|
| Level 1 | Region | Eastern Western |
| Level 2 | Plant | Plant 6 Plant 7 |
| Level 3 | Department | Packing Shipping |

At a minimum, you must associate each position with a specific level 1 location. You can use level 2, level 3 and level 4 to further identify the location of positions in your organization. Depending on the configuration of your company and the complexity of various groups within the company, you

may associate some positions with four levels while you associate other positions with only the first two levels.

Using Levels for General Ledger Costing

In Infinium PY you can use levels to resolve account numbers and to cost payroll expense to the general ledger. You can enter portions of general ledger account numbers onto any or all level controls. When you enter time for employees during pay cycle processing, the system automatically defaults the home levels for each employee into his or her time entry records. The Infinium PY user who processes pay cycles can replace the home levels with different levels if the employee's labor expense and employer liabilities should be charged elsewhere for some or all of that pay period.

For example, if a weekly paid employee works 20 hours in his or her home level location and 20 hours in a different department, the Infinium PY cycle processor can record two different time entry records for that pay period. The first time entry record has 20 hours charged to the employee's home levels; the second time entry record has 20 hours charged to the other level location where the employee worked that week.

When the system processes the time entry records during the release stage of pay cycle processing, it builds labor expense account numbers by searching for the payroll level controls that correspond to the home or worked levels of the employees in that cycle.

After the pay cycle is complete, the system builds account numbers for employee payroll deductions and employer liabilities when the Infinium PY user runs the *Close to General Ledger* function. The Infinium PY user can charge all of an employee's deduction expense and employer liabilities to his or her home levels, or the user can have the system automatically prorate the deduction expense and employer liability among the level locations worked by each employee.

Please refer to the *Infinium Payroll Guide to Controls* for additional information on how the system uses level controls for general ledger processing.

Changing the Level Structure

Because levels are associated with position controls, employees and general ledger account numbers, it can be time consuming to make changes to the basic level structure after you implement Infinium HR. You should plan ahead and thoroughly consider future reporting and processing needs when you establish the levels for a new employer.

For example, you establish level 1 as division and level 2 as cost center. After you begin using Infinium HR in a production environment, you decide to change cost center to level 3 and insert department as level 2. You must update all of the position controls and employee records with this change. You can use mass update functions in Infinium HR to apply level changes to large groups of position controls or employees; however, you should avoid re-implementing the level structure if at all possible.

You can make changes within the existing level structure or to add new level locations to the established hierarchy due to company reorganizations and changes in business needs. For example, you establish level 1 as region and level 2 as branch. You set up branch 100 under the eastern region. Later, the company is reorganized and branch 100 moves to the central region. You must update the position controls and employee records that are associated with branch 100; you can make the changes manually or use mass updates.

You can define new level locations within an existing level structure at any time. After you define the level location, you must establish new position controls that are associated with the new levels or change existing position controls to reference the new level location. The system automatically updates the level information in the records of employees assigned to changed position controls. If you set up new position controls, you must manually assign employees to them.

Establishing Level Descriptions and Specific Level Locations

You can establish levels for your organization based on geographical locations, on functional areas such as departments, cost centers, and divisions, or on any other criteria that suits your organizational and reporting needs. You can use various combinations, such as geographical locations with functional areas, to pinpoint areas in the organization.

The level structure does not need to be balanced or symmetrical. In other words, you can have as many or as few level locations for each tier as you need to accurately represent the company's organizational structure. However, it is helpful to be consistent in your structure. In other words, if you use level 3 to represent cost center, you should assign each employee to a level 3 location for general ledger costing and ease of reporting.

In order to assign each employee to a level 3 location, he or she must also be assigned to a level 1 and level 2 location. You may need to set up "dummy" levels if one of the level groupings does not apply to certain parts of your organization. For example, in the chart that follows the Administrative level is defined twice within the Western Region, once as **ADMIN** for level 2 and again as **1000** for level 3.

You establish levels for your organization in two steps:

- 1 Assign a global title or description to each level tier that you require. For example, you can label level 1 as **Region** and level 2 as **Plant**. You establish generic field descriptions for your levels through the *Update Employer Controls* option.
- 2 Define a code for each specific level location in your organization's structure. You build specific level locations within each global level description. The level code can be up to 5 characters in length. You also type a description for each level code. You define codes to represent specific level locations through the *Update Level Controls* option.

The following table lists sample code values and descriptions for level locations in company ABC:

Company ABC Level Structure

| Level 1 - Region | | Level 2 - Plant | | Level 3 - Cost Center | |
|------------------|-------------|-----------------|----------------|-----------------------|----------------|
| Code | Description | Code | Description | Code | Description |
| EAST | Eastern | ADMIN | Administration | 1000 | Administration |
| | | | | PLT3 | Plant 3 |
| | | 3400 | Packing | | |
| | | 3500 | Production | | |
| | | PLT4 | Plant 4 | 4000 | Plant |
| | | | | 4400 | Packing |
| | | | | 4500 | Production |
| | | WH | Warehouse | 9000 | Warehouse |
| | | | | 9100 | Receiving |
| | | WEST | Western | ADMIN | Administration |
| 2600 | Human | | | | |
| PLT5 | Plant 5 | | | 5000 | Plant |
| | | | | 5400 | Packing |
| | | | | 5500 | Production |
| PLT6 | Plant 6 | | | 6000 | Plant |
| | | | | 6400 | Packing |
| | | | | 6500 | Production |

Storing Default Values on Level Controls

In addition to storing payroll expense account components on the level controls, you can use these controls to specify default criteria for new employees. The system fills in the default values when you enter new employees into Infinium HR. The default values save typing time and ensure accuracy and consistency. If necessary, you can replace the default values with other values if you hire an employee whose values should be different from the default values.

When you define level controls on Infinium HR, you can enter default values for the following employee information:

- residence country
- residence state/province
- pay frequency
- physical work location
- shift

When you define level controls on Infinium PY, you can enter default values for the following employee information:

- employment country
- employment state/province
- local taxing entity
- pay frequency
- shift code
- pay cycle code

All but one of the default fields on the Infinium HR level control screen use code values that you define through *Update Employer Codes*. The exception is the *Frequency* field; Infinium has pre-defined values for this field. With your cursor on the *Frequency* field, press Help to display the valid values.

The table below summarizes how these default values operate when you use the *Enter New Hire* function. In the System column, PE refers to Infinium HR and PY refers to Infinium PY.

| Name of Default Field on the Level Control | System | Uses Code Type? | Field Affected during the Enter New Hire Function |
|--|--------|---------------------------------------|---|
| <i>Country</i> | PE | CTR | <i>Country</i> (home residence) |
| | PY | CTR | <i>Payroll Country</i> (employment country) |
| <i>State/Province</i> | PE | STA | <i>State/Province</i> (home residence) |
| | PY | STP | <i>Current State</i> (work location for U.S. employees) <i>Province</i> (work location for Canadian employees) |
| <i>Fquency</i> | PE | See Help text for pre-defined values. | <i>Pay Frequency</i> |
| | PY | | |
| <i>Locality</i> | PE | LOC | This default is only used with the alternate method of hiring. When you use the standard method of hiring, the LOC value defaults from employee's hiring position rather than from the level controls. |
| | PY | LCN | <i>Tax Locality</i> (U.S. employees only) |
| <i>Shift Code</i> | PE | SFT | <i>Shift Code</i> |
| | PY | | |
| <i>NAICS Code</i> | PY | NAI | This is used only for Wyoming unemployment reporting |

The default values that you specify on level controls override those that you enter on the employer control. For example, most employees at the ABC Company are assigned to the first shift. You define a shift code value of 1 to represent the first shift, and you then enter 1 in the *Shift* field on the company's employer control record. This value is correct for all employees except employees of cost center 600, who should be automatically assigned to shift 3.

You define **3** as the shift code value for third shift in your employer and enter that value in the *Shift* field on only the level control for cost center 600. When you hire a new employee assigned to cost center 600, the system defaults **3** into the new employee's *Shift* field. Because you left the *Shift* field blank on the level controls for other cost centers, the system uses the default value **1** from the employer control for all other new employees.

Likewise, default values entered on lower level controls override the default values entered on the higher levels to which they are attached. For example, when you enter a default value for employment state/province on a level 2 control, it overrides the employment state/province default value found on the level 1 control with which it is associated.

Do not repeat the same default values from upper level controls on lower level controls. Using redundant default values is inefficient for processing and maintenance. In the above example, you do not need to enter **1** as the default value for the *Shift* field on the majority of the level controls because you have already entered it on the employer control, which supersedes the level controls.

Displaying inactive levels

You can include or exclude inactive levels from displaying on screens for selected functions:

Employer controls

Use the *Edit Inact Levels* field in the *Update Employer Controls* function to indicate whether a warning or error is displayed when a user attempts to hire or transfer an employee to a position that has an inactive level set associated with it.

Use the *Inact Lvl Rpt Dft* field in the *Update Employer Controls* function to set a default value for reports to include or omit inactive levels from the reports. The user can override the default value by pressing F15 when running a report that is set up to omit inactive levels.

See the "Setting up the Entity and Employer Controls" chapter in this guide for more information.

Functions that affect user access to inactive levels

In addition to the employer controls, you can use these functions to control user access to inactive levels:

| Function | Description |
|--------------------------------------|---|
| <i>Update Reporting Levels</i> | In the Infinium HR <i>Update Reporting Levels</i> function, you can deactivate a level control. You can also include or omit inactive levels in the <i>Display Reporting Levels</i> and <i>List Reporting Levels</i> functions |
| <i>Update Level Controls</i> | In the Infinium PY <i>Update Level Controls</i> function, you can deactivate a level control. You can also include or omit inactive levels in the <i>Display Employer Levels</i> and <i>List Level Controls</i> functions |
| Level prompt | You can include or omit inactive levels from the display when you prompt on a level. |
| <i>Enter New Hire</i> | The <i>Enter New Hire</i> function displays a warning or error when a user attempts to hire an employee into an inactive level set, depending on the value in the <i>Edit Inact Levels</i> field on the employer control. |
| <i>Enter Personnel Actions</i> | The <i>Enter Personnel Actions</i> function displays a warning or error when you move an employee into an inactive level set, depending on the value in the <i>Edit Inact Levels</i> field on the employer control. |
| <i>Update Basic Data</i> | The <i>Update Basic Data</i> function displays a warning or error when a user attempts to change an employee's position to one associated with an inactive level set, depending on the value in the <i>Edit Inact Levels</i> field in the <i>Update Employer Controls</i> function. The user can use <i>Update Basic Data</i> to change an employee's position only when the <i>Posit. File Used?</i> field in the <i>Update Employer Controls</i> function is 0. |
| <i>Update User Security Controls</i> | The <i>Include Inactive Levels?</i> field in the <i>Update User Security Controls - Defaults</i> function contains the value that the user enters in the <i>Inc Inactive Lvl</i> field from the employer control the last time the prompt key is pressed on an employee number or name or the <i>Employee Locate</i> function is used. |
| <i>Update User Security Levels</i> | The <i>Update User Security Levels</i> function displays active levels as highlighted so you can distinguish between active and inactive levels. |

| Function | Description |
|-------------------------------------|--|
| <i>Display User Security Levels</i> | The <i>Display User Security Levels</i> function displays active levels as highlighted so that you can distinguish between active and inactive levels. |

Functions from which you can omit inactive levels

You can omit inactive levels from display for these functions:

- *Employee Locate* (employee prompt)
- *Display Employee Data* (PE and PY)
- *Display Open Positions by Level*
- *Display Current Positions by Level*
- *Display Workforce Levels*
- *Display Turnover Analysis*
- *Display Employee History*
- *Employee Inquiry*
- *Display Employee Work Actions*
- *Display Salary Changes*
- *Display Accident/OSHA Data*
- *Display OSHA 200 Data*
- *Display Cost Transactions*
- *Display Employee Medical Exams*

Reports from which you can omit inactive levels

You can omit inactive levels from these reports:

- *List Employee Data* (PE and PY)
- *List Reporting Levels* (PE)
- *List Level Controls* (PY)
- *List Positions by Levels*
- *List Current Positions*
- *List Current Positions by Levels*
- *List Overstaffing Report*

- *List Positions with Salaries*
 - *List Turnover Analysis*
 - *List Employee Property*
 - *List Employee Dependents*
 - *List Eligibility Data*
 - *List Next Review Schedule*
 - *List PE Actions by Levels*
 - *Create Statement Workfile (Benefits Administration)*
 - *List Transfers/Promotions/Demotions*
 - *List Terminations Detail*
 - *Seniority Date Listing*
 - *Date of Hire Anniversary Listing*
 - *List Employee Profiles (PE and PY)*
 - *List Birthdays*
 - *List Restricted Parking*
 - *List Auth/Budg/Sched Hours*
 - *List Budget/Schedule by Position*
 - *List Hours by Levels*
 - *List FTE Recap*
 - *List Accumulated Hours Worked*
 - *List Average Hours by Levels*
 - *List Average FTE Recap*
 - *List License Data – Summary*
 - *List Authority Report*
 - *List Transactions by Levels*
 - *List OSHA 301 Incident/Level EE*
 - *List Cost Analysis*
 - *List Medical Exams by Level*
 - *List Compensation by Levels*
 - *List Budget Salaries – Level*
 - *List Budget Salary vs Paid – Level*
 - *List Salary Paid – Level*
-

- *List Average Salary Paid – Level*
- *List Employee Calendar Data*
- *List Absence Analysis Data*
- *Trial Mass Supervisor Data*
- *Mass Update Supervisor Data*
- *List Employee Incomes*
- *List Employee Deductions*
- *List Multiple Distributions*
- *List Base Pay Rates*
- *List EE Cycles by Levels*
- *List Add'l EE Positions*
- *List Check History*
- *Selective Mailing Labels*

When you run one of the above reports, an additional submission page, PRTCPBL, is printed. This page indicates whether you selected to include inactive levels on the report.

Setting up Level Controls

When you create your organization's level structure, you must build it from the top down. You can accomplish this in two ways, by focusing on each vertical stack of levels or by working horizontally across the organization chart from top to bottom. Follow these steps to build each organization component from the top down:

- 1 Create a level 1 control.
- 2 For that level 1, create all necessary level 2 controls.
- 3 For each level 2, create all necessary level 3 controls.
- 4 For each level 3, create all necessary level 4 controls.

If you take the other approach, you build all level 1 controls first. Then you define all level 2 controls, then all level 3 controls, then all level 4 controls. Since the level controls are hierarchical combinations, you must associate each level 4 control with a level 3 control, each level 3 control with a level 2 and each level 2 control with a level 1 control.

When you select employees by levels for processing or reporting, you must type their full level combination. The following table illustrates the level selections that you make depending on whether employees are associated with only a level 1 location, a level 1 and level 2 location, and so on.

| To Select Employees Assigned to Level . . . | On the Selection Screen Type . . . |
|---|--|
| 1 | Their Level 1 Code Value |
| 2 | Their Level 1 and Level 2 Code Values |
| 3 | Their Level 1, 2 and 3 Code Values |
| 4 | Their Level 1, 2, 3, and 4 Code Values |

Entering Level 1 Controls

Follow the steps below to create level 1 controls.

- 1 From the Infinium HR main menu select *Master Files*.
-

- 2 Select *Update Master Files*.
- 3 Select *Update Reporting Level Controls [URL]*. Press Enter. The system displays the screen shown in Figure 6-2.

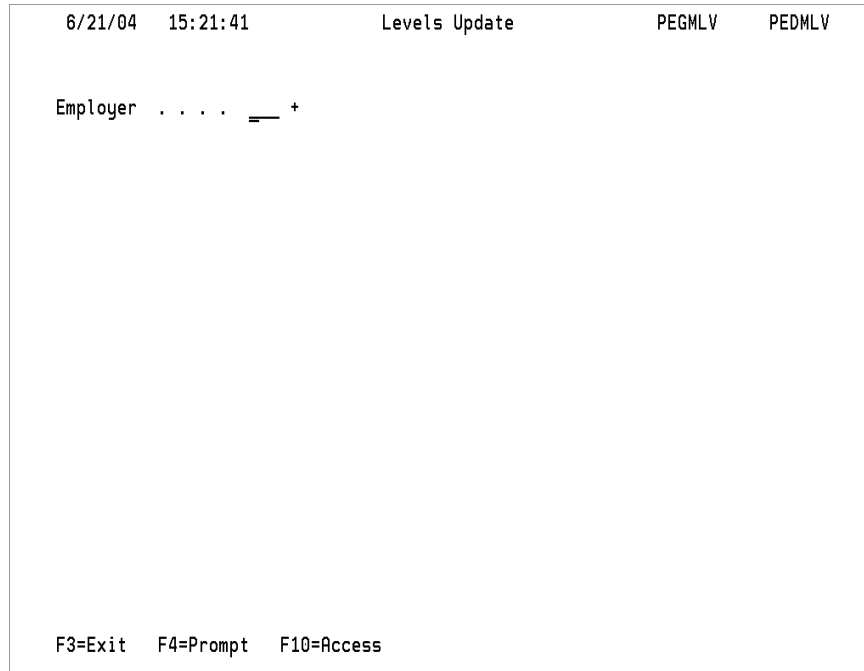


Figure 6-2: Levels Update Screen 1

- 4 Type the value that identifies the employer for which you want to create level controls.
- 5 Press Enter. The system displays the screen shown in Figure 6-3.

| | | | | |
|---|----------|-------------------|--------|--------|
| 6/21/04 | 15:22:12 | Levels Update | PEGMLV | PEDMLV |
| Employer . . . : | ZUS | SAMPLE US COMPANY | | |
| Area . . . | _____ | + | | |
| Division . . . | _____ | + | | |
| Department . . . | _____ | + | | |
| Cost Centr . . . | _____ | + | | |
| F3=Exit F4=Prompt F10=Access F12=Cancel | | | | |

Figure 6-3: Levels Update screen 2

6 Use the following information to fill in the fields on this screen:

You must fill in levels from the top down, building one level at a time. You must define a value for level 1 before you can enter a value for level 2.

The field names that you see on the left of this screen are unique to your organization. You establish the names for these fields when you enter descriptions for your levels using the *Update Employer Controls* option. Since the field names are different for each employer, they are referred to generically in this guide as level 1, level 2 and so on.

Level 1

Type a value that represents the specific level 1 location that you want to establish. You can enter up to five letters or numbers in any combination.

7 Press Enter. The system displays the screen shown in Figure 6-4.

```

6/23/12  11:02:09          Levels Update          PEGMLV  PEDMLV

Employer . . . : ZUS   SAMPLE US COMPANY
Area      . . . : 300
Division  . . . :
Department . . . :
Cost Centr . . . :

Level Description EASTERN AREA
Active/Inactive? 0 (0=Act./1=Inact)
Level Defaults
Country . . . . .     +          NAICS Code . . . . .        +
State/Province . . .     +
Frequency . . . . .    
Locality . . . . .        +
Shift Code . . . . .        +

Standard Annual Hours
Exempt . . . . .       
Non-Exempt . . . .       

F3=Exit  F4=Prompt  F10=Access  F12=Cancel  F22=Delete

```

Figure 6-4: Levels Update screen 3

- 8 Use the information below to complete the fields on this screen.

You must enter information in the *Level Description* field. All of the other fields are optional.

Level Description

Type a description of this level code value. This is a 30 character alphanumeric field. The system uses the level code and level description in reports and displays.

Active/Inactive?

Indicate if this level is active or inactive. Valid values are:

- 0** This is an active level.
- 1** This is an inactive level.

Level Defaults

Use the fields in this section of the screen to establish values that apply to all or most of the employees in this level. The default values that you type in these fields override the default values on the employer control. See the “Overview of Levels” topic in this chapter for further information.

You must establish values using the *Update Employer Codes* function for the fields marked with + before you can enter information into them on this screen. See the table in the preceding section for details.

Standard Annual Hours

These fields are for informational purposes only. The system does not use them in employee records or for processing.

Exempt

Type the number of hours normally worked per year by employees assigned to this level who are exempt from overtime payments.

Non-Exempt

Type the number of hours normally worked per year by employees assigned to this level who are eligible for overtime payments.

- 9 Press Enter. The system returns you to the Levels Update screen 1 of 3.
- 10 Repeat steps 4 through 9 to create additional level 1 controls.
- 11 Press F3 to exit this option when you have completed creating level 1 controls or follow the steps below to enter values for levels 2, 3 and 4.

Entering Levels 2 - 4 Controls

You can create level 2 controls for some or all of the level 1 controls that you have established. Similarly, you can create level 3 controls for some or all of the level 2 controls that you have established, and level 4 controls for some or all of the level 3 controls that you have entered. The screens you complete are identical to the ones discussed in the previous section.

The same level 2 code can be associated with more than one level 1 code. For example, in company ABC you define level 1 as division and level 2 as department. Department 100 represents payroll and is associated with 5 different divisions. You must create 5 different level combinations, each of which includes a level 2 location identified as department 100 that is attached to a different level 1 code.

Follow the steps below to create level 2 controls. You follow the same steps to create level 3 and level 4 controls.

- 1 From the Infinium HR main menu select *Master Files*.
-

- 2 Select *Update Master Files*.
- 3 Select *Update Reporting Levels [URL]*.
- 4 Press Enter. On the first Levels Update screen, type the value that identifies the employer for which you want to create level controls.
- 5 Press Enter. The system displays the screen shown in Figure 6-5.

| | | | | |
|---|--------------|-------------------|--------|--------|
| 6/21/04 | 15:28:09 | Levels Update | PEGMLV | PEDMLV |
| Employer . . . : | ZUS | SAMPLE US COMPANY | | |
| Area . . . : | <u>100</u> | + | | |
| Division . . . : | <u>ADMIN</u> | + | | |
| Department . . . : | _____ | + | | |
| Cost Centr . . . : | _____ | + | | |
| F3=Exit F4=Prompt F10=Access F12=Cancel | | | | |

Figure 6-5: Levels Update prompt screen 2

- 6 Use the following information to fill in the fields on this screen:

To define a level 2 control, you must fill in the level 1 location to which it is connected on this screen along with the code representing the new level 2 location. To define a level 3 control, you must fill in the level 1 and 2 locations to which it is connected. To define a level 4 control, you must fill in the level 1, 2, and 3 locations to which it is connected.

Level 1

Type the value that identifies the level 1 location for which you want to establish a level 2 location. Press F4 to display a list of valid level 1 choices.

Level 2

Type a value that identifies a level 2 location within the level 1 location specified above. You can enter any combination of 5 or fewer letters or

numbers. If you have already established level 2 locations for the specified level 1, you can press F4 to display a list of the existing level 2 choices.

- 7 Press Enter. The system displays the screen shown in Figure 6-6.

```

6/21/04  15:29:20                Levels Update                PEGMLV  PEDMLV

Employer . . . : ZUS   SAMPLE US COMPANY
Area      . . . : 100   WESTERN AREA
Division  . . . : ADMIN
Department . . . :
Cost Centr . . . :

Level Description ADMINISTRATION

Level Defaults
-----
Country . . . . . ___ +           NAICS Code. . . . . _____ +
State/Province . . ___ +
Frequency . . . . . ___
Locality . . . . . _____ +
Shift Code. . . . . _____ +

Standard Annual Hours
-----
Exempt . . . . . _____
Non-Exempt . . . . . _____

F3=Exit  F4=Prompt  F10=Access  F12=Cancel  F22=Delete

```

Figure 6-6: Levels Update screen 3

- 8 Complete the information on this screen using the field descriptions from the previous section of this topic, “Entering Level 1 Controls.”
- 9 Press Enter. The system returns you to the Level Controls screen 1 of 3. Repeat steps 4 through 9 to create additional level 2 controls.
- 10 Press F3 to exit this option when you have completed creating level 2 controls or use the information below to create level 3 and level 4 controls.

Entering Level 3 Controls

Follow the steps described above to establish level 3 controls. You must enter values in the level 1, level 2 and level 3 fields in the screen shown in Figure 6-4. You must establish level 1 and 2 locations before you can define a level 3 location for them.

Entering Level 4 Controls

Follow the steps described above to establish level 4 controls. You must enter values in the level 1, level 2, level 3 and level 4 fields in the screen

shown in Figure 6-4. You must establish level 1, 2 and 3 locations before you can define a level 4 location for them.

Changing Level Controls

You can change a level description or any of the default information for an established level code at any time. The system uses the new level description in reports and displays as soon as you press Enter to exit from the Levels Update screen 3 of 3. The new default values take effect with the first new employee that you hire into the level after you update the level control record.

You cannot change an existing level code. If you need to establish a new level location to replace an old level location, follow the instructions in the preceding section. If a particular level location is no longer valid, you can delete it after you remove it from the records of employees who were previously assigned to it.

Deleting Level Controls

You can delete an established level control; however, you must first remove the level code from the basic data records of any active employees that are currently assigned to the level location. You must also remove the level code that you want to delete from any position control records associated with active employees and replace it with a different level code.

You can manually update the level fields on position control records. When you press Enter to update the position control, the system automatically updates the level fields in the basic data records of employees assigned to the position.

If the level that you want to delete was attached to many positions and active employees, you can use two Infinium HR mass update functions to automate the removal of the level code from positions and employees. You use the *Mass Change Position Levels* function to have the system automatically replace the code for an obsolete level with a new level code for all positions in a particular employer. You can then run the *Mass Update Employee Positions* function to update the records of existing employees with the new level code associated with their assigned position. See the topic in this guide entitled “Using Position Mass Updates” for details.

When you delete levels, you must delete them from the bottom up. For example, if you want to delete a level 1 location, you must first delete all level

4 controls with which it is associated. You must then delete all the level 3 and level 2 controls with which it is associated. You delete the level 1 control last, after you have removed all of its associated levels.

When you delete a level control, the system automatically also deletes it from the level security file. You use level security to limit Infinium HR and Infinium PY users to accessing the records of only those employees assigned to one or more specified levels.

Follow the steps below to delete level controls.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Reporting Levels* [URL].
- 4 Press Enter. On the first Levels Update screen, type the value that identifies the employer for which you want to delete level controls.
- 5 Press Enter. The system displays the screen shown in Figure 6-7.

| 6/21/04 | 15:31:06 | Levels Update | PEGMLV | PEDMLV |
|------------------|--------------|-------------------|--------|--------|
| Employer . . . : | ZUS | SAMPLE US COMPANY | | |
| Area . . . | <u>100</u> | + | | |
| Division . . . | <u>ADMIN</u> | + | | |
| Department . . . | <u>ACCT</u> | + | | |
| Cost Centr . . . | <u>103</u> | + | | |

F3=Exit F4=Prompt F10=Access F12=Cancel

Figure 6-7: Levels Update screen 2

- 6 Use the following information to fill in the fields on this screen.

Fill in the lowest level that is connected to the level control that you want to delete. For example, if you want to delete a level 3 control, you must first delete all level 4 controls to which it is attached.

7 Press Enter. The system displays the screen shown in Figure 6-8.

```

6/21/04  15:31:45          Levels Update          PEGMLV  PEDMLV

Employer . . . : ZUS  SAMPLE US COMPANY
Area      . . . : 100  WESTERN AREA
Division  . . . : ADMIN ADMINISTRATION
Department . . . : ACCT ACCOUNTING
Cost Centr . . . : 103

Level Description GENERAL LEDGER

Level Defaults
Country . . . . . ___ +          NAICS Code. . . . . _____ +
State/Province . . . ___ +
Frequency . . . . . ___
Locality . . . . . _____ +
Shift Code. . . . . _____ +

Standard Annual Hours
Exempt . . . . . _____
Non-Exempt . . . . . _____

F3=Exit  F4=Prompt  F10=Access  F12=Cancel  F22=Delete

```

Figure 6-8: Levels Update screen 3

8 Use the information below to delete a level control.

Press F22 to delete the specified level control.

Responding to an Error Message

If active employees are assigned to the level control that you want to delete, the system displays the following error message at the bottom of this screen:

Active employees in this level, deletion not allowed.

You must remove the level code from the basic data record of active employees before you can delete the level control. Press F3 to exit from this screen.

Update the position control records associated with the obsolete level manually or through the use of the *Mass Change Position Levels* function. After you have corrected position controls and employee basic data records, repeat steps 1 through 8 to delete level controls.

Responding to a Warning Message

If terminated employees are assigned to the level control that you want to delete, the system displays the following warning message at the bottom of this screen:

WARNING: Terminated employees are attached, F21 to override.

The system allows you to delete the level, even though it is still in the basic data records of terminated employees by pressing F21. However, if you display or print the basic data record of a terminated employee who is assigned to a deleted level, the system cannot display or print the level description since it has been deleted.

Displaying Level Controls

You should occasionally view the employer's entire level structure as you build it to verify that you have entered all levels and connected them correctly to other levels in the organization. After the level structure is complete, you can use the *Display Reporting Levels* function as a quick and easy way to identify where a particular level code is located and to which higher and lower level(s) it is connected.

Follow these steps to display the level structure of an employer.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Display Master Files*.
 - 3 Select *Display Reporting Levels* [DRL]. Press Enter. The system displays the screen shown in Figure 6-9.
-

```

6/21/04 15:33:01      Display Reporting Levels      PRGDLV2  PRDDL2V2

Employer . . . .  ZUS +

F3=Exit  F4=Prompt  F10=Access

```

Figure 6-9: Display Reporting Levels prompt screen

- 4 Type the value that identifies the employer for which you want to display the level structure and press Enter.
- 5 The system displays the screen shown in Figure 6-10.

```

6/23/12 11:14:08      Display Reporting Levels      PRGDLV2  PRDDL2V2
Employer . . . .  ZUS  SAMPLE US COMPANY      Inc Inactive? @ (0/1)
Search For . . . .  _____  (Enter word or known characters)
Area      Division    Department  Cost Centr  Description
200                               CENTRAL AREA
200      ADMIN                               ADMINISTRATION
200      ADMIN      ACCT                               ACCOUNTING
200      ADMIN      ACCT      101      ACCOUNTS PAYABLE
200      ADMIN      ACCT      102      ACCOUNTS RECEIVABLE
200      ADMIN      ACCT      103      GENERAL LEDGER
200      ADMIN      ACCT      104      PAYROLL
300                               EASTERN AREA
300      ADMIN                               ADMINISTRATIVE
300      ADMIN      ACCT                               ACCOUNTING
300      ADMIN      ACCT      506      VIRGIN ISLANDS -PAYROLL
500                               PACIFIC AREA
500      ADMIN                               ADMINISTRATION
500      ADMIN      ACCT                               ACCOUNTING
500      ADMIN      ACCT      504      PAYROLL
500      ADMIN      ACCT      505      PAYROLL- N. MARIANAS
500      ADMIN      ACCT      506      PAYROLL - PUERTO RICO      +

F3=Exit  F10=Access

```

Figure 6-10: Display Reporting Levels screen

6 Use the following information to work with this screen:

The system displays each level 1 separately and then underneath each level 1, displays all level combinations connected with it.

If all of the level combinations cannot be displayed on a screen, the system displays + in the lower right hand corner of the screen. Press PageDown to advance to the next screen. Press PageUp to return to a previous screen.

Inc Inactive?

Indicate whether to include only active levels or both active and inactive levels in the list.

Valid values are:

- 0** Include only active levels.
- 1** Include both active and inactive levels.

Search For

If you want to locate a particular level location, type the value that represents that level in this field. Press Enter. The system searches through all of the level controls; if it locates the level that you specified, it displays the level value, its description and the higher levels to which it is connected on a separate screen. Press F5 to return to the full level display.

7 Press F3 to return to the Infinium HR main menu.

Generating the Level Controls Report

You can generate a report that lists some or all of the level controls within a particular employer, or all levels for all employers in your Infinium HR database. The report may be helpful in auditing information on level controls such as default values or general ledger account numbers.

Follow these steps to print a report of the level structure of an employer.

- 1** From the Infinium HR main menu select *Master Files*.
 - 2** Select *List Master Files*.
 - 3** Select *List Reporting Levels [LRL]*. Press Enter. The system displays the screen shown in Figure 6-11.
-

```

6/21/04 15:33:51      Display Reporting Levels      PRGDLV2  PRDDL2
Employer . . . : ZUS      SAMPLE US COMPANY
Search For . . . _____ (Enter word or known characters)
Area      Division  Department  Cost Centr  Description
100
100      ADMIN
100      ADMIN      ACCT      ACCOUNTING
100      ADMIN      ACCT      100      ACCOUNTING ADMIN.
100      ADMIN      ACCT      101      ACCOUNTS PAYABLE
100      ADMIN      ACCT      102      ACCOUNTS RECEIVABLE
100      ADMIN      ACCT      103      GENERAL LEDGER
100      ADMIN      ACCT      104      PAYROLL
100      ADMIN      HR
100      ADMIN      HR      110      HUMAN RESOURCES ADMIN.
100      ADMIN      HR      111      COMPENSATION & BENEFITS
100      ADMIN      HR      112      RECRUITING
100      ADMIN      HR      113      EMPLOYEE & LABOR RELATIONS
100      ADMIN      HR      114      SAFETY & HEALTH
100      ADMIN      HR      121      PROGRAMMING
100      ADMIN      MIS
100      ADMIN      MIS      120      MIS ADMIN.      +
F3=Exit  F10=Access

```

Figure 6-11: List Reporting Levels screen

4 Use the following information to fill in the fields on this screen:

Employer

If you want to include only the levels of a particular employer in the report, type the value that identifies that employer in this field. Press F4 to display a list of valid employers.

Leave this field blank to include the levels of all employers in your Infinium HR database in the report.

Level 1

To restrict the report to only the level 2, 3 and 4 controls connected to a particular level 1 within a specified employer, type the value that identifies that level 1 in this field.

Level 2

To restrict the report to only the level 3 and 4 controls connected to a particular level 2 within a specified employer and level 1 location, type the value that identifies that level 2 in this field.

Level 3

To restrict the report to only the level 4 controls connected to a particular level 3 within a specified employer, level 1 and level 2, type the value that identifies that level 3 in this field.

Level 4

To restrict the report to only a particular level 4 control within a specified employer, level 1, level 2 and level 3, type the value that identifies that level 4 location in this field.

- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu:

Building submission request . . .

The system uses batch processing to generate the Level Controls report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.

Summary of Levels

In summary, you have become familiar with how levels function in Infinium HR, as well as with how to set up, display and print level controls.

Notes

Chapter 7 Understanding Step-In-Grade Processing

7

Step-in-grade processing is an optional function of Infinium HR that allows you to manage salary administration for employees who are paid standard rates that increase based on their length of service, hours worked, or a combination of both factors. To implement step-in-grade processing, you define pay grades and establish steps within each pay grade; for each step, you specify the number of months and/or hours to be worked before an employee can move to the next step. You can associate up to three pay rates with each step.

Step-in-grade processing is explained in detail in the *Infinium Human Resources Guide to Processing*. This chapter provides a brief overview of step-in-grade processing.

The chapter consists of the following topics:

| Topic | Page |
|--------------------------------------|------|
| Overview of Step-in-Grade Processing | 7-2 |
| Setting up Step-in-Grade Processing | 7-5 |
| Summary of Step-in-Grade Processing | 7-6 |

Overview of Step-in-Grade Processing

Objectives

After completing this chapter, you should be familiar with the basic concepts of step-in-grade processing and whether it is suitable for your employer.

Understanding Step-in-Grade Processing Concepts

You typically use step-in-grade processing for those employees, such as union-represented employees, whose rate progression is based on a fixed schedule regardless of job performance considerations. You can, however, define off-scale steps for employees who are paid a special rate that others do not receive and freeze employees who should not progress due to other exception situations. You can use Infinium HR to administer both step-in-grade and non-step-in-grade employees within the same employer.

You use the *Mass Update Employee Steps* function in step-in-grade processing to automate the employee's movement through steps in his or her assigned pay grade. The system uses the length of service and/or hours worked requirements defined on the pay grade control to advance the employee from one step to the next in his or her assigned pay grade. It automatically updates the employee's personnel and payroll pay rates with the rates associated with each new step and records the rate changes in the employee's salary change history.

You can use functions within step-in-grade processing to mass change step rates on pay grade controls and apply the rate changes to step-in-grade employees. The system creates salary change transactions in the *Enter Personnel Actions* function for all rate changes generated through step-in-grade processing enabling you to generate reports on employer history and to display history information.

It is important for you to understand basic Infinium HR controls and processing before you implement step-in-grade processing. When you implement step-in-grade processing, you must set up additional controls that affect the new hire and basic employee maintenance functions. You must also learn how to use the step-in-grade mass updates to automate employee rate progression.

Learning about Step-in-Grade Processing

The fields on control records that affect step-in-grade processing are identified in the topics that follow in this guide. Two chapters in the *Infinium Human Resources Guide to Processing* provide you with detailed information on step-in-grade processing. The first chapter explains how to set up step-in-grade processing. The second explains how to use step-in-grade mass update functions to automatically advance employees through their pay grade and maintain step rates in pay grade controls and employee records.

Using Step-in-Grade Processing

The following example illustrates how you use the step-in-grade function. You set up pay grade 100 in your employer. It contains 3 steps as shown in the following illustration.

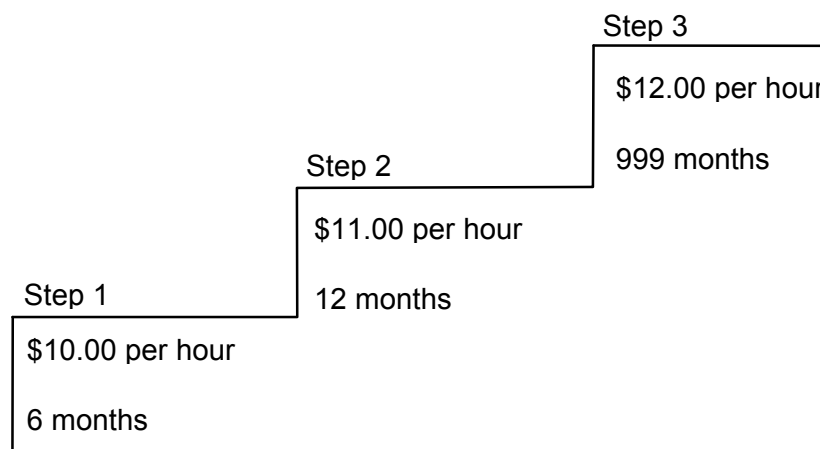


Figure 7-1: Pay Grade Illustration

An employee who is assigned to step 1 must work 6 months before the system advances him or her to step 2. Once assigned to step 2, the employee must work 12 months before the system advances him or her to step 3. Since step 3 is the top step in pay grade 100, the system does not advance the employee beyond step 3.

For example, you associate pay grade 100 with the electrician job in your employer. On 1-1-95, you hire Sparky Jones and assign him to the electrician job. During the hiring process, you start Sparky on step 1 of pay grade 100; he is paid \$10.00 per hour. He must work 6 months before he or she can advance to step 2.

You run the *Mass Update Employee Steps* function before each pay period to advance employees to their next step. In this example, when you run the *Mass Update Employee Steps* function for the pay period that ends on or after 6-1-95, the system automatically advances Sparky to step 2 and increases his rate to \$11.00 per hour. He must work 12 months before he can advance to step 3.

When you run the *Mass Update Employee Steps* function for the pay period that ends on or after 6-1-96, the system automatically advances Sparky to step 3 and increases his rate to \$12.00 per hour. Since step 3 is the top step in pay grade 100, the system enters 1 in the *Freeze Step?* field in Sparky's basic data record so that his record is not processed in the future when you run the *Mass Update Employee Steps* function.

Setting up Step-in-Grade Processing

To implement step-in-grade processing on Infinium HR, you take the following actions in the order listed below:

- 1 Set up pay grade controls, which contain steps with corresponding pay rates and length of service requirements.
- 2 Associate each pay grade with one or more job controls.
- 3 Associate each job control with one or more position controls.
- 4 Assign employees to a position associated with a step-in-grade job, either during the new hire process or later using the *Enter Personnel Actions* function. The system uses information on the employee's assigned job to automatically update his or her Basic Data and Payroll Data records with pay grade information, including pay rates.
- 5 Run the *Mass Update Employee Steps* function before each payroll period to progress the employee from one step to another in his or her grade, and to update his or her pay rates accordingly.

You can set up step-in-grade processing when you initially implement Infinium HR or after you are using Infinium HR in your production environment. It is easier to set up step-in-grade processing during your initial implementation if time and project resources permit.

Summary of Step-in-Grade Processing

In summary, you became familiar with basic concepts of how step-in-grade processing works in Infinium HR. See the *Infinium Human Resources Guide to Processing* for details on how to implement and maintain pay grade information.

Salary ranges identify the minimum, midpoint and maximum rates of pay for the jobs with which they are associated. You must establish at least one salary range before you can define job controls in Infinium HR.

The system uses the salary range to ensure that each employee's individual base pay rate is between the specified minimum and maximum rates defined for his or her job.

The chapter consists of the following topics:

| Topic | Page |
|---|-------------|
| Overview of Salary Ranges | 8-2 |
| Setting Up Salary Ranges | 8-6 |
| Using the <i>Mass Change Salary Ranges</i> Function | 8-23 |
| Summary of Salary Ranges | 8-27 |

Overview of Salary Ranges

Objectives

After completing this chapter, you should be familiar with:

- How salary ranges work
- How to enter a flat amount salary range
- How to enter a user defined salary range
- How to enter a system-calculated salary range
- How to change a salary range
- How to delete a salary range
- How to display salary ranges
- How to print salary ranges
- How to use the *Mass Change Salary Ranges* function

Understanding Salary Ranges

You use salary ranges to define the minimum, midpoint and maximum rates of pay for the jobs with which they are associated. You must establish at least one salary range before you can define job controls on Infinium HR. There is no limit to how many ranges you can define. Each salary range is associated with one or more jobs.

You use job controls to define a general category of work performed in an employer. You use position controls to further identify where a particular job is performed within an organization.

Each employee is assigned to a position during the new hire process. The position is associated with a job and the job is associated with a salary range. Therefore, a new employee is automatically assigned to the salary range associated with his or her hiring job as illustrated in the diagram below. When you transfer, promote or demote an existing employee to a different job, the employee is associated with the salary range of that job. The system uses the salary range when you hire employees and maintain employee information to ensure that you enter employee pay rates correctly.

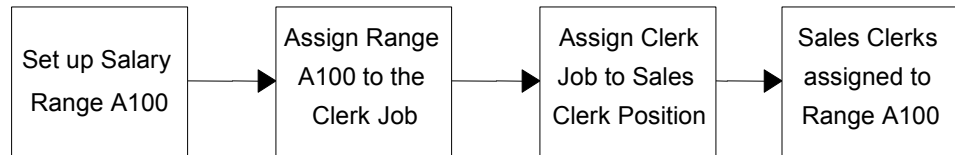


Figure 8-1: Salary Range Flowchart

The system uses the salary range to ensure that each employee's individual base pay rate is within the specified range for his or her job. The system produces a warning message if the employee's base rate is below the minimum or above the maximum rate of his or her salary range. You can override the warning message if you want to pay an employee a rate above or below his or her range.

The system also uses the salary range to compute and fill in the *Comp Ratio* and *Salary Quartile* fields in each employee's basic data record. You can use these fields in your organization's salary administration program. They are described below.

For example, you set up salary range A100. You define the minimum as \$8.00 per hour, the midpoint as \$10.00 and the maximum as \$12.00. You then associate this salary range with two jobs, receptionist and clerk. When you hire a new employee into one of these jobs, the system verifies that the new employee's starting rate is between \$8.00 and \$12.00 per hour. If it is less than \$8.00 or greater than \$12.00, the system produces a warning message during the *Enter New Hire* function. You can adjust the rate or override the warning message to allow the employee's pay rate as an exception.

You can define salary ranges using annual, semimonthly, monthly, biweekly, weekly or hourly rates. You use the *Range Frequency* field on the Update Salary Ranges screen to identify the kind of rates you entered for the range. You do not have to use the same salary range frequency for all salary ranges in an employer. For example, you can establish ranges with annual rates for exempt employees and ranges with hourly rates for non-exempt employees.

You are not required to set up salary ranges that match the base rate frequency of the employees with which they are associated. For example, in your company you state the base pay rates of salaried employees as monthly amounts and the base rates of hourly employees as hourly amounts. However, you enter all salary range values as annual amounts so that they are consistent and easy to use in compensation reports and salary surveys. Infinium HR makes the necessary adjustments when it compares the base pay rates of employees to their assigned salary range.

Using Salary Quartiles

When you establish a salary range, you must enter a minimum, midpoint and maximum value for the range. You also set up quartiles, which divide the range into four quarters. You can manually enter quartiles or allow the system to automatically determine them. When the system determines quartiles, it automatically breaks the salary range into four equal parts.

For example, you use the *Update Salary Ranges* function to define the minimum of the range as \$8.00 per hour, the midpoint as \$10.00 per hour and the maximum as \$12.00 per hour. You let the system calculate the quartiles; therefore, the system automatically divides the range into the quarters shown below. The range minimum, midpoint and maximum are in bold type for reference.

| | |
|---------------|-----------------------|
| 1st quartile: | \$ 8.00 - 8.99 |
| 2nd quartile | 9.00 - 9.99 |
| 3rd quartile | 10.00 - 10.99 |
| 4th quartile | 11.00 - 12.00 |

The system uses quartile **0** to identify rates that fall below the minimum of the salary range, in this case \$8.00 per hour. It uses quartile **5** to identify rates greater than the maximum of the salary range, in this example \$12.00 per hour.

The system compares the base pay rate of each employee to his or her salary range and assigns the employee to a quartile. If the employee's base rate is below the minimum, he or she is assigned to quartile 0; if his or her base rate is above the maximum, he or she is assigned to quartile 5.

You can use the salary quartile in your salary administration program to determine the amount or frequency of employee pay increases.

If you manually update the rates associated with the *Minimum*, *Quartile 2*, *Midpoint*, *Quartile 4* or *Maximum* fields defined for a salary range, the system checks the Basic Data records of employees assigned to the salary range to determine if any employees have shifted to a new quartile as a result of the salary range change. It then automatically updates the *Salary Quartile* field in the Basic Data records of affected employees. You cannot manually update the *Salary Quartile* field in the employee basic data record.

If you find that the quartiles of employees assigned to a particular salary range are inaccurate, you can press F8 on the corresponding Update Salary Ranges screen to update the employee quartiles based on the current salary range values.

Using Comp Ratios

The system also uses the salary range to compute a comparative ratio, referred to in Infinium HR as a comp ratio, for each employee by dividing the employee's base rate into the midpoint of his or her salary range. You can use the comp ratio in your salary administration program to determine the amount or frequency of employee pay increases.

The value in the *Comp Ratio* field in the employee basic data record represents a percentage that compares the employee's base pay rate to the midpoint of his or her assigned salary range. For example, if the employee's base rate is \$12.00 and the midpoint of his or her salary range is \$10.00, the system divides 12 by 10 to compute a comp ratio of 120%.

If you manually update the dollar value in the *Midpoint* field of a salary range, you can use the *Update Salary Ranges*, *Mass Change Salary Ranges* or *Mass Update Employee Positions* functions to update the *Comp Ratio* fields of employees assigned to the changed salary range. You cannot manually update the *Comp Ratio* field in the employee basic data record. The *Update Salary Ranges* and *Mass Change Salary Ranges* functions are described in this topic. The *Mass Update Employee Positions* function is described in the *Infinium Human Resources Guide to Processing*.

Setting Up Salary Ranges

You can set up salary ranges using one of the following three methods:

- Flat Amount

Use this method to establish a salary range whose minimum, midpoint and maximum are the same rate. You use this type of salary range for jobs in which all assigned employees are paid the same rate.

For example, all maintenance helpers are paid \$5.00 per hour. You establish a salary range in which the minimum, midpoint and maximum rates are all \$5.00. You associate this salary range with the helper job. When you assign an employee to the helper job, if his or her base pay rate is not \$5.00 per hour you receive a warning message from Infinium HR.

- User defined

Use this method to enter your own minimum, midpoint, and maximum rates for a range. The system requires that the minimum rate that you enter must be less than the midpoint rate; likewise, the midpoint rate that you enter must be less than the maximum rate.

- System-calculated

Use this method for the system to calculate minimum and maximum rates based on the values you enter in the *Midpoint* and *Range Spread %* fields for a salary range.

For example, you enter \$10.00 as the midpoint and 50% as the range spread percentage. The system automatically determines the minimum rate of \$8.00 and the maximum rate of \$12.00.

Each method is described in detail below. You can utilize one or more of the methods to establish salary ranges in your employer, depending on the way each salary range has been developed in your organization.

Entering Flat Amount Salary Ranges

Follow these steps to define a salary range using the flat amount method.

- 1 From the Infinium HR main menu select *Master Files*.
-

- 2 Select *Update Master Files*.
- 3 Select *Update Salary Ranges [USR]*. The system displays the screen shown in Figure 8-2.



Figure 8-2: Update Salary Ranges screen 1 of 2

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that identifies the employer for which you are establishing a salary range. Press F4 to display a list of valid employers.

Salary Range

Type a value that represents the salary range that you are establishing. You can enter up to five letters or numbers in any combination.

Press F4 to display salary ranges you have already entered. The system displays the minimum, midpoint and maximum values for each range; press F11 on this screen to view the quartile 2 and quartile 4 values.

Range Spread %

Type 1 in this field to indicate that you are using the flat amount method to establish the salary range identified above.

You must press FieldExit to exit from this field and right-justify the value you entered.

- 5 Press Enter. The system displays the screen shown in Figure 8-3.

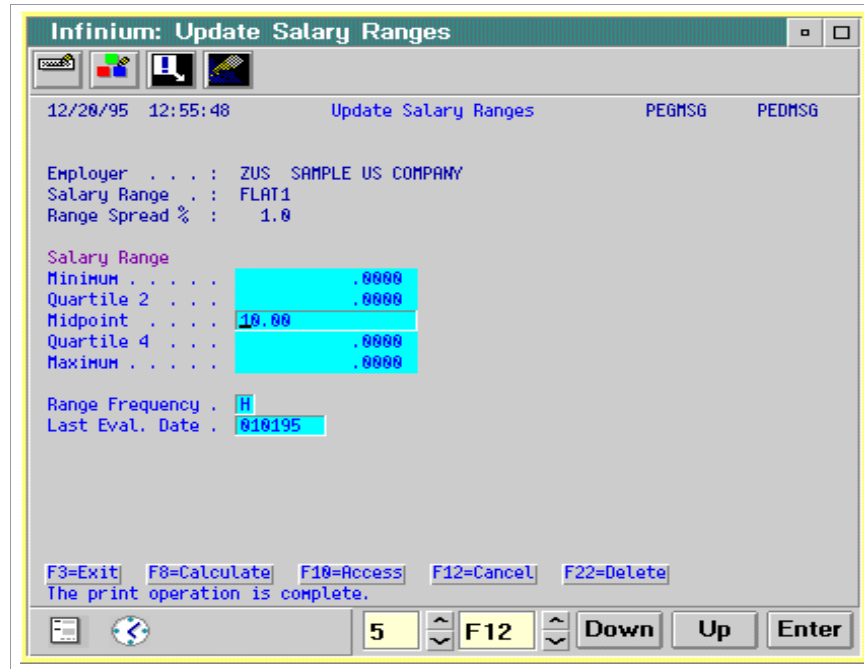


Figure 8-3: Update Salary Ranges screen 2 of 2

- 6 Use the information below to fill in the fields on this screen.

Working with the Update Salary Ranges Screen

When you set up a flat amount range, the system positions your cursor in the *Midpoint* field. It automatically fills in the other dollar value fields on this screen after you complete the required fields and press Enter to exit from this screen.

The screen displays four decimal positions for each dollar value; you can enter a value in some or all of the decimal positions in the *Midpoint* field or leave them blank. The system automatically fills 0 in unused decimal places.

You must enter information in the *Midpoint*, *Range Frequency* and *Last Eval. Date* fields.

Midpoint

Type the dollar value that represents midpoint of the salary range. You can type up to four decimal places in the *Midpoint* field. Press FieldExit after you

enter your dollar value to clear the extra zeros that default into the right-hand side of the *Midpoint* field.

The system will enter this same value in the *Minimum*, *Quartile 2*, *Quartile 4* and *Maximum* fields when you press Enter to exit from this screen.

Range Frequency

Type a value that represents how the system should interpret the dollar values of this salary range. Press Help to display a list of valid range frequency values. These values are pre-defined by Infinium as follows:

| | |
|----------|-------------|
| A | Annual |
| S | Semimonthly |
| B | Biweekly |
| M | Monthly |
| W | Weekly |
| H | Hourly |

Last Eval. Date

Type the date on which you last evaluated and updated the dollar values in this salary range. This date is used for informational purposes only.

- 7 Press Enter. The system saves your salary range and displays the screen shown in Figure 8-2.
- 8 Repeat steps 4 - 7 to enter additional salary ranges or press F3 to return to the Infinium HR main menu.

Entering User Defined Salary Ranges

Follow these steps to define a salary range using the user defined method:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Salary Ranges [USR]*. The system displays the screen shown in Figure 8-4.
-

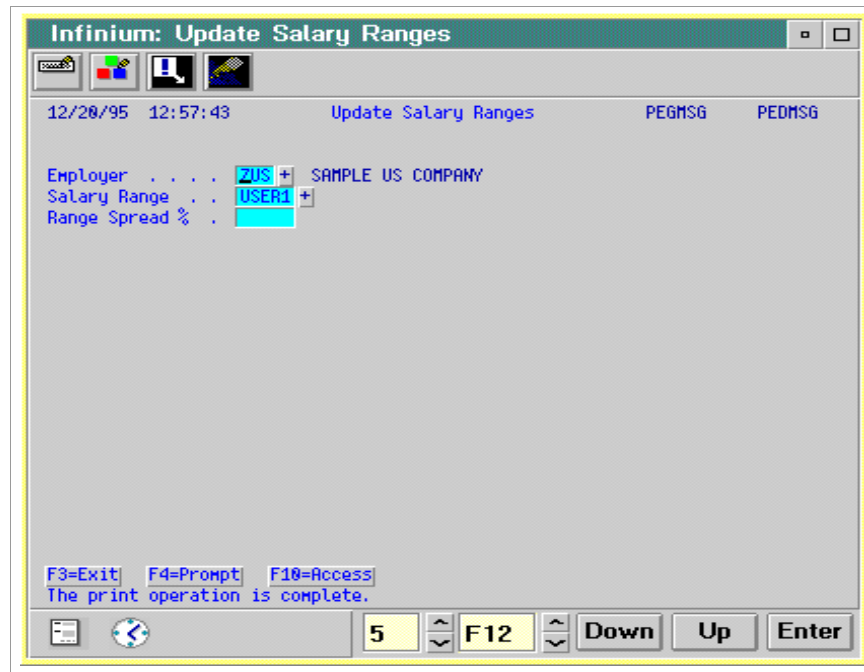


Figure 8-4: Update Salary Ranges screen 1 of 2

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that identifies the employer for which you are establishing a salary range. Press F4 to display a list of valid employer codes.

Salary Range

Type a value that represents the salary range that you are establishing. You can enter up to five letters or numbers in any combination.

Press F4 to display salary ranges that you have already entered. The system displays the minimum, midpoint and maximum values for each range; press F11 on this screen to view the quartile 2 and quartile 4 values.

Range Spread %

Leave this field blank to establish a user defined salary range.

- 5 Press Enter. The system displays the screen shown in Figure 8-5.

```

Infinium: Update Salary Ranges
12/28/95 12:58:22 Update Salary Ranges PEGMSG PEDMSG

Employer . . . : ZUS SAMPLE US COMPANY
Salary Range . : USER1
Range Spread % :

Salary Range
Minimum . . . . 10000
Quartile 2 . . . . .0000
Midpoint . . . . 12000
Quartile 4 . . . . .0000
Maximum . . . . 14000

Range Frequency . A
Last Eval. Date . 010195

F3=Exit F8=Calculate F10=Access F12=Cancel F22=Delete
The print operation is complete.

5 F12 Down Up Enter

```

Figure 8-5: Update Salary Ranges screen 2 of 2

- Use the information below to fill in the fields on this screen.

Working with the Update Salary Ranges Screen

The system positions your cursor in the *Minimum* field, which is one of the required fields on this screen. As you progress through the fields on this screen from top to bottom, each dollar value that you enter must be larger than the previous value. For example, the dollar value you enter in the *Midpoint* field must be larger than the value that you entered in the *Minimum* field.

You can enter values in the *Quartile 2* and *Quartile 4* fields or you can leave them blank; if you leave them blank, the system automatically calculates and fills in the amounts when you press Enter to exit from this screen.

Minimum

Type the dollar value that represents the lower limit of the salary range. The system generates a warning message during the *Enter New Hire* and *Enter Personnel Actions* functions if you enter a base pay rate that is less than this value for employees assigned to this salary range.

Quartile 2

Type the dollar value that identifies the lower boundary of the second quartile. The upper boundary of the first quartile is the next smaller dollar

amount than this value. See the “Using Salary Quartiles” section for an explanation of how the system computes quartiles. Leave this field blank to have the system compute the quartile dollar value and enter it in this field.

Midpoint

Type the dollar value that represents the center or middle of this salary range. The midpoint typically identifies the competitive market rate for a fully qualified employee assigned to the job associated with this salary range. The system uses the midpoint to calculate a comp ratio for each employee.

Quartile 4

Type the dollar value that represents the lower boundary of the fourth quartile of this range. The upper boundary of the third quartile is the next smaller dollar amount than this value. Leave this field blank to have the system compute the quartile dollar value and enter it in this field.

Maximum

Type the dollar value that identifies the upper limit of this salary range. The system generates a warning message during the *Enter New Hire* and *Enter Personnel Actions* functions if you enter a base pay rate that is greater than this value for employees assigned to this salary range.

Range Frequency

Type a value that represents how the system should interpret the dollar values of this salary range. Press Help to display a list of valid range frequency values. These values are pre-defined by Infinium as follows:

| | |
|----------|-------------|
| A | Annual |
| S | Semimonthly |
| B | Biweekly |
| M | Monthly |
| W | Weekly |
| H | Hourly |

Last Eval. Date

Type the date on which you last evaluated and updated the dollar values in this salary range. This date is used for informational purposes only.

- 7 Press Enter. If you left the *Quartile* fields blank, the system computes the appropriate values, updates the fields and then saves your salary range. It displays the screen shown in Figure 8-4.

If you leave all of the values on the Update Salary Ranges screen 1 of 2 the same and press Enter, you can review the values for the salary range that you just set up, including the *Quartile* field values determined by the system.

- 8 Repeat steps 4 - 7 to enter additional salary ranges or press F3 to return to the Infinium HR main menu.

Entering a System-Calculated Salary Range

Follow these steps to define a salary range using the system-calculated method.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Salary Ranges [USR]*. The system displays the screen shown in Figure 8-6.

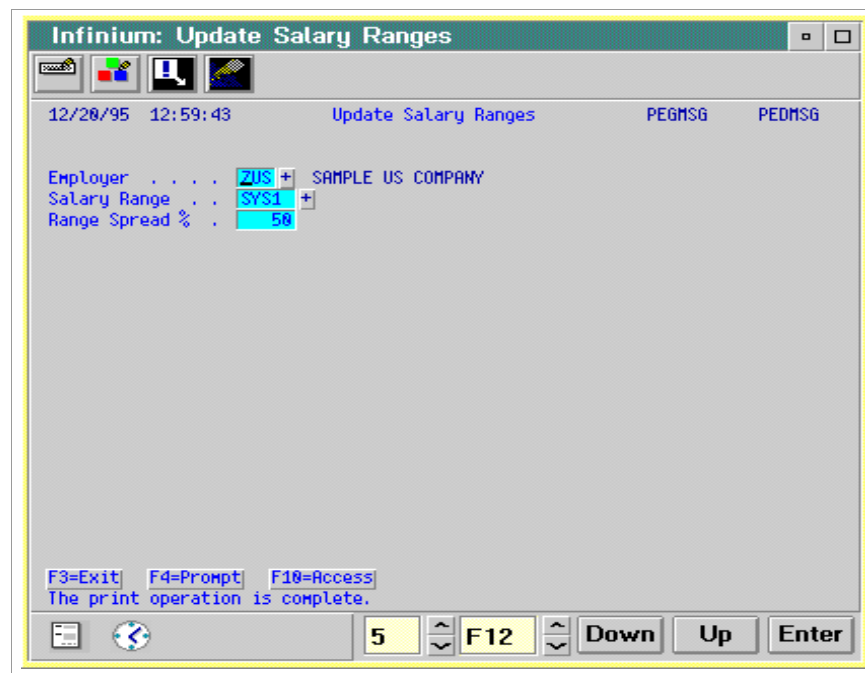


Figure 8-6: Update Salary Ranges screen 1 of 2

- 4 Use the information below to complete the fields on this screen.

Working with the Update Salary Ranges Screen

When you enter a value other than 1 in the *Range Spread %* field on this screen, you use the system-calculated method to define the salary range. Infinium HR uses the percentage you enter on this screen and the dollar value that you enter in the *Midpoint* field on the next screen to compute the minimum, maximum and quartile amounts of the salary range.

You must type values in the *Employer*, *Salary Range* and *Range Spread %* fields.

Employer

Type the value that identifies the employer for which you are establishing a salary range. Press F4 to display a list of valid employers.

Salary Range

Type a value that represents the salary range that you are establishing. You can enter up to five letters or numbers in any combination.

Press F4 to display salary ranges that you have already entered. The system displays the minimum, midpoint and maximum values for each range; press F11 on this screen to view the quartile 2 and quartile 4 values.

Range Spread %

Type a value greater than 1 and less than 999.9 in this field. The system uses this percentage to compute the minimum, maximum and quartile dollar amounts for this salary range. Use the FieldExit key to right-justify the percentage value that you type.

To compute the minimum value, the system adds 200 to the range spread you specify here and multiplies the midpoint you enter on the next screen by 200; it then divides the adjusted midpoint by the adjusted spread. In the first example shown in the table below, the system adds 200 to the 100% range spread you enter to obtain 300; it multiplies 15, the midpoint you enter, by 200 to obtain 3000. It then divides 3000 by 300 to obtain the range minimum of \$10.00.

Once the system determines the minimum value, it subtracts the minimum from the midpoint to determine the difference between the two; it then adds that difference to the midpoint to determine the maximum value. In the first example below, the system subtracts 10, the computed minimum, from the midpoint you entered, 15, to obtain a difference of 5. It then adds 5 to the midpoint to obtain a range maximum of 20.

The following table provides several examples of how the system calculates salary range minimums and maximums.

| You enter this Range Spread % | You enter this Midpoint | The system computes this Minimum | The system computes this Maximum |
|-------------------------------|-------------------------|----------------------------------|----------------------------------|
| 100 | 15.00 | 10.00 (3000 / 300) | 20.00 (15 + (15-10)) |
| 50 | 15.00 | 12.00 (3000 / 250) | 18.00 (15 + (15-12)) |
| 25 | 15.00 | 13.3333 (3000 / 225) | 16.6667 (15 + (15 -13.3333)) |

5 Press Enter. The system displays the screen shown in Figure 8-7.

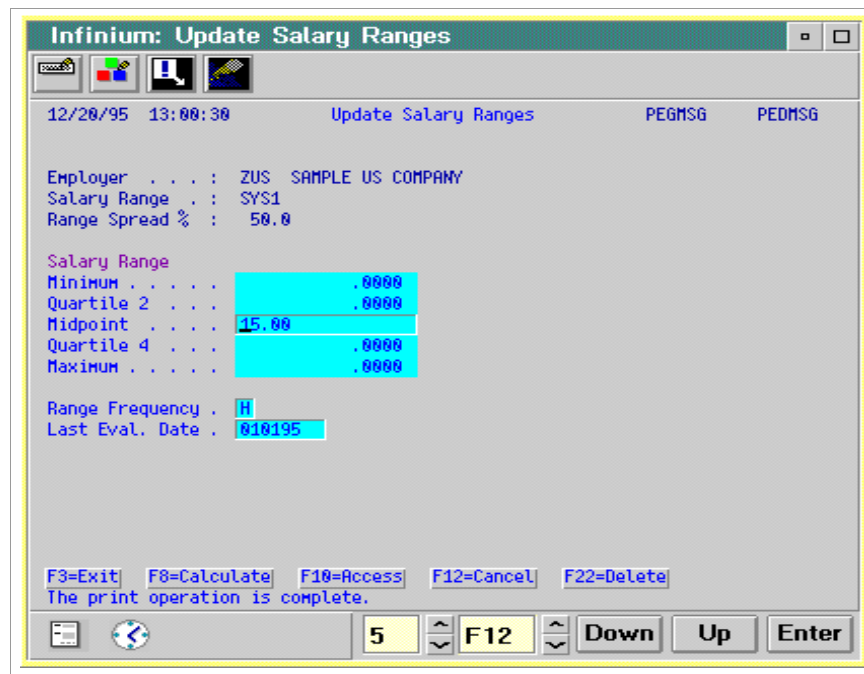


Figure 8-7: Update Salary Ranges screen 2 of 2

6 Use the information below to fill in the fields on this screen.

Working with the Update Salary Ranges Screen

The system positions your cursor in the *Midpoint* field. It automatically fills in the other dollar value fields on this screen after you complete the required fields and press Enter to exit from this screen.

The screen displays four decimal positions for each dollar value; you can enter a value in some or all of the decimal positions or leave them blank. The system automatically fills 0 in unused decimal places.

Midpoint

Type the dollar value that represents midpoint of the salary range. You can type up to four decimal places in the *Midpoint* field. Press FieldExit after you enter your dollar value to clear the zeros that default into the right-hand side of the *Midpoint* field.

The system will use this value to calculate the *Minimum*, *Quartile 2*, *Quartile 4* and *Maximum* fields when you press Enter to exit from this screen.

Range Frequency

Type a value that represents the way the system should interpret the dollar values of this salary range. Press Help to display a list of valid range frequency values. These values are pre-defined by Infinium as follows:

| | |
|----------|-------------|
| A | Annual |
| S | Semimonthly |
| B | Biweekly |
| M | Monthly |
| W | Weekly |
| H | Hourly |

Last Eval. Date

Type the date on which you last evaluated and updated the dollar values in this salary range. This date is used for informational purposes only.

- 7 Press Enter. The system saves your salary range and displays the screen shown in Figure 8-6.
- 8 Repeat steps 4 - 7 to enter additional salary ranges or press F3 to return to the Infinium HR main menu.

Changing a Salary Range

You can use the *Update Salary Ranges* function to manually update the dollar amounts associated with individual salary ranges after they are established or you can use the *Mass Change Salary Ranges* function to automatically update one or all salary ranges. You typically use the *Mass Change Salary Ranges* option to apply percentage changes after you

conduct a salary survey or otherwise need to adjust established salary range dollar values.

You can manually update the range frequency, last evaluation date and one or more of the dollar amounts associated with the range at any time. When you use the *Update Salary Ranges* function to update the midpoint of flat amount or system-calculated ranges, the system automatically updates the *Minimum*, *Quartile 2*, *Quartile 4* and *Maximum* fields after you press Enter to exit from the Update Salary Ranges screen 2 of 2.

To increase or decrease the amounts in more than one range by the same percentage, you can also use the *Mass Change Salary Ranges* function. The system automatically updates the salary range amounts and produces an audit report for your records. See the topic in this “Using the *Mass Change Salary Ranges* Function” chapter for details.

When you change the dollar values of salary ranges or change the salary range that is assigned to a particular job control, you may need to recalculate the *Salary Quartile* and *Comp Ratio* fields of employees assigned to the affected salary range or job. You cannot manually update the *Salary Quartile* or *Comp Ratio* fields in the employee Basic Data record; they are protected fields that are maintained by the system. The following paragraphs provide you with information on how to update these two employee fields.

Updating the Employee *Salary Quartile* Field When You Change Salary Range Amounts

When you press Enter after you type new salary range amounts on the Update Salary Ranges screen 2 of 2, the system automatically checks the base pay rate of employees assigned to the changed salary range. If the salary range dollar values that you changed cause the employee to be assigned to a different quartile, the system automatically updates the *Salary Quartile* field of affected employees.

Updating the *Salary Quartile* Field When a New Salary Range is Assigned to an Existing Job Control

Salary ranges are associated with jobs. When you assign an employee to a job, he or she is automatically assigned to the job’s salary range. The system uses that salary range to compute the employee’s *Salary Quartile* and *Comp Ratio* fields.

If you change the salary range associated with an existing job, the system does not automatically update the quartiles of employees currently assigned to that job. For example, you associate salary range 100 with the accounting clerk job when you implement Infinium HR. You assign employees to the

accounting clerk job and the system determines a quartile for each employee using the dollar values defined for salary range 100.

Later, you replace salary range 100 with salary range 200 on the accounting clerk job control. The system automatically replaces **100** with **200** in the *Salary Range* field of employees currently assigned to the accounting clerk job but does not automatically recompute and update their *Salary Quartile* field.

You can use the *Update Salary Ranges* function to update the quartiles of employees. Follow the directions in the preceding section to display the Update Salary Ranges screen 1 of 2 as shown in Figure 8-6. Specify the new salary range; in the example above, you would select salary range 200. Press Enter to display the Update Salary Ranges screen 2 of 2. Press F8. The system instantly recalculates the quartiles of employees currently assigned to the specified salary range. Then press Enter or F3 to exit from the screen.

You can also use the *Mass Update Employee Positions* function to update the *Salary Quartile* field in employee basic data records. This function updates job and position-related information for all employees in a specified employer. See the “Changing Employee Data” chapter in the *Infinium Human Resources Guide to Processing* for details on how to use this function.

Updating the Employee *Comp Ratio* Field

The system automatically updates the employee *Comp Ratio* field when you manually update salary range amounts or change the salary range assigned to a job control. You can also use the *Mass Change Salary Ranges* function or the *Mass Update Employee Positions* function to update this field.

You can use the *Mass Change Salary Ranges* function in a special way to update the *Comp Ratio* field for employees assigned to a specified salary range. When you leave the *Inc./Dec. %* field blank on the selection screen for the *Mass Change Salary Ranges* function and run the option, the system compares the current base pay rate of each employee assigned to the specified range to the midpoint of that salary range. If you changed the midpoint of the specified salary range after employees were assigned to it, the system recalculates the comp ratio for affected employees and updates the *Comp Ratio* field in each employee’s basic data record. See the topic in this “Using the *Mass Change Salary Ranges* Function” chapter for details.

You can also use the *Mass Update Employee Positions* function to update the *Comp Ratio* field in the employee basic data record. This function updates job and position-related information for all employees in a specified employer. See the chapter entitled “Changing Employee Data” in the *Infinium*

Human Resources Guide to Processing for details on how to use this function.

Displaying Salary Ranges

After you enter salary ranges, you can use the *Display Salary Ranges* function to review them on-line. Follow these steps to display salary ranges:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Display Master Files*.
- 3 Select *Display Salary Ranges* [DSR]. The system displays the screen shown in Figure 8-8.



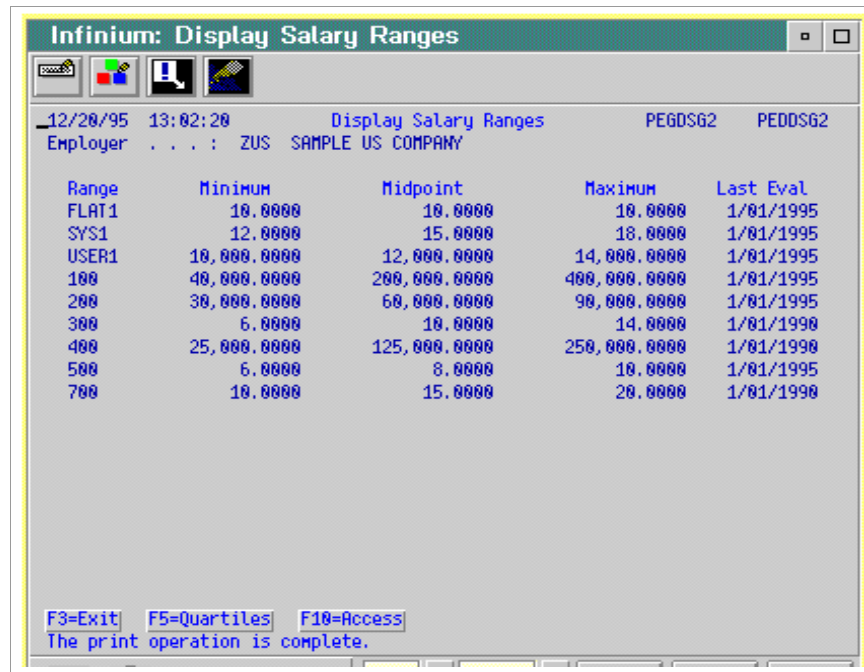
Figure 8-8: Display Salary Ranges screen 1 of 2

- 4 Use the following information to fill in the field on this screen:

Employer

Type the value that represents the employer whose salary ranges you want to display.

- 5 Press Enter. The system displays the screen shown in Figure 8-9.



| Range | Minimum | Midpoint | Maximum | Last Eval |
|-------|-------------|--------------|--------------|-----------|
| FLAT1 | 10.0000 | 10.0000 | 10.0000 | 1/01/1995 |
| SYS1 | 12.0000 | 15.0000 | 18.0000 | 1/01/1995 |
| USER1 | 10,000.0000 | 12,000.0000 | 14,000.0000 | 1/01/1995 |
| 100 | 40,000.0000 | 200,000.0000 | 400,000.0000 | 1/01/1995 |
| 200 | 30,000.0000 | 60,000.0000 | 90,000.0000 | 1/01/1995 |
| 300 | 6.0000 | 10.0000 | 14.0000 | 1/01/1990 |
| 400 | 25,000.0000 | 125,000.0000 | 250,000.0000 | 1/01/1990 |
| 500 | 6.0000 | 8.0000 | 10.0000 | 1/01/1995 |
| 700 | 10.0000 | 15.0000 | 20.0000 | 1/01/1990 |

F3=Exit F5=Quartiles F10=Access
The print operation is complete.

Figure 8-9: Display Salary Ranges screen 2 of 2

- Use the information below to work with this screen.

Displaying Salary Ranges

The system displays all salary ranges for the specified employer. If there are more ranges than can be displayed on a single screen, the system displays + in the lower right-hand corner. Press PageDown to advance to the next screen of ranges.

Viewing Quartile Values

The system first displays minimum, midpoint and maximum values for each salary range along with the evaluation date of each range. Press F5 to expand the display. In addition to minimum, midpoint and maximum values, the system displays quartile 2 and 4 values. Press F5 again to return to the default display.

- Press Enter or F3. The system displays the Infinium HR main menu.

Printing Salary Ranges

After you enter salary ranges, you can use the *List Salary Ranges* function to print a report that lists all ranges for a specified employer or employers in a specified employer group. Follow these steps:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *List Master Files*.
- 3 Select *List Salary Ranges* [LSR]. The system displays the screen shown in Figure 8-10.

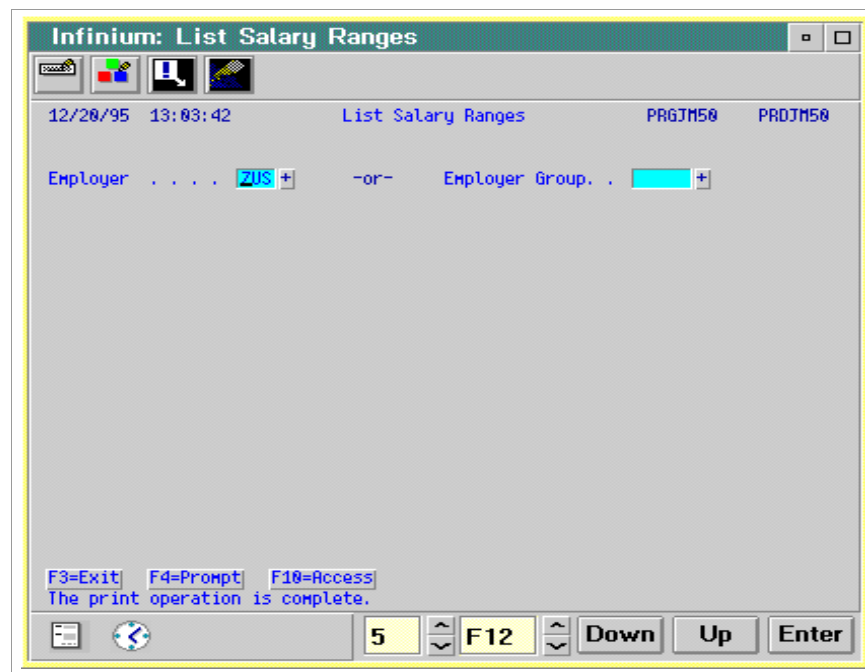


Figure 8-10: List Salary Ranges selection screen

- 4 Use the following information to fill in the field on this screen.

Employer

Type the value that represents the employer whose salary ranges you want to print. Press F4 to display a list of valid employer codes. You must enter a value in this field or the *Employer Group* field.

Employer Group

Type the code value that represents the group of employers whose salary ranges you want to print. Press F4 to display a list of valid employer group codes. You use code type **ERG** to define employer groups. See the “Setting

Up Employer Groups” chapter in this guide for details. You must enter a value in this field or the *Employer* field.

- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu:

Building submission request . . .

- 6 The system uses batch processing to generate the List Salary Ranges report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.
-

Using the *Mass Change Salary Ranges* Function

You can use the *Mass Change Salary Ranges* function for the two purposes described below.

- You can increase or decrease dollar values in one or more salary ranges using batch processing rather than making manual updates. This is particularly helpful if you need to make the same percentage adjustment to many existing salary ranges.

For example, you want to increase all salary range amounts by 2%. You can use the *Update Salary Ranges* function to manually update each salary range one by one or you can use the *Mass Change Salary Ranges* function to apply the 2% increase to all salary ranges in a specified employer or employer group in one step.

- You can update the *Comp Ratio* field in employee basic data records without updating salary range amounts. Since the comp ratio is derived by dividing each employee's base pay rate into the midpoint of his or her assigned salary range, you need to refresh the *Comp Ratio* field in employee basic data if you make manual updates to the midpoints of existing salary ranges.

You cannot manually update the *Comp Ratio* field in employee basic data records since it is a protected field.

In addition to updating salary range amounts, the *Mass Change Salary Ranges* function produces an audit report that shows you the salary range minimum, midpoint and maximum values before and after the specified increase or decrease percentage is applied.

The *Mass Change Salary Ranges* function does not update employee pay rates. You use the *Enter Personnel Actions* function to update individual employee pay rates.

Follow these steps to mass change salary ranges:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Mass Change Salary Ranges* [MISR]. The system displays the screen shown in Figure 8-11.
-

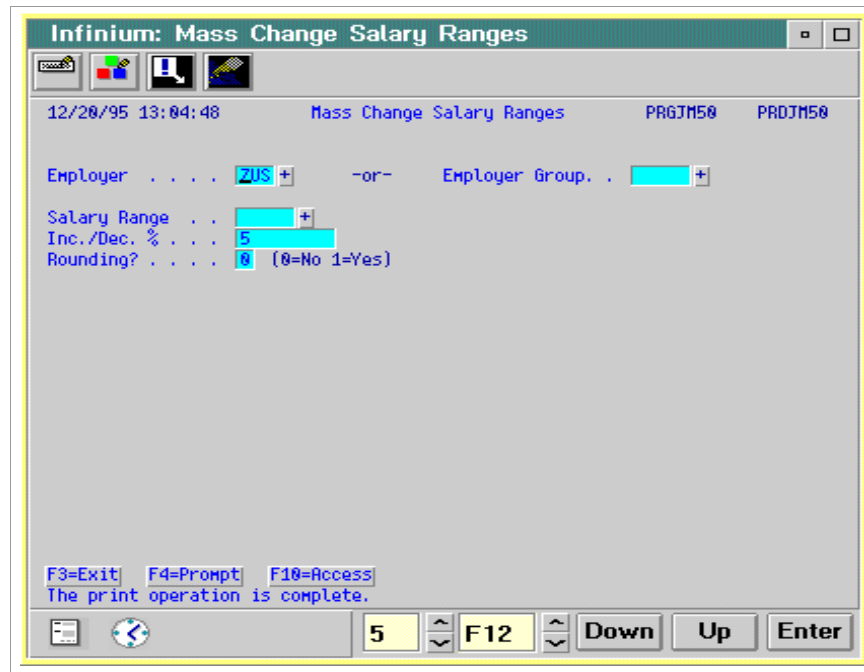


Figure 8-11: Mass Change Salary Ranges screen

- 4 Use the information below to fill in the fields on this screen.

Refreshing the Employee Comp Ratio Field

If you only want to update employee comp ratios, leave the *Inc./Dec. %* field blank. The system does not update salary range amounts; however, it uses existing salary range midpoints and employee base pay rates to recalculate the *Comp Ratio* field in employee basic data records.

Use the *Inc./Dec. %* field to increase or decrease salary range dollar amounts. When you update salary range amounts, the system automatically also recalculates and updates the *Comp Ratio* field for affected employees.

Updating Employee Quartiles

If you use the *Mass Update Salary Ranges* function to make changes that affect employee quartiles, you must use the *Update Salary Ranges* function to update the *Salary Quartile* field in employee basic data records. Specify the salary range on the Update Salary Ranges screen 1 of 2 and then press Enter. Press F8 on the Update Salary Ranges screen 2 of 2 and then press Enter. The system updates each employee's *Salary Quartile* field by comparing his or her base pay rate to the quartiles of his or her assigned salary range.

You must enter information in the *Employer* or *Employer Group* fields and the *Rounding?* field.

Employer

Specify the value that represents the employer whose salary ranges you want to change.

Employer Group

If you want to update only employee compensation ratios and you want to do so for multiple employers, specify the value that represents the group of employers whose employee compensation ratios you want to update. Leave the *Inc./Dec. %* field blank.

You cannot use this field to change the salary ranges for a group of employers.

You use code type **ERG** to define employer groups. See the “Setting Up Employer Groups” chapter in this guide for details.

Salary Range

Type the value that identifies the salary range you want to update. You must enter a value in the *Employer* field in order to specify a particular salary range. Press F4 to display a list of valid salary range codes.

Leave this field blank to update all salary ranges in the specified employer or employer group.

Inc./Dec.%

Type a percentage by which you want to increase or decrease dollar amounts of the specified salary range(s). The increase or decrease is applied to all dollar values of the specified salary range(s) including the minimum, midpoint, maximum and quartile values.

If you want to implement a 5 percent increase, type **5** and then press FieldExit to right-justify your entry. The system accepts up to four decimal places (999.9999.) If you type **.05** the system applies a five hundredths of one percent increase.

If you want to implement a salary range reduction, type a minus sign after the percentage, for example **5-**. The system reduces all dollar values in the specified salary range(s) by 5%.

If you leave this field blank and press Enter, the system recalculates and refreshes all employee comp ratios, even if a salary range was entered in the *Salary Range* field.

Rounding

Use this field to indicate if the system should round updated salary range dollar values to the nearest whole dollar. For example, if the result of a 2% increase to a salary range minimum is \$5.75 and you use rounding, the system updates the minimum to \$6.00. You generally do not use rounding when you update salary ranges with hourly rates.

Valid values are:

- 0** Do not round salary range amounts to the nearest whole dollar. Update salary range amounts with dollars and cents.
 - 1** Round salary range amounts to the nearest whole dollar. Eliminate cents from all salary range amounts.
- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu.

Building submission request . . .

- 6 The system uses batch processing to update salary ranges and/or employee comp ratios and generate the Salary Range Increase report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.
-

Summary of Salary Ranges

In summary, you have become familiar with the following:

- The function of salary ranges
 - How to set up, display and print salary ranges
 - How to update salary range dollar values manually or using the *Mass Update Salary Ranges* function
 - How to update the *Salary Quartile* and *Comp Ratio* fields in the employee Basic Data record
-

Notes

Chapter 9 Establishing Job Evaluation Groups and Factors

9

Job evaluation groups identify sets of attributes you use to assess the value and determine the ranking of jobs in your organization. After you establish job evaluation groups, you associate them with job controls. You can use job evaluation groups to determine the appropriate salary range for each job.

To implement job evaluation on Infinium HR, you first define job evaluation group names. You then assign up to twelve factors to each job evaluation group. You associate a job evaluation group with one or more jobs. Then you use the factors to perform a numeric appraisal of each affiliated job.

If you use the Hay system of job evaluation in your organization, you can enter the Hay slots and points associated with each job into Infinium HR.

Job evaluation is an optional function in Infinium HR. You can skip setting up job evaluation factors and assigning point values if you do not conduct a formal job evaluation process in your organization.

The chapter consists of the following topics:

| Topic | Page |
|--|-------------|
| Overview of Job Evaluation Groups and Factors | 9-2 |
| Skipping Job Evaluation | 9-5 |
| Setting up and Maintaining Job Evaluation Groups and Factors | 9-8 |
| Entering Hay Job Evaluation Information | 9-19 |
| Summary of Job Evaluation Groups and Factors | 9-37 |

Overview of Job Evaluation Groups and Factors

Objectives

After completing this chapter, you should be familiar with:

- How job evaluation groups and factors work
- How to skip setting up job evaluation groups
- How to set up job evaluation groups
- How to set up job evaluation factor titles
- How to change job evaluation groups and factors
- How to delete job evaluation groups and factors
- How to set up Hay job evaluation factors
- How to copy Hay job evaluation factors
- How to change Hay job evaluation factors
- How to mass change Hay job evaluation factors
- How to delete Hay job evaluation factors
- How to display Hay job evaluation factors
- How to print Hay job evaluation factors

Understanding Job Evaluation Groups and Factors

You use job evaluation groups and factors to measure the contribution and relative worth of jobs in your organization. You do not use the factors to measure the performance of employees assigned to jobs; you use the factors to measure the theoretical worth of the jobs themselves.

You attach a job evaluation group to each job control and then assign points to one or more of the evaluation factors for each job. A job control represents a general category of duties and responsibilities in your organization. The system automatically totals the points you assign to the factors associated with each job so that you can rank jobs from lowest to highest point value.

For example, you define job evaluation groups of **CLERK** and **MGR**. You attach the factors shown in the table below.

| Factors for the CLERK Job Evaluation Group | Factors for the MGR Job Evaluation Group |
|---|---|
| Variety of tasks | Number of employees supervised |
| Volume of documents handled | Budget size |
| Judgment required | Judgment required |
| Amount of supervision | Decision-making responsibility |
| Experience required | Experience required |
| Impact on organization | Impact on organization |

You need to determine the ranking of five clerical jobs in your organization so that you can select the appropriate salary range for each job and be successful in recruiting qualified employees to fill the jobs. You assign the **CLERK** job evaluation group to five clerk jobs in your employer. After you analyze the responsibilities of each job and meet with the supervisors and managers on your job evaluation committee, you assign points to some or all of the factors for each job. The job that receives the highest number of points becomes the senior clerk job; the job that receives the lowest number of total points becomes the entry-level junior clerk job. The intermediate jobs are classified as clerks.

In another case, after your company is reorganized, you need to review the ranking of the remaining management jobs. You assign the **MGR** job evaluation group to 15 managerial jobs in your organization. For each job, the job evaluation committee assigns points to some or all of the factors. Typically, the highest ranking managerial job, such as CEO, receives the highest number of total points; the most junior level manager job receives the lowest number of points. You update the points on the Job Control screen for each manager job so that you can assign the appropriate salary range, run reports and do additional analysis.

You do not have to utilize job evaluation to implement Infinium HR; however, you must define at least one job evaluation group code value. The following topic entitled “Skipping Job Evaluation” describes the steps you should take if you do not want to use job evaluation in your organization.

Understanding the Hay Job Evaluation System

The Hay job evaluation system is a standardized method of performing job evaluation. It uses the four standard factors listed below to assess the relative worth of jobs in your organization:

- Know How
- Accountability
- Problem Solving
- Working Conditions

With the assistance of Hay job evaluation consultants, you use these factors to assess each job; you enter points and a slot for each factor according to instructions in the Hay Evaluation Manual. Infinium HR automatically computes a salary range for each job based on the information you enter on the Update Hay Job Evaluation Factors screen.

You use job controls, not job evaluation groups, to set up Hay job evaluation factors on the system. Follow the instructions in the “Skipping Job Evaluation Groups” topic that follows for information on how to set up a dummy or blank job evaluation group code value.

Since you must define job controls before you can enter Hay job evaluation criteria into the system, use information in the “Defining Job Controls” chapter to establish job controls. Then return to the Hay Job Evaluation topic in this chapter to learn about how to enter Hay job evaluation information.

Skipping Job Evaluation

You can skip setting up job evaluation factors and assigning point values if you do not use job evaluation in your employer. However, you must set up job controls to implement Infinium HR. Since you must make an entry in the *Job Evaluation* field on the Update Job Control screen, you must set up a dummy or a blank job evaluation group code value to use in that field. When you define a blank code value for a particular code type, the system allows you to skip entering information in required fields that are validated against that code type.

Even if you do not use job evaluation in your employer, you may want to consider setting up job evaluation groups without factors for reporting purposes. You can use the *Job Evaluation* field to group jobs and employees together for reporting and analysis. You can use Infinium QY to develop reports that use the *Job Evaluation* field to sort or select job control or employee information.

If you do not want to use job evaluation groups at all, follow these steps to set up a blank or dummy job evaluation group code value:

- 1 From the Infinium HR main menu, select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Employer Codes [UCC]*. Press Enter. The system displays the screen shown in Figure 9-1.
-

```

5/14/02  13:53:57      Update Employer Codes      PRGMCD  PRDMCD
-----
Employer . . . . . ZUS +      -or-  Employer group . . . ____ +
Code type . . . . . GRP +
Code value . . . . . _____ +

F3=Exit  F4=Prompt  F10=QuikAccess  F18=Message line  F21=Override

```

Figure 9-1: Update Employer Codes screen 1 of 2

4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you do not want to set up job evaluation. You must make an entry in this field or the *Employer group* field.

Employer group

Type the code value that represents the group of employers for whom you do not want to set up job evaluation. You define code values for this field using code type **ERG**. You must make an entry in this field or the *Employer* field.

Code type

Type **GRP**, which represents the job evaluation group code type. You use this code type to establish the name of the job evaluation group.

Code value

Type a generic or dummy code value. For example, you can type **NA** to indicate Not Applicable. When you set up job controls, you must enter this code value in the *Job Evaluation* field.

You can also establish a blank value. This allows you to leave the *Job Evaluation* field on the Job Control screen blank.

- 5 Press Enter. If you typed a dummy value, the system displays the screen shown in Figure 9-2.

If you left the *Code value* field blank, the system displays the following warning message:

Warning: Blank code value may cause undesired results - F21 to accept.

- 6 Press F21. The system displays the screen shown in Figure 9-2.

```

5/14/02   14:01:49           Update Employer Codes           PRGMCD   PRDMCD
-----
Employer . . . . . : ZUS   SAMPLE US COMPANY
Code type . . . . . : GRP   JOB EVALUATION GROUP
Code value . . . . . :
Description . . . . . BLANK VALUE
Active/Inactive . . . 0           (0=Act./1=Inact)

-----
F3=Exit  F10=QuikAccess  F12=Cancel  F18=Message line  F22=Delete
    
```

Figure 9-2: Update Employer Codes screen 2 of 2

- 7 Type one or more words that describe the blank or dummy code value you typed on the previous screen. The description can be up to thirty characters in length. The system uses this description in reports and displays.
- 8 Press Enter. The system saves the new code value and description and returns you to the Update Employer Codes screen 1 of 2.
- 9 Press F3 to return to the Infinium HR main menu.

Setting up and Maintaining Job Evaluation Groups and Factors

Before you set up job evaluation groups on Infinium HR, you should analyze the jobs you plan to define in your employer. You generally can group the jobs into categories or families and then define one job evaluation group for the entire job family.

For example, you plan to define five different supervisor jobs in your employer. You define one job evaluation group to evaluate these jobs. You associate factors that are applicable to all of the supervisor jobs. You attach the job evaluation group to each of the five jobs. Then for each job you assign different point values to the factors to differentiate between the five supervisor jobs.

You can also use the job evaluation group code value to sort and select jobs for reports in Infinium QY.

Follow these steps to set up job evaluation groups:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Employer Codes [UCC]*. Press Enter. The system displays the screen shown in Figure 9-3.
-

```
6/20/02  15:18:09      Update Employer Codes      PRGMCD  PRDMCD
-----
Employer . . . . . ZUS +      -or-  Employer group . . . ____ +
Code type . . . . . GRP +
Code value . . . . . MGR_____ +

-----
F3=Exit  F4=Prompt  F10=QuikAccess  F18=Message line  F21=Override
```

Figure 9-3: Update Employer Codes screen 1 of 2

4 Use the following information to fill in the fields on this screen:

Required Fields

You must type information in the *Employer* or *Employer group* fields along with the *Code type* field.

Employer

Type the value that represents the employer for which you want to set up job evaluation groups. You must make an entry in this field or the *Employer group* field. Press F4 to display a list of valid employers.

Employer group

Type the code value that represents the group of employers for whom you want to set up job evaluation groups. You define code values for this field using code type **ERG**. You must make an entry in this field or the *Employer* field. Press F4 to display a list of valid employer group code values.

Code type

Type **GRP**, which represents the job evaluation group code type. You use this code type to establish the name of the job evaluation group.

Code value

Type a value of five or fewer letters or numbers to represent the job evaluation group.

- 5 Press Enter. The system displays the screen shown in Figure 9-4.

| | | | | |
|---|-------------------------------|-----------------------|--------|--------|
| 6/20/02 | 15:19:46 | Update Employer Codes | PRGMCD | PRDMCD |
| <hr/> | | | | |
| Employer | ZUS | SAMPLE US COMPANY | | |
| Code type | GRP | JOB EVALUATION GROUP | | |
| Code value | MGR | | | |
| Description | <u>MANAGER JOB EVAL GROUP</u> | | | |
| Active/Inactive | 0 | (0=Act./1=Inact) | | |
| <hr/> | | | | |
| F3=Exit F10=QuikAccess F12=Cancel F18=Message line F22=Delete | | | | |

Figure 9-4: Update Employer Codes screen 2 of 2

- 6 Use the following information to fill in the fields on this screen:

Description

Type one or more words that describe the job evaluation group. You can enter up to 30 characters in this field.

- 7 Press Enter. The system displays the screen shown in Figure 9-3.
- 8 Define additional job evaluation group code values or press F3 to return to the Infinium HR main menu.

Setting up Job Evaluation Factors

After you establish job evaluation group names, you assign factors to each group. You use these factors to enter numerical ratings of the jobs associated with the job evaluation group. You enter a title or description for

each factor. The system displays the titles associated with each job's factors on the second screen of the job control record.

Follow these steps to set up titles for job evaluation factors:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Job Evaluation Titles* [UJET]. Press Enter. The system displays the screen shown in Figure 9-5.

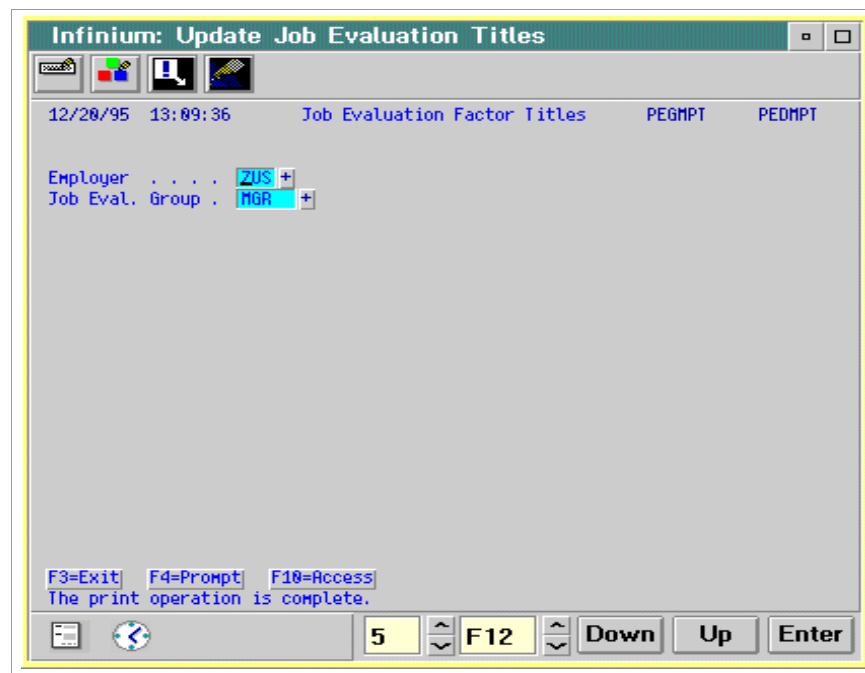


Figure 9-5: Job Evaluation Factor Titles screen 1 of 2

- 4 Use the following information to fill in the fields on this screen:

You must type information in the *Employer* and *Job Eval. Group* fields.

Employer

Type the value that represents the employer for which you want to set up job evaluation titles. Press F4 to display a list of valid employers.

Job Eval. Group

Type the code value that represents the job evaluation group to which you want to assign factor titles. Press F4 to display a list of valid job evaluation group code values. You define code values for this field using code type **GRP**.

- 5 Press Enter. The system displays the screen shown in Figure 9-6.

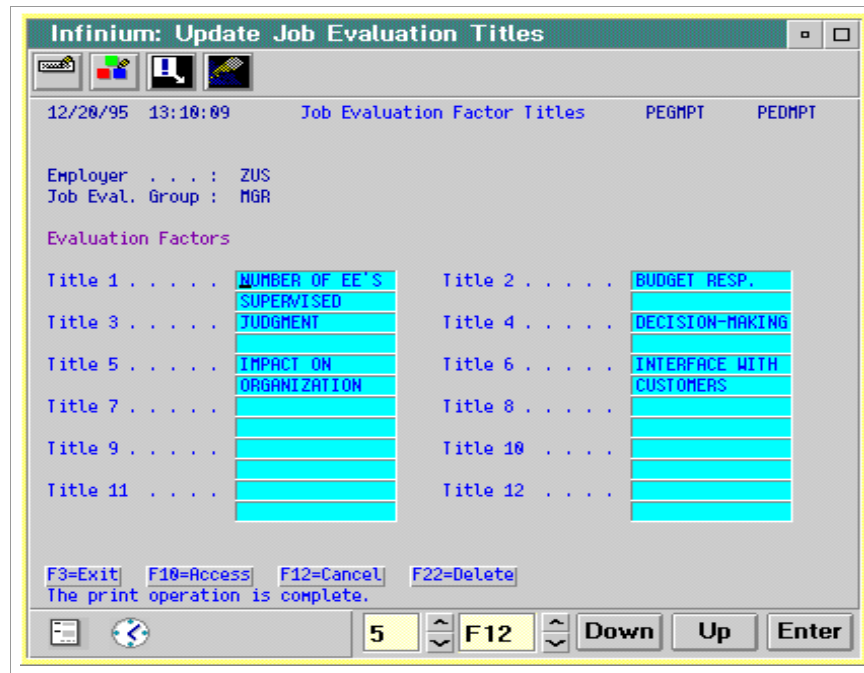


Figure 9-6: Job Evaluation Factor Titles screen 2 of 2

- 6 Use the following information to fill in the fields on this screen:

Title 1 - 12

Type a description or title for up to 12 factors that you want to associate with the specified job evaluation group. You can enter one or more words for each title; each title can be up to 30 characters in length. For each title, you can type on the line adjacent to the *Title* field and on the line beneath it.

The system displays these titles on the second screen of each job control associated with the specified job evaluation group. You enter points for one or more of the factors for each job.

- 7 Press Enter. The system displays the screen shown in Figure 9-5.
- 8 Specify the code value that represents another job evaluation group or press F3 to return to the Infinium HR main menu.

Changing Job Evaluation Groups and Factors

You can change the factor titles associated with an established job evaluation group at any time. However, if you replace one factor with

another, you may need to update the points assigned to that factor on affiliated job controls.

For example, you initially define Title 8 of a particular job evaluation group as budget responsibility. You associate the job evaluation group with several jobs and for each job, you enter points that identify its level of budget responsibility.

If you replace budget responsibility with autonomy, you must reevaluate the points associated with Title 8 for each affiliated job.

You cannot change the job evaluation group name. To replace one group name with another, follow the steps in the preceding section to set up a new job evaluation group and assign factors to it. Then enter the new job evaluation group name on job controls and enter points for the appropriate factors on each job. You should delete the obsolete job evaluation group so that you do not mistakenly use it in the future.

Deleting Job Evaluation Factors

You can delete one or more of the factors associated with a job evaluation group at any time. However, if you have attached the job evaluation group to job controls and assigned points to the factors for each job, the system does not remove the points from the second screen of the job control. The system displays the points adjacent to blank titles. You must manually delete the points from each affected job control.

Follow these steps to delete job evaluation factor titles:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Job Evaluation Titles* [UJET]. Press Enter. The system displays the screen shown in Figure 9-7.
-

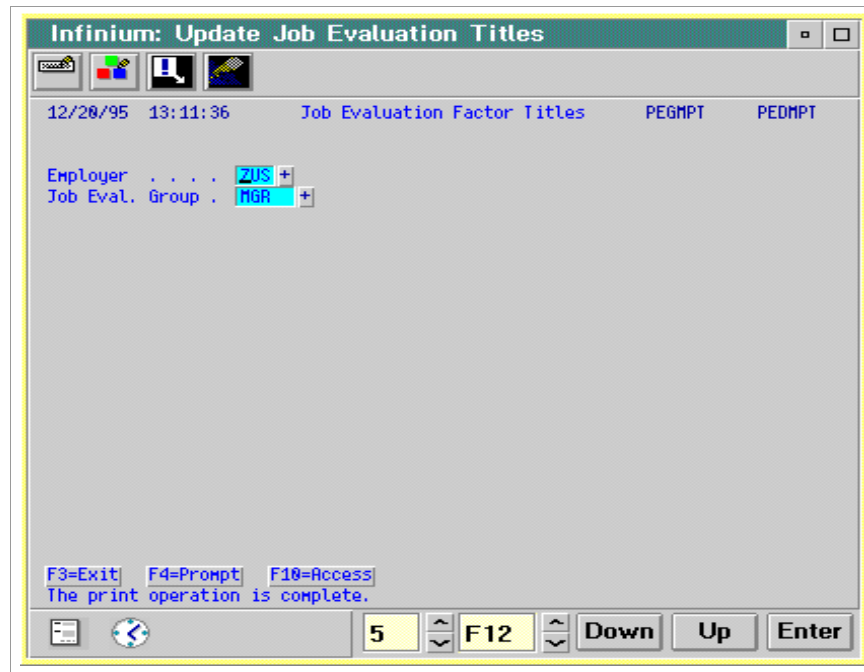


Figure 9-7: Job Evaluation Factor Titles screen 1 of 2

- 4 Use the following information to fill in the fields on this screen:

You must type information in the *Employer* and *Job Eval. Group* fields.

Employer

Type the value that represents the employer for which you want to delete factor titles. Press F4 to display a list of valid employers.

Job Eval. Group

Type the code value that represents the job evaluation group whose factors you want to delete. Press F4 to display a list of valid job evaluation group code values. You define code values for this field using code type **GRP**.

- 5 Press Enter. The system displays the screen shown in Figure 9-8.

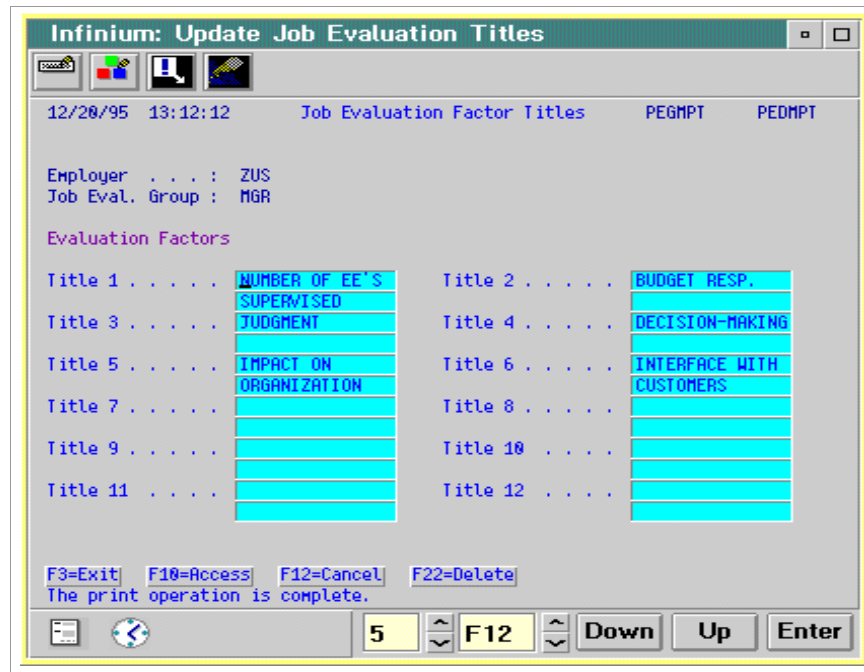


Figure 9-8: Job Evaluation Factor Titles screen 2 of 2

- 6 Use the following information to delete job evaluation factor titles.

Press F22. The system displays the following question in the Confirmation window at the bottom of the screen:

Delete Record?

Type 0 to cancel your deletion of the factor titles for the specified job evaluation group. Type 1 to continue deleting the factor titles.

- 7 Press Enter. If you typed 0 in the Confirmation window, the system displays the screen shown above. Press Enter to exit from this screen without deleting the factor titles.

If you typed 1 in the Confirmation window, the system deletes the factor titles for the specified job evaluation group and displays the screen shown in Figure 9-7. Press F3 to return to the Infinium HR main menu.

Deleting Job Evaluation Groups

You can delete a job evaluation group name at any time; however, you should use caution if you have associated factors with it and attached it to job controls. You typically replace the deleted job evaluation group code value on

job controls with a valid job evaluation group code value. When you do so, you should also update the points assigned to the job control to correspond to the factors associated with the new job evaluation group.

If you remove the deleted job evaluation group code value from the first screen of the job control, but do not replace it and do not update the points you previously entered on the second screen of the job control, the system displays the points adjacent to blank factor titles. If you replace the deleted job evaluation group on the first screen of the job control but do not update the points you previously assigned on the second screen of the job control, the system displays the old point values adjacent to the factor titles associated with the new job evaluation group.

Follow these steps to delete job evaluation groups:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Employer Codes [UCC]*. Press Enter. The system displays the screen shown in Figure 9-9.

| | | | | |
|--|------------|-----------------------|--------------------------|---------|
| 6/20/02 | 15:18:09 | Update Employer Codes | PRGMCD | PRDMCD |
| <hr/> | | | | |
| Employer | ZUS + | -or- | Employer group | _____ + |
| Code type | GRP + | | | |
| Code value | MGR_____ + | | | |
| <hr/> | | | | |
| F3=Exit F4=Prompt F10=QuikAccess F18=Message line F21=Override | | | | |

Figure 9-9: Update Employer Codes screen 1 of 2

- 4 Use the following information to fill in the fields on this screen:

You must type information in the *Employer* or *Employer group* fields along with the *Code type* field.

Employer

Type the value that represents the employer for which you want to delete a job evaluation group. You must make an entry in this field or the *Employer group* field. Press F4 to display a list of valid employers.

Employer group

Type the code value that represents the group of employers for whom you want to delete a job evaluation group. You define code values for this field using code type **ERG**. You must make an entry in this field or the *Employer* field. Press F4 to display a list of valid employer group code values.

Code type

Type **GRP**, which represents the job evaluation group code type. You use this code type to remove the name of the job evaluation group.

Code value

Type the code value that represents the job evaluation group you want to delete. Press F4 to display a list of valid job evaluation group code values.

5 Press Enter. The system displays the screen shown in Figure 9-10.

```

6/20/02   15:19:46           Update Employer Codes           PRGMCD   PRDMCD
-----
Employer . . . . . : ZUS   SAMPLE US COMPANY
Code type . . . . . : GRP   JOB EVALUATION GROUP
Code value . . . . . : MGR
Description . . . . . : MANAGER JOB EVAL GROUP

Active/Inactive . . . . 0           (0=Act./1=Inact)

-----
F3=Exit F10=QuikAccess F12=Cancel F18=Message line F22=Delete
    
```

Figure 9-10: Update Employer Codes screen 2 of 2

6 Press F22 to delete the job evaluation group code value.

The system removes the job evaluation group name from your list of valid code values for code type **GRP** and displays the screen shown in Figure 9-9.

- 7 Press F3 to return to the Infinium HR main menu.

Displaying and Printing Job Evaluation Groups and Factors

At this time, Infinium HR does not have standard displays or reports of only job evaluation group code values and factors. You can obtain job evaluation information using displays and reports of job controls. See the “Defining Job Controls” chapter for further information.

Entering Hay Job Evaluation Information

The Hay job evaluation system is a standardized method of performing job evaluation and determining salary ranges. It uses the four standard factors listed below to assess the relative value of jobs in your organization:

- Know How
- Accountability
- Problem Solving
- Working Conditions

Hay job evaluations are performed by consultants working for Hay Associates. As part of the analysis, you are provided with the Hay Evaluation Manual for your organization. You can use this manual to fill in fields on the Update Hay Job Evaluation Factors screen in Infinium HR.

After you fill in the fields on the Update Hay Job Evaluation Factors screen, the system automatically computes an annualized salary range for each job control. You can display this information in a window on the Update Hay Job Evaluation Factors screen. You can print this information to aid you in setting up salary ranges on the system.

Implementing Hay Job Evaluation on Infinium HR

Follow these steps to set up Hay job evaluation on Infinium HR:

- 1 Set up a dummy or blank job evaluation group name.

You do not use job evaluation groups to set up Hay job evaluation factors on the system. Follow the instructions in the “Skipping Job Evaluation” topic for information on how to set up a dummy or blank job evaluation group.

- 2 Set up a salary range.

You must define at least one salary range before you can enter job controls into Infinium HR. You can set up a dummy salary range or a valid salary range. See the “Defining Salary Ranges” chapter for information on how to set up salary ranges on Infinium HR.

- 3 Set up job controls.
-

You enter Hay job evaluation factors for each job you define on Infinium HR. Therefore, you must define job controls before you can enter Hay job evaluation criteria into the system. See the “Establishing Job Controls” chapter for information on how to set up job controls.

4 Enter Hay job evaluations.

For each job you define in step 3, you enter Hay slots and points using the standardized Hay factors. See the information that follows for details on how to enter and maintain Hay job evaluation information on the system.

5 Set up or modify salary ranges.

Using salary range information from the Hay Job Evaluation Factor Titles screen, set up new salary ranges or modify existing ranges.

6 Update salary ranges on job controls.

If you entered a dummy salary range on job controls, replace that range with the correct salary range for each job.

Follow these steps to enter Hay Job Evaluation factors:

7 From the Infinium HR main menu select *Master Files*.

8 Select *Update Master Files*.

9 Select *Update HAY Job Evaluations* [UH]. Press Enter. The system displays the screen shown in Figure 9-11.

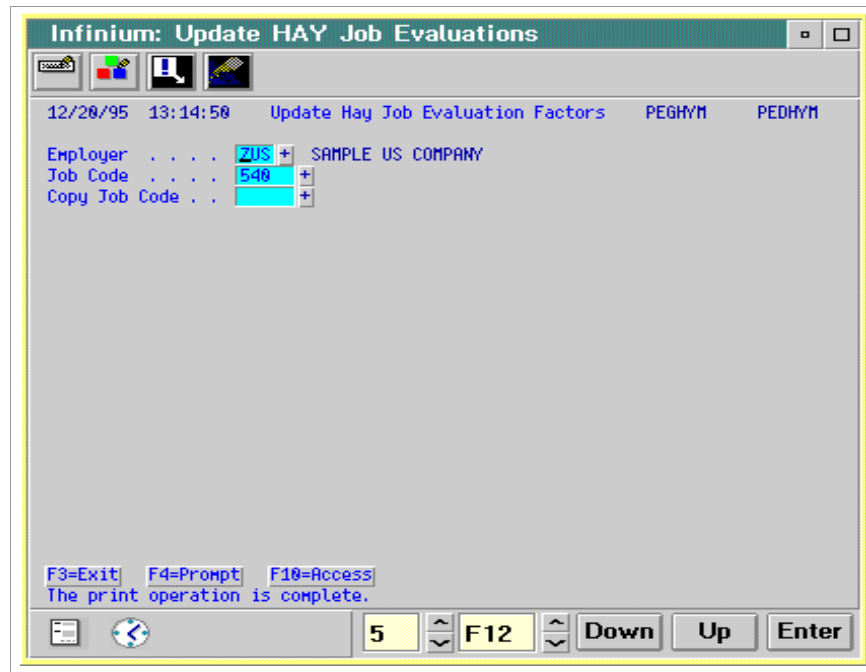


Figure 9-11: Update Hay Job Evaluation Factors prompt screen

- 10 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you are entering Hay job evaluation information. Press F4 to display a list of valid employers.

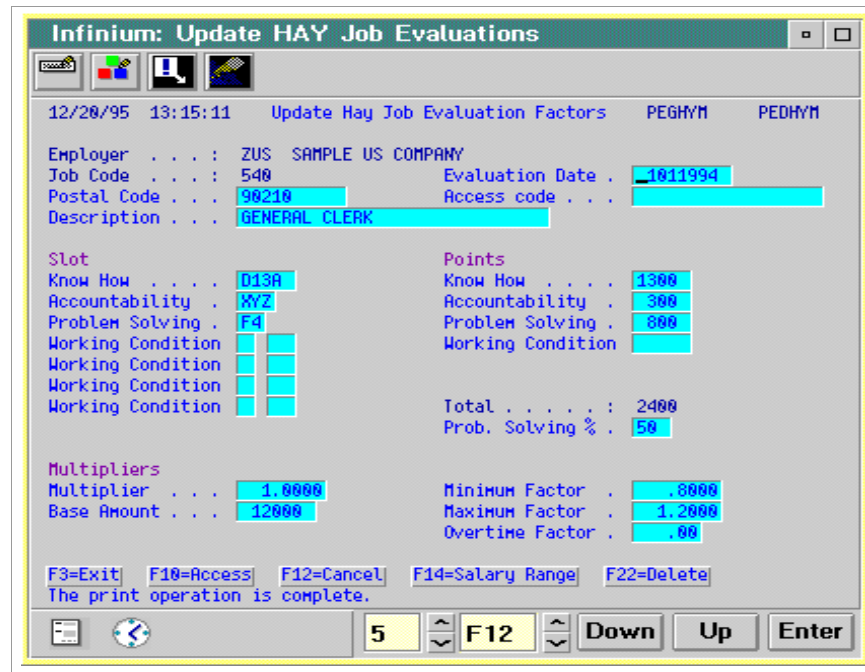
Job Code

Type the value that represents the job for which you are entering Hay job evaluation information. Press F4 to display a list of valid jobs.

Copy Job Code

If you have already entered Hay job evaluation for another job and want to copy that information to the job whose value you entered in the *Job Code* field on this screen, type the value that represents the job you have already evaluated. Press F4 to display a list of valid jobs.

- 11 Press Enter. The system displays the screen shown in Figure 9-12.



12/28/95 13:15:11 Update Hay Job Evaluation Factors PEGHYM PEDHYM

Employer . . . : ZUS SAMPLE US COMPANY
 Job Code . . . : 540 Evaluation Date . . . 1011994
 Postal Code . . . 90210 Access code . . .
 Description . . . GENERAL CLERK

Slot
 Know How D13A Points
 Accountability . . XYZ Know How 1300
 Problem Solving . F4 Accountability . . . 300
 Working Condition Working Condition . . . 800
 Working Condition
 Working Condition
 Working Condition

Multipliers
 Multiplier . . . 1.0000 Minimum Factor8000
 Base Amount . . . 12000 Maximum Factor . . . 1.2000
 Overtime Factor80

Total : 2400
 Prob. Solving % . 50

F3=Exit F10=Access F12=Cancel F14=Salary Range F22=Delete
 The print operation is complete.

5 F12 Down Up Enter

Figure 9-12: Update Hay Job Evaluation Factors screen 2 of 2

12 Use the following information to fill in the fields on this screen:

Evaluation Date

Type the date on which you evaluated the specified job. This field is for informational purposes only.

Postal Code

Type the zip code or postal code of the work location in your organization in which the job is located. You can use this information to adjust the salary range associated with this job for regional differences. This is a 10 character alphanumeric field.

Access code

Type the code assigned by Hay & Associates for this job.

Description

The system automatically defaults information from the *Description* field on the specified job control into the *Description* field on this screen. You can change or delete the description if necessary. This is a 30 character alphanumeric field.

Slot Fields

You use these fields to identify for each factor the specific classification from the standard Hay Evaluation Manual that applies to this job.

Know How

Type the Hay slot for *Know How* that applies to the specified job.

Accountability

Type the Hay slot for *Accountability* that applies to the specified job.

Problem Solving

Type the Hay slot for *Problem Solving* that applies to the specified job.

Working Condition

Fields 1 - 4

Type the Hay slots for *Working Conditions* that apply to the specified job.

Points Fields

Use these fields to enter points assigned to the specified job for each applicable Hay factor or category. You can enter up to 9999 points for each factor. The system automatically totals the points when you press Enter to save your information.

Know How

Type the number of points assigned to the specified job for the know how factor.

Accountability

Type the number of points assigned to the specified job for the accountability factor.

Problem Solving

Type the number of points assigned to the specified job for the problem solving factor.

Working Condition

Type the total number of points assigned to the specified job for the working condition factors.

Total

The system automatically sums the points you entered on this screen and displays the total in this field when you press Enter to save your information.

Prob. Solving %

Type the percentage that represents the amount of work time that employees assigned to this job spend solving problems. You multiply this percentage by the points assigned to the know how factor for this job to derive the points to be assigned to the working condition factor for this job.

Multipliers Fields

You use these fields to enter information that Infinium HR uses to compute the salary range annual minimum, midpoint and maximum amounts for the specified job.

Multiplier

Type the value the system should use to calculate the midpoint of the salary range for the specified job. The system first multiplies this figure by the total Hay system points for the specified job. It then adds the result to the value you enter in the *Base Amount* field on this screen to determine the midpoint of the salary range for this job. If you enter a value in the *Overtime Factor* field, the system uses that value to further adjust the midpoint.

Minimum Factor

Type the value the system should use to calculate the minimum of the salary range for the specified job. The system multiplies the midpoint by this value to determine the bottom of the salary range.

Base Amount

Type the initial dollar value the system should use to compute the midpoint of the salary range for the specified job. The system adds this value to the result derived from multiplying the total Hay system points for the specified job by the multiplier that you enter on this screen.

Maximum Factor

Type the value the system should use to calculate the maximum of the salary range for the specified job. The system multiplies the midpoint by this value to determine the top of the salary range.

Overtime Factor

Enter the overtime factor that applies to jobs in which assigned employees are eligible for overtime pay.

- 13 Press Enter. The system totals the points you entered on the screen and displays the prompt screen shown in Figure 9-12.
- 14 Press Enter without changing any of the information on the Update Hay Job Evaluation Factors prompt screen. The system displays the screen shown in Figure 9-13.
- 15 Press F14 to display the salary range the system calculates for the specified job as shown in Figure 9-13.

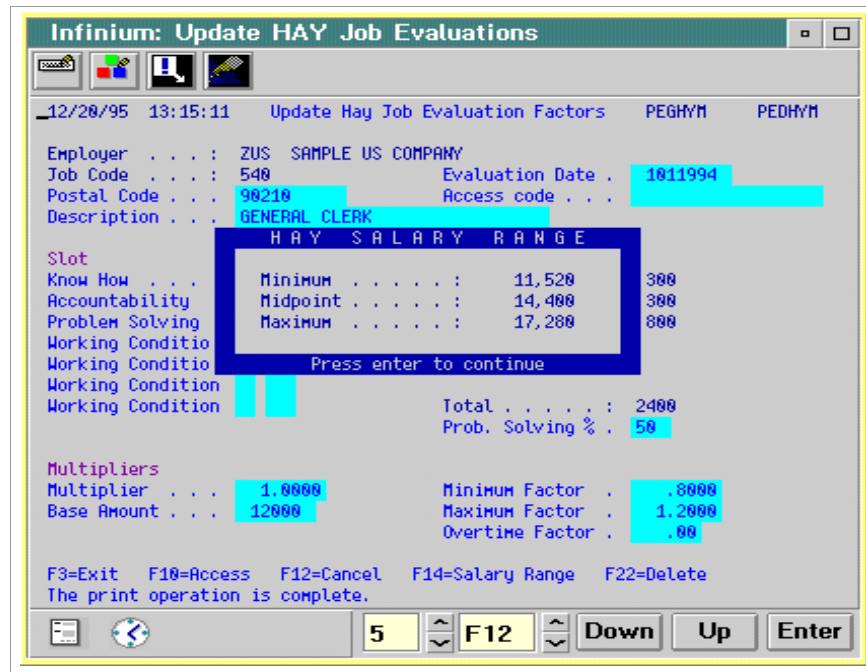


Figure 9-13: Update Hay Job Evaluation Factors screen

- 16 You can make note of the minimum, midpoint and maximum values, or use the *List HAY Job Evaluations* function to generate a report of the salary range amounts. You need this information to enter the salary range in Infinium HR using the *Update Salary Ranges* function. Press Enter or F3 to exit from the Hay Salary Range window.
- 17 Press Enter to exit from the Update Hay Job Evaluation Factors screen. The system displays the screen shown in Figure 9-11.
- 18 Type the value that represents another job for which you want to enter Hay job evaluation information or press F3 to return to the Infinium HR main menu.

Note: Use the *Update Salary Ranges* function to enter the salary range information for each job you evaluate using the Hay system. Refer to the preceding topic entitled “Defining Salary Ranges” for details.

Copying Job Evaluation Factors

You can copy the multiplier values from a job for which you have already entered Hay data to a job that you have not yet updated with Hay information. You must manually enter the slot and points information for the new job.

Follow these steps to copy Hay Job Evaluation information:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update HAY Job Evaluations* [UH]. Press Enter. The system displays the screen shown in Figure 9-14.

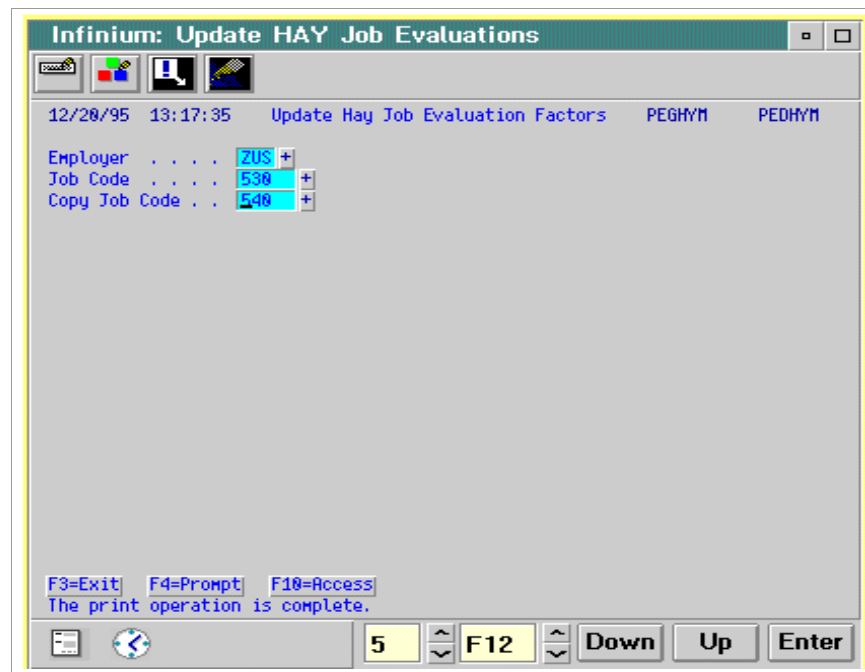


Figure 9-14: Update Hay Job Evaluation Factors prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you are copying Hay job evaluation information. Press F4 to display a list of valid employers.

Job Code

Type the value that represents the job to which you are copying Hay job evaluation information. Press F4 to display a list of valid jobs.

Copy Job Code

Type the value that represents the job from which you want to copy Hay job evaluation information. Press F4 to display a list of the jobs for which you have already entered Hay evaluation information.

- 5 Press Enter. The system displays the screen shown in Figure 9-15.

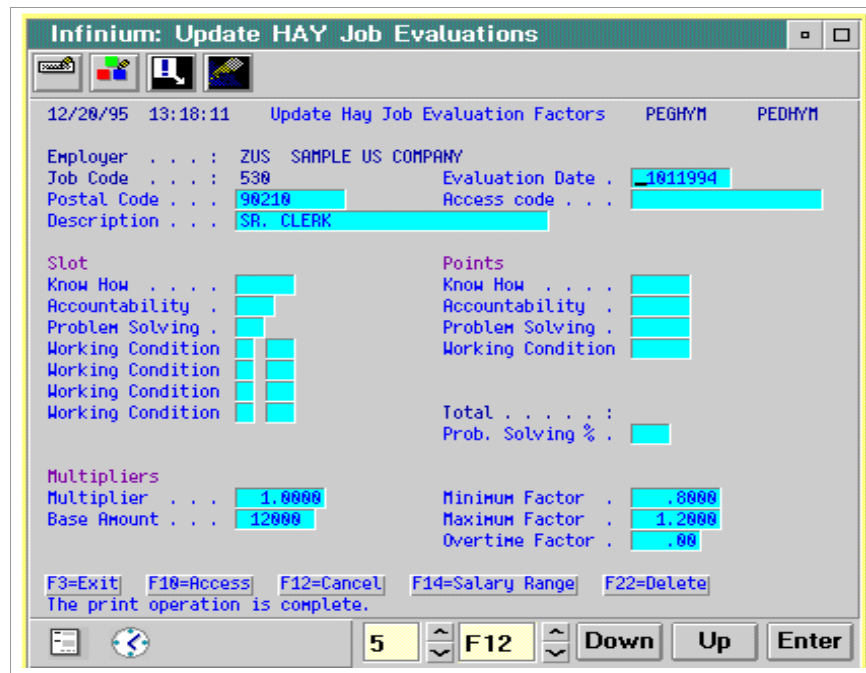


Figure 9-15: Update Hay Job Evaluation Factors screen

- 6 The system fills in the multiplier fields at the bottom of the screen with information copied from the specified job. Use the information beginning on page 9-22 to fill in the rest of the fields on this screen.

Changing Hay Job Evaluation Factors

You can manually update the slots or points associated with Hay factors for an established job at any time. Follow the steps beginning on page 9-22 to update the Hay information.

After you type your changes, press Enter to update the Hay information for the specified job. If you made changes that affect the total number of Hay points for the job or you updated the multiplier fields, press Enter to display the Update Hay Job Evaluation Factors screen. Then press F14 to review and make note of the updated salary range values for the specified job.

Use the *Update Salary Ranges* function to make the necessary changes to the salary range amounts in Infinium HR. See the “Defining Salary Ranges” chapter for information on how to update salary range values.

Mass Changing Hay Job Evaluation Factors

The preceding section provides you with information on how to make manual changes to Hay information for individual jobs. If you want to make changes to the Hay multiplier fields listed below for some or all of the jobs for which you use Hay job evaluation, you can use the *Mass Update HAY Salaries* function.

This function uses batch processing to update the fields listed below for the Hay jobs you specify and also automatically updates the salary range amounts displayed in the Hay Salary Range window on the Update Hay Job Evaluation Factors screen 2 of 2. The fields that you can change through the *Mass Update HAY Salaries* function are:

- *Multiplier*
- *Base Amount*
- *Minimum Factor*
- *Maximum Factor*

When you run the *Mass Update HAY Salaries* function, the system produces an audit report of the new salary range dollar values for the Hay jobs you updated. You can use this report to manually update the corresponding salary ranges in Infinium HR using the *Update Salary Ranges* function. If the affected ranges increase by the same percentage, you may be able to use the *Mass Change Salary Ranges* function. See the “Defining Salary Ranges” chapter for details.

Follow these steps to use the *Mass Update HAY Salaries* function:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Mass Update HAY Salaries [MUHS]*. Press Enter. The system displays the screen shown in Figure 9-16.

Infinium: Mass Update HAY Salaries

12/20/95 13:18:59 Mass Update HAY Salaries PRGJM50 PRDJM50

Employer ZUS + -or- Employer Group. . . . +

Multiplier 1.0000

Base Amount 12000

Minimum Factor8000

Maximum Factor 1.2000

Job Pay Type

F3=Exit F4=Prompt F10=Access
The print operation is complete.

Figure 9-16: Mass Update HAY Salaries screen 1 of 2

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for whom you are mass updating Hay job evaluation information. Press F4 to display a list of valid employers.

Employer Group

Type the code value that identifies the group of employers for whom you are mass updating Hay job evaluation information. Press F4 to display a list of valid employer groups. You define code values for this field using code type **ERG**.

Multiplier

Type the new value to calculate the midpoint of the salary ranges for the specified groups of jobs. The system first multiplies this figure by the total Hay system points for the specified jobs. It then adds the result to the value

that you enter in the *Base Amount* field on this screen to determine the new midpoint of the salary ranges for groups of Hay jobs that you specify using the *Job Pay Type* field. If you entered a value in the *Overtime Factor* field for the specified jobs, the system uses that value to further adjust the midpoint.

Base Amount

Type the new underlying dollar value the system should use to compute the midpoint of the salary ranges for the specified jobs. The system adds this value to the result derived from multiplying the total Hay system points for the specified job by the multiplier that you enter on this screen.

Minimum Factor

Type the new value to calculate the minimums of the salary ranges for the specified jobs. The system multiplies the midpoints by this value to determine the new lower limit of each affected salary range.

Maximum Factor

Type the new value to calculate the maximums of the salary ranges for the specified jobs. The system multiplies the midpoints by this value to determine the new upper limit of each affected salary range.

Job Pay Type

Use this field to specify the types of jobs for which you want to update Hay job evaluation information. The system applies the new multiplier values to jobs for which you have previously entered Hay job evaluation information using the *Update Hay Job Evaluations* function.

Valid values are:

- | | |
|--------------|--|
| Blank | Apply the multiplier changes entered on this screen to all Hay jobs. |
| H | Apply the multiplier changes entered on this screen to all Hay jobs whose pay type is H, which represents hourly. |
| S | Apply the multiplier changes entered on this screen to all Hay jobs whose pay type is S, which represents salaried. |
| N | Apply the multiplier changes entered on this screen to all Hay jobs whose pay type is N, which represents non-exempt salaried. |

See the “Establishing Job Controls” chapter for detailed information on the *Pay Type* field.

Deleting Hay Job Evaluation Factors

You can delete Hay job evaluation factors for a job code at any time.

Follow these steps to delete Hay job evaluation factors:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update HAY Job Evaluations [UH]*. Press Enter. The system displays the screen shown in Figure 9-17.

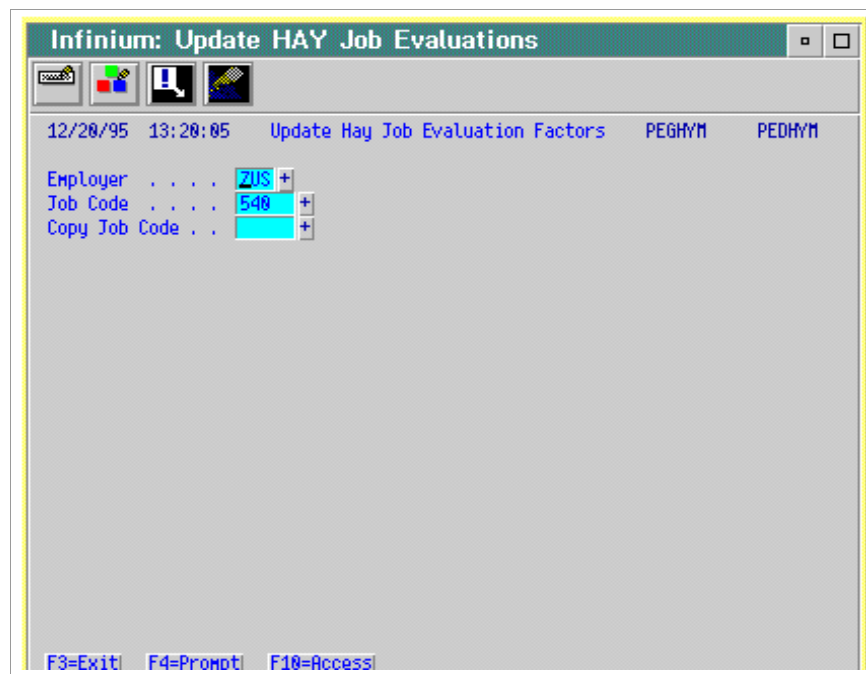


Figure 9-17: Update Hay Job Evaluation Factors prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you are deleting Hay job evaluation information. Press F4 to display a list of valid employers.

Job Code

Type the value that represents the job for which you are deleting Hay job evaluation information. Press F4 to display a list of valid jobs.

Copy Job Code

- 5 Press Enter. The system displays the screen shown in Figure 9-18.

12/28/95 13:28:39 Update Hay Job Evaluation Factors PEGHYM PEDHYM

Employer . . . : ZUS SAMPLE US COMPANY
 Job Code . . . : 548 Evaluation Date . . . 1011994
 Postal Code . . . 98218 Access code . . .
 Description . . . GENERAL CLERK

Slot

| | | | | |
|-------------------|------|--------|-------------------|------|
| Know How | D13A | Points | Know How | 1300 |
| Accountability . | XYZ | | Accountability . | 300 |
| Problem Solving . | F4 | | Problem Solving . | 800 |
| Working Condition | | | Working Condition | |
| Working Condition | | | | |
| Working Condition | | | | |
| Working Condition | | | | |

Total : 2400
 Prob. Solving % . 50

Multipliers

| | | | |
|------------------|--------|-------------------|--------|
| Multiplier . . . | 1.0000 | Minimum Factor . | .8000 |
| Base Amount . . | 12000 | Maximum Factor . | 1.2000 |
| | | Overtime Factor . | .80 |

F3=Exit| F10=Access| F12=Cancel| F14=Salary Range| F22=Delete|

Figure 9-18: Update Hay Job Evaluation Factors screen

- 6 Press F22 to delete the Hay job evaluation information for the specified job. The system displays the screen shown in Figure 9-17. You can enter another job code for which you want to delete Hay job evaluation information or press F3 to return to the Infinium HR main menu or desktop.

Displaying Hay Job Evaluation Factors

Follow these steps to display Hay job evaluation factors:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Display Master Files*.
- 3 Select *Display HAY Job Evaluations [DH]*. Press Enter. The system displays the screen shown in Figure 9-19.



Figure 9-19: Display Hay Job Evaluations prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you are deleting Hay job evaluation information. Press F4 to display a list of valid employers.

- 5 Press Enter. The system displays the screen shown in Figure 9-20.

| Job | Know How | Prob Solv | Acct | Work Cond | Total | Minimum | Midpoint | Maximum |
|-----|----------|-----------|------|-----------|-------|---------|----------|---------|
| 530 | 1400 | 1000 | 400 | | 2800 | 11840 | 14800 | 17760 |
| 540 | 1300 | 800 | 300 | | 2400 | 11520 | 14400 | 17280 |

Figure 9-20: Display Hay Job Evaluations screen

- 6 The system displays the points assigned to Hay factors and the salary range amounts for jobs for which you entered Hay job evaluation information.
- 7 Press F3 or Enter. The system returns to the Infinium HR main menu.

Printing Hay Job Evaluation Factors

Follow these steps to generate a report of Hay job evaluation factors:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *List Master Files*.
- 3 Select *List HAY Job Evaluations* [LH]. Press Enter. The system displays the screen shown in Figure 9-21.

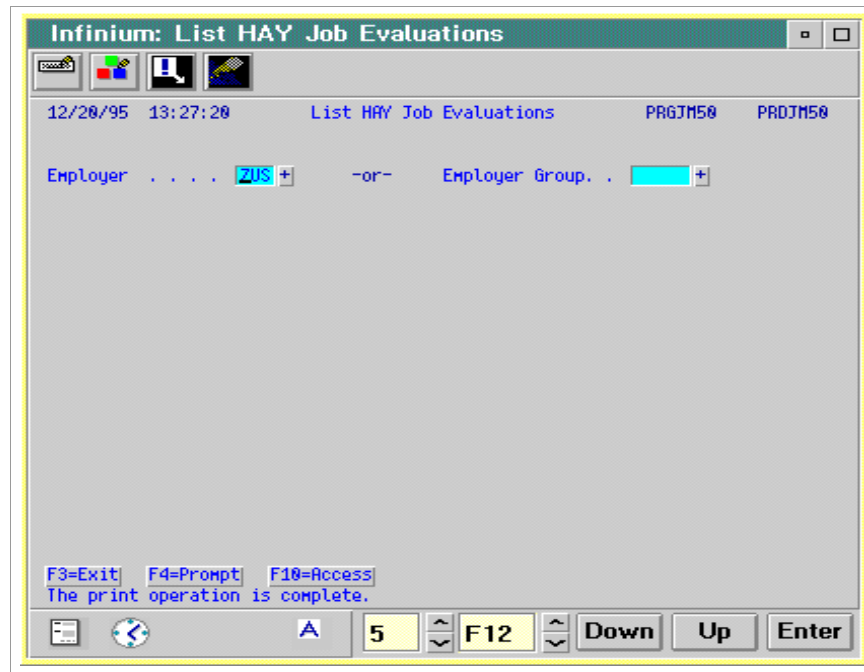


Figure 9-21: List HAY Job Evaluations selection screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you are printing Hay job evaluation information. Press F4 to display a list of valid employers.

Employer Group

Type the code value that represents the group of employers for which you want to print Hay job evaluation information. Press F4 to display a list of valid employer group code values. You define employer groups using code type **ERG**.

- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu:

Building submission request . . .

- 6 The system uses batch processing to generate the Hay Evaluation Report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.

Continuing to the Next Step

After you set up job evaluation groups, you define job controls. See the following chapter for detailed information on how to set up job controls.

If you are using Hay job evaluation in your organization, return to this topic after you set up job controls to enter Hay information for the jobs.

Summary of Job Evaluation Groups and Factors

In summary, you have become familiar with the following about setting up job evaluation on Infinium HR:

- How to set up, change and delete job evaluation groups and factors
 - How to set up, change and delete Hay job evaluation factors
 - How to copy and mass change Hay job evaluation factors
 - How to display and print Hay job evaluation information
-

Notes

Job controls define the types of work performed in your organization. You can establish somewhat generic jobs, such as clerk, or more specific jobs, such as accounts payable clerk. Each employee is assigned to a job when he or she is hired. You use transactions such as promotion, transfer and demotion in the *Enter Personnel Actions* function to maintain employee job information.

You define a code of up to five alphanumeric characters to represent each job. You then enter a description and several attributes for each job. When you assign an employee to a job, the system automatically assigns all of the related attributes to the employee.

Jobs identify the types of work performed for the employer, but they do not describe where the work is performed in the employer. You use position controls to identify the location of each job in your organization.

The chapter consists of the following topics:

| Topic | Page |
|--|-------------|
| Overview of Job Controls | 10-2 |
| Setting up and Maintaining Job Controls | 10-7 |
| Copying Job Management Files to Another Employer | 10-27 |
| Summary of Job Controls | 10-30 |

Overview of Job Controls

Objectives

After completing this chapter, you should be familiar with:

- How to use job controls to maintain employee information
- How Infinium PY users utilize job controls
- How to set up a job control
- How to change a job control
- How to delete a job control
- How to display and print job controls
- How to copy Job Management Files to another employer

Understanding Job Controls

Job controls define the types of work performed in your organization. You can establish somewhat generic jobs, such as clerk, or more specific jobs, such as accounts payable clerk. Each employee is assigned to a job when he or she is hired. You use transactions such as promotion, transfer and demotion in the *Enter Personnel Actions* function to maintain employee job information.

You define a code of up to five alphanumeric characters to represent each job. Since job controls are one of the most important controls that you define on Infinium HR, it is beneficial to explore various naming conventions for job codes during your implementation of Infinium HR. Ideally, the coding scheme you develop should be functional, logical, easy to maintain and descriptive.

After you set up a job code, you enter a description and several attributes for the job including the following:

- Pay Type
 - EEO Code Value
 - Salary Range
 - Job Evaluation Group
-

The system automatically assigns employees to the pay type, EEO code, salary range and job evaluation group associated with their assigned job.

Jobs identify the types of work performed for the employer, but they do not describe where the work is performed in the employer. For example, you assign employees in five different departments within your organization's headquarters to the same clerk job. You also assign employees who work in the Accounting department in three different physical work locations to the clerk job.

You use position controls to identify where jobs are performed in an employer, either based on function or physical work location. You must establish at least one position for each job. In the preceding examples, you would define eight positions for the clerk job, one for each department and physical work location in which clerks are located. The "Defining Position Controls" chapter provides detailed information on how to set up positions.

Using Job Controls to Maintain Employee Information

When you type 1 in the *Positions Used?* field on the employer control, the system defaults information from the job control into the records of assigned employees. You cannot manually update most of the job-related fields in employee basic data records.

The system uses information from the job control to automatically default values into fields in the employee basic data record listed in the following table. The table indicates which fields are mandatory or required entry fields on the job control and which fields are optional. It also identifies which fields in the employee basic data record can be maintained manually as well as automatically based on the employee's assigned job control. Fields that are related are grouped together in the same cell on the table.

| Field in the Employee Basic Data Record | Is This Field Required on the Job Control? | Can You Manually Update This Field in the Employee Record? |
|---|--|--|
| <i>Job Code 1</i> | Yes | No |
| <i>EEO Category EEO-4 Function</i> | Yes No | No Yes |
| <i>Next Review Next Review Date</i> | No | Yes |
| <i>Security Group</i> | No | Yes |
| <i>Pay Type</i> | Yes | Yes |

| Field in the Employee Basic Data Record | Is This Field Required on the Job Control? | Can You Manually Update This Field in the Employee Record? |
|---|--|--|
| <i>Pay Grade</i> | No | Yes |
| <i>Step</i> | No | No |
| <i>Salary Range</i> | Yes | No |

When you hire a new employee, you assign the employee to a position. Each position is associated with a job. Depending on the fields that you complete on the job control, the system uses information from the employee's hiring job to fill in some or all of the fields listed above in the employee basic data record. It fills in additional fields using information from the position control record.

When you use the promotion, demotion, transfer or rehire transactions in the *Enter Personnel Actions* function to move the employee to a new job and position, the system updates these fields with information from the employee's new job and position. When you use jobs and positions to maintain employee information, you ensure that employee data is accurate, current, and consistent.

See the *Infinium Human Resources Guide to Processing* for detailed information on fields in the employee basic data record. See the "Establishing Position Controls" chapter for more information on how you use the position to maintain employee information.

Entering Job Controls on Infinium PY

Infinium HR users normally define and use job controls. However, job controls are kept in a file that is shared between Infinium HR and Infinium PY. When you define a job using Infinium HR, it is automatically set up in Infinium PY. Similarly, if Infinium PY users define a job control, it is automatically also set up on Infinium HR.

Generally Infinium PY users set up and maintain job controls because they want to implement pay-by-job processing or associate general ledger numbers with jobs to charge employee labor expense and employer liabilities based on job assignment. Infinium PY users can store employee pay rates and general ledger numbers on job control records. They can enter multiple jobs for each employee during payroll cycle processing to pay the employee different rates and charge different cost centers based on the jobs the employee performed during the pay period.

During the hire process you assign each employee to a job, which the system displays in the employee’s basic data record after you complete the hire process. This job is the employee’s home job. Infinium HR users use the *Enter Personnel Actions* function to update the employee’s home job assignment.

The system defaults each employee’s home job into Infinium PY time entry screens during pay cycle processing. However, Infinium PY processors can temporarily assign employees to different jobs during pay cycle processing so that they can allocate labor expense and/or employer liabilities to different parts of the organization based on which jobs the employees worked during that pay period. They can also use the temporary job assignments to change the employee’s normal pay rate. Changes made during pay cycle processing do not affect the employee’s home job assignment in his or her basic data record.

Although job control information is shared between the two systems, Infinium PY users see somewhat different job control information than Infinium HR users see. The following table identifies which job control fields you can access using Infinium HR and Infinium PY.

| Job Control Field Name | Included in Infinium HR? | Included in Infinium PY? |
|--|---------------------------------|---------------------------------|
| <i>Job Code</i> | Yes | Yes |
| <i>Position Code</i> | | |
| <i>Job Description</i> | | |
| <i>EEO Category</i> | | |
| <i>Pay Type</i> | | |
| <i>Security Group</i> | | |
| <i>Start Date</i> | | |
| <i>End Date</i> | | |
| <i>EEO-4 Function</i> | Yes | No |
| <i>Exempt/Non Exempt</i> | | |
| <i>Job Evaluation</i> | | |
| <i>License Code Req.</i> | | |
| <i>Salary Range</i> | | |
| <i>Next Review</i> | | |
| <i>Next Review Days</i> | | |
| <i>Pay Grade</i> | | |
| <i>Step Number</i> | | |
| <i>Step-in-Grade?</i> | | |
| <i>Freeze Step?</i> | | |
| <i>Comparative Salary Range Minimum, Midpoint, Maximum Evaluation Points</i> | | |

| Job Control Field Name | Included in Infinium HR? | Included in Infinium PY? |
|-----------------------------------|-------------------------------------|-------------------------------------|
| <i>Tips Code</i> | No | Yes |
| <i>Base Rate Min?</i> | | |
| <i>Pay Basis</i> | | |
| <i>Pay Factor</i> | | |
| <i>Pay Matrix</i> | | |
| <i>Matrix Column</i> | | |
| <i>Matrix Row</i> | | |
| <i>Labor Exp. Acct.</i> | | |
| <i>EE Liab Mask Acct</i> | | |
| <i>ER Liab Mask Acct</i> | | |
| <i>Statistical Acct.</i> | | |
| <i>Tip Comp Occup</i> | | |
| <i>Use Alt Min Wage</i> | | |

See the “Using Pay-by-Job Processing” chapter in the *Infinium Payroll Guide to Processing* for detailed information on how to set up job controls and pay-by-job processing on Infinium PY.

Setting up and Maintaining Job Controls

Follow these steps to set up a job control:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Job Controls [UJ]*. Press Enter. The system displays the screen shown in Figure 10-1.

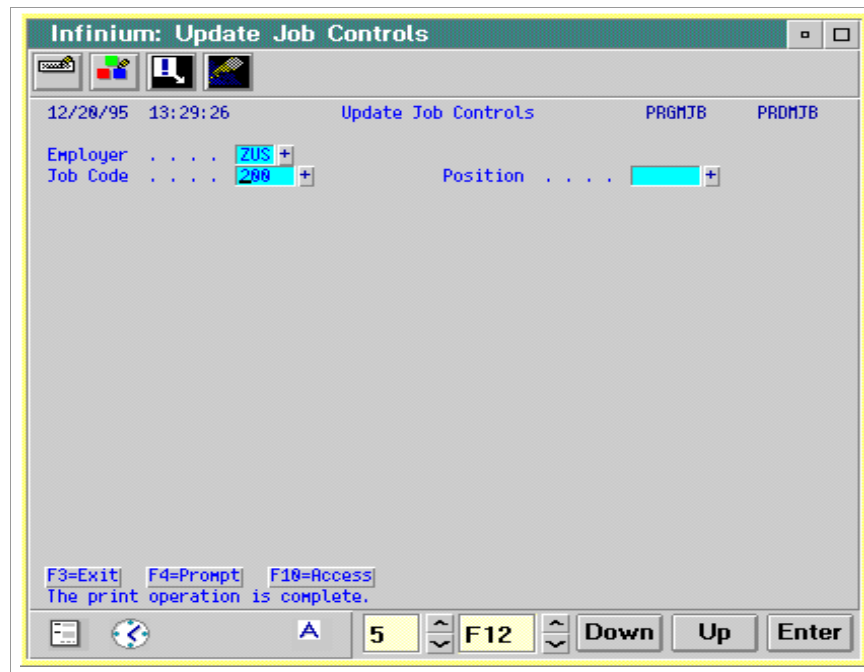


Figure 10-1: Update Job Controls prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you are setting up a job control. Press F4 to display a list of valid employers.

Job Code

Type any combination of up to five alphanumeric characters to represent the job control. Press F4 to display a list of previously defined job codes.

Position

Leave this field blank when you initially define a job control. You use this field to set up a special job/position combination. See the topic entitled “Defining Unique Job/Position Combinations” for details.

- 5 Press Enter. The system displays the screen shown in Figure 10-2.

Figure 10-2: Update Job Controls screen 1 of 2

- 6 Use the following information to fill in the fields on this screen:

Description

Type one or more words to describe the job control that you are defining. This is a 30-character free-form field.

Pay Type

Type a value that indicates the way you state payroll rates for employees assigned to this job. For example, if you pay employees by the hour on Infinium PY, you should type H in this field. If you pay employees using a flat amount, such as \$500 per pay period, you should type S or N in this field. In some installations, Payroll uses hourly incomes for all employees because hourly incomes simplify the time entry process.

When you enter salary change transactions for employees using the *Enter Personnel Actions* function, you normally update the employees' payroll rate. If the value in the *Pay Type* field corresponds with the payroll rate, you can

use a function key on the salary change transaction screen to calculate the new payroll rate. When you use the function key, you significantly reduce the risk of errors. See the “Entering Personnel Actions” chapter in the *Infinium Human Resources Guide to Processing* for detailed information on how to enter salary change transactions for employees.

Valid values are:

- H** Hourly: you assign hourly employees to this job and state their Payroll Rate on an hourly basis.
- S** Salaried: you assign exempt employees to this job and state their Payroll Rate as a flat amount per pay period.
- N** Non-Exempt: you assign non-exempt employees to this job and state their Payroll Rate as a flat amount per pay period.

EEO-4 Function

If you are defining a job for a U.S. public sector employer, type a value that indicates how employees assigned to this job are classified on the EEO-4 State & Local Information Report. See the *Infinium Human Resources Guide to Management Functions* for details on how to generate the EEO-4 report.

If your organization is not a U.S. public sector employer, leave the default value of **0** in this field.

Infinium has defined the values for this field based on statutory regulations.

Valid values are:

- 01** Financial Administration
 - 02** Streets and Highways
 - 03** Public Welfare
 - 04** Police Protection
 - 05** Fire Protection
 - 06** Natural Resources
 - 07** Hospitals and Sanitariums
 - 08** Health
-

- 09** Housing
- 10** Community Development
- 11** Corrections
- 12** Utilities and Transportation
- 13** Sanitation and Sewage
- 14** Employment Security
- 15** Other

Exempt/Non Exempt

In this field indicate if employees assigned to this job are covered by the overtime provisions of the U.S. Fair Labor Standards Act (non-exempt) or are not covered by the overtime provisions (exempt).

Valid values are:

- 1** Exempt: employees are exempt from statutory overtime payments.
- 0** Non-Exempt: employees are covered by statutory overtime payment regulations.

Infinium PY does not use this field to verify whether employees can receive overtime earnings.

EEO Category

In this field indicate how employees assigned to this job should be categorized on the EEO-1 Employer Information Report (for U.S. private sector employers), the EEO-4 State & Local Data Report (for U.S. public sector employers) or the Employment Equity Report (for Canadian employers).

You define standard values for this field using code type **EEO**. You define different values depending on the type of report that you produce for the specified employer. Press F4 to display a list of valid values.

Standard values for U.S. private sector employers are:

- 1.1** Executive/Senior Level Officials and Managers
-

- 1.2** First/Mid-level Officials and Managers
- 2** Professionals
- 3** Technicians
- 4** Sales Workers
- 5** Administrative Support Workers
- 6** Craft Workers
- 7** Operatives
- 8** Laborers
- 9** Service Workers

Standard values for U.S. public sector employers are:

- 1** Officials and Managers
- 2** Professionals
- 3** Technicians
- 4** Protective Services
- 5** Para-Professionals
- 6** Administrative/Support
- 7** Skilled Crafts
- 8** Service/Maintenance

Standard values for Canadian employers are:

- NA** Not Applicable
 - 1** Upper Level Managers
 - 2** Middle and Other Managers
 - 3** Professionals
 - 4** Semi-Professionals and Technicians
-

| | |
|----|-----------------------------------|
| 5 | Supervisors |
| 6 | Foremen/Forewomen |
| 7 | Clerical Workers |
| 8 | Sales Workers |
| 9 | Service Workers |
| 10 | Skilled Crafts and Trades Workers |
| 11 | Semi-Skilled Manual Workers |
| 12 | Other Manual Workers |

You can define sub-categories of the standard values listed above for private sector U.S. employers.

See the “Setting up and Maintaining Employer Code Values” chapter in this guide for details on how to establish standard code values. See the *Infinium HR Guide to Management Functions* for information on generating the U.S. EEO-1 and EEO-4 reports and Canadian employment equity reports.

Job Evaluation

If you are implementing job evaluation for the specified employer, type the code value that identifies the job evaluation group to which this job belongs. The system displays factors associated with the chosen job evaluation group on the following screen. Press F4 to display a list of valid job evaluation groups. You define values for this field using code type **GRP**.

If you do not use job evaluation or you are using the Hay job evaluation system, you can enter a dummy job evaluation code or you can leave this field blank, if you have defined a blank code value for code type **GRP**. See the “Setting up Job Evaluation Groups and Factors” chapter for details on how to define dummy or blank code values.

License Code Req.

To implement the *Professional Licensing* function on Infinium HR for the specified employer, type the code value that identifies the type of license that employees who are assigned to this job must possess. You can use the *Professional Licensing* function to enter additional information for employees assigned to this job, such as their individual license number, expiration date and so on. The information in this field is used for information only.

Press F4 to display a list of valid license code values. You define code values for this field using code type **LCD**.

Salary Range

Type the value that identifies the salary range for this job. The system uses the salary range to verify that employees assigned to this job are paid a rate between the minimum and maximum limits of the salary range. Press F4 to display a list of salary ranges. See the “Defining Salary Ranges” chapter for further information.

You can override the warning message that the system produces when the base rate of an employee assigned to this job exceeds the salary range maximum or is below the salary range minimum.

Security Group

If you are implementing system security by employee groupings, type the code value that identifies the group to which employees assigned to this job belong. Your system security administrator can restrict personnel and payroll users from accessing the records of employees in selected security groups. See the *Infinium Human Resources Guide to Management Functions* for further details.

Press F4 to display a list of valid security group code values. You define code values for this field using code type **SEC**. Leave this field blank if you do not use security groups.

Start Date

Type the date this job was established within the specified employer. This field is for informational purposes only.

End Date

Type the date this job is no longer valid within the specified employer. This field is for informational purposes only.

Next Review

If you want the system to automatically assign a performance review category to new employees hired into this job, type the code value that represents that category in this field. Press F4 to display a list of valid performance review code values. You define code values for this field using code type **RTP**.

Leave this field blank if you want to manually assign employees to a performance review category during the new hire process.

Next Review Days

If you want the system to automatically determine the date of a new employee's first performance review, type the number of calendar days from the date of hire that should elapse before the review is scheduled. For example, if you type **90** in this field, the system adds 90 days to a new employee's hire date to determine his or her first appraisal date and fills that date into the employee's *Next Review Date* field during the new hire process.

You can generate the List Next Review Schedule report to monitor when performance reviews are due. See the "Printing Employee Data" chapter in the *Infinium Human Resources Guide to Processing* for details on how to generate this report.

Leave this field blank if you want to manually assign employees to a performance review date during the new hire process.

Pay Grade

If you use step-in-grade processing for this job, type the value that identifies the pay grade for employees assigned to this job. You use step-in-grade processing to automate the rate progression of employees based on their length of service, hours worked, or a combination of both factors.

See the parts entitled "Establishing Step-in-Grade Processing" and "Using Step-in-Grade Mass Update Functions" in the *Infinium Human Resources Guide to Processing* for details on how to implement step-in-grade processing.

Leave this field blank if you do not use step-in-grade processing for employees assigned to this job.

Step Number

If you use step-in-grade processing for this job, type the starting step number for new employees assigned to this job during the hire process. You can override this step for exception employees.

Leave this field blank if you do not use step-in-grade processing for employees assigned to this job.

Step-in-Grade?

In this field indicate if you want to use step-in-grade mass update functions to administer the rate progression of employees assigned to this job.

Valid values are:

- 0** You do not use step-in-grade processing for this job.
- 1** You use step-in-grade processing for this job.

Freeze Step?

If you use step-in-grade processing for employees assigned to this job, in this field indicate if you want employees to automatically progress to the next step in their pay grade when you run the *Mass Update Employee Steps* function.

Valid values are:

- 0** Automatically advance employees to the next step in their assigned pay grade..
- 1** Do not automatically advance employees to the next step in their assigned pay grade.

Comparative Salary Ranges

Use the nine fields in this portion of the screen to store salary survey data for similar jobs in your area, country or industry. All of these fields are optional. You can leave some or all of them blank and press Enter to advance to the next screen. After you set up the job control, the system automatically displays whole dollar values for the salary range associated with this job in the *Actual* fields at the bottom of the screen.

Regional

Type salary range minimum, midpoint and maximum values for similar jobs in the geographic locality of the specified employer.

National

Type salary range minimum, midpoint and maximum values for similar jobs across the country for the specified employer.

Industry

Type salary range minimum, midpoint and maximum values for similar jobs in the same business sector or function as the specified employer.

- 7 Press Enter. The system displays the screen shown in Figure 10-3.
-

12/28/95 13:32:17 Update Job Controls PRGMJB PRDMJB
Page 2 of 2

Employer . . . : ZUS SAMPLE US COMPANY
Job Code . . . : 200 Position . . . :
Evaluation Date . . 10/1998

Evaluation Points

| | | | |
|-------------------------------|-----|------------------------------|-----|
| 1 DEPTH OF KNOWLEDGE | 500 | 2 IMPACT ON THE ORGANIZATION | 300 |
| 3 EXPERIENCE REQUIRED | 300 | 4 AUTONOMY | 250 |
| 5 JUDGEMENT & DECISION-MAKING | 400 | 6 RISK-TAKING | 200 |
| 7 | | 8 | |
| 9 | | 10 | |
| 11 | | 12 | |
| Total Points . . | | 1950 | |

F3=Exit F10=Access F12=Cancel
The print operation is complete.

5 F12 Down Up Enter

Figure 10-3: Update Job Controls screen 2 of 2

- Use the information below to fill in the fields on this screen.

Job Evaluation Factors

If you entered a job evaluation group on the preceding screen for which you defined factors, the system displays those factors on this screen. You use this screen to enter numeric values for one or more of the factors based on the organizational contributions of the job that you are defining.

All fields on this screen are optional. If you are not using job evaluation, press Enter to save your job control information and exit from this screen.

If you are using Hay job evaluation, the system displays the total value of the points that you entered using the Update HAY Job Evaluations screen in the lower right hand corner of this screen.

Evaluation Date

If you are using job evaluation for this job, type the date on which you last assessed this job.

Evaluation Points

Type the numeric value for one or more of the job evaluation factors associated with this job. You can enter up to 99999 for each factor. Press FieldExit to right-justify each of your numeric entries.

- 9 Press Enter to save your job control information and exit this screen.

Changing Job Controls

You can make changes to any of the fields on the job control except the job code. If you want to change the job code, you must set up a new job control. Follow the instructions in the preceding section to set up a new job control. You can use the *Enter Personnel Actions* function to assign employees to the new job.

When you make changes to certain fields on the job control, the system automatically updates the corresponding fields in the basic data records of employees assigned to that job if you entered 1 in the *Positions Used?* field on the employer control. Generally, the system updates fields that you cannot manually update in the employee basic data record.

You can use the *Mass Update Employee Positions* function to have the system refresh fields in the employee basic data record that default from the job control. See the “Using Step-in-grade Mass Update Functions” chapter in the *Infinium Human Resources Guide to Processing* for details.

The following table summarizes which fields in the employee Basic Data record are updated when you make changes to them on the job control record:

| Field on the Job Control | Does the System Update This Field in the Employee Basic Data Record If You Change It on the Job Control? |
|--------------------------|--|
| <i>EEO Category</i> | Yes |
| <i>EEO-4 Function</i> | Yes |
| <i>Next Review</i> | No |
| <i>Next Review Date</i> | No |
| <i>Security Group</i> | No |
| <i>Pay Type</i> | No |
| <i>Pay Grade</i> | No |
| <i>Step</i> | No |
| <i>Salary Range</i> | Yes |
| <i>Salary Quartile</i> | No |
| <i>Comp Ratio</i> | No |

See the discussion on changing salary ranges in the “Defining Salary Ranges” chapter for information on how to update the *Salary Quartile* and *Comp Ratio* fields in the employee basic data record when you assign a new salary range to an existing job control record.

Deleting a Job Control

You use the *Update Job Controls* function to delete a job control. However, you cannot delete a job control if positions are associated with it. If you remove the job code from position controls and replace it with another job code, you can delete the job control.

The history records of employees who were transferred, promoted, demoted or rehired into positions associated with the job control that you delete still contain the job code of the deleted job. Therefore, when you use the *Display Employee History* function to review the employee’s history, the system displays the deleted job code, but it cannot display the deleted job’s description.

Follow these steps to delete a job control:

- 1 From the Infinium HR main menu, select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Job Controls* [UJ]. Press Enter. The system displays the screen shown in Figure 10-4.
-

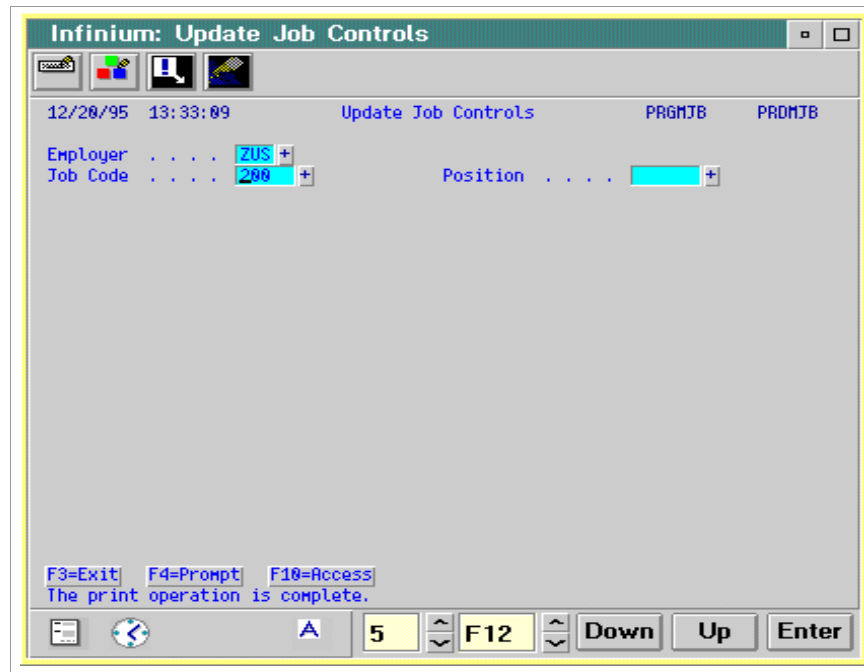


Figure 10-4: Update Job Controls screen 1 of 2

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you want to delete a job control. Press F4 to display a list of valid employers.

Job Code

Type the value that represents the job control that you want to delete. Press F4 to display a list of valid jobs.

Position

You use this field to set up a special job/position combination. See the “Defining Unique Job/Position Combinations” chapter in this guide for details on how to set up and delete job/position combinations.

- 5 Press Enter. The system displays the screen shown in Figure 10-5.

12/20/95 13:33:29 Update Job Controls PRGMJB PRDMJB
Page 1 of 2

Employer . . . : ZUS SAMPLE US COMPANY
Job Code . . . : 200 Position . . . :
Description . . : ACCOUNTANT

Pay Type . . . : S EE0-4 Function . . : 0 (1->15)
Exempt/Non Exempt . . : 1 (0->1) EE0 Category . . : 2A +
Job Evaluation . . : PRONT + License Code Req. . : DRVC3 +
Salary Range . . : 200 + Security Group . . : +

Start Date . . . : End Date . . . :
Next Review . . : PROB + Next Review Days . :
Pay Grade . . . : + Step Number . . . : 0 +
Step-in-Grade? . . : 0 (0=No 1=Yes) Freeze Step? . . : 0 (0=No 1=Yes)

| Comparative Salary Ranges | | | |
|---------------------------|---------|----------|---------|
| Description | Minimum | Midpoint | Maximum |
| Regional | 30000 | 34000 | 36000 |
| National | | | |
| Industry | | | |
| Actual : | 31500 | 63000 | 94500 |

F3=Exit F4=Prompt F10=Access F12=Cancel F22=Delete
The print operation is complete.

A 5 F12 Down Up Enter

Figure 10-5: Update Job Controls screen 1 of 2

- 6 Press F22 to delete the specified job control.

If the job is attached to one or more position controls, the system displays the following error message at the bottom of the screen:

Position codes attached to job code. Deletion of job code denied.

- 7 Press F3 to exit this screen. Use information in the “Defining Position Controls” chapter to update the position control(s) with a new job code. Then repeat steps 1 through 6 above.
- 8 If the job control is not attached to position controls, the system displays the Deletion Confirmation window at the bottom of the screen. Type 1 in the box to delete the job control, and then press Enter. The system deletes the job control and displays the screen shown in Figure 10-4.
- 9 You can work with another job control or press F3 to return to the Infinium HR main menu.

Displaying Job Controls

You can use the *Display Job Controls* function to display one or more job controls for a specified employer.

Follow these steps to display a job control:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Display Master Files*.
- 3 Select *Display Job Controls [DJ]*. Press Enter. The system displays the screen shown in Figure 10-6.

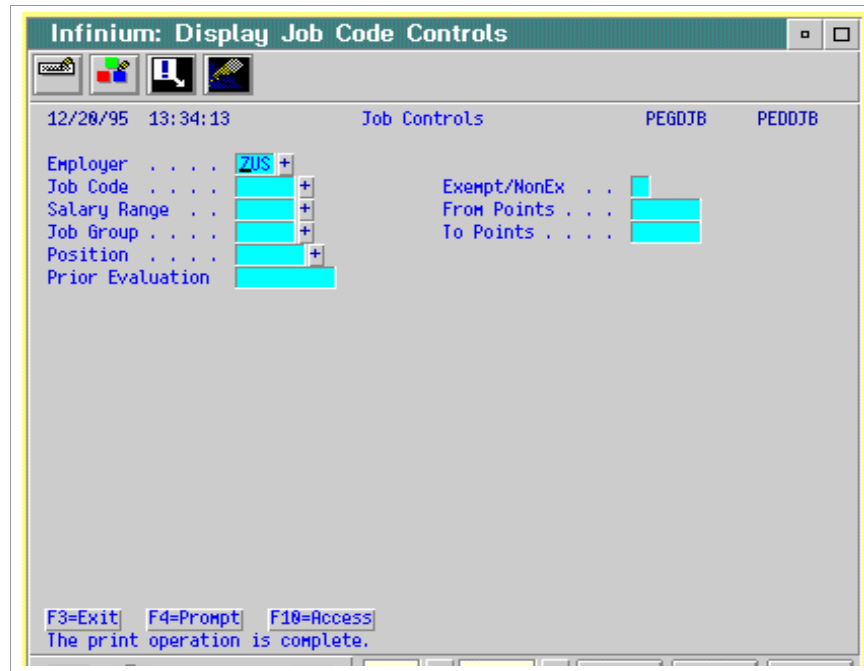


Figure 10-6: Job Controls selection screen

- 4 Use the following information to fill in the fields on this screen:

You can use any combination of fields on this screen to identify the jobs that you want to display on the following screen.

Employer

Type the value that represents the employer for which you want to display job controls. Press F4 to display a list of valid employers.

Job Code

Type the value that identifies the job control that you want to display. Press F4 to display a list of valid jobs. Leave this field blank if you want to display all job controls for the specified employer.

Exempt/NonEx

Use this field to limit the following display to only exempt or non-exempt jobs.

Valid values are:

- 0** Display only non-exempt jobs
- 1** Display only exempt jobs

Leave this field blank to display all jobs regardless of their exempt/non-exempt status.

Salary Range

To limit the following display to only jobs associated with a particular salary range, type the code that represents that salary range. Press F4 to display a list of valid salary ranges. To display all jobs regardless of their affiliated salary range, leave this field blank.

From Points

To limit the following display to only those jobs whose total evaluation points exceed a certain value, type the bottommost point total in this field. The system displays those jobs whose total evaluation points exceed this value.

Job Group

To limit the following display to only those jobs associated with a particular job evaluation group, type the code value that represents that group. Press F4 to display a list of valid job evaluation group code values. You define code values for this field using code type **GRP**. To display all jobs regardless of their affiliated job evaluation group, leave this field blank.

To Points

To limit the following display to only those jobs whose total evaluation points are less than a certain value, type the uppermost point total in this field. The system displays those jobs whose total evaluation points are less than this value.

Position

If you have set up unique combinations of jobs and positions, referred to as tiebacks, type the value that represents the tieback position in this field. Leave this field blank if you have not set up tieback positions. See the “Defining Unique Job/Position Combinations” chapter in this guide for details.

Prior Evaluation

To limit the following display to only those jobs whose last evaluation date precedes a particular date, type that date in this field. The system displays those jobs whose *Evaluation Date* field is blank or precedes the date you enter in this field. To display all jobs regardless of their evaluation date, leave this field blank.

- 5 Press Enter. The system displays the screen shown in Figure 10-7.

12/28/95 13:34:38 Job Controls PEGDJB PEDDJB

Employer . . . : ZUS
 Job Code . . . :
 Salary Range . . : Exempt/NonEx . . :
 Job Group . . . : From Points . . . :
 Position . . . : To Points . . . :

Prior Evaluation:

| Job | Job Title | Position | E/N | Group | EEO | Salary | Last Evaluated | Total Points |
|-----|-------------------|----------|-------|-------|-----|-----------|----------------|--------------|
| 100 | PRESIDENT | 1 | MANAG | 1 | 100 | 1/01/1990 | 21400 | |
| 120 | VICE PRESIDENT | 1 | MANAG | 1 | 100 | 1/01/1990 | 11300 | |
| 130 | DIRECTOR | 1 | MANAG | 1 | 100 | 1/01/1990 | 3600 | |
| 140 | MANAGER | 1 | MANAG | 1 | 100 | 1/01/1990 | 2100 | |
| 150 | ASSISTANT MANAGER | 1 | MANAG | 1 | 100 | 1/01/1990 | 1350 | |
| 160 | SUPERVISOR | 1 | MANAG | 1 | 100 | 1/01/1990 | 850 | |
| 200 | ACCOUNTANT | 1 | PRONT | 2A | 200 | 1/01/1990 | 1950 | |
| 210 | ANALYST | 1 | PRONT | 2A | 200 | 1/01/1990 | 1550 | |
| 220 | ENGINEER | 1 | PROT | 2B | 200 | 1/01/1990 | 2450 | |
| 230 | PROGRAMMER | 1 | PROT | 2 | 200 | 1/01/1990 | 2800 | |
| 300 | LAB TECHNICIAN | 0 | TECH | 3 | 300 | 1/01/1990 | 1850 | |
| 400 | SALES PERSON | 1 | SALES | 4 | 400 | 1/01/1990 | 360 + | |

F3=Exit F5=More Info F10=Access
 The print operation is complete.

Figure 10-7: Job Controls screen

- 6 Use the following information to work with this screen:

The system displays key information from the specified job controls on this screen. Press F5 to display the *License Code* and *Security Group* fields for each job control. Press F5 again to return the screen to the initial display.

If the system displays + in the lower right-hand corner of the screen, press PageDown to view the additional screens of information.

- 7 Press Enter or F3 to return to the screen shown in Figure 10-8.
- 8 Enter different selection criteria or press F3 to return to the Infinium HR main menu.

Printing Job Controls

You use the *List Job Code Controls* function to generate a report of key information from the Infinium HR job control including salary range amounts and evaluation points. Infinium PY users can use the List Job Controls report to generate a report of key information from the Infinium PY job control including general ledger expense account numbers and rates.

Follow these steps to print the Infinium HR job control information:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *List Master Files*.
- 3 Select *List Job Code Controls* [LJ]. Press Enter. The system displays the screen shown in Figure 10-8.

The screenshot shows a terminal window titled "Infinium: List Job Code Controls". The window contains the following text and controls:

- Header: 12/20/95 13:35:36 List Job Code Controls PRGJM50 PRDJM50
- Fields:
 - Employer 2US +
 - Employer Group. . . . +
 - Position +
 - Job Group +
 - Salary Range +
 - Pay Type H
 - Exempt/Non-Exempt []
- Footer:
 - F3=Exit F4=Prompt F10=Access
 - The print operation is complete.
 - Navigation buttons: A, 5, F12, Down, Up, Enter

Figure 10-8: List Job Code Controls selection screen

- 4 Use the following information to fill in the fields on this screen:

You can use any combination of fields on this screen to identify the jobs that you want to print on the report.

Employer

Type the value that represents the employer for whom you want to display job controls. Press F4 to display a list of valid employers. You must enter a value in this field or the *Employer Group* field.

Employer Group

Type the code value that identifies the group of employers for whom you want to print the job code report. Press F4 to display a list of valid employer group code values. You define code values for this field using code type **ERG**. You must enter a code value in this field or the *Employer* field.

Position

If you have set up unique combinations of jobs and positions, referred to as tiebacks, and want to print only information for the job associated with a particular tieback position, type the value that represents that position in this field. Leave this field blank if you have not set up tieback positions. See the “Defining Unique Job/Position Combinations” chapter for details.

Job Group

To limit the report to only those jobs associated with a particular job evaluation group, type the code value that represents that group. Press F4 to display a list of valid job evaluation group code values. You define code values for this field using code type **GRP**. Leave this field blank to print information for all jobs regardless of their affiliated job evaluation group.

Salary Range

To limit the report to only jobs associated with a particular salary range, type the value that represents that salary range. Press F4 to display a list of valid salary ranges. To print information for all jobs regardless of their affiliated salary range, leave this field blank.

Pay Type

To limit the report to only jobs associated with a particular pay type, type the value that represents that pay type in this field.

Valid values are:

- | | |
|----------|---------------------|
| H | Hourly pay type |
| S | Salaried pay type |
| N | Non-Exempt pay type |
-

To print information for all jobs regardless of their pay type, leave this field blank.

Exempt/NonEx

Use this field to limit the report to only exempt or only non-exempt jobs.

Valid values are:

- 0** Display only non-exempt jobs
- 1** Display only exempt jobs

To print information for all jobs regardless of their exempt/non-exempt status, leave this field blank.

- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu:

Building submission request . . .

The system uses batch processing to generate the Job Code Controls report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.

Copying Job Management Files to Another Employer

You use the *Copy Job Management Files* function to copy the job-related controls listed below from one employer to another:

- 1 Salary Ranges
- 2 Job Evaluation Factors
- 3 Job Controls

This function does not copy Hay job evaluation information to the new employer.

This function does not copy job evaluation group names to the new employer; however, it copies job evaluation factors based on the groups defined in the old employer. In order for you to use the copied factors in the new company, you must set up job evaluation group code values in the new employer that match the code values in the old employer. Use code type **GRP** to define the job evaluation group names in the new employer or use the *Copy Employer Codes* function to copy the code values for this code type from the old employer to the new employer.

The *Copy Job Management Files* function is a “copy and replace” option. Before the system copies the job-related controls to the new employer, it erases all existing salary ranges, job evaluation factors and job information already defined for the new employer. Therefore, if you are setting up a new company and want to use this function to accelerate setting up controls, ensure that you use it before you manually enter salary ranges, job evaluation groups or job controls in the new employer. You can make adjustments to the copied controls in the new employer after you use the *Copy Job Management Files* function.

Follow these steps to copy job-related information from one employer to another employer:

- 1 From the Infinium HR main menu select *System Operations*.
 - 2 Select *Supervisor's Functions*.
 - 3 Select *Miscellaneous Operations*.
 - 4 Select *Copy Job Management Files* [CJ]. Press Enter. The system displays the screen shown in Figure 10-9.
-

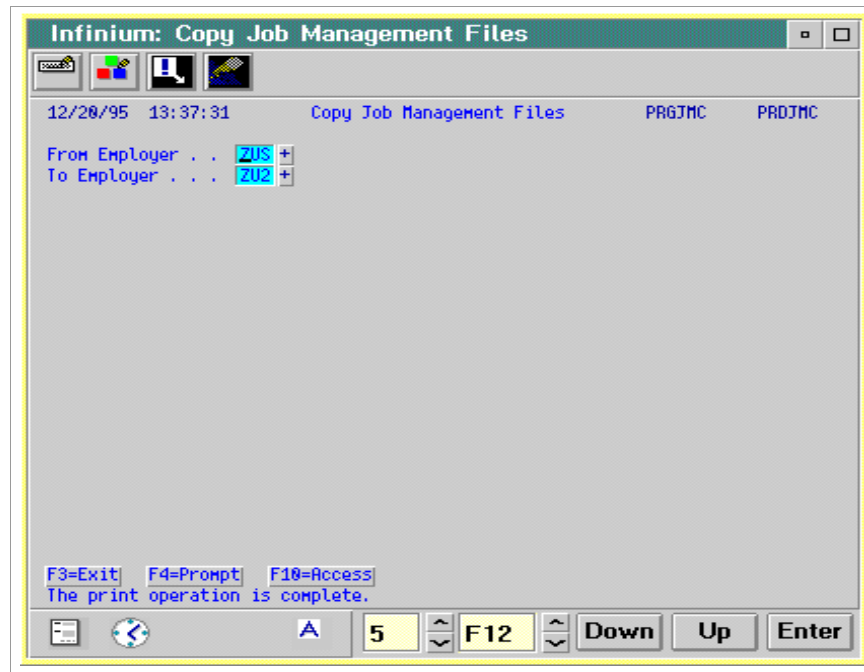


Figure 10-9: Copy Job Management Files screen

- 5 Use the following information to fill in the fields on this screen:

From Employer

Type the value that represents the employer from which you want to copy job-related information. Press F4 to display a list of valid employers.

To Employer

Type the value that represents the employer to which you want to copy job-related information. Press F4 to display a list of valid employers.

- 6 Press Enter. The system generates the following message at the bottom of the screen while it instantly copies the controls listed above to the new employer:

Copy function executing. Please wait.

You can enter another employer to which you want to copy job management files or press F3 to exit from this screen. The system returns you to the Infinium HR main menu.

Continuing to the Next step

After you set up job controls, you set up position controls. Position controls are the last major control in Infinium HR that you must define in order to manually enter or convert employee information into the system prior to going live. See the following chapter for details on how to set up position controls.

Summary of Job Controls

In summary, you have become familiar with the following:

- How to use job controls to maintain employee information
 - How Infinium PY users utilize job controls
 - How to set up, change, and delete job controls
 - How to display and print job control information
 - How to copy Job Management Files to another employer
-

Chapter 11 Establishing Position Controls and Position Defaults

11

Position controls are records that identify where employees perform their jobs within an employer. You identify where positions are located in your organization by associating each position with one or more levels; levels represent your employer's organization structure. Collectively, position controls depict your employer's organization chart.

You also use position controls to default key information into employee records, track authorized headcount and enter budget information. Position controls are the most critical controls you establish on Infinium HR because they link employees to key control files that you establish on Infinium HR. You use Infinium HR to set up and maintain position controls; you cannot access position controls using Infinium PY.

You must establish position controls to use the following functions:

- *Enter New Hire*
- *Enter Personnel Actions* (Transfer, Promotion, Demotion, and Rehire transactions)
- *Salary Planning*
- *Salary Budgeting*
- *FTE Operations*
- *Update Add'l Employee Positions* in Infinium PY

Use position defaults to associate additional payroll-related information, such as localities, with positions. The additional information is used as default information when you use the *Enter New Hire* function and the *Enter Personnel Actions* function for hire (HI), rehire (RH), demotion (DM), promotion (PR) or transfer (TR) transactions. The following information is included:

- Current state
-

- Current city
- Current school district
- Miscellaneous locality
- Home state
- Home city
- Home school district
- Home miscellaneous locality
- SUTA state
- Default value for the *Prt ID on Check* field
- Default value for the *Prt Rates on Chk* field

The chapter consists of the following topics:

| Topic | Page |
|--|-------|
| Overview of Position Controls | 11-3 |
| Setting up and Maintaining Position Controls | 11-10 |
| Copying Positions | 11-43 |
| Using the <i>Mass Update Position Corrections</i> Function | 11-47 |
| Mass Changing Levels on Position Controls | 11-52 |
| Summary of Position Controls | 11-57 |
| Creating and Updating Position Defaults | 11-58 |

Overview of Position Controls

Objectives

After completing this chapter, you should be familiar with:

- How to use position controls
- The difference between jobs and positions
- How to set up a position control
- How to copy position controls
- How to change position controls
- How to delete position controls
- How to deactivate and reactivate a position
- How to use the *Mass Update Position Corrections* function
- How to use the *Mass Update Position Levels* function

Understanding Position Controls

You use position controls to set up and maintain basic employee information. You assign each employee to a position when he or she is hired and use the *Enter Personnel Actions* function to update his or her position assignment over time. Information from the position and job controls defaults into the employee's records including his or her assigned levels, job, and salary range.

Position controls identify where employees perform their jobs within an employer. You associate one or more levels and a job code with each position control. You can also associate several other optional attributes with each position including values that represent physical work location, union, workers' compensation group, benefit group and payroll authorization group.

For each position, you establish an authorized headcount, authorized number of total hours or authorized number of FTE units. The system automatically tracks the number of employees, hours and FTE units assigned to each position. It generates warning messages when you use the *Enter New Hire*

and *Enter Personnel Actions* functions if the number of employees, hours or FTE units assigned to a position exceed the authorized values.

You can display and print position information in several formats by using the following functions:

- *Display and List Organization Structure*
- *Display and List Open Positions*
- *Display and List Current Positions*
- *Display Workforce Levels*
- *List Positions with Salaries*

See the “Displaying Position Information” and “Printing Position Information” chapters in this guide for further information.

Comparing Positions and Jobs

Jobs identify the type of work performed in your organization. They can be generic, such as clerk, mechanic or supervisor, or somewhat more specific, such as accounting manager, executive secretary or senior electrician. Regardless of whether you define jobs broadly or narrowly, they apply to work performed throughout your entire organization.

In contrast to jobs, positions are more specific and identify precisely where work is performed in your organization. You must establish at least one position for each job because you cannot directly assign employees to a job; you must assign them to a position, which is associated with a job. You can associate an unlimited number of positions with each job.

For example, if you have three hundred restaurant locations you can set up one food server job in your organization and associate three hundred positions with it. You can expedite your set up time by copying information from one position control to another within an employer.

You use level controls to identify where each position is located in your organization. Therefore, when you define your organization’s level structure, you also predetermine whether your positions will locate jobs functionally or geographically or reflect a combination of both.

You must associate at least a level 1 location with each position; you can associate additional levels, such as level 2, level 3 and level 4, with a position as necessary. Since levels represent a hierarchical structure for your employer, when you select a level 1 location for a position, you can only choose level 2 locations that are associated with that particular level 1.

Similarly, when you select a level 3 location for a position, it must be associated with the level 2 location you have already chosen; if you assign a level 4 location to a position, it must be associated with the level 3 location you have already selected.

A particular position cannot be associated with more than one level 1, one level 2, one level 3 and one level 4 location. Therefore, if you have many different level locations where a particular job is performed, you must set up a position for each level combination. The following examples illustrate how to set up positions using geographical and functional level structures.

Setting up Positions in Different Physical Work Locations

The first example uses a level structure that identifies different physical work locations. Your employer has ten different warehouse locations, one in each region; each location employs forklift drivers. You define a level 1 record for each region; within each region, you define a level 2 record to represent each warehouse location. Next, you set up a forklift operator job for your employer. You then set up ten different forklift operator positions, one for each warehouse within each region. You associate a different level 1 and 2 location with each position control. You can assign more than one employee to each forklift operator position.

Setting up Positions in Different Functional Locations

The second example uses a level structure that identifies different functional groups within one physical work location. Your employer has accounting, payroll and operations departments in its headquarters location; each department employs clerks. You define a level 1 record to represent the headquarters location. You define a level 2 record for each department. Next, you set up a clerk job for your employer. You then set up accounting clerk, payroll clerk and operations clerk positions; each is associated with a different department within the headquarters location. You assign multiple employees to each position.

Using Positions to Maintain Employee Information

When you type 1 in the *Positions Used?* field on the employer control, the system defaults information from the position control into the records of employees assigned to the position. When you use positions to maintain employee information, you ensure that employee data is always accurate, current, and consistent.

You cannot manually update about half of the position-related fields in employee records. The table that follows identifies which employee fields you can manually maintain and which the system automatically maintains based on each employee's position assignment. To change position-related information in fields that you cannot manually update, you must change the employee's assigned position using the *Enter Personnel Actions* function.

When you use position controls, the system defaults information from the position control into fields in the employee basic data, personnel data, and payroll data records. These fields are listed in the following table. The table indicates which fields you are required to fill in on the position control, which fields are optional and which employee fields can be maintained manually as well as automatically. Fields that are related to each other are grouped together in the same cell on the table.

| Field on the Position Control Record | Are you required to enter this information on the position control? | Can you manually update this field in employee records? |
|---|--|--|
| <i>Position</i> | Yes | No |
| <i>Position Title</i> | No | Yes |
| <i>Level 1</i> | Yes | No |
| <i>Level 2</i> | No | No |
| <i>Level 3</i> | No | No |
| <i>Level 4</i> | No | No |
| <i>Job Code</i> | Yes | No |
| <i>Location Code</i> | Yes | No |
| <i>Union Code</i> | No | No |
| <i>Shift Code</i> | No | Yes |
| <i>Season Code</i> | No | Yes |
| <i>Labor Category</i> | No | Yes |
| <i>Workers Comp Code</i> | No | Yes |
| <i>Benefit Group</i> | No | Yes |
| <i>PY Auth Group</i> | No | Yes |
| <i>Training Group</i> | No | Yes |

When you hire a new employee, you assign him or her to a position. The system uses information from the employee's hiring position to fill in the fields in employee records listed above. When you move the employee to a new position using the promotion, demotion, transfer or rehire transactions in the

Enter *Personnel Actions* function, the system updates the employee's position-related fields with information the employee's new position.

See the *Infinium Human Resources Guide to Processing* for detailed information on hiring employees and maintaining employee information.

Understanding Position Budgeting

You must enter information into two screens when you set up a new position control record. The system first presents the Update Organization screen on which you enter the position's title, the levels and job associated with the position and other key information.

The second screen displayed by the system varies depending on whether you want to track budgeting information for the position based on the number of assigned employees, FTE units or pay period hours. The value you enter in the *Budget Type* field on the Update Organization screen determines which screen the system displays after you complete the Update Organization screen.

The following table illustrates the relationship between the value you enter in the position's *Budget Type* field and the budgeting screen the system displays:

| Value in the <i>Budget Type</i> field | Name of Screen That Follows the Update Organization Screen |
|---------------------------------------|--|
| 0 | Update Workforce Levels |
| 1 | Update Authorized/Budgeted FTEs |
| 2 | Update Authorized/Budgeted Hours |

Although each screen is similar, two of the fields on it vary from one screen to the next. Each screen is discussed in separate topics in this chapter.

You use the screens listed above to create a budget or staffing history for each position in your organization. You must set up at least one budget period for each position; over time you can define an unlimited number of budget periods to track the position's staffing and budget level history. Each budget period is displayed as a separate entry in the sub-file at the bottom of the screen.

For example, you set up a position using budget type 0, indicating that you budget by employee headcount. You establish the position's initial budget period with a beginning date of 1-1-94 and no ending date. You authorize a headcount of 6 employees for this position. Due to changes in business conditions in 1996, you want to increase the staffing level for this position to

8. You can modify the headcount associated with the initial budget period or you can close out the initial budget period by retrieving it from the sub-file and entering an ending date of 12-31-95.

You can then define a new budget period with a starting date of 1-1-96 and indicate the new staffing level. When you define a series of budget periods, you can track the position's staffing and budget levels over time.

All entries in the sub-file must be sequential. In other words, they must be in chronological order. The ending date of the first budget period must precede the starting date of the next budget period and so on.

Setting Up Position Controls

For maximum efficiency when you are building controls, you should set up position controls from the top down. In other words, it is preferable to first establish the highest position in an organization, such as the CEO or president. After establishing the highest position, set up positions representing subsequent tiers of management, such as vice presidents, directors, managers, supervisors and so on. After you set up all management positions, enter the non-managerial positions in your organization. When you build positions from the top down, you can associate each position with its supervisory position.

The system uses both the *Reports to ER* and *Reports to Posit* fields on each position control record to group employees by their reporting position for printing or displaying position information. For example, in the Human Resources Department of your organization, the compensation and benefits supervisor, recruiting supervisor and labor relations supervisor positions all report to the human resources director. Each individual is in the ABC corporation. When you set up these supervisory positions, you specify the human resources director position as the position to which they report and the ABC corporation as the employer to which each member of the group reports. Later, you can use the *Reports to ER* and *Reports to Posit* fields on various selection screens to easily display and report on the employees who directly report to the human resources director or the specified employer.

Although the *Reports to ER* and *Reports to Posit* fields are useful for reporting, particularly when you want to generate an organization chart, they are not a required fields on the position control. If, however, you decide to use these fields, it is efficient and convenient to build position controls from the top down and associate each position with its supervisory position and employer.

Developing Position Codes

Since you typically set up many positions in each organization, it is wise to spend some time designing meaningful and logical position codes before you enter position controls into Infinium HR. You can use any combination of up to six letters or numbers for your position codes. You may want to designate certain characters in your coding scheme to represent key information such as the position's cost center or department, exempt or non-exempt status, EEO category or other meaningful factors that help Infinium HR users identify and interpret position codes.

If you plan to generate Infinium QY reports using position codes, it is especially helpful to define the codes consistently, particularly the code length. You simplify selecting and sorting on position codes when all of them are the same length. In addition, if you set up codes of different lengths, for example you define some 4-character position codes, some 5-character codes and some 6-character codes, the Positions Display screen groups the positions with the shortest position codes together, then groups the next longer position codes together and so on. Unless all Infinium HR users understand your logic in assigning position codes, they can have difficulty locating and identifying the correct positions for hiring and employee maintenance activities.

Setting up and Maintaining Position Controls

Follow these steps to set up a position control:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Position Data* [UO]. Press Enter. The system displays the Organization Update prompt screen.
- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for whom you are setting up a position control. Press F4 to display a list of valid employers.

Position Code

Type any combination of up to six letters or numbers to represent the position control. Press F4 to display a list of previously defined position codes.

Leave this field blank if you want to copy information from an existing position to create a new position. See the topic in this “Copying Position Controls” chapter in this guide for detailed instructions.

If you type a position code that is less than six characters in length, you must press FieldExit to right-justify the position code before you can advance to the next screen.

- 5 Press Enter. The system displays the Update Organization screen shown in Figure 11-1.
-

```

1/29/08 09:20:57          Update Organization          PEGMOG  PEDMOG
                                                    Page 1 of 2
Employer . . . : ZUS  SAMPLE US COMPANY
Position . . . : 100140 ACCOUNTING MANAGER
Active/Inactive?: 0 (0=Act./1=Inact) Training Group . MGMT +
Organiz. Level .      Assigned Employee MULTIPLE
Reports to ER . . ZUS + Entry Level? 0 (0=No 1=Yes)
Reports to Posit. 100120 +
Area . . . 200 + Division . . . ADMIN +
Department . . . ACCT + Cost Centr . . . 103 +

Job Code . . . . 140 + Location Code . . HQ +
Union Code . . .      +
Shift Code. . . .      + Labor Category .      +
Position Group 1.      + Workers Comp Code 5810 +
Position Group 2.      + Benefit Group . . *BENSAL-B +
Requisition Date. 1011990 PY Auth Group . . CA-SALARY +
FTE Hours . . . . .00 Type of Position. M
Current # Emps. . 13 Budget Type . . . 1 (0->2)
Current FTE Units .00 Current Act Hours 973.2
Lvl Trans Reason.      +
Statistical Acct.      +
F3=Exit F4=Prompt F6=Pos. Defaults F8=Update Force F24=More keys
    
```

Figure 11-1: Update Organization screen

You can do the following on this screen:

- Create or update position defaults for this position by pressing F6
- Update the workforce by pressing F8
- Update position information by pressing F16
- Delete the position by pressing F22

6 Use the following information to fill in the fields on this screen.

Updating Information in Fields Maintained by Infinium HR

Infinium HR automatically maintains the information in the following fields on this screen when you assign employees to an established position:

- *Assigned Employee*
- *Current # Emps*
- *Current FTE Units*
- *Current Act Hours*

If you need to correct any inaccuracies, you can manually update the information in these fields or use the *Mass Update Position Corrections* function. It is especially helpful to use the *Mass Update Position Corrections* function to update these fields for all positions prior to going live on Infinium

HR. See the “Using the *Mass Update Position Corrections* Function” topic for further information.

Position

The system displays the position code that you entered on the previous screen adjacent to the *Position* field. On the line next to the position code, type a title of one or more words for the position that you are defining. This is a 30-character free-form field.

Note: When you press Enter on this screen, the system instantly updates the *Position Title* field in the basic data records of non-terminated employees assigned to this position. If you have overridden the *Position Title* field in the basic data record for one or more of the employees assigned to this position, the system replaces the employee’s special title with the default title from the position control. This update occurs regardless of whether you actually change any fields on the screen.

Training Group

If you entered 1 in the *TR2000 Installed?* field on the entity control, the system shows this field. If you have defined training groups in Infinium TR, type the code value that identifies the training group for employees assigned to this position. You define code values for this field using code type **TGP**. Press F4 to display a list of valid training group code values.

You use Infinium TR to define courses and associate them with one or more training groups. When you complete the *Enter New Hire* and *Enter Personnel Action* functions, the system defaults the training group code value into the basic data records of employees assigned to this position; the system automatically establishes employee training request records in Infinium TR for the courses associated with the group.

Leave this field blank if you have installed Infinium TR but have not yet defined training groups.

Active/Inactive?

Specify whether this position is active.

| | |
|--------------|----------|
| blank | Active |
| 0 | Active |
| 1 | Inactive |

The system uses the information in this field combined with the information in the *Include Inactive?* field on the Position Display screen to display all positions, active and inactive or only active positions on the Position Display

screen. Throughout the system, after you prompt on the *Position* field, the system displays the Position Display screen listing positions.

Organiz. Level

Type a numeric value, up to 99, that represents the hierarchical rank of this position in your organization. The system uses this field when you display and print information including the organization chart.

For example, you can establish a ranking system where the CEO position is organizational level 01, vice president positions are 05, director positions are 10, manager positions are 15, supervisor positions are 20 and so on.

See the “Displaying Position Information” and “Printing Position Information” parts for further information.

Assigned Employee

The system does not display this field when you are first defining a new position. You only see this field after you initially set up a position, save it, and access it again. You use this field to verify if one or more employees are assigned to a position.

As you use the *Enter New Hire* and *Enter Personnel Actions* functions to assign employees to this position, the system automatically updates the information in this field.

If you type **S** in the *Type of Position* field on this screen to designate a single position, the system displays the employee number of the assigned active employee in the *Assigned Employee* field. If you type **M** in the *Type of Position* field to designate a multiple position, the system displays **MULTIPLE** in this field.

Reports to ER

Specify the value of the employer for the position to whom this position reports. If you specify a reports-to position, you must specify a reports-to employer and vice versa.

For example, if you create position VPRES in employer ABC, and employees in position VPRES report to position PRES in employer XYZ, type **XYZ** in the *Reports to ER* field.

Entry Level?

Use this field to indicate if this is an entry level position for assigned employees. The field is for informational purposes only. Valid values are:

- 0** This is not an entry level position.
- 1** This is an entry level position.

Reports to Posit

Specify the value that identifies the position to which this position reports. The system uses this value when you display and print information to group employees by the position to which they report. If you specify a reports-to employer, you must specify a reports-to position and vice versa.

Level Fields

The system uses the level descriptions that you entered on the Employer Control for the specified employer as field names in this section of the screen. Since each employer can have different level descriptions, the levels are referred to generically in this guide as level 1, level 2, level 3 and level 4. At a minimum, you must enter a level 1 description for each employer.

Note: Infinium PY users can associate general ledger numbers with level controls. If they do so, the system uses the levels assigned to each employee to charge labor and deduction expenses during payroll cycle processing. Since the system uses the position control to default level codes into employee basic data records, you should coordinate with Infinium PY users when you assign levels to positions.

Level 1

Type the code that represents the level 1 location for this position. The system automatically assigns employees in this position to the level 1 location that you specify here. Press F4 to display a list of valid level 1 choices. You must specify a level 1 code for each position.

Level 2

If applicable, type the code that represents the level 2 location for this position. The system automatically assigns employees in this position to the level 2 location that you specify here. Press F4 to display a list of valid level 2 choices within the specified level 1.

Level 3

If applicable, type the code that represents the level 3 location for this position. The system automatically assigns employees in this position to the level 3 location that you specify here. Press F4 to display a list of valid level 3 choices within the specified level 2.

Level 4

If applicable, type the code that represents the level 4 location for this position. The system automatically assigns employees in this position to the level 4 location that you specify here. Press F4 to display a list of valid level 4 codes within the specified level 3.

Job Code

Type the code that identifies the job with which this position is associated. Press F4 to display a list of valid job codes.

Location Code

Type the code value that identifies the physical work location of this position. The system can use this code value to sort employees when you generate the EEO-1 report. See the *Infinium Human Resources-Guide to Management Functions* for details.

You define code values for this field using code type **LOC**. Press F4 to display a list of valid code values.

Union Code

Type the code value that represents the union with which this position is associated. You define code values for this field using code type **UNI**. Press F4 to display a list of valid union code values. Leave this field blank if the position is not associated with a union.

Shift Code

Type the code value that represents the shift with which this position is associated. You define values for this field using code type **SFT**; you establish shift premium rates and incomes in Infinium PY. Press F4 to display a list of valid shift code values. Leave this field blank if the position is not associated with a particular shift.

Employees assigned to this position are assigned to the shift code value that you enter here as a default; during Infinium PY cycle processing, the system can automatically generate shift premiums based on this code value. Infinium PY users can temporarily change this value as necessary during cycle processing.

Position Group 1

You can use this field to group positions and employees together for reporting purposes. For example, you want to group all clerical positions and employees together, all supervisory positions and employees together and so

on. Infinium HR uses this code for several reports that you can generate using the *FTE Operations* function.

You can also use this field when you define your own reports using Infinium QY. You define code values for this field using code type **PG1**. Press F4 to display a list of valid code values.

Labor Category

You can use this field to group positions and employees together for reporting purposes. For example, you want to group all production positions and employees together, all maintenance positions and employees together and so on.

You can use this field when you define your own reports using Infinium QY. You define code values for this field using code type **LAB**. Press F4 to display a list of valid code values.

Position Group 2

You can use this field to group positions and employees together for reporting purposes. For example, you want to group all technical positions and employees together, all non-technical positions and employees together and so on. Infinium HR uses this code for several reports you can generate using the *FTE Operations* function.

You can also use this field when you define your own reports using Infinium QY. You define code values for this field using code type **PG2**. Press F4 to display a list of valid code values.

Workers Comp Code

Type the code value that represents the workers compensation category with which this position is associated. You can use this field to group employees together on the Worker Compensation Worksheets report in Infinium PY. You define code values for this field using code type **WCC**. Press F4 to display a list of valid code values.

Requisition Date

Type the date this position was originally established for the specified employer. If you are setting up positions for the first time as part of your implementation of Infinium HR, the system defaults this date into the *From Date* field on the next screen shown in Figure 11-3. The system uses the *From Date* field for tracking authorized staffing levels. When you set up positions during your start up of Infinium HR, ensure that the date you type here precedes the hire date of employees that will be assigned to this position through the conversion program.

For example, you plan to set up a financial analyst position; you determine that the employees you will assign to this position using the conversion program have hire dates of May 1, 1994, and February 15, 1993. To correctly track employee headcount during your initial implementation of the system, you must specify a requisition date that precedes February 15, 1993.

Benefit Group

Type the value that identifies the group of benefits associated with this position. When you assign an employee to this position, you can enroll him or her in the benefit plans associated with this benefit group. You use the *Benefits Administration* function in Infinium HR to define benefit groups and associate benefit plans with benefit groups. See the *Infinium HR Guide to Setup and Processing for Benefits Administration* for detailed information. Press F4 to display a list of valid benefit groups.

During the *Enter New Hire* function, the system defaults the value you enter in the *Benefit Group* field on the position control into the new employee's *Benefit Group* field. Depending on your security restrictions, the system can also display a list of benefit plans associated with the employee's benefit group on the last screen of the *Enter New Hire* function.

After you hire an employee you maintain his or her benefit group assignment through the *Update Employee Enrollments* function within the *Benefits Administration* option.

You may want to leave this field blank if most employees assigned to this position do not share the same benefit group. If the same benefit group is appropriate for all but a few employees assigned to this position, you can override the default benefit group value for those employees during the new hire process.

PY Auth Group

Type the value that identifies the group of incomes and deductions associated with this position. You define incomes and deductions and associate them with payroll authorization groups using Infinium PY.

During the *Enter New Hire* function, the system defaults the value you enter in the *PY Auth Group* field on the position control into the new employee's *PY Auth Group* field. It also assigns the employee to the incomes and deductions associated with his or her authorization group. The employee must have income and deduction authorizations to be paid through Infinium PY. After you hire an employee, you change his or her assigned authorization group by using the *Update Payroll Data (USA)* or *Update Payroll Data (CAN)* functions. See the *Infinium Payroll Guide to Controls* for details.

You may want to leave this field blank if most employees assigned to this position do not share the same authorization group. If the same authorization group is appropriate for all but a few employees assigned to this position, you can override the default authorization group value for those employees during the new hire process.

FTE Hours

If you budget this position by the number of full time equivalent units rather than assigned headcount or hours, type the number of hours that represent a full time per pay period workload for this position. FTE stands for full time equivalency.

For example, if you are setting up a full time position whose incumbents are paid on a weekly basis, you might type **40** in this field. If you are setting up a part time position whose incumbents are paid on weekly basis, you might type **20** in this field.

The system uses the information in this field to calculate the value in the *Current FTE Units* field described below. As you assign employees to this position, the system totals the employees' regular hours and then divides the total by the value in the *FTE Hours* field to determine the number of full time equivalent units assigned to this position. For example, you type **80** in this field when you set up the position control. You hire an employee into this position whose standard hours per pay period are 40; the system automatically enters **.5** into the *FTE Units* field. If you assign three employees who each work 40 hours per pay period, the system enters **1.5** into this field.

Accept the default value of **.00** in this field if you do not use FTE units to budget for this position.

Type of Position

Use this field to indicate if you will assign one or more than one active employee to this position concurrently. For example, you define the CEO position as a single position because at any one point in time there is only one active assigned employee. You define the warehouse packer position as a multiple position because at any one point in time there is more than one active assigned employee.

Valid values are:

- S** Single position: only one active employee is assigned to this position at any given time.
 - M** Multiple position: more than one active employee is assigned to this position at any given time.
-

Note: Active employees are those employees who are not terminated; the system retains the records of both active and terminated employees unless you use the *Purge Terminated Employees* function to remove the records of terminated employees from your Infinium HR database.

If you type **S** in this field to designate a single position, the system generates a warning message if you try to assign more than one active employee to the position at the same time. You can override this message if necessary.

The system also uses the value in this field to determine how to display information in the *Assigned Employee* field on the Update Organization screen for existing positions.

Current # Emps

After you set up this position the system displays the number of active employees currently assigned to this position in this field. The system maintains this field automatically as you assign employees to this position using the *Enter New Hire* and *Enter Personnel Actions* functions.

Budget Type

Use this field to indicate how you will budget for this position. The system uses this field to track the number of employees, FTE units or hours assigned to this position. The system generates warning messages if you exceed the budgeted value when you use the Enter New Hire or Enter Personnel Actions functions to assign employees to this position. You can override warning messages by using the function key specified in the warning message.

Valid values are:

- 0** Budget by the number of assigned active employees.
- 1** Budget by the number full time equivalent units.
- 2** Budget by the number of regular pay period hours of assigned employees.

If you type **0** in this field, you can use the *Close Salary Budget History* function in Infinium HR to extract monetary information from Infinium PY. The system compares wages paid to employees in payroll cycles to budgeted values on the Update Workforce Levels screen.

If you type **2** in this field, you can use the *Close to FTE History* function in Infinium HR to extract hours and monetary information from Infinium PY. The system compares hours worked and wages paid to employees in payroll cycles to budgeted values on the Update Authorized/Budgeted Hours screen.

You cannot use standard Infinium HR menu options to extract payroll hours or wages information if you type **1** in this field.

You can use different budgeting methods for different positions within the same employer.

The system uses the value you enter in this field to format the next screen. When you are setting up a new position, the system automatically displays a second screen after you press Enter to exit from the Update Organization screen. After you set up a new position, you can access the second screen by using a function key on the Update Organization screen or from the Infinium HR main menu.

Current FTE Units

After you set up a position whose budget type is **1**, the system displays the number of full time equivalent units for this position in this field. It calculates the entry for this field by dividing the value in the *Current Act Hours* field by the value in the *FTE Hours* field.

For example, if the value in the *Current Act Hours* field is **160** and the value in the *FTE Hours* field is **40**, the system fills in a value of **4.00** in the *Current FTE Units* field. The system updates this field as you use the *Enter New Hire* and *Enter Personnel Action* functions to assign employees to this position.

Current Act Hours

After you set up a position, the system uses this field to display the total number of regular hours associated with employees assigned to this position. It calculates the value for this field by summing the value in the *Regular Hours* field in the Basic Data records of employees assigned to this position. The *Regular Hours* field reflects the number of hours per pay period an employee is expected to work; it does not reflect actual hours keyed into Infinium PY each pay period.

For example, you assign two employees to this position. The value in each employee's *Regular Hours* field is **40**; therefore, the system displays **80** in this field. The system updates this field as you use the *Enter New Hire* and *Enter Personnel Action* functions to assign employees to this position.

Lvl Trans Reason

Infinium HR creates a transfer (TR) personnel transaction record for each employee with a level or job change. The system uses the value you type in this field to update the *TR Reason* field on each transaction record associated with this position. The system does not retain the value you type in this field.

Specify the value that represents the reason for the employees transfer to a new level or job. Leave blank when setting up a new position control.

Use the *Update Employer Codes* function and code type **TRR** to set up level transfer reason values. Set up a blank value if you plan to leave the *Lvl Trans Reason* field blank to create transfer transactions in PE actions with a blank transfer reason.

Statistical Acct

If applicable, enter the statistical general ledger account number for this position. You can define statistical account numbers on Infinium PY to track the number of employees assigned to positions, jobs and/or levels. The system uses this number during the *Close Statistical Accounts* function on Infinium PY to count the number of assigned employees and pass the headcount information to your general ledger system. This is an optional function in Infinium PY. Check with Infinium PY users to verify whether they want to use this function and to confirm the correct account number for each position.

Leave this field blank if you do not use statistical accounts in Infinium PY.

If you use statistical accounts, press F4 to display a list of general ledger account numbers defined in Infinium PY. The system displays the Chart of Accounts screen. Payroll users define statistical accounts using account type **S** (statistical) or **B** (both statistical and monetary). Check the value in the **T** column on the right side of the Chart of Accounts screen to confirm the account type for each general ledger number. You can only enter a statistical account number in this field and you cannot enter a number whose account type is blank.

- 7 Press Enter. The system displays the second Update Organization screen similar to Figure 11-2.
-

```

1/29/08 09:26:02          Update Organization          PEGMOG  PEDMOG
                                                    Page 2 of 2
Employer . . . . : ZUS  SAMPLE US COMPANY
Position . . . . : 100140 ACCOUNTING MANAGER
Active/Inactive?: 0

NAICS Code. . . . _____ +
Occupational Code _____ _

Action Code . . . _____ +
Season Code . . . _____ +

Comments . . . . _____ COMMENT _____ FOR TESTING

F3=Exit F4=Prompt F10=QuikAccess F12=Previous F16=Update

```

Figure 11-2: Update Organization screen 2

- 8 Use the information below to complete the field on this screen.

NAICS Code

Specify the NAICS code (North American Industry Classification Code System) associated with this position control. This value is only used for Wyoming unemployment reporting.

The system uses the following hierarchy to retrieve the NAICS code for Wyoming unemployment reporting:

- a Position control
- b Level 4 control
- c Level 3 control
- d Level 2 control
- e Level 1 control
- f Employer control

Depending on the value you entered in the *Budget Type* field, the system displays one of the screens listed in the table below.

| Value in the <i>Budget Type</i> field | Name of Screen That Follows the Update Organization Screen |
|--|---|
| 0 | Update Workforce Levels |
| 1 | Update Authorized/Budgeted FTEs |
| 2 | Update Authorized/Budgeted Hours |

Although each screen is similar, two of the fields on it vary from one screen to the next. Each screen is discussed in separate sections below beginning with the Update Workforce Levels screen. Before each screen is discussed in detail, the following information pertains to all three of the screens.

Occupational Code

Type the occupational code associated with this position. For Alaska unemployment reporting, type the entire 6 digit code, not including the hyphens.

After you enter the occupational code, type the two-digit occupational code extension in the field next to *Occupational Code*. For example, the code for seafood processing workers is 51-3022.05. You would type **510322** in the *Occupational Code* field and then type the **05** in this field. This field is currently used only for Alaska unemployment reporting.

Action Code

Type the code value that identifies the reason why the position was established for this employer. For example, the Accounting Department is reorganized and as a result, several positions are combined into one position. When you set up the new position on Infinium HR, you can use this field to select a code that indicates that the position was created as a result of reorganization.

You define code values for this field using code type **PAC**. Press F4 to display valid code values for this field.

Season Code

Type the code value that identifies during which times of the year you assign employees to this position. For example, a retail employer hires extra employees during the year end holiday season; they define seasonal positions for these holiday employees. You define code values for this field using code type **SEA**. Press F4 to display a list of valid code values.

Comments

Use this field to record any miscellaneous information or commentary about this position. The field is for informational purposes only. It is a 30-character free-form field.

Understanding Sub-files

The three screens listed in the above table are divided into two parts. The top part of the screen contains fields into which you enter information. The bottom part of the screen contains a sub-file, which is a storage area where the system holds previously recorded information. The system can store an unlimited number of entries in the sub-file. You can retrieve information from the sub-file to view it or modify it or you can delete sub-file entries.

Entering Workforce Levels Information

The system presents the Update Workforce Levels screen after you complete the Update Organization screen for a new position if you entered **0** in the *Budget Type* field. Budget type **0** indicates that you are budgeting for the specified position by the number of assigned employees.

Follow these steps to display the Update Workforce Levels screen for a new position:

- 1 Complete the Update Organization screen, typing **0** in the *Budget Type* field.
- 2 Press Enter. The system displays the Update Workforce Level screen shown in Figure 11-3.

Figure 11-3: Update Workforce Levels screen

- Use the following information to fill in the fields on this screen:

From Date

You use this date to indicate the first date of the budget period for this position. When you are first establishing a new position, the system defaults the value from the *Requisition Date* field on the Update Organization screen into this field. This indicates the beginning of the earliest budget period for the new position. You can override this date if necessary.

When you assign an employee to this position using the *Enter New Hire* or *Enter Personnel Actions* functions, the system compares this date to the employee's effective date in the position. If the employee's effective date precedes the starting date of the first budget period, the system generates the following warning message:

Authorized workforce level exceeded.

For example, the starting date of the first budget period for a new position is January 1, 1996. If you use the *Enter New Hire* or *Enter Personnel Actions* function to assign an employee to this position before January 1, 1996, the system generates the warning message displayed above. If appropriate, you can override this warning message and assign an employee to the position regardless of whether his or her effective date precedes the from date of the first budget period.

To Date

Use this field to indicate the last date of a budget period for this position. You can leave this field blank if the budget period you are defining is open-ended and does not have an ending date.

If you want to add another budget period for this position at a later time, you must type a date in the *To Date* field to end the current budget period before you can set up a new budget period. The date in the *To Date* field must precede the date in the *From Date* field of the next budget period.

Auth Force Level

Type the number of active employees that can be assigned to this position at the same time during the specified budget period. The field name is an abbreviation of the words authorized workforce level. The largest number you can type in this field is 999999.99.

When you first establish a position, the system defaults 1 into this field if you typed **S** for Single in the *Type of Position* field on the Update Organization screen.

When you assign an employee to this position using the *Enter New Hire* or *Enter Personnel Actions* functions, the system automatically compares this value to the total number of active employees assigned to this position. If the total number of employees exceeds this number, the system generates the following warning message during the *Enter New Hire* or *Enter Personnel Actions* functions:

Authorized workforce level exceeded.

You can override this warning message and assign an employee to the position regardless of whether the total number of employees exceeds the authorized workforce level. You can update this field with a different authorized workforce level during a budget period if necessary due to changes in business conditions.

Budg Force Level

Type the number of active employees for which you budgeted during the specified budget period. The field name is an abbreviation of the words budgeted workforce level. The largest number you can type in this field is 999999.99.

When you are first establish a position, the system defaults 1 into this field if you typed **S** for Single in the *Type of Position* field on the Update Organization screen.

The value in the *Budg Force Level* field does not need to match the value in the *Auth Force Level* field. The *Budg Force Level* field tracks the headcount formally budgeted for this position at the beginning of a budget period while the *Auth Force Level* field tracks the headcount that is currently approved for the position.

You can leave this field blank if you do not track budgeted staffing levels; however, the system generates the warning message described below when you exit from this screen.

Auth Pay Pd Sal

Use this field to indicate the total pay period salary dollars authorized for this position. The field name is an abbreviation of the words authorized pay period salaries.

For example, you are defining the first budget period for an accounting clerk position. If you authorize five weekly paid employees to the position and plan to pay each employee an average of \$500 per week, type **2500** in this field.

For budget type **0** positions, the system uses this field in the *Salary Budget History* option to generate reports that compare authorized salary dollars for each position to actual wages extracted from Infinium PY for assigned employees. For budget type **2** positions, the system uses this field in the *FTE Operations* option to generate reports that compare authorized salary dollars for each position to actual wages paid to assigned employees extracted from Infinium PY.

Accept the default value of **.00** in this field if you do not want to set up authorized salary amounts for this position.

Budg Pay Pd Sal

Use this field to indicate the total pay period salary dollars budgeted for this position. The field name is an abbreviation of the words budgeted pay period salaries.

For example, you are defining the first budget period for an accounting clerk position. If you budget for four monthly paid employees in this position at an average expenditure of \$1000 per month per employee, type **4000** in this field.

For budget type **0** positions, the system uses this field in the *Salary Budget History* option to generate reports that compare budgeted salary dollars for each position to actual wages extracted from Infinium PY for assigned employees. For budget type **2** positions, the system uses this field in the *FTE Operations* option to generate reports that compare budgeted salary dollars

for each position to actual wages extracted from Infinium PY for assigned employees.

Accept the default value of **.00** in this field if you do not want to set up budgeted salary amounts for this position.

- 4 Press Enter. The system stores your budget information in the sub-file at the bottom of the screen.

If you did not enter a value in the *Budg Force Level* field, the system displays the following warning message:

Warning: Budget amount is 0. Use F21 to override.

Press F21. The system stores your budget information in the sub-file at the bottom of the screen.

- 5 Press F3. The system displays the Organization Update prompt screen. Press F3 to return to the Infinium HR main menu.

Entering FTE Information

The system presents the Update Authorized/Budgeted FTEs screen after you complete the Update Organization screen for a new position if you entered **1** in the *Budget Type* field. Budget type **1** indicates that you are budgeting for the specified position by the number of full time equivalent units.

Follow these steps to display the Update Authorized/Budget FTEs screen for a new position:

- 1 Complete the Update Organization screen, typing **1** in the *Budget Type* field.
 - 2 Press Enter. The system displays the Update Authorized/Budget FTEs screen shown in Figure 11-4.
-

Figure 11-4: Update Authorized/Budgeted FTEs screen

3 Use the information below to fill in the fields on this screen.

The following section describes only the fields that differ from those found on the Update Workforce Levels screen discussed above.

Auth FTE Units

Type the number of full time equivalency units that can be assigned to this position at the same time during the specified budget period. The largest number you can type in this field is 999999.99.

When you are first establishing a new position, the system defaults 1 into this field if you typed **S** for single in the *Type of Position* field on the Update Organization screen.

When you assign an employee to this position using the *Enter New Hire* or *Enter Personnel Actions* functions, the system automatically compares this value to the total number of full time equivalent units assigned to this position. It computes the FTE units attributable to the new employee by dividing the value in his or her *Regular Hours* field by the value in the *FTE Hours* field on the Update Organization screen, then adds the result to the value in the *Current FTE Units* field on the Update Organization screen.

If the total number of units exceeds the value in the *Auth FTE Units* field, the system generates the following warning message during the *Enter New Hire* or *Enter Personnel Actions* functions:

Authorized workforce level exceeded.

You can override this warning message and assign an employee to the position regardless of whether the total FTE units exceed the authorized level. You can update this field with a different authorized FTE Units value during a budget period if necessary due to changes in business conditions.

Budg FTE Units

Type the number of FTE units for which you budgeted during the specified budget period. The largest number you can type in this field is 999999.99.

When you are first establishing a new position, the system defaults **1.00** into this field if you typed **S** for single in the *Type of Position* field on the Update Organization screen.

The value in the *Budg FTE Units* field does not need to match the value in the *Auth FTE Units* field. The system tracks the FTE units formally budgeted for this position at the beginning of a budget period in the *Budg FTE Units* field while the *Auth FTE Units* field tracks the FTE units that are currently approved for the position.

You can leave this field blank if you do not track budgeted staffing levels, however the system generates the warning message described in below when you exit from this screen.

- 4 Press Enter. The system stores your budget information in the sub-file at the bottom of the screen.

If you did not enter a value in the Budg FTE Units field, the system displays the following warning message:

Warning: Budget amount is 0. Use F21 to override.

Press F21. The system stores your budget information in the sub-file at the bottom of the screen.

- 5 Press F3. The system displays the Organization Update prompt screen. Press F3 to return to the Infinium HR main menu.

Entering Budgeted Hours Information

The system presents the Update Authorized/Budgeted Hours screen after you complete the Update Organization screen for a new position if you entered **2** in the *Budget Type* field. Budget type **2** indicates that you are

budgeting for the specified position based on the number of hours worked each pay period by employees assigned to the position.

Follow these steps to display the Update Authorized/Budget Hours screen for a new position:

- 1 Complete the Update Organization screen, typing **2** in the *Budget Type* field.
- 2 Press Enter. The system displays the Update Authorized/Budget Hours screen shown in Figure 11-5.

Figure 11-5: Update Authorized/Budgeted Hours screen

- 3 Use the following information to fill in the fields on this screen.

The following section describes only the fields that differ from those found on the Update Workforce Levels screen discussed above.

Auth Pay Hours

Type the total number of hours allowed per pay period for all employees that are assigned to this position. The field name is an abbreviation of the words Authorized Pay Period Hours. The largest number you can type in this field is 999999.99.

For example, if you plan to assign four employees to this position and each is expected to work 40 hours per weekly pay period, type **160** in this field.

The system uses this field in the *FTE Operations* function to generate reports that compare authorized hours for each position to actual hours extracted from Infinium PY for assigned employees. When you set up FTE Controls, you use income reporting groups defined on Infinium PY to specify the incomes the system should extract from payroll. You can extract hours and dollars associated with incomes defined for regular pay, sick pay, vacation pay, holiday pay, overtime pay and so on. See the *Infinium Human Resources Guide to Management Functions* for detailed information on how to set up FTE Processing.

When you first establish a position, the system defaults **1.00** into this field if you typed **S** for single in the *Type of Position* field on the Update Organization screen.

When you assign an employee to this position using the *Enter New Hire* or *Enter Personnel Actions* functions, the system automatically compares this value to the total number of regular hours assigned to this position. It adds the regular hours associated with the new employee to the value in the *Current Act Hours* field on the Update Organization screen. If the total number of hours exceeds the value in the *Auth Pay Hours* field, the system generates the following warning message during the *Enter New Hire* or *Enter Personnel Actions* functions:

Authorized workforce level exceeded.

You can override this warning message and assign an employee to the position regardless of whether the total regular hours exceeds the authorized level. You can update this field with a different authorized hours value during a budget period if necessary due to changes in business conditions.

Budg Pay Hours

Type the number of hours per pay period you projected for all employees assigned to the position. The field name is an abbreviation of the words budgeted pay period hours. The largest number you can type in this field is 999999.99.

For example, if in your budget you plan to assign five employees to this position and each is expected to work 40 hours per weekly pay period, type **200** in this field.

When you are first establishing a new position, the system defaults **1.00** into this field if you typed **S** for single in the *Type of Position* field on the Update Organization screen.

The value in the *Budg Pay Hours* field does not need to match the value in the *Auth Pay Hours* field. The *Budg Pay Hours* field tracks the hours formally

budgeted for this position at the beginning of a budget period while the *Auth Pay Hours* field tracks the hours that are currently approved for the position.

You can leave this field blank if you do not track budgeted staffing levels, however the system generates the warning message described below when you exit from this screen.

- 4 Press Enter. The system stores the information in the sub-file in the lower portion of the screen.

If you did not enter a value in the *Budg Pay Hours* field, the system generates the following warning message:

Warning: Budgeted amount is 0. Use F21 to override.

Press F21 to disregard the warning message and store your entry in the sub-file.

- 5 Press F3 to exit from this screen. The system displays the Organization Update prompt screen. Press F3 to return to the Infinium HR main menu.

Changing a Position Control

You can make changes to any of the fields on the position control except the position code. If you want to change the position code, you must set up a new position control. Follow the instructions in the “Setting up Position Controls” section to set up a new position control. You can use the *Enter Personnel Actions* function to assign employees to the new position.

When you make changes to certain fields on the position control, the system automatically updates the corresponding fields in the records of employees assigned to that job if you entered 1 in the *Positions Used?* field on the employer control. Generally, the system updates fields that you cannot manually update in the employee basic data record. The following table describes the fields in the employee basic data and personnel data records that the system updates when you make changes on the position control record.

You can use the *Mass Update Employee Positions* function to refresh fields in the employee Basic Data record that default from the position control. See the chapter entitled “Changing Employee Data” in the *Infinium Human Resources Guide to Processing* for details.

| Field on the Position Control | Does the System Update This Field in the Employee Basic Data Record If You Change It on the Position Control? |
|-------------------------------|---|
| <i>Position Title</i> | Yes |
| <i>Training Group</i> | No |
| <i>Level 1, 2, 3, 4</i> | Yes |
| <i>Job Code</i> | Yes |
| <i>Location Code</i> | Yes |
| <i>Union Code</i> | Yes |
| <i>Shift Code</i> | No |
| <i>Labor Category</i> | Yes |
| <i>Workers Comp Code</i> | Yes |
| <i>Benefit Group</i> | Yes |
| <i>Season Code*</i> | No |

* The *Season Code* field is stored in the employee personnel data record.

When you change the benefit group on the position control, you may need to perform additional maintenance on the individual benefit enrollment records of assigned employees. See the *Infinium HR Guide to Setup and Processing for Benefits Administration* for details.

Making Changes to the Update Organization Screen

Follow the instructions beginning on page 11-11 to update the fields on the Update Organization screen for an existing position. You do not need to manually update the fields listed below since the system automatically maintains these fields when you assign employees to a position.

- *Assigned Employee*
- *Current # Emps*
- *Current FTE Units*
- *Current Act Hours*

Use the *Mass Update Position Corrections* function to maintain these fields if they appear to be inaccurate or out-of-date. See the section in this topic entitled “Using Mass Update Position Corrections” for details.

When you work with an existing position, the system does not automatically present the Update Workforce Levels screen, the Update

Authorized/Budgeted FTEs screen or the Update Authorized/Budgeted Hours screen after you press Enter to exit from the Update Organization screen. See the following paragraph for information on how to access and update the information on these screens.

Updating the Position Budget Screen

After you establish a position control, you can use one of the two methods listed below to access the associated budget information.

- Press F8 from the Update Organization screen.
- Access it from the Infinium HR main menu.

Depending on the value in the *Budget Type* field on the Update Organization screen, the position's budget information displays on the Update Workforce Levels screen, the Update Authorized/Budgeted FTEs screen or the Update Authorized/Budgeted Hours screen. See the table that immediately precedes the "Entering Workforce Levels Information" topic for details.

Use the following information to access the position budget information screen from the Infinium HR main menu:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Workforce Levels [UAW]*. Press Enter. The system displays the screen shown in Figure 11-6.
-

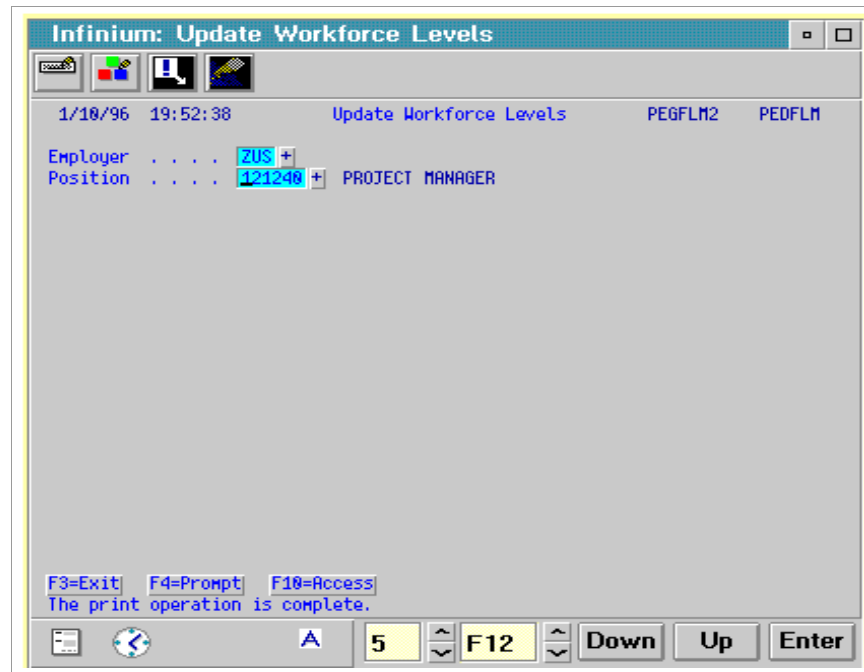


Figure 11-6: Update Workforce Levels screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for whom you want to update position budgeting information. Press F4 to display a list of valid employers.

Position

Type the value that represents the position for which you want to update budgeting information. Press F4 to display a list of valid positions.

Press FieldExit to right-justify the position code if it is less than 6 characters in length.

- 5 Press Enter. Depending on the value you entered in the *Budget Type* field on the Update Organization screen for the specified position, the system displays the Update Workforce Levels screen, the Update Authorized/Budgeted FTEs screen or the Update Authorized/Budgeted Hours screen. The Update Workforce Levels screen is used as an example in Figure 11-7.

1/18/96 19:53:25 Update Workforce Levels PEGFLM2 PEDFLM

Employer . . . : ZUS SAMPLE US COMPANY
Position . . . : 121240 PROJECT MANAGER

From Date . . . : 01/01/96 To Date
Auth Force Level. 3 Budg Force Level. 3
Auth Pay Pd Sal . 6000.00 Budg Pay Pd Sal . 6000.00

2=Change 4=Delete

| From | To | Auth Force | Budgeted | Opt | Auth Salary | Budgeted |
|-----------|------------|------------|----------|-----|-------------|----------|
| 1/01/1990 | 12/31/1995 | 2.00 | 2.00 | | 4000.00 | 4000.00 |

F3=Exit F10=Access
The print operation is complete.

5 F12 Down Up Enter

Figure 11-7: Update Workforce Levels screen

6 Use the information below to work with this screen.

Adding a New Record

Use the information beginning on page 11-23 to fill in the fields in the top portion of the screen. Press Enter to store the new budget information record in the sub-file of the screen.

Changing a Record

If you want to change information in one of the records displayed in the bottom portion of this screen, press Tab to move your cursor to the *Opt* field next to the record you want to change. Type 2 in the *Opt* field, then press Enter. The system displays the information in the top portion of your screen. Make any necessary changes, then press Enter to return the updated information to the sub-file.

Deleting a Record

If you want to remove a record from the sub-file, press Tab to move your cursor to the *Opt* field next to the record you want to delete. Type 4 in the *Opt* field, then press Enter. The system displays ***DELETED** in the from and to columns. The system completely removes the record when you press F3 to exit from this screen.

If there is only one budget record in the sub-file, do not delete it unless you are replacing it with a new record. You must associate at least one budget record with each position or the system will generate warning messages each time you assign an employee to this position.

- 7 Press F3 to exit from this screen. The system displays the Update Workforce Levels screen. Type the code of another position for which you want to make budget changes or press F3 to return to the Infinium HR main menu.

Deleting a Position

You can delete a position only when there are no employees currently or previously assigned to that position. In other words, you cannot delete a position if you ever assigned employees to it and their records are still in your Infinium HR database.

The system does not automatically remove the records of terminated employees from your database. You must run the *Purge Terminated Employees* function to do so. You may be able to delete obsolete positions after you use the *Purge Terminated Employees* function. See the *Infinium Human Resources Guide to Processing* for details on how to terminate and purge employees.

For example, you define the human resources administrator job. You then set up three human resources administrator positions, one for each of your regional offices. You assign an employee to each position. You cannot delete the position or the job controls at this time.

Due to reorganization, you reassign all three employees to new positions and do not hire replacements to fill their previous positions. You want to delete the human resources administrator positions; however, the system prevents you from deleting the position controls if the system still contains terminated employees who were assigned to the position at the time they left.

Although you cannot delete positions that currently have active or terminated employees assigned to them, you can make the positions inactive. When you deactivate a position, you can exclude it from some of the standard Infinium HR position displays and reports. The system continues, however, to use information from deactivated position controls for various historical displays and reports, for terminated employees and employees who held a position at some point in the past but are now in a different position. See the following section entitled “Deactivating a Position” for details.

Follow these steps to delete a position control:

- 1 From the Infinium HR main menu select *Master Files*.
-

- 2 Select *Update Master Files*.
- 3 Select *Update Position Data* [UO]. Press Enter. The system displays the Organization Update prompt screen.
- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you want to delete a position control. Press F4 to display a list of valid employers.

Position

Type the value that represents the position you want to delete. Press F4 to display a list of valid positions.

Press FieldExit to right-justify the position code if it is less than 6 characters in length.

- 5 Press Enter. The system displays the Update Organization screen.
- 6 Press F22 to delete the specified position control.

If employees are or were assigned to this position and their records are in your Infinium HR database, the system displays the following error message at the bottom of the screen:

Position code attached to employees. Deletion of Position code denied.

See the following section entitled “Deactivating a Position” for details about deactivating the position. When you deactivate a position, the system generates a warning message if you try to assign employees to it.

If you have never assigned employees to the position, but you specified that it is one that others report to, the system produces the following error message at the bottom of the screen:

Deletion not permitted - reported to by other Positions.

- 7 If the system does not display an error message, it deletes the specified position control and associated budget information and automatically returns you to the Infinium HR main menu.

If you receive the second error message noted above, you can use the *Display Organization Structure* or *List Organization Structure* functions to identify which positions report to the position you want to delete. After you

remove the code for the position you want to delete from the *Reports To* field of these position controls, you can delete the specified position.

Deactivating a Position

You can deactivate a position to prevent Infinium HR users from assigning employees to it and to exclude it from various Infinium HR displays and reports. You use the position's budget information screen to deactivate a position.

Infinium HR provides two ways to deactivate a position:

- Entering a date into the *From Date* field on one of three Budget screens
- Specifying inactive in the *Active/Inactive?* field on the Update Organization screen

Deactivating a Position on a Budget Information Screen

The system displays budget information for each position using one of the screens listed below, depending on the value in the *Budget Type* field on the position's Update Organization screen. Use the *From Date* field on the three screens listed below to indicate that a position is inactive and does not have current authorized or budgeted headcount:

- Update Workforce Levels screen
- Update Authorized/Budgeted FTEs screen
- Update Authorized/Budgeted Hours screen

The system selects only active positions for position displays and reports by comparing the value you enter in the latest *From Date* field for each position to the As of Date you specify when you are displaying or printing position information. It also generates a warning message if you try to assign an employee to an inactive position.

You can access the budget information screen for a position in two ways:

- Press F8 on the Update Organization screen for the position
- Use the *Update Workforce Levels* function on the Infinium HR main menu.

When you display the position's budget information screen, select the most recent budget record from the sub-file displayed at the bottom of the screen. Type a date in the *To Date* field that indicates when the position became inactive in your organization.

When you display or print position information, you can use the *As of Date* and *Incl Inactive?* fields on selection screens to exclude inactive positions. The system compares the date in the latest *To Date* field for each position to the date you enter in the *As of Date* field. It excludes a position if the date in the position's *From Date* field precedes the date in the *As of Date* field.

For example, you transfer the only employee remaining in the senior executive coffee maker position to another position and type **1231907** in the *To Date* field for this position indicating that this position should no longer be staffed starting in 2008. When you use the *Display Organization Structure* function, you type **010108** in the *As of Date* field and type **0** to represent No in the *Include Inactive?* field. The system excludes the senior executive coffee maker position from the positions it displays. See the parts entitled "Displaying Position Information" and "Printing Position Information" for details.

Continuing with the same example, when you use the *Enter New Hire* function to hire an employee whose hire date is January 1, 2007, and mistakenly attempt to assign the employee to the senior executive coffee maker position, the system generates a warning message indicating that you are exceeding the position's authorized headcount. You can correct your mistake and select an active position. The warning message helps you avoid assigning employees to the obsolete position.

Reactivating a Position

You can use three methods to reactive a position:

- Remove the date from the *To Date* field in the most current budget record for the position, leaving the *To Date* field blank. Positions with blank *To Date* fields are valid for an infinite duration.
- Change the date in the *To Date* field in the most current budget record for the position to a future date.
- Enter a new budget record for the position. The date you type in the *From Date* field for the new budget record must be at least one day after the date in the *To Date* field in the most current existing budget record for the position.

In the above example, if you need to reactivate the senior executive coffee maker position effective June 1, 2008, you could take one of the following actions:

- Delete the December 31, 2007, date from the existing budget entry and leave the *To Date* field blank.
-

- Change the date in the *To Date* field for the most current existing budget period to a date after June 1, 2008
- Enter another budget record. You would enter **060108** in the *From Date* field of the new budget record.

Displaying Position Controls

You can display position information eight ways in Infinium HR to review position controls, assigned employees and related information. See the “Displaying Position Information” chapter for details.

Printing Position Controls

You can print eight different reports that list position controls, assigned employees and related information. See the “Printing Position Information” chapter for details.

Copying Positions

You can copy positions within an employer to expedite setting up new positions. You cannot copy positions between employers. This is a time-saving way to set up similar positions without starting completely over each time. When you use the copy function, the system copies information from a current position into the Update Organization screen for a new position; you then modify the information as appropriate for the new position.

Follow these steps to copy positions within a specified employer:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Position Data [UO]*. Press Enter. The system displays the screen shown in Figure 11-8.

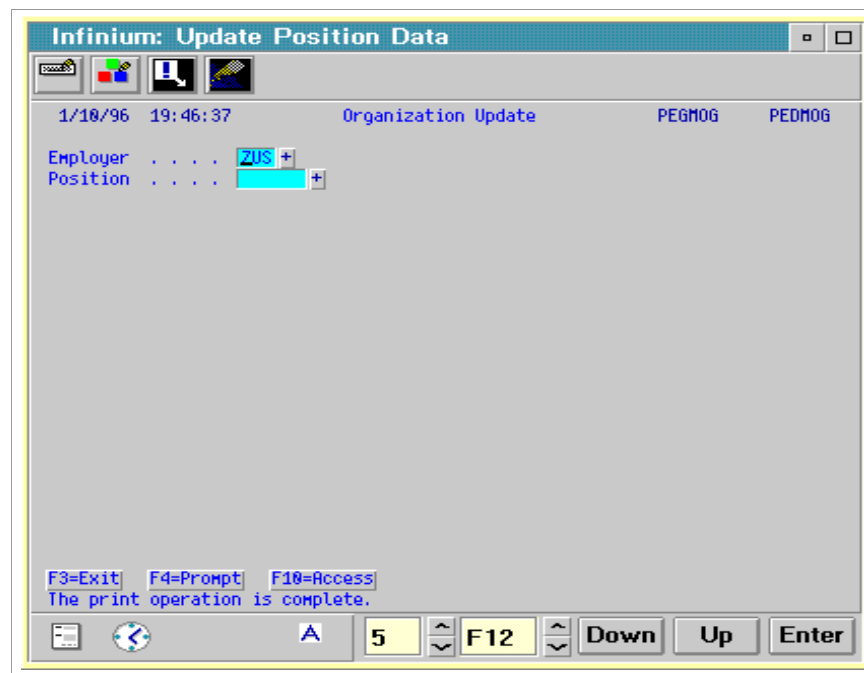


Figure 11-8: Organization Update prompt screen

- 4 Use the following information to copy positions:

Employer

Type the value that represents the employer whose position control records you want to copy. Press F4 to display a list of valid employers.

Position

Leave this field blank to copy positions.

- 5 Press Enter. The system displays the screen shown in Figure 11-9.

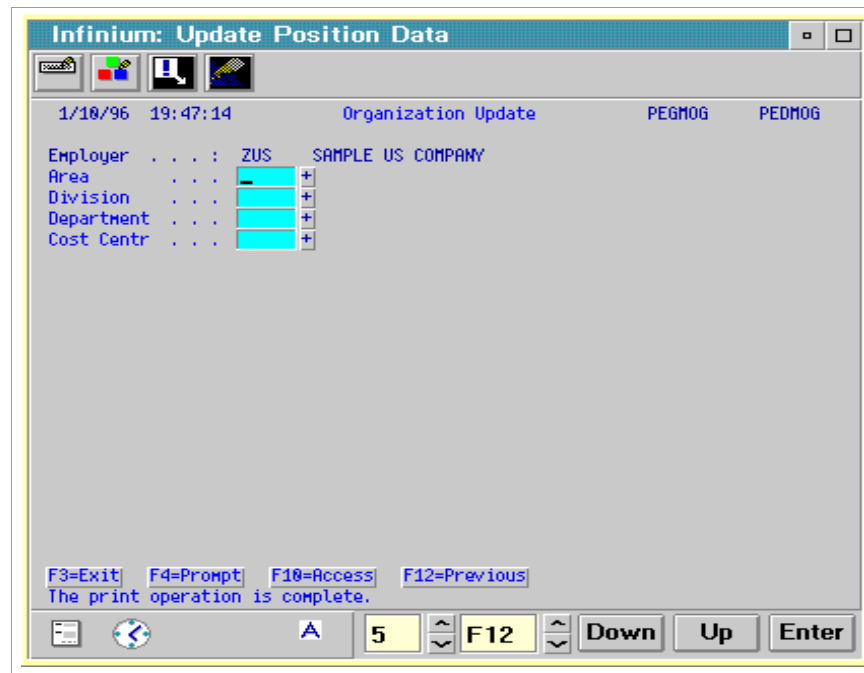


Figure 11-9: Organization Update prompt screen 2

- 6 Use the following information to fill in the fields on this screen:

Level 1, 2, 3 4

The system displays the level descriptions defined for this employer. Type a value in one or more of the level fields to display a list of positions assigned to a particular set of levels from which you can select a position to copy. Press F4 on each field to display a list of valid levels.

Leave the level fields blank if you want a list of all positions in the specified employer from which you can select a position to copy.

- 7 Press Enter. The system displays the screen shown in Figure 11-10.

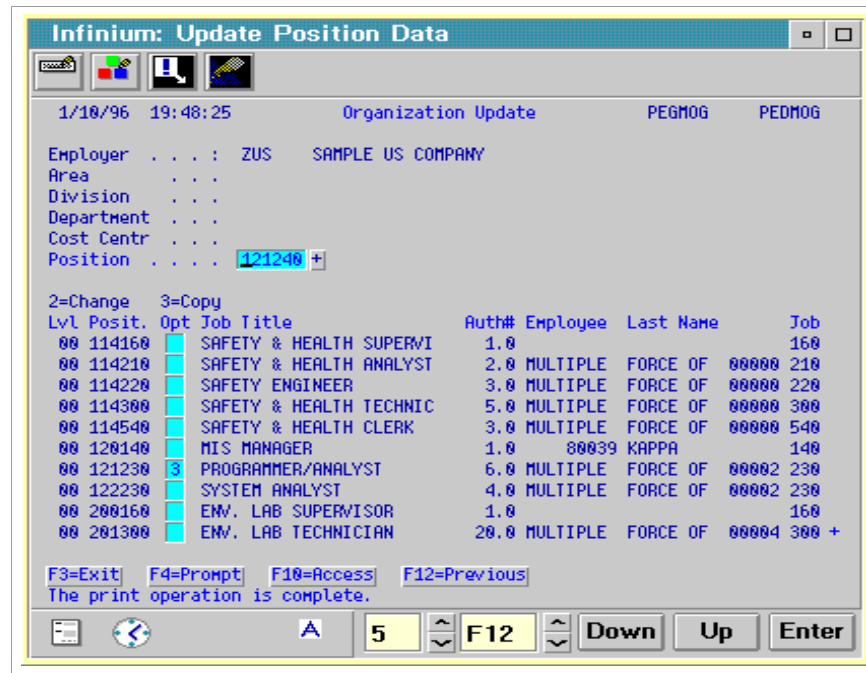


Figure 11-10: Organization Update prompt screen 3

8 Use the following information to copy positions:

The system presents a list of all existing positions for the specified employer and specified levels, if you entered information on the prior page. Press PageDown to scroll through the list until you locate the position from which you want to copy information into a new position, then fill in the fields described below.

Position

Type a code of up to six alphanumeric characters that represents the new position you want to define. Press FieldExit to right-justify the code if it is less than six characters in length.

Opt

Type **3** in this field next to the position record that you want to copy.

9 Press Enter. The system displays the Update Organization screen for the new position and automatically fills in the fields using information from the specified position. You can modify the information for the new position as necessary. Follow the instructions beginning on page 11-11 for detailed information on each field.

10 After you complete the Update Organization screen, press Enter.

Depending on the value in the *Budget Type* field on the Update Organization screen, the system displays the Update Workforce Levels screen, the Update Authorized/Budgeted FTEs screen or the Update Authorized/Budgeted Hours screen. Use the information beginning on page 11-23 to review and update the fields on this screen.

- 11 Press Enter to store the budget information in the sub-file of the Update Workforce Levels screen, the Update Authorized/Budgeted FTEs screen or the Update Authorized/Budgeted Hours screen.
 - 12 Press F3 to exit from the new position control. The system displays the screen shown in Figure 11-10. Follow steps 1 through 11 to copy another position or press F3 to exit from this screen. The system returns to the Infinium HR main menu.
-

Using the *Mass Update Position Corrections* Function

As you hire new employees and maintain employee position assignments, the system automatically maintains the following fields on position control records:

- *Assigned Employee*
- *Current # Emps*
- *Current FTE Units*
- *Current Act Hours*
- *Type of Position*

If for some reason these fields are inaccurate, particularly after you convert employee data prior to going live on Infinium HR, you can use the *Mass Update Position Corrections* function to refresh these fields with current information. You can use this function at any time after going live to ensure that the fields listed above contain current and accurate information.

When you use the *Mass Update Position Corrections* function, the system verifies which employees are assigned to each position and uses information in each employee's Basic Data record to update the fields listed above with current information. It makes no changes to employee information.

You can run the *Trial Update Position Correction* function to preview the changes the system will make when you use the *Mass Update Position Corrections* function. The *Trial Update Position Correction* function does not make any changes to position data, it only produces an audit report that reflects the changes the system will make when you run the *Mass Update Position Corrections* function. You can review the audit report and make any necessary changes to position controls prior to running the actual update. The *Mass Update Position Corrections* function updates the fields on the position control listed above and produces a final report for your records.

Using the *Trial Update Position Correction* Function

Follow these steps to run the *Trial Update Position Correction* function:

- 1 From the Infinium HR main menu select *Master Files*.
-

- 2 Select *Update Master Files*.
- 3 Select *Trial Update Position Correction* [POSRE]. Press Enter. The system displays the screen shown in Figure 11-11.

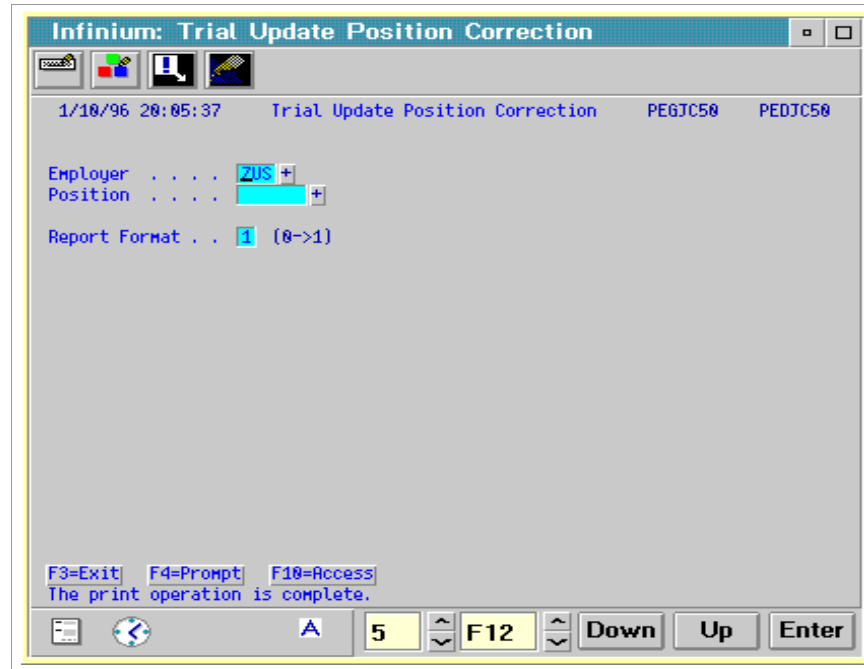


Figure 11-11: Trial Update Position Correction screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you want to mass update position information.

Position

Type the value that represents the position whose information you want to update. Leave this field blank to update information for all positions in the specified employer.

Report Format

Use this field to indicate the type of report you want the system to generate. Valid values are:

- | | |
|----------|---|
| 0 | Summary. Do not include employee information on the report. |
| 1 | Detail. Include employee information on the report. |
-

Both reports sort by position code and compare information on the position control to information from employee records. Each report includes the fields listed above, along with an “Errors” column that indicates the reason why position information is being updated. The detailed report includes the name and employee number of the employees assigned to each position.

- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu.

Building submission request . . .

- 6 The system uses batch processing to generate the Position Exceptions List. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.

After you review the Position Exceptions List generated by the *Trial Update Position Correction* function, you can make any necessary changes to position controls. You can run the *Trial Update Position Correction* function as many times as necessary to ensure that the system will update position information correctly when you run the *Mass Update Position Corrections* function.

Using the *Mass Update Position Corrections* Function

After you have verified that the *Trial Update Position Correction* function produces the correct results, follow the steps listed below to run the *Mass Update Position Corrections* function. The *Mass Update Position Corrections* function updates headcount and FTE information on position controls and produces an audit report of the updated information.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Mass Update Position Corrections* [POSUP]. Press Enter. The system displays the screen shown in Figure 11-12.
-

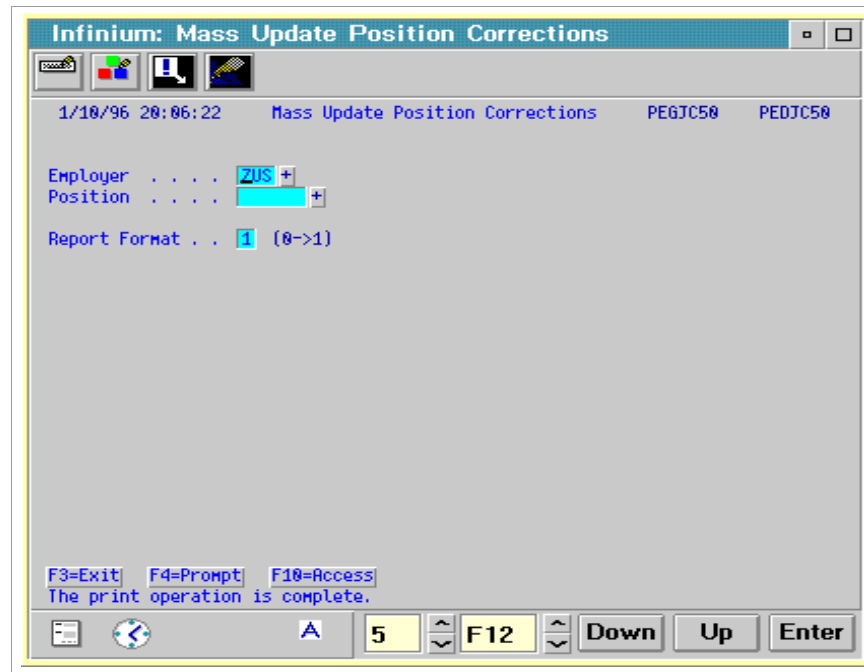


Figure 11-12: Mass Update Position Corrections screen

4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for whom you want to mass update position information.

Position

Type the value that represents the position whose information you want to update. Leave this field blank to update information for all positions in the specified employer.

Report Format

Use this field to indicate the type of report you want the system to generate. Valid values are:

- 0** Summary. Do not include employee information on the report.
- 1** Detail. Include employee information on the report.

Both reports sort by position code and compare information on the position control to information from employee records. Each report includes the fields listed on page 11-47, along with an “Errors” column that indicates the reason

why position information is being updated. The detailed report includes the name and employee number of the employees assigned to each position.

- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu.

Building submission request . . .

- 6 The system uses batch processing to generate the Corrected Position Exceptions List. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.

Mass Changing Levels on Position Controls

After you set up position controls, you can manually update the information on them at any time. However, if your employer undergoes a reorganization that affects your level structure, you can use the *Mass Change Position Levels* function to quickly and easily update all positions associated with a certain set of levels.

For example, in your employer level 1 represents department and level 2 represents cost center. When you set up your system, cost centers 1000, 1001 and 1002 are associated with the marketing department. You set up fifteen positions associated with these cost centers; the level 1 code on each position is **MKT**, which represents Marketing.

Later, you reorganize the company and these cost centers move under the sales department. You need to replace the value **MKT** in the *Level 1* field on the fifteen positions with **Sales**. You also need to update the *Level 1* field in the basic data records of employees associated with the cost centers that moved.

You can use the *Update Position Data* function to manually update the *Level 1* field on the fifteen affected positions. When you manually update the level fields on position controls, the system automatically updates the level fields in the basic data records of employees assigned to the positions you manually changed.

However, if you have many positions you need to update with new level codes, you can use the *Mass Update Position Levels* function to update all of them at once. This function updates level fields on position controls. It does not update employee level fields.

After you use the *Mass Update Position Levels* function to update level information on position controls, you can use the *Mass Update Employee Positions* function to change the level information in the basic data records of affected employees. See the *Infinium Human Resources Guide to Processing* for information on how to use the *Mass Update Employee Positions* function.

You can replace any level combination with any other level combination. In the previous example, you selected positions whose level 1 was **MKT** and whose level 2 was **1000**, **1001** or **1002**. You replaced the level 1 code **MKT** with **SALES**. You did not make any change to the level 2 code.

In other cases, you may need to replace the existing level 1, level 2, level 3 and/or level 4 codes with new codes.

Follow these steps to use the *Mass Change Position Levels* function:

- 1 From the Infinium HR main menu select *System Operations*.
- 2 Select *Personnel Init. Functions*.
- 3 Select *Position Data*.
- 4 Select *Mass Change Position Levels* [MCPL]. Press Enter. The system displays the screen shown in Figure 11-13.

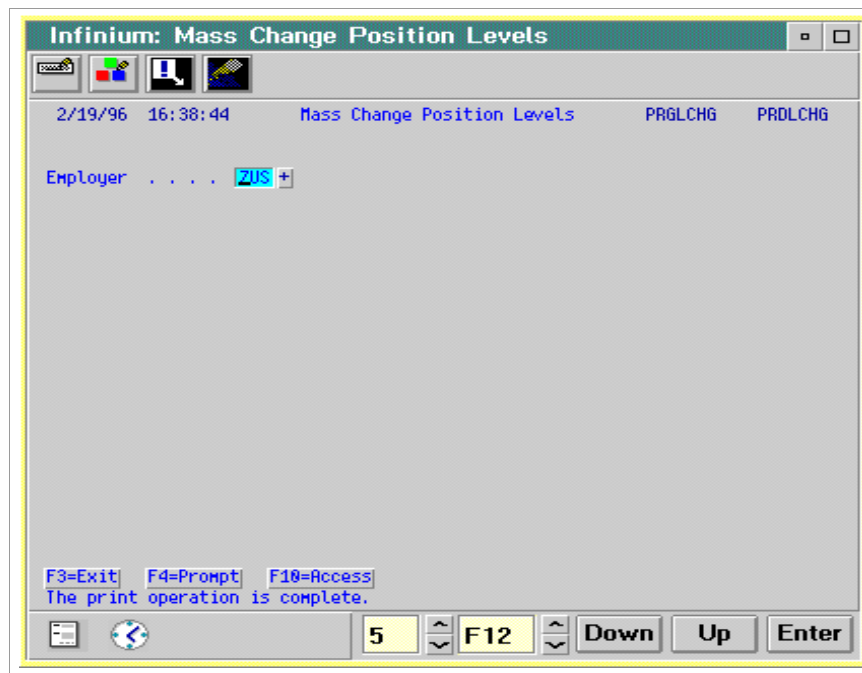


Figure 11-13: Mass Change Position Levels prompt screen

- 5 Use the following information to fill in this field:

Employer

Type the value that represents the employer for which you are changing level fields on position controls. Press F4 to display a list of valid employers.

- 6 Press Enter. The system displays the screen shown in Figure 11-14.

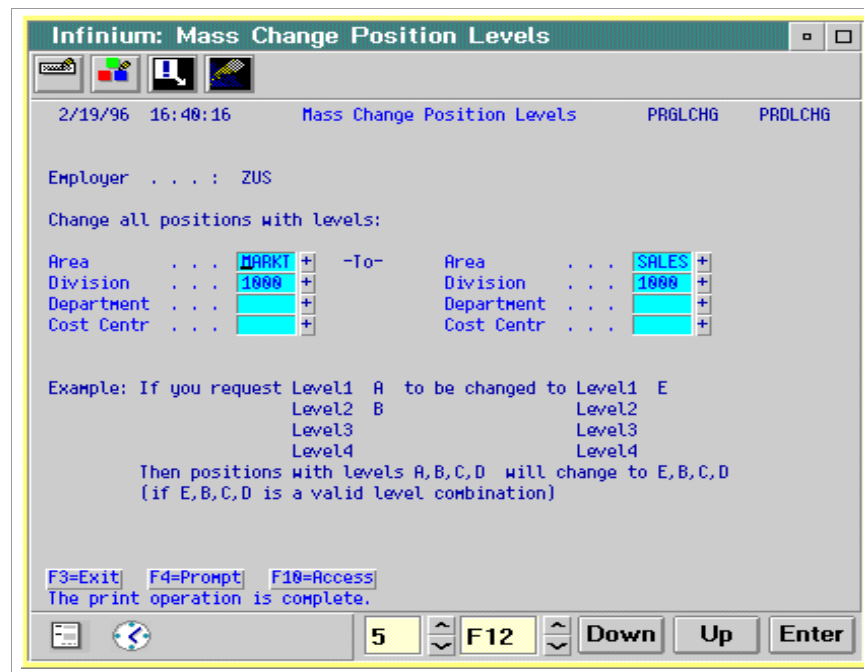


Figure 11-14: Mass Change Position Levels screen

- 7 Use the information below to fill in this screen.

Changing Position Levels

Use this screen to specify the existing level combination on position controls that should be replaced by a new level combination. You type the values that represent current level combination in the fields on the left-hand side of the screen. You enter the values that represent the new level combination in the fields on the right-hand side of the screen.

You can enter old and new values in one or more of the level fields used by your employer. If you want to make changes to levels 2, 3 or 4, you must specify the higher levels to which each is connected. For example, if you want to change a level 2 value, you must specify the old and new level 1 with which it is associated. If you want to change a level 3 value, you must specify the old and new levels 1 and 2 with which it is associated.

The system uses the level descriptions you entered on your employer control for the field names that are adjacent to the entry fields. Since levels are defined differently for each employer, generic level descriptions are used below.

You must enter values in the *Level 1* and *To Level 1* fields.

Level 1

Type the value that represents the existing level 1 in position controls whose levels you want to change.

Level 2

If applicable, type the value that represents the existing level 2 in position controls whose levels you want to change.

Level 3

If applicable, type the value that represents the existing level 3 in position controls whose levels you want to change.

Level 4

If applicable, type the value that represents the existing level 4 in position controls whose levels you want to change.

To Level 1

Type the value that represents the new level 1 for position controls whose levels you want to change.

To Level 2

If applicable, type the value that represents the new level 2 for position controls whose levels you want to change.

To Level 3

If applicable, type the value that represents the new level 3 for position controls whose levels you want to change.

To Level 4

If applicable, type the value that represents the new level 4 for position controls whose levels you want to change.

- 8 Press Enter. The system generates the following message and returns you to the Infinium HR main menu.

Building submission request . . .

- 9 The system uses batch processing to generate the Mass Change of Position Levels report and update affected position controls. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens.
-

- 10 Use the *Mass Update Employee Positions* function to update the level fields for employees assigned to the changed positions. Refer to the *Infinium Human Resources Guide to Processing* for further information.

Continuing to the Next Step

Position controls are the last major control file that you must set up on Infinium HR before you can convert employee information and begin parallel testing prior to going live on Infinium HR. See the three parts that follow for information on how to set up unique job/position combinations, as well as how to display and print position data.

If you are implementing benefits administration when you go live on Infinium HR, refer to the *Infinium Guide to Setup and Processing for Benefits Administration* for information on how to set up and maintain employee benefit data. If you are implementing flexible benefits administration when you go live, refer to the *Flexible Benefits Users Guide* for information.

See the *Infinium Human Resources Guide to Processing* for information on how to hire employees and maintain employee information. See the *Infinium Payroll Guide to Processing* for details on how to process payroll cycles.

Summary of Position Controls

In summary, you have become familiar with:

- How to use position controls to maintain employee information
 - How to set up a position control
 - How to copy position controls
 - How to change and delete position controls
 - How to deactivate and reactive positions
 - How to use the *Mass Update Position Corrections* function
 - How to use the *Mass Update Position Levels* function
-

Creating and Updating Position Defaults

Use the *Update Position Defaults* function to associate additional payroll information with positions. You can also update position default information by pressing F6 on the first Update Organization screen of the *Update Position Data* function.

Follow the steps below to associate additional payroll information with positions.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Position Defaults [UPD]*. The system displays the Update Position Defaults-Select screen similar to Figure 11-15.

```
6/24/04 10:17:35   Update Position Defaults-Select   PRGMDF10   PRDMDF10
-----
Employer . . . . _ +
Position . . . . ____ +

-----
F3=Exit F4=Prompt F10=QuikAccess
```

Figure 11-15: Update Position Defaults – Select screen

- 4 Use the information below to complete the fields on this screen.

Employer

Specify the employer for whom you are creating position defaults.

Position

Specify the position for which you are creating the position defaults.

- 5 Press Enter. The system displays the Update Position Defaults – Detail screen shown in Figure 11-16.

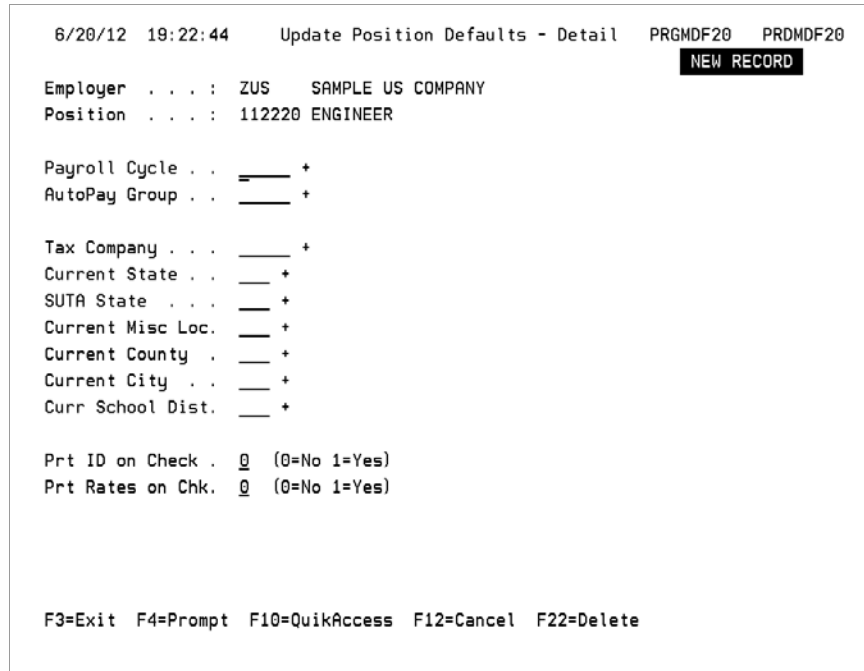


Figure 11-16: Update Position Defaults – Detail screen

- 6 Use the information below to complete the fields on this screen.

Payroll Cycle

Specify the default payroll cycle to be used when this position is selected for new hires, transfers, promotions, demotions, or rehires.

When you set the *Position Defaults* field in the *Update Employer Controls* function to 1 and you specify a *Payroll Cycle* value in this field, the system uses the value as the default *Payroll Cycle* value for the *Enter New Hire* function, for the *Enter Personnel Actions* Promotion, Transfer, Demotion, and Rehire transactions, and for the corresponding field in the employee’s payroll data record.

AutoPay Group

Specify the default autopay group to be used when this position is selected for new hires, transfers, promotions, demotions, or rehires.

When you set the *Position Defaults* field in the *Update Employer Controls* function to 1 and you specify an *AutoPay Group* value in this field, the system uses the value as the default *AutoPay Group* value for the *Enter New Hire* function, for the *Enter Personnel Actions* Promotion, Transfer, Demotion, and Rehire transactions, and for the corresponding field in the employee's payroll data record.

Tax Company

If this employer is using multi-tax processing and the federal tax company is different from the value entered in the *Tax Company Dflt* field on the employer control in Infinium PY, specify a default federal tax company. Leave this field blank if the employees in this position are assigned to the default tax company or if this employer does not use multi-tax processing.

Current State

Specify the value that represents the default state where the employees in this position are paid. The employee's current state is used as the default for generated earnings for the employee.

SUTA State

Specify the default SUTA (State Unemployment Tax Act) state for the employee.

Current Misc Loc

Specify the default miscellaneous tax locality where employees in this position are paid, if applicable. The employee's current value is used as a default for generated time entry records. This value is associated with code type LCN and locality type 4, miscellaneous.

Current County

Specify the default county tax locality where employees in this position are paid, if applicable. The employee's current value is used as a default for generated time entry records. This value is associated with code type LCN and locality type 1, county.

Current City

Type the default city tax locality where employees in this position are paid, if applicable. The employee's current value is used as a default for generated time entry records. This value is associated with code type LCN and locality type 2, city.

Curr School Dist

Type the default school district tax locality where employees in this position are paid, if applicable. The employee's current value is used as a default for generated time entry records. This value is associated with code type LCN and locality type 3, school district.

Prt ID on Check

Type the default value that indicates whether to print the employee's tax identification number on the pay stub. Valid values are:

- 0** Do not print the employee's tax ID on the pay stub.
- 1** Print the employee's tax ID on the pay stub.

Prt Rates on Check

Type the default value that indicates whether to print the employee's job code, rate, and units or hours on the pay stub. Valid values are:

- 0** Do not print the employee's job code, rate, and units or hours on the pay stub.
 - 1** Print the employee's job code, rate, and units or hours on the pay stub.
-

Notes

Chapter 12 Setting up Job/Position Combinations

12

A job/position combination refers to a special version of a job control that you can set up to accommodate unique features of a particular position with which it is associated. You use the job/position combination when you want to set up many positions associated with one job and some of the attributes that you assign on the job control, such as salary range or EEO code, vary from one position to another.

The job/position combination is also referred to as a tieback, since you tie a position back to a special version of its affiliated job. You do not need to use tieback positions to implement Infinium HR. This is an optional approach that you can use to limit the number of jobs that you define for your employer. You can set up different jobs for similar positions with unique features if you do not want to set up job/position combinations.

The chapter consists of the following topics:

| Topic | Page |
|--|-------------|
| Overview of Job/Position Combinations | 12-2 |
| Setting up and Maintaining Job/Position Combinations | 12-4 |
| Summary of Job/Position Combinations | 12-22 |

Overview of Job/Position Combinations

Objectives

After completing this chapter, you should be familiar with:

- Why you use job/position combinations
- How to set up job/position combinations
- How to change job/position combinations
- How to delete job/position combinations
- How to display job/position combinations
- How to print job/position combinations
- How to copy job/position combinations

Understanding Job/Position Combinations

A job/position combination refers to a special version of a job control that you can set up to accommodate unique features of a particular position with which it is associated. You use the job/position combination when you want to set up many positions associated with one job and some of the attributes that you assign on the job, such as salary range or EEO code, vary from one position to another. The job/position combination is also referred to as a tieback, since you tie a position back to a special version of its affiliated job.

For example, you define the job **RN1** to represent an entry level nursing job in your hospital. You associate the salary range **RN100** with this job. You then associate ten positions with this job. Later, you discover that one of the positions in the labor and delivery area, **RN1L&D**, requires a higher salary range, **RN101**, because this position requires greater skills and training than the other nine similar positions. If you leave your setup as it is, employees assigned to the **RN1L&D** position will be assigned to the wrong salary range, resulting in incorrect **WARNING** messages, employee comp ratios and salary quartiles.

You can solve your problem in two ways: you can define a separate job for the exception position, to which you assign salary range **RN101**; alternatively, you can create a special version of the **RN1** job for only the

RN1L&D position. You assign salary range RN101 to the special version of the RN1 job. You do not change the generic version of the RN1 job, which still contains salary range RN100.

When you use job codes to extract information from Infinium HR, you can obtain results more efficiently and easily if you have limited the number of jobs in your employer. Job/position combinations allow you to limit the number of jobs in your employer and still accommodate unique differences between similar positions.

In the previous example, you can specify the job code **RN1** to display or print information. The system selects all employees assigned to job code RN1, even those associated with the special version of the job.

The job/position combination is an optional way to set up jobs on Infinium HR. If you do not elect to use job/position combinations, you can set up multiple jobs to accommodate similar positions that require different information on the job control.

Setting up and Maintaining Job/Position Combinations

To implement a job/position combination, you must set up the controls listed below in the following order:

- 1 Set up a job control.
- 2 Set up one or more position controls associated with the job control.
- 3 Modify the standard job control to fit the requirements for one or more exception positions.

This section briefly describes steps 1 and 2. Detailed information on step 1, setting up job controls, is provided in the topic in this guide entitled “Setting up Job Controls.” Detailed information on step 2, setting up position controls, is provided in the topic in this guide entitled “Establishing Position Controls.” Detailed information on step 3 is provided in this section.

Setting up a Job Control

Follow these steps to set up a job control. Refer to the topic entitled “Defining Job Controls” for detailed information on each field.

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Update Master Files*.
 - 3 Select *Update Job Controls [UJ]*. Press Enter. The system displays the screen shown in Figure 12-1.
-

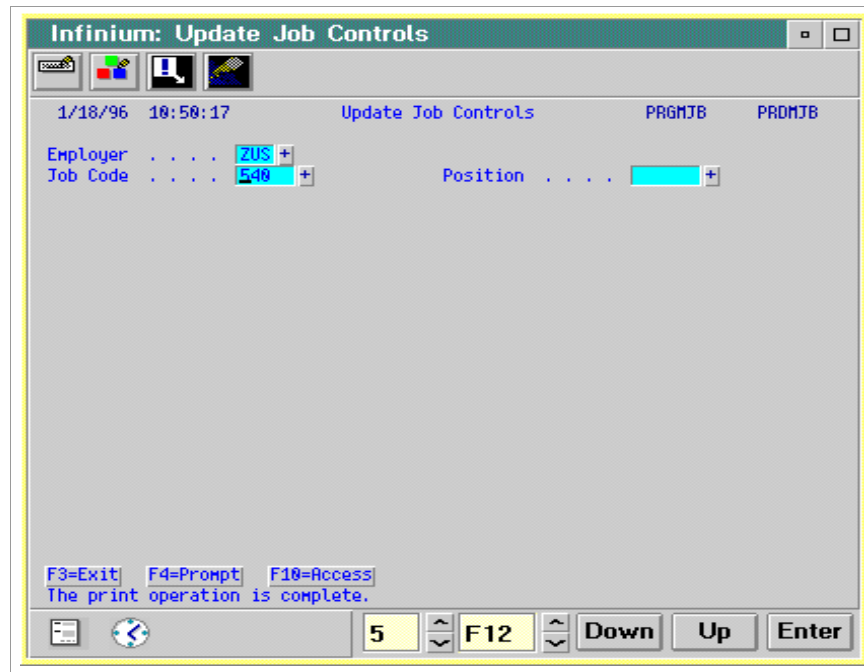


Figure 12-1: Update Job Controls prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for whom you are setting up a job control. Press F4 to display a list of valid employers.

Job Code

Type any combination of up to five alphanumeric characters to represent the job control. Press F4 to display a list of previously defined jobs.

Position

Leave this field blank when you initially define a job control. You use this field to set up a special job/position combination. See step 3 in this section for further information.

- 5 Press Enter. The system displays the screen shown in Figure 12-2.

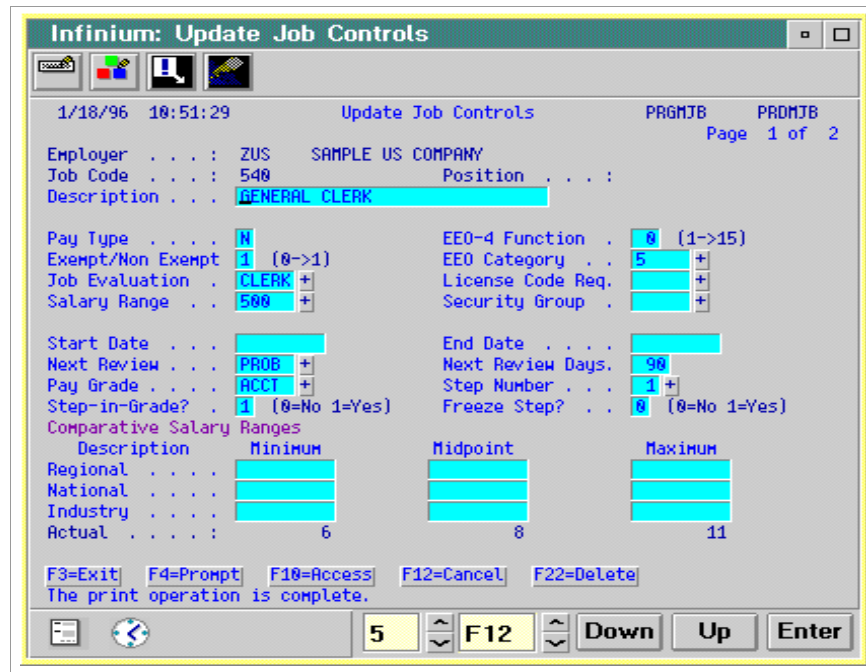


Figure 12-2: Update Job Controls screen 1 of 2

- 6 Use the information in the “Defining Job Controls” chapter to fill in the fields on this screen.
- 7 Press Enter. The system displays the screen shown in Figure 12-3.

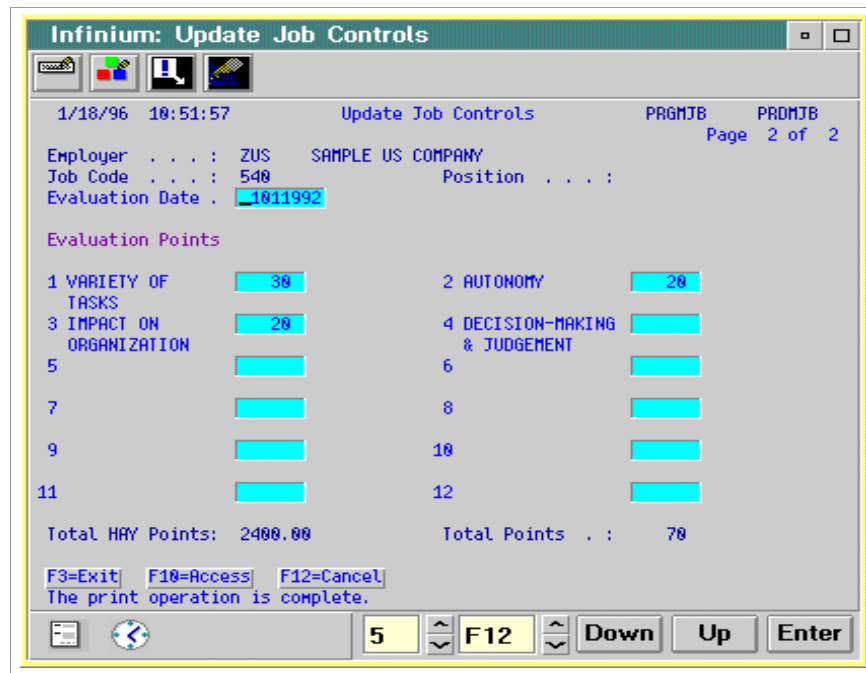


Figure 12-3: Update Job Controls screen 2 of 2

- 8 Use the information in the “Defining Job Controls” chapter to fill in the fields on this screen.
- 9 Press Enter to save your job control information and exit from this screen.

Setting up a Position Control

Follow these steps to set up a position control. Refer to the “Establishing Position Controls” chapter for detailed information on each field.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Position Data* [UO]. Press Enter. The system displays the Organization Update prompt screen.
- 4 Use the information in the “Establishing Position Controls” chapter to fill in the fields on this screen.

Employer

Type the value that represents the employer for whom you are setting up a job/position combination. Press F4 to display a list of valid employers.

Position

Type the value that represents the position for which you plan to set up a job/position combination. Press F4 to display a list of valid positions.

If you type a position code that is less than six characters, you must press FieldExit to right-justify the position code before you can advance from this screen.

- 5 Press Enter. The system displays the Update Organization screen 1 of 2.
- 6 Use the information in the “Establishing Position Controls” chapter to fill in the fields on this screen.

The value you enter in the *Job Code* field on this screen represents the job with which this position is associated. You use this job to define a job/position combination for this position.

- 7 Press Enter. Depending on the value you entered in the *Budget Type* field, the system displays one of three budget information screens for the position.
-

- 8 Use the information in the “Establishing Position Controls” chapter to fill in the fields on these screens.
- 9 After you complete budget information for the position, press Enter to save the budget information in the sub-file at the bottom of the screen. Press F3 to exit from the budget information screen.

Setting up the Job/Position Combination

After you have completed the first two steps described above, you return to the *Update Job Controls* function to set up the job/position combination.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Job Controls [UJ]*. Press Enter. The system displays the screen shown in Figure 12-4.

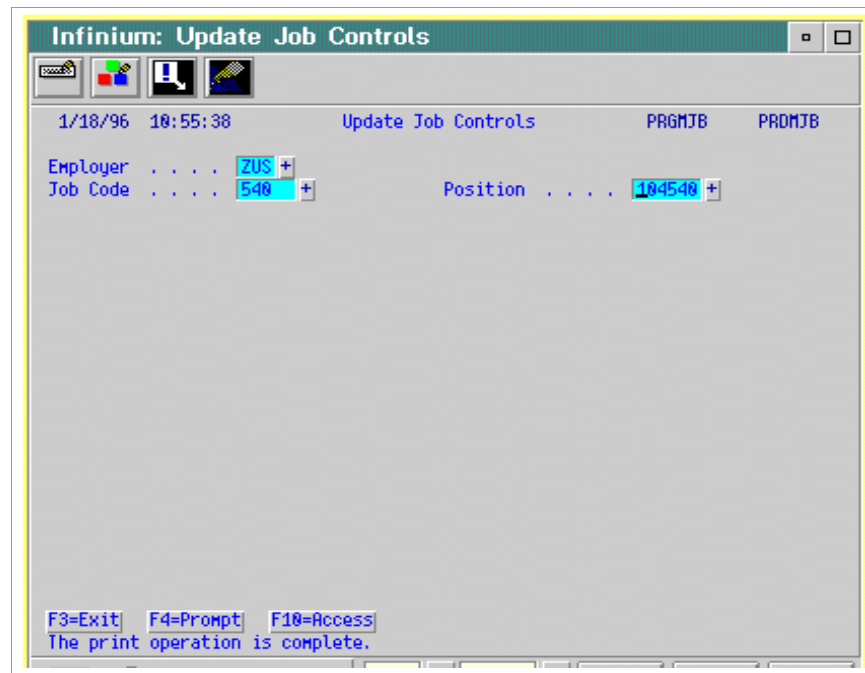


Figure 12-4: Update Job Controls prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for whom you want to set up a job/position combination. Press F4 to display a list of valid employers.

Job Code

Type the value that represents the job for which you want to modify information that pertains to a particular position. Press F4 to display a list of valid jobs.

Leave this field blank if you want the system to use the value you enter in the *Position* field to default a job code value into this field.

Position

Type the value that represents the position for which you want to override certain attributes on the job with which it is already associated. The position must be associated with the job code you entered in the *Job Code* field on this screen.

- 5 Press Enter. The system displays the screen shown in Figure 12-5.

If the job code you entered is not the one associated with the position you entered, the system produces the following error message at the bottom of the screen:

This job code is not the one defined for the position.

Press F4 on the *Position* field to display a list of position information. You can use this information to verify which job code is associated with the specified position. If you select the position from the Positions Display screen, the system replaces the value you entered in the *Job Code* field with the correct job code value for the chosen position.

1/18/96 10:56:07 Update Job Controls PRGMJB PRDMJB
Page 1 of 2

Employer : ZUS SAMPLE US COMPANY
Job Code : 540 Position : 104540
Description . . . : GEN CLERK JOB/PY CLERK POS

Pay Type : N EEO-4 Function : 0 (1->15)
Exempt/Non Exempt : 1 (0->1) EEO Category : 2 +
Job Evaluation . . : CLERK + License Code Req. . . . : +
Salary Range . . . : 500 + Security Group : +

Start Date : End Date :
Next Review . . . : PROB + Next Review Days . . . : 90
Pay Grade : ACCT + Step Number : 1 +
Step-in-Grade? . . : 1 (0=No 1=Yes) Freeze Step? : 0 (0=No 1=Yes)

Comparative Salary Ranges

| Description | Minimum | Midpoint | Maximum |
|------------------|---------|----------|---------|
| Regional | | | |
| National | | | |
| Industry | | | |
| Actual : | 6 | 8 | 11 |

F3=Exit F4=Prompt F10=Access F12=Cancel F22=Delete
The print operation is complete.

Figure 12-5: Update Job Controls screen 1 of 2

- Use the following guidelines to fill in the fields on this screen. See the “Defining Job Controls” chapter for specific information about each field on this screen.

Overriding Standard Job Information

The system uses information from the specified standard job control to automatically fill in the fields on this screen. You can update one or more of the fields on this screen with different information that more accurately corresponds with the specified position. The system uses this version of the job control only for employees assigned to the specified position.

For example, you establish an administrative assistant job in your organization and associate six positions with the job. EEO category 5 is correct for all but two of the positions associated with the administrative assistant job. The two exception positions require EEO category 2. When you define the standard job, you type 5 in the *EEO Category* field.

Later, when you define the job/position combination for the first exception position, the system displays 5 in the *EEO Category* field; you type 2 in this field to override this value for only that position. You repeat this procedure for the second exception position. When you assign employees to the two exception positions, the system assigns the employees to EEO category 2 rather than EEO category 5. The system assigns EEO category 5 to

employees assigned to the other four positions associated with the administrative assistant job.

- 7 After you update all of the necessary fields, press Enter. The system displays the screen shown in Figure 12-6.

1/18/96 10:58:26 Update Job Controls PRGMJB PRDMJB
Page 2 of 2

Employer . . . : ZUS SAMPLE US COMPANY
Job Code . . . : 540 Position . . . : 104540
Evaluation Date . . : 10/11/98

Evaluation Points

| | | | |
|--------------------------|----|-------------------------------|----|
| 1 VARIETY OF TASKS | 30 | 2 AUTONOMY | 20 |
| 3 IMPACT ON ORGANIZATION | 20 | 4 DECISION-MAKING & JUDGEMENT | |
| 5 | | 6 | |
| 7 | | 8 | |
| 9 | | 10 | |
| 11 | | 12 | |

Total HAY Points: 2400.00 Total Points . : 70

F3=Exit F10=Access F12=Cancel
The print operation is complete.

Figure 12-6: Update Job Controls screen 2 of 2

- 8 Use the following guidelines to fill in the fields on this screen. See the “Defining Job Controls” chapter for specific information about each field.

Overriding Standard Job Information

The system defaults job evaluation information from the specified standard job control into fields on this screen. You can update one or more of the fields with different values that correspond more closely with the specified exception position.

- 9 Press Enter. The system displays the Update Job Controls prompt screen.
- 10 Press F4 on the *Job Code* field on the Update Job Controls prompt screen to verify the job/position combinations that you have entered. The system displays the screen shown in Figure 12-7.

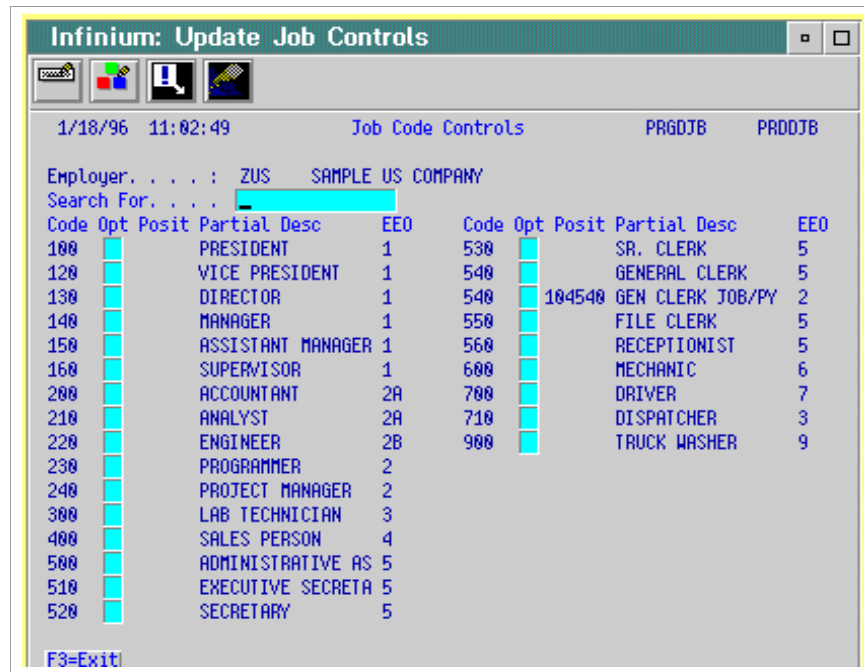


Figure 12-7: Job Code Controls screen

Identifying Job/Position Combinations

The system displays a value in the “Posit” column for job/position combinations. The “Posit” column is blank next to standard job controls that are not tied back to a specific position.

- 11 You can select a job or job/position combination from this screen to review or press F3 to return to the Update Job Controls prompt screen.
- 12 Follow steps 1 through 9 to set up another job/position combination or press F3 to return to the Infinium HR main menu.

Changing Job/Position Combinations

After you set up a job/position combination, you can make changes to the special version of the job associated with the exception position, or to the position control. Follow the instructions in the preceding section to update the job/position record. Follow the instructions in the “Establishing Position Controls” chapter to update the position control.

Deleting Job/Position Combinations

You can delete a job/position combination at any time, even if employees are assigned to the job and position. Since the system retains the separate job and position controls, it automatically updates the records of assigned employees with information from the standard job control if the values on the standard job control differ from the values on the job/position combination record.

For example, you set up a clerk job and associate several positions with it. You set up a special job/position combination for the medical records clerk position on which you override the standard salary range. The salary range associated with this job/position combination is **G08**. The salary range associated with the standard clerk job is **G07**.

You assign Tracy Transcriber to the medical records clerk position. Since the employee is assigned to the job/position combination, she is assigned to salary range **G08**. Later, you delete the job/position combination, but you do not delete the standard clerk job.

After you delete the job/position combination and exit from the *Update Job Controls* function, the system automatically enters **G07** in the *Salary Range* field in Tracy's basic data record. You must run the *Update Salary Ranges* or *Mass Update Employee Positions* function to update salary range-related fields, such as the *Salary Quartile* and *Comp Ratio* fields, in the employee record. See the "Defining Salary Ranges" chapter for details.

Deleting the Position Control

If you have set up a job/position combination and then want to delete the position control itself, you should first delete the job/position combination and then delete the position control. If you first delete the position control, the system generates a warning message when you try to access the job/position combination; you must override the warning to access and delete the job/position combination.

You cannot delete a position if employees have ever been assigned to it. See the "Establishing Position Controls" chapter for further information.

Deleting the Job Control

If you have set up a job/position combination and then want to delete the standard job control, you must first remove it from position controls by replacing the value in the *Job Code* field of associated position controls with the value for another job.

The system generates an error message that you cannot override if you attempt to delete the standard job control when position controls are associated with it. If you first delete the position controls or associate a different job with them, you can delete the standard job control. Make sure that you also delete any job/position combination records.

Deleting a Job/Position Combination

Follow these instructions to delete a job/position combination.

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Update Master Files*.
- 3 Select *Update Job Controls [UJ]*. Press Enter. The system displays the screen shown in Figure 12-8.

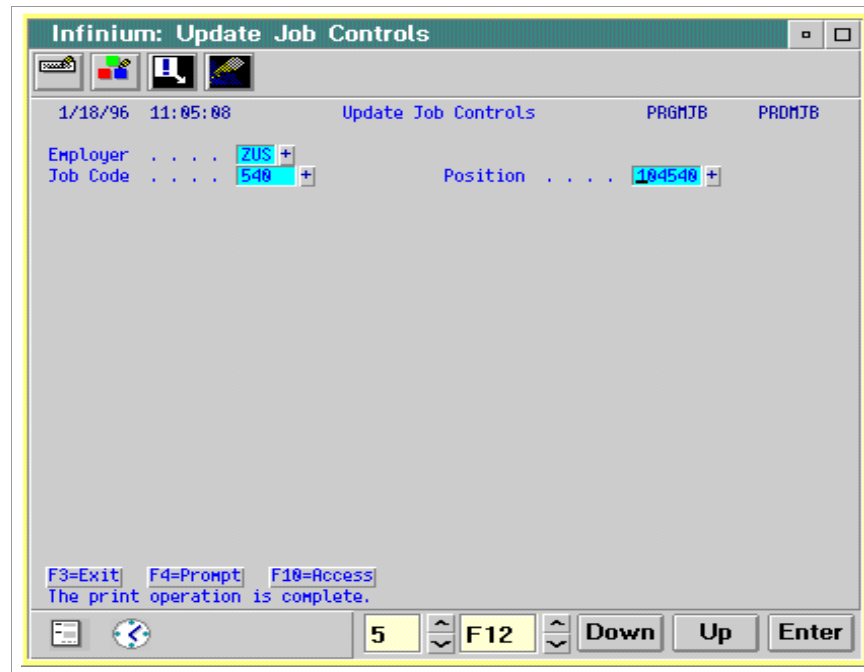


Figure 12-8: Update Job Controls prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you want to delete a job/position combination. Press F4 to display a list of valid employers.

Job Code

Type the value that represents the job associated with the job/position combination. Press F4 to display a list of valid jobs. The system displays a value in the “Posit” column on the Job Code Controls display for job/position combinations.

Leave this field blank if you want the system to use the value that you enter in the *Position* field to default a job code value into this field.

Position

Type the value that represents the position for which you want to delete a job/position combination. The position must be associated with the job you specified in the *Job Code* field on this screen.

- 5 Press Enter. The system displays the screen shown in Figure 12-9.

Infinium: Update Job Controls

1/18/96 11:06:26 Update Job Controls PRGMJB PRDMJB
Page 1 of 2

Employer : ZUS SAMPLE US COMPANY
Job Code : 540 Position : 104540
Description . . . : GEN CLERK JOB/PY CLERK POS

Pay Type : N EE0-4 Function . . : 0 (1->15)
Exempt/Non Exempt : 1 [0->1] EE0 Category . . . : 2 +
Job Evaluation . . : CLERK + License Code Req. . : +
Salary Range . . . : 500 + Security Group . . . : +

Start Date : End Date :
Next Review . . . : PROB + Next Review Days . : 90
Pay Grade : ACCT + Step Number : 1 +
Step-in-Grade? . . : 1 (0=No 1=Yes) Freeze Step? . . . : 0 (0=No 1=Yes)

| Comparative Salary Ranges | | | |
|---------------------------|---------|----------|---------|
| Description | Minimum | Midpoint | Maximum |
| Regional | | | |
| National | | | |
| Industry | | | |
| Actual | 6 | 8 | 11 |

F3=Exit F4=Prompt F10=Access F12=Cancel F22=Delete
The print operation is complete.

5 F12 Down Up Enter

Figure 12-9: Update Job Controls screen 1 of 2

- 6 Press F22 to delete the job/position combination.

The system displays the Confirm Deletion of Record window at the bottom of the screen. Type 1 in the *Delete Record?* field in the window to verify that you want to delete the job/position combination and then press Enter. The system deletes the combination and displays the Update Job Controls prompt screen.

- 7 You can do additional job control maintenance or press F3 to return to the Infinium HR main menu.

Displaying Job/Position Combinations

You can use the *Display Job Controls* function to display key information associated with job/position combinations.

Follow these steps to display a job control:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Display Master Files*.
- 3 Select *Display Job Controls [DJ]*. Press Enter. The system displays the screen shown in Figure 12-10.

Infinium: Display Job Code Controls

1/18/96 12:57:07 Job Controls PEG0JB PED0JB

Employer 2US +
Job Code 548 +
Salary Range +
Job Group +
Position +
Prior Evaluation [redacted]

Exempt/NonEx . . [redacted]
From Points . . . [redacted]
To Points [redacted]

F3=Exit F4=Prompt F10=Access
The print operation is complete.

5 F12 Down Up Enter

Figure 12-10: Job Controls selection screen

- 4 Use the following information to fill in the fields on this screen:

Using Selection Criteria

You can use any combination of the fields on this screen to identify the jobs that you want to display on the following screen. The instructions that follow describe how to use this display for job/position combinations.

Employer

Type the value that represents the employer for which you want to display job controls. Press F4 to display a list of valid employers.

Job Code

Type the value that identifies the job control for which you have set up job/position combinations. Press F4 to display a list of valid jobs. The system displays a value in the "Posit" column on the Job Code Controls display for job/position combinations.

Position

To restrict the information to only that which is associated with a specific job/position combination, type the value that represents the exception position. Leave this field blank to display information for both the standard job control and the job/position combination(s).

- 5 Press Enter. The system displays the screen shown in Figure 12-11.

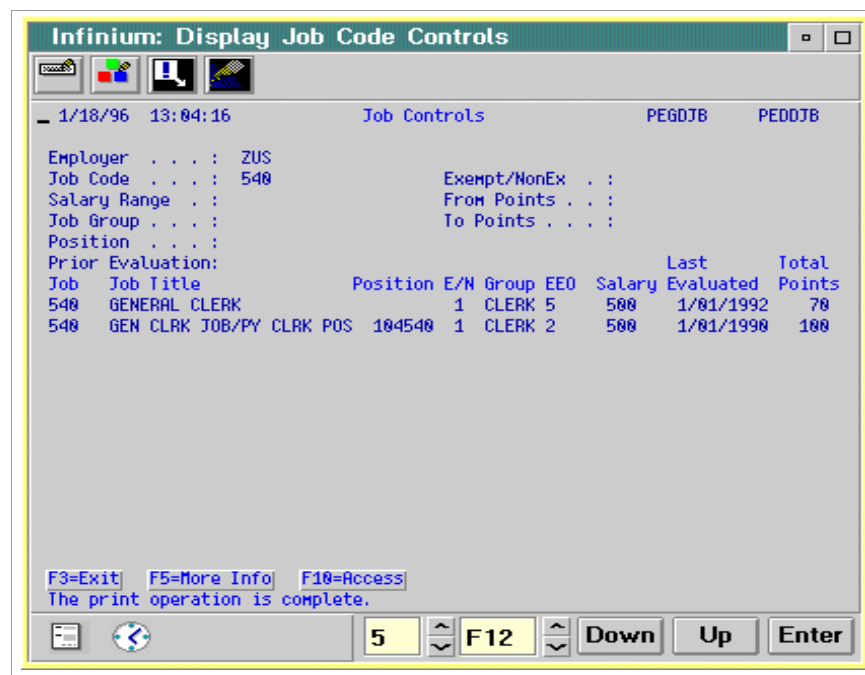


Figure 12-11: Job Controls screen

- 6 The system displays key information for the standard job control along with equivalent information for the associated job/position combination(s). Each job/position combination is listed as a separate line on the display.

Press F5 to display the license code and security group code associated with the standard job control and related job/position combinations, if applicable.

- 7 Press F3 to exit from the display. The system displays the screen shown in Figure 12-10. You can specify criteria to display additional job control information or press F3 to return to the Infinium HR main menu.

Printing Job/Position Controls

You can use the *List Job Controls* function to generate a report of key information from job/position combinations including salary range amounts and evaluation points. Infinium PY users can use the List Job Controls report to generate a report of key information from the Infinium PY job control including general ledger expense account numbers and rates.

Follow these steps to print the Infinium HR job control information:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *List Master Files*.
 - 3 Select *List Job Code Controls* [LJ]. Press Enter. The system displays the screen shown in Figure 12-12.
-

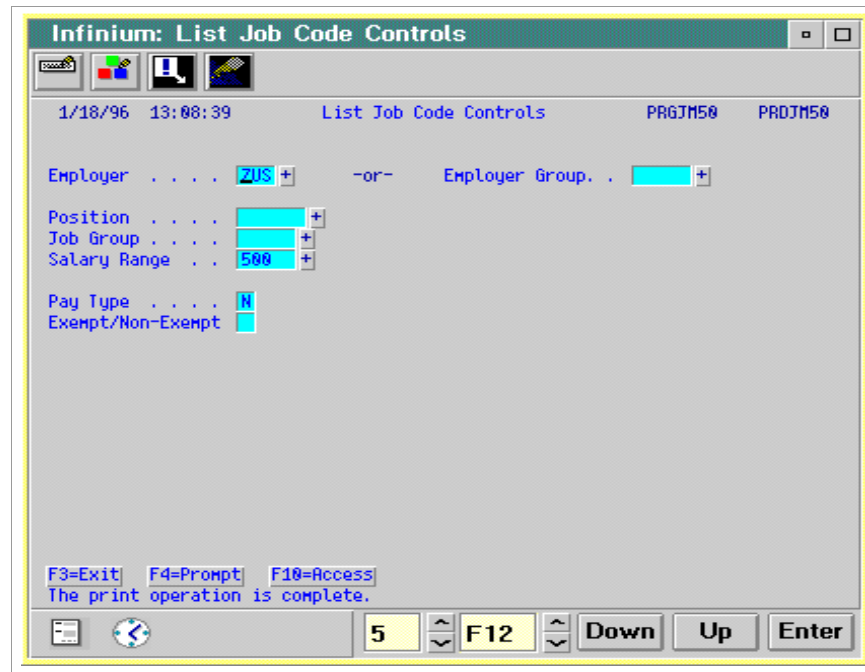


Figure 12-12: List Job Code Controls selection screen

- 4 Use the information below to fill in the fields on this screen.

Using Selection Criteria

You can use any combination of fields on this screen to identify the job/position combinations that you want to print on the report. See the topic entitled "Defining Job Controls" for a complete explanation of all of the fields on this screen.

You must type a value in the *Employer* or *Employer Group* fields.

Employer

Type the value that represents the employer for which you want to print job information. Press F4 to display a list of valid employer codes. You must enter a value in this field or in the *Employer Group* field.

Employer Group

Type the code value that identifies the group of employers for which you want to print the job code report. Press F4 to display a list of valid employer group code values. You define code values for this field using code type **ERG**. You must enter a code value in this field or in the *Employer* field.

Position

If you have set up unique combinations of jobs and positions, referred to as tiebacks, and want to print only the job information associated with a particular tieback position, type the value that represents that position in this field. Leave this field blank to print information for all jobs.

- 5 Press Enter. The system generates the following message and returns you to the Infinium HR main menu :

Building submission request . . .

The system uses batch processing to generate the Job Code Controls report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print this report using options on these screens. A sample of the report is shown on the next page.

Copying Job/Position Combinations to Another Employer

You can copy job-related information from one employer to another, including the job control portion of job/position combinations. However, you must manually set up position controls in the copied-to employer. See the topic entitled “Defining Job Controls” for details on how to use the copy function.

1/18/96

EMPLOYER ZUS SAMPLE US COMPANY

| POSITION | JOB | DESCRIPTION | EEO | PAY TYPE | SAL RANGE | JOB GROUP | SECURITY GROUP | DATE EVALUATED | TOTAL POINTS | PAY GRADE |
|-------------------------|-----|----------------------|--------|----------|-----------|-----------|----------------|----------------|--------------|-----------|
| | 540 | GENERAL CLERK | 5 | N | 500 | CLERK | | 1/01/1992 | 70 | ACCT |
| | | MINIMUM | 6.3000 | MIDPOINT | | 8.4000 | MAXIMUM | 10.5000 | | |
| 104540 | 540 | GEN CLRK JOB/PY CLRK | 2 | N | 500 | CLERK | | 1/01/1990 | 100 | ACCT |
| | | MINIMUM | 6.3000 | MIDPOINT | | 8.4000 | MAXIMUM | 10.5000 | | |
| TOTAL JOB CODES FOR ZUS | | | 2 | | | | | | | |

•

Summary of Job/Position Combinations

In summary, you have become familiar with the following information in this chapter:

- Why you use job/position combinations
 - How to set up job/position combinations
 - How to change job/position combinations
 - How to delete job/position combinations
 - How to display job/position combinations
 - How to print job/position combinations
 - How to copy job/position combinations
-

You can display and print position-related information using sixteen different functions in Infinium HR. You use eight of the functions to view position information and eight of the functions to generate reports of position information.

Before you can display or print position information, you must establish position controls and assign employees to positions. See the “Establishing Position Controls” chapter for details on how to set up position controls. The *Infinium Human Resources Guide to Processing* provides information on how to assign employees to positions using the *Enter New Hire* and *Enter Personnel Actions* functions.

The chapter consists of the following topics:

| Topic | Page |
|---|-------------|
| Overview of Position Displays and Reports | 13-2 |
| Displaying Position Information | 13-3 |
| Printing Position Information | 13-37 |
| Summary of Position Displays and Reports | 13-48 |

Overview of Position Displays and Reports

Objectives

After completing this chapter, you should be familiar with:

- Displaying open positions
 - Displaying current positions
 - Displaying organization information
 - Displaying workforce levels
 - Displaying turnover analysis
 - Printing position information
-

Displaying Position Information

You can display position information using eight different functions in Infinium HR. Position information includes details from position controls, budget information and employee position assignments. The following table provides a brief synopsis of the information shown on each display.

| Display Function Name and Quick Access Code | Selection Criteria and Information Included in the Display |
|--|--|
| <i>Display Open Positions</i> [DOPJ] | As of a specified date, you can select positions by job code or location code. The system displays key information about positions whose authorized headcount, hours or FTE units exceed the current number of assigned employees, hours or FTE units. The system displays authorized budget levels for each position as of the specified date reduced by currently assigned employees, hours or FTE units. |
| <i>Display Open Positions/Level</i> [DOP] | You can select positions by reporting levels and As Of Date. The system displays key information about positions by levels and position code. This display uses the logic described above. |
| <i>Display Current Positions</i> [DCP] | By job code and position code, the system displays positions whose most current budget period's ending date is blank or is after the date on which you are using the display. For single positions, the system shows the name of the current incumbent. For multiple positions, it shows the total number of current incumbents. You can use options to display the Update Organization screen for a position, a list of all assigned employees for each position, or the Basic Data, Personnel Data and I-9 records of an employee. |

| Display Function Name and Quick Access Code | Selection Criteria and Information Included in the Display |
|--|--|
| <i>Display Current Positions/Level</i> [DP] | The system provides the same information in this display as it does in the <i>Display Current Positions</i> function, except that you can select positions by reporting level. The system sorts the information first by reporting level, then by job code, then by position code. |
| <i>Display Organization Structure</i> [DOR] | You can select positions by their reports to position. The system sorts the information by organization ranking level, then by reports to employer and reports to position and then by position code. For single positions, the system shows the name of current incumbent. For multiple positions, the system shows the total number of assigned employees. |
| <i>Display Organization History</i> [DOH] | You can select positions by as of date to display past information up to the specified date. The system sorts the information by organization ranking level, then by job code, then by position code. For single positions, the system shows the name of current or past incumbents. For multiple positions, the system shows the total number of current or past incumbents. |
| <i>Display Workforce Levels</i> [WLI] | You can select positions by budget type, reporting levels, job code, location code, position code, reports to employer, and reports to position. Depending on the budget type selected, the system shows the total authorized budget levels for an employer versus actual headcount, FTE units or hours; it computes numeric and percentage differences between the two values. You can also project future authorized staffing levels and compare them to present actual headcount, FTE units or hours. |

| Display Function Name and Quick Access Code | Selection Criteria and Information Included in the Display |
|---|--|
| <i>Display Turnover Analysis</i> [ETA] | Based on the beginning and ending dates you specify, the system displays the total number of active and terminated employees during the period and computes a turnover percentage. |

Displaying Open Positions

Use this display to review positions whose authorized headcount, authorized FTE units or authorized hours exceeds current staffing levels.

Follow these steps to display open positions:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Display Master Files*.
- 3 Select *Display Open Positions* [DOPJ]. Press Enter. The system displays the screen shown in Figure 13-1.

```

1/12/09 11:36:39      Open Positions Display      PEGD75B  PEDD75B

Employer . . . .  _  +
As Of Date . . .  _____      Budget Type . . .  0 (0->2)
Job Code . . . .  _  +
Location Code . .  _  +
Include Inactive?  0 (0=No 1=Yes)

F3=Exit  F4=Prompt  F10=Access
    
```

Figure 13-1: Open Positions Display prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you want to display open positions. Press F4 to display a list of valid employers.

As Of Date

Type the date through which you want to see open positions. The system uses position budget history to display the authorized workforce levels as of the specified date. If you leave this field blank, Infinium HR uses the system date (today's date) for the display.

Budget Type

Use this field to indicate which types of positions you want to include in the display.

Valid values are:

- 0** Headcount. Positions budgeted by the number of assigned active employees.
- 1** FTE. Positions budgeted by the number full time equivalent units.
- 2** Hours. Positions budgeted by the number of regular pay period hours of assigned employees.

Job Code

To limit the display to positions associated with a particular job, type the value that represents that job. Press F4 to display a list of valid jobs. To display information for positions regardless of the job with which they are associated, leave this field blank.

Location Code

To limit the display to positions associated with a particular work location, type the code value that represents that location. Press F4 to display a list of valid location code values. You define values for this field using code type **LOC**.

To display information for positions regardless of the job with which they are associated, leave this field blank.

Include Inactive?

Use this field to indicate whether to include inactive positions in the display. The system determines which positions are inactive by comparing the last

date entered into the *To Date* field on the budget screen for each position to the date in the *As of Date* field on this screen and the value in the *Active/Inactive* field on the position master record.

Valid values are:

- 0** No, do not include inactive positions.
- 1** Yes, include inactive positions.

5 Press Enter. The system displays the screen shown in Figure 13-2.

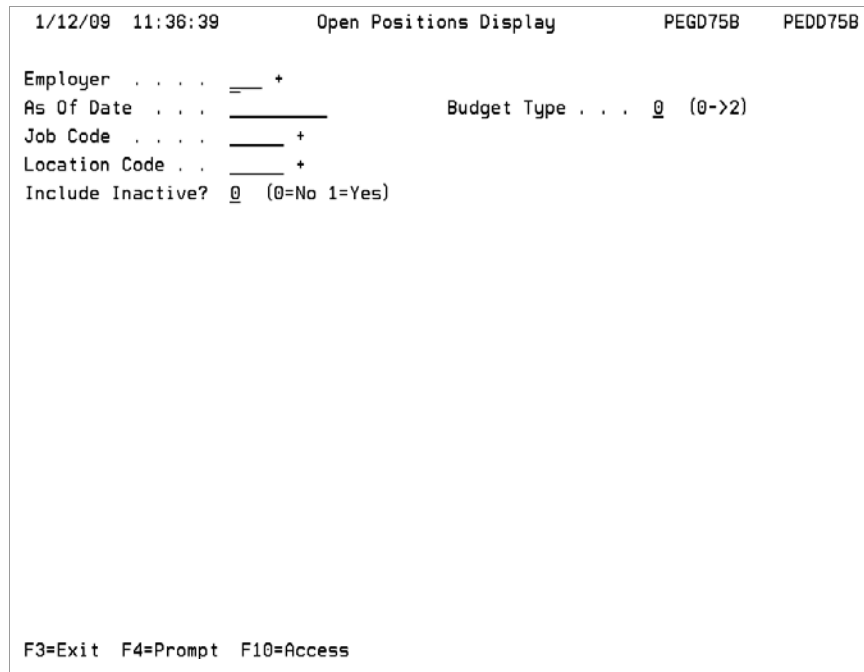


Figure 13-2: Open Positions Display screen

6 Use the following information to interpret this screen:

The system displays positions for which the authorized workforce level as of the specified date exceeds current staffing. For example, you are using the *Display Open Positions* function on January 15, 2006. You specify an as-of date of **060105** and a budget type of **0**. The system checks each selected position’s budget information screen to determine the authorized workforce level as of June 1, 2005.

The system then reduces the authorized workforce level displayed on the screen shown above by the number of employees currently assigned to each position. Continuing the example of the preceding paragraph, the authorized workforce level as of June 1, 2005, for the project manager position is 5; however, you hired one employee into the position on May 15, 2004, and

another on August 1, 2005. The system displays an authorized workforce level of 3 in the “Auth No.” column on the screen shown above.

If the latest to date on the position’s budget information screen precedes the as of date you specify, the system does not include that position on the display. For example, if the latest to date for the **PYCLRK** position is December 31, 1995, and you type **010196** in the *As of Date* field for this display, the system excludes this position from the display since it is no longer a current position.

Lvl

This column is displayed at the far left and on the right of the screen shown above. The system displays the value from the *Organiz. Level* field on the Update Organization screen for each open position in the leftmost column on the screen; it uses information from the same field for the position each open position reports to on the right of the screen.

Press F5 to expand the information on the Open Positions Display screen to include the reports to position. The system displays a screen similar to Figure 13-3.

```

6/30/05 09:10:30      Open Positions Display      PEGD75B  PEDD75B

Employer . . . . : ZUS  SAMPLE US COMPANY
As of Date . . . : 6302005      Budget Type . . : 0 (0->2)
Job Code . . . . :
Location Code . . :
Search For . . . . (Enter word or known characters)
Lvl Postn Position Title      Auth No. Job Locn Reports to Lvl/Pos/Name
20 121240 PROJECT MANAGER      3.00 240 HQ 00 120140
                                Reports to ER:
00 122230 SYSTEM ANALYST      1.00 230 HQ 00 120140
                                Reports to ER:
00 200910 SERVER              16.00 910 KEY 00 200140
                                Reports to ER:
00 200911 WAITER/WAITRESS - BIST 25.00 911 KEY 00 200140
                                Reports to ER:
00 200915 WAITER/WAITRESS - BIST 23.00 915 KEY 00 200140
                                Reports to ER:
00 200920 BUS PERSON          8.00 920 KEY 00 200140
                                Reports to ER:
00 201260 WEATHER FORECASTER    3.00 260 HI 00 200160
                                Reports to ER:
F3=Exit F5=More Info F10=Access

```

Figure 13-3: Open Positions Display screen - expanded

- 7 Press Enter or F3 to exit from this screen. The system displays the screen shown in Figure 13-1. You can specify additional selection criteria or press F3 to return to the Infinium HR main menu.

Displaying Open Positions by Level

The *Display Open Positions/Level* function works in the same way and displays the same information as the *Display Open Positions* function described above, except that you can select positions by reporting levels rather than by job code and/or location code.

Displaying Current Positions

The *Display Current Positions* function provides you with a snapshot of current positions with authorized workforce levels and the number of assigned employees as of the date you use the display. For example, if you use the display on January 10, 1996, the system displays the total authorized workforce levels, FTE units or hours as of January 10, 1996, along with current staffing information. For single positions, the system displays the name of the current incumbent. For multiple positions, the system displays the number of assigned active employees.

You can use options on the display screen to view position control information or the names and basic data, personnel data and I-9 records of assigned employees.

Follow these steps to display current positions:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Display Master Files*.
 - 3 Select *Display Current Positions* [DCP]. Press Enter. The system displays the screen shown in Figure 13-4.
-

```
8/09/02 12:26:36      Current Organization      PEGD65C  PEDD65C

Employer . . . .  _  +
Organization Lvl.  _
Job Code . . . .  _  +
Location Code . .  _  +
Incl Inactive? .  0 (0=No 1=Yes)

F3=Exit  F4=Prompt  F10=Access
```

Figure 13-4: Current Organization prompt screen

4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you want to display current positions. Press F4 to display a list of valid employers.

Organization Lvl

Type a value that indicates the organization ranking level of positions that you want to include in the display. The system compares the value you type in this field to the value in the *Organiz. Level* field on the Update Organization screen for each position and selects the positions that are assigned to the specified level.

Leave this field blank to select positions regardless of their organization ranking level.

Job Code

To limit the display to positions associated with a particular job, type the value that represents that job. Press F4 to display a list of valid jobs. To display information for positions regardless of the job with which they are associated, leave this field blank.

Location Code

To limit the display to positions associated with a particular work location, type the code value that represents that location. Press F4 to display a list of valid location code values. You define values for this field using code type **LOC**.

To display information for positions regardless of the location with which they are associated, leave this field blank.

Include Inactive?

Use this field to indicate whether the system should include inactive positions in the display.

The system determines which positions are inactive by comparing the last date entered into the *To Date* field on the budget screen for each position to the date in the *As of Date* field on this screen and the value in the *Active/Inactive* field on the position master record.

Valid values are:

- 1** Yes, include inactive positions in the display.
- 0** No, do not include inactive positions in the display.

5 Press Enter. The system displays the screen shown in Figure 13-5.

```

8/09/02 12:27:02          Current Organization          PEGD65C  PEDD65C

Employer . . . : ZUS   SAMPLE US COMPANY
Organization Lvl: 00
Job Code . . . :
Location Code . :
Incl Inactive? : 0 (0=No 1=Yes)
Search For . . . _____ (Enter word or known characters)
1=Employee Data  2=Position Data
Opt Lvl Postn Position Title          Auth No. Employee Name/Work Force Job
- 00 HRTST SIG KC218                  5.00 MULTIPLE FORCE OF 00001 HRTST
- 70 KAF FSE TEST-STEPINGRADE JO     10.00 MULTIPLE FORCE OF 00002 KAF
- 00 100100 CHIEF OPERATING OFFICER   1.00 MULTIPLE FORCE OF 00002 100
- 00 120120 CHIEF INFORMATION OFFIC  1.00 80214 PIDGEON           120
- 70 PYMGR PY MANGAGER                10.00 MULTIPLE FORCE OF 00003 140
- 00 100140 ACCOUNTING MANAGER        4.00 MULTIPLE FORCE OF 00007 140
- 00 110140 HUMAN RESOURCES MANAGER   1.00                                140
- 00 120140 MIS MANAGER                1.00 80039 KAPPA             140
- 00 400140 DRIVER MANAGER             1.00                                140
- 00 401160 DRIVER SUPERVISOR         1.00 80026 ROAD              140
- 00 200140 RESTUARANT MANAGER        1.00 80226 LASAGNA           140 +

F3=Exit  F10=Access

```

Figure 13-5: Current Organization screen

6 Use the following information to work with this screen.

The system displays a line of information for each selected position indicating the current authorized workforce level, hours or FTE units. To the right of the authorized value for single positions, the system indicates the employee number and name of the current incumbent. For multiple positions, the system displays **Multiple Force of xxxxx** where xxxxx represents the current number of assigned employees.

The system sorts the selected positions by their job code, then their position code.

Opt

Type **1** in this field adjacent to a position to view a list of assigned employees, from which you can display the basic data, personnel data and I-9 information for each assigned employee. Type **2** in this field to display the Update Organization screen for the selected position.

7 If you do not want to review assigned employees or position control information for any of the selected positions, press Enter or F3 to exit from this screen. The system displays the screen shown in Figure 13-3. You can specify selection criteria to view other current positions or press F3 to return to the Infinium HR main menu.

Viewing Assigned Employees

- 8 To view employees currently assigned to a particular position, type **1** in the *Opt* field adjacent to the position and then press Enter. The system displays the screen shown in Figure 13-6.

```

7/21/05 12:52:11      Employees In Position      PEGD65C  PEDD65C

Employer . . . : ZUS  SAMPLE US COMPANY
Position . . . : 112210  RECRUITER

Employee#  Opt  Employee Name
1117      -   FORCE, GAYLE
1118      -   KAWOKA, KENJI
1119      -   RABBIT, BUNNY
80110     -   TURNER, PAIGE
80116     -   CLUELESS, CALVIN
80154     -   GLAMOUR, GRETA

F3=Exit  F10=Access
    
```

Figure 13-6: Employees In Position screen

- 9 The system displays a list of employees currently assigned to the selected position. To view the basic data, personnel data and employment eligibility (I-9) information for one of the employees, type any character in the *Opt* field next to that employee and press Enter.
- 10 The system displays the first of five screens of the employee's basic data record. Press Enter to advance from one screen to the next. After you view all five Basic Data screens, the system displays the first of three screens of the employee's personnel data record. Press Enter to advance from one screen to the next. For U.S. employees, you can press F8 on any of the three Personnel Data screens to view the employee's employment eligibility (I-9) information.
- 11 After you view all of the selected employee's information, the system returns to the screen shown in Figure 13-5. You can choose another employee whose information you want to review or press F3 to return to the screen shown in Figure 13-4.

- 12 To review the position control information for a particular position, type **2** in the *Opt* field adjacent to the position and press Enter. The system displays the screen shown in Figure 13-7.

```

_ 7/21/05 12:55:22          Position Display          PEGOGD  PEDOGD
                                     Page 1 of 2
Employer . . . : ZUS  SAMPLE US COMPANY
Position . . . : 112210 RECRUITER
                                     Training Group : ADMIN
Organiz. Level : 00                   Assigned Employee MULTIPLE
Reports to ER . :                      Entry Level ? . : 0 (0=No 1=Yes)
Reports to Posit: 111160
Area . . . : 100                       Division . . . : ADMIN
Department . . . : HR                   Cost Centr . . . : 112

Job Code . . . : 210                     Location Code . . : HQ
Union Code . . . :
Shift . . . . . :
Position Group 1:
Position Group 2:
Requisition Date: 1/01/1990             Labor Category : OFF
FTE Hours . . . : .00                    Workers Comp Code
Current # Emps. : 00006                  Benefit Group . . : *BENSAL-B
Current FTE Units .00                    PY Auth Group . .
Type of Position: M
Budget Type . . . : 0 (0->2)
Current Act Hours 440.0
Comments . . . :
Statistical Acct:
F3=Exit F6=Pos. Defaults

```

Figure 13-7: Position Display screen

- 13 After you review the position control information, you can press F3 or Enter to exit from the screen.
- 14 The system displays the screen shown in Figure 13-4. You can review assigned employee or position control information for another position or press F3 to return to the Infinium HR main menu.

Displaying Current Positions by Level

The *Display Current Positions/Level* function works in almost the same way and displays the same information as the *Display Current Positions* function described above. It differs in that you can select positions by reporting levels rather than by job code and/or location code.

The *Display Current Positions/Level* differs from the *Display Current Positions* function in that it does not present the Employees in Position screen shown in Figure 13-5 for single positions. When you review employee data for a single position, the system immediately displays the first screen of the employee's basic data record.

Displaying Organization Structure

You use the *Display Organization Structure* function to display positions by organization ranking level. You can enter a numeric value from 01 to 99 in the *Organiz. Level* field on the Update Organization screen for each position. This display sorts positions in the following order:

- By their organization level
- By reports to employer
- By report to position
- By position code.

The information includes the position title, number of assigned employees (for multiple positions) or the employee number and name of the incumbent (for single positions) along with the job associated with each position and the position and employer each position reports to.

Follow these steps to display your organization structure:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Display Master Files*.
 - 3 Select *Display Organization Structure* [DOR]. Press Enter. The system displays the screen shown in Figure 13-8.
-

```
6/30/05 09:21:21      Organization Reporting Display  PEGD60B  PEDD60B

Employer . . . .  ZUS + SAMPLE US COMPANY
As of date . . .  6302005
Reports to ER . .  _ +
Reports to Postn.  _ +
OR Employee . . .  _ + -or- Last Name . . . .  _ +
Incl Inactive ? .  0 (0=No 1=Yes)

F3=Exit  F4=Prompt  F10=Access
```

Figure 13-8: Organization Reporting Display prompt screen

- 4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you want to display position information. Press F4 to display a list of valid employers.

As of date

Type the date for which you want to see position information. The system uses position budget history to display information for positions with authorized workforce levels as of the specified date. If you leave this field blank, Infinium HR uses the system date (today's date) for the display.

Include Inactive?

Use this field to indicate whether the system should include inactive positions in the display. The system determines which positions are inactive by comparing the last to date entered on the budget screen for each position to the date on which you are using the display.

For example, on January 10, 1996, you use the *Display Organization Structure* function. The latest To Date on the budget information screen for the **HRADMIN** position is December 31, 1995. The system excludes this position from the display, even if active employees are currently assigned to the position, unless you specify that inactive positions should be included in the display.

Valid values are:

- 1** Yes, include inactive positions in the display.
- 0** No, do not include inactive positions in the display.

Reports to ER

To limit the display to positions that report to a particular employer, type the value that represents that position in this field.

The system compares the value you type in this field to the value in the *Reports to ER* field on the Update Organization screen for each position. It displays information for only those positions that report to the employer you specify.

Leave this field blank to retrieve information for all positions or to use the *OR Employee* field

Reports to Positn

To limit the display to positions that report to a particular position, type the value that represents that position in this field. Press F4 to display a list of valid positions.

The system compares the value you type in this field to the value in the *Reports to Positn* field on the Update Organization screen for each position. It displays information for only those positions that report to the position you specify.

Leave this field blank to retrieve information for all positions or to use the *OR Employee* field.

OR Employee

To limit the display to positions that report to an employee who is the only incumbent in a particular single position, type the employee's number in this field. Press F4 to display a list of employees. When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or all of his or her last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee whose subordinate positions you want to view and press Enter. The system returns to the prompt screen and automatically fills in the employee number and last name of the employee you selected.

For example, employees in six positions report to the incumbent in the lead packer position. You define the **LDPACK** position as a single position; Joe Smith, employee number 45, is the only employee assigned to it. If you type **45** in the *OR Employee* field, the system displays information for the six positions that report to Joe. This field does not function for positions you define as multiple, even if only one employee is assigned to the multiple position.

The system compares the value you type in this field to the value in the *Assigned Employee* field on the Update Organization screen for each position. It displays information for only those positions that report to the employee you specify.

Leave this field blank to retrieve information for all positions.

Last Name

To limit the display to positions that report to an employee who is the only incumbent in a particular single position, you can use this field to fill the employee's number into the *OR Employee* field. The system uses the value only in the *OR Employee* field to find employees who report to a particular employee. If you are unsure of the employee's number or name, you can leave this field blank and press F4 to display a list of employees.

If you know the employee's last name, type it in this field and press F4 to display the Employee Locate screen. The system displays the employee's name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee's entire last name, type as much as you know and press F4. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

Leave this field blank to view information for all positions.

Include Inactive?

Use this field to indicate whether the system should include inactive positions in the display.

The system determines which positions are inactive by comparing the last date entered into the *To Date* field on the budget screen for each position to

the date in the *As of Date* field on this screen and the value in the *Active/Inactive* field on the position master record.

Valid values are:

- 1 Yes, include inactive positions in the display.
- 0 No, do not include inactive positions in the display.

5 Press Enter. The system displays the screen shown in Figure 13-9.

```

_ 6/30/05 09:21:50      Organization Reporting Display  PEGD60B  PEDD60B

Employer . . . : ZUS  SAMPLE US COMPANY
As of date . . : 06302005
Reports to ER. .:
Reports to Postn:

Incl Inactive ? : 0 (0=No 1=Yes)
Lvl Postn Job Title      Employee Name      Reports to Postn/EE/Name
00 HRTST SIG KC218      MULTIPLE          100125
00 100100 CHIEF OPERATING OF MULTIPLE
00 100140 ACCOUNTING MANAGER MULTIPLE          100120
00 100250 SKI INSTRUCTOR  MULTIPLE          103160
00 100550 FILE CLERK - ACCOU MULTIPLE          101160
00 101160 ACCTS PAYABLE SUPE MULTIPLE          100140
00 101200 ACCTS PAYABLE ACCO MULTIPLE          101160
00 101540 ACCTS PAYABLE CLER MULTIPLE          101160
00 101550 FILE CLERK - ACCOU MULTIPLE          101160
00 102160 ACCTS RECEIVABLE S MULTIPLE          100140
00 102540 ACCTS RECEIVABLE C MULTIPLE          102160
00 102550 FILE CLERK - ACCTS MULTIPLE          101160      +

F3=Exit  F5=More Info  F10=Access
    
```

Figure 13-9: Organization Reporting Display screen

6 Use the following information to work with this screen:

The system displays a line of information for each selected position indicating the position title, the reports to position and the name of the incumbent in the reports to position, if it has been defined as a single position. For single positions, the system displays the employee number and name of the current assigned employee; for multiple positions, the system displays **Multiple**.

The positions are sorted by organization ranking level and then by position code.

7 Press F5. The system displays a screen similar to Figure 13-10 that shows the employer to whom persons in the position report.

```

_ 6/30/05 09:21:50      Organization Reporting Display  PEGD60B  PEDD60B

Employer . . . : ZUS  SAMPLE US COMPANY
As of date . . . : 06302005
Reports to ER. .:
Reports to Postn:

Incl Inactive ? : 0 (0=No 1=Yes)
Lvl Postn Job Title      Employee Name      Reports to Postn/EE/Name
00 HRTST SIG KC218      MULTIPLE      100125
                                Reports to ER:
00 100100 CHIEF OPERATING OF MULTIPLE
                                Reports to ER:
00 100140 ACCOUNTING MANAGER MULTIPLE 100120
                                Reports to ER:
00 100250 SKI INSTRUCTOR  MULTIPLE      103160
                                Reports to ER:
00 100550 FILE CLERK - ACCOU MULTIPLE 101160
                                Reports to ER:
00 101160 ACCTS PAYABLE SUPE MULTIPLE 100140
                                Reports to ER:      +

F3=Exit  F5=More Info  F10=Access

```

Figure 13-10: Organization Reporting Display screen – expanded information

- 8 Press F3 or Enter to exit from this screen. The system displays the screen shown in Figure 13-7. Specify selection criteria for additional displays or press F3 to return to the Infinium HR main menu.

Displaying Organization History

The *Display Organization History* function works in almost the same way and displays the same information as the *Display Current Positions* function described above, with two exceptions. The sort order is different and you can specify an as of date. The system uses the as of date to select positions and to display workforce, FTE or hours budget information.

Follow these steps to display historical information for positions:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Display Master Files*.
- 3 Select *Display Organization History* [DOH]. Press Enter. The system displays the screen shown in Figure 13-11.

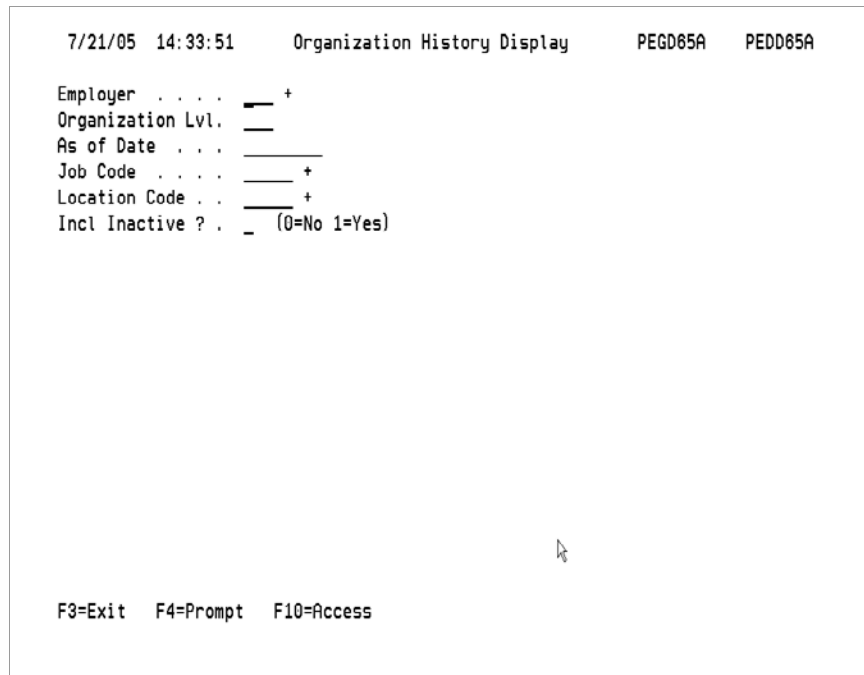


Figure 13-11: Organization History Display prompt screen

4 Use the following information to fill in the fields on this screen:

Employer

Type the value that represents the employer for which you want to display position budget history information. Press F4 to display a list of valid employers.

Organization Lvl

Type a value that indicates the organization ranking level of positions that you want to include in the display. The system compares the value you type in this field to the value in the *Organiz. Level* field on the Update Organization screen for each position and selects the positions that are assigned to the specified level.

Leave this field blank to select positions regardless of their organization ranking level.

As of Date

Type the date the system should use to select active positions for the display. The system uses position budget history to display information for positions with authorized workforce levels as of the specified date. If you leave this field blank, Infinium HR uses the system date (today's date) for the display.

Job Code

To limit the display to positions associated with a particular job, type the code that represents that job. Press F4 to display a list of valid job codes. To display information for positions regardless of the job with which they are associated, leave this field blank.

Location Code

To limit the display to positions associated with a particular work location, type the code value that represents that location. Press F4 to display a list of valid location code values. You define code values for this field using code type **LOC**.

To display information for positions regardless of the location with which they are associated, leave this field blank.

Incl Inactive?

Use this field to indicate whether the system should include inactive positions in the display.

The system determines which positions are inactive by comparing the last date entered into the *To Date* field on the budget screen for each position to the date in the *As of Date* field on this screen and the value in the *Active/Inactive* field on the position master record.

Valid values are:

- 1** Yes, include inactive positions in the display.
- 0** No, do not include inactive positions in the display.

5 Press Enter. The system displays the screen shown in Figure 13-12.

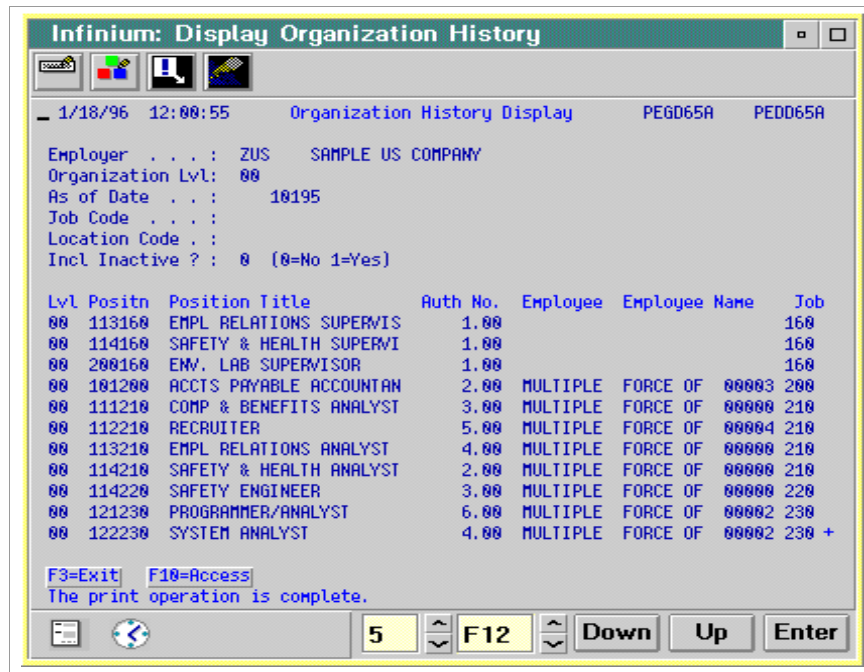


Figure 13-12: Organization History Display screen

6 Use the following information to work with this screen:

The system displays a line of information for each selected position indicating the current authorized workforce level, hours or FTE units. To the right of the authorized value, for single positions it indicates the employee number and name of the current incumbent. For multiple positions, the system displays **Multiple Force of xxxxx** where xxxxx represents the current number of assigned employees.

The system sorts the selected positions by their organization ranking level, then by job code and then by position code.

7 Press F3 or Enter to exit from this screen. The system displays the screen shown in Figure 13-9. Specify selection criteria for additional displays or press F3 to return to the Infinium HR main menu.

Displaying Workforce Levels

You use the *Display Workforce Levels* function to view total authorized headcount, FTE units or hours for an employer as of a specified date. The system also displays the total active workforce, FTE units or hours associated with the active positions as of the specified date and computes the difference between the authorized and actual values.

You can also use this display to project differences between the workforce levels as of the specified date and levels as of a future date.

Follow these steps to display workforce levels for an employer:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *Display Master Files*.
- 3 Select *Display Workforce Levels [WLI]*. Press Enter. The system displays the screen shown in Figure 13-13.

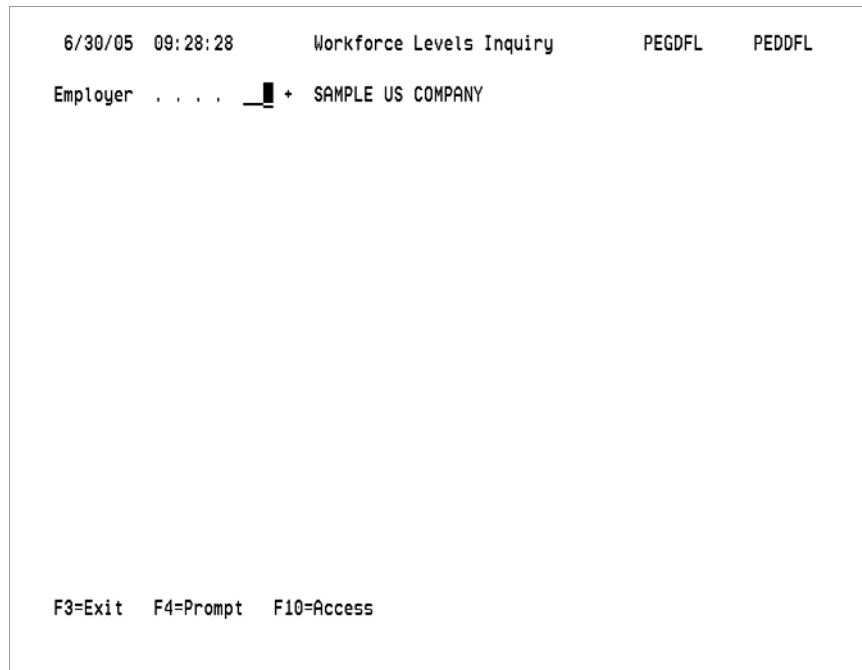


Figure 13-13: Workforce Levels Inquiry prompt screen 1 of 2

- 4 Type the value that represents the employer for which you want to display workforce levels information. Press F4 to display a list of valid employers.
- 5 Press Enter. The system displays the screen shown in Figure 13-14.

```

6/23/12 11:44:27      Workforce Levels Inquiry      PEGDFL      PEDDFL

Employer . . . . : ZUS      SAMPLE US COMPANY
Budget Type . . . : 0 (0->2)
Area . . . . . : _____ +
Division . . . . : _____ +
Department . . . : _____ +
Cost Centr . . . : _____ +
Job Code . . . . : _____ +
Location . . . . : _____ +
Position . . . . : _____ +

Reports to ER . . : ___ +
Reports to Postn. : _____ +
As of Date . . . : _____
Inc Inactive Lvl : 0 (0=No 1=Yes)

F3=Exit F4=Prompt F10=Access
    
```

Figure 13-14: Workforce Levels Inquiry prompt screen 2 of 2

6 Use the following information to fill in the fields on this screen:

Budget Type

Use this field to indicate which types of positions you want to include in the display.

Valid values are:

- 0** Headcount. You budget by the number of assigned active employees.
- 1** FTE. You budget by the number of full time equivalent units.
- 2** Hours. You budget by the number of regular pay period hours of assigned employees.

Level 1

To limit the display to positions assigned to a particular level 1, type the value that represents that level. Press F4 to display a list of valid level 1 choices.

Leave this field blank to include all positions in the display regardless of the level 1 with which they are associated.

Level 2

To limit the display to positions assigned to a particular level 2, type the value that represents that level. Press F4 to display a list of valid level 2 choices within the specified level 1.

Level 3

To limit the display to positions assigned to a particular level 3, type the value that represents that level. Press F4 to display a list of valid level 3 choices within the specified level 2.

Level 4

To limit the display to positions assigned to a particular level 4, type the code that represents that level. Press F4 to display a list of valid level 4 choices within the specified level 3.

Job Code

To limit the display to positions associated with a particular job, type the code that represents that job. Press F4 to display a list of valid job codes. Leave this field blank to display information for positions regardless of the job with which they are associated.

Location

To limit the display to positions associated with a particular work location, type the code value that represents that location. Press F4 to display a list of valid location code values. You define code values for this field using code type **LOC**.

Leave this field blank to display information for positions regardless of the job with which they are associated.

Position

To limit the display to the workforce levels of a particular position, type the code that represents that position. Press F4 to display a list of valid position codes.

Leave this field blank to display information for all positions.

Reports to ER

To limit the display to the workforce levels of positions that report to a particular employer, type the code that represents the reports to-position's employer.

Leave this field blank to display information for all positions.

Reports to Postn

To limit the display to the workforce levels of positions that report to a particular position, type the code that represents the reports to position. Press F4 to display a list of valid positions.

Leave this field blank to display information for all positions.

As of Date

Type the date the system should use to select active positions for the display. The system uses position budget history to display information for positions with authorized workforce levels as of the specified date. If you leave this field blank, Infinium HR uses the system date (today's date) for the display.

Inc Inactive Lvl

Specify whether the system should include positions associated with inactive levels in the display.

Valid values are:

- 0** No, do not include positions associated with inactive levels.
- 1** Yes, include positions associated with inactive levels.

7 Press Enter. The system displays the screen shown in Figure 13-15.

```

6/30/05 09:43:20      Workforce Levels Inquiry      PEGDFL      PEDDFL

Employer . . . : ZUS  SAMPLE US COMPANY
Budget Type . . : 2  (0->2)
Area . . . :
Division . . . :
Department . . . :
Cost Centr . . . :
Job Code . . . :
Location . . . :
Position . . . :
Reports to ER . . :
Reports to Postn:
Workforce Hours
-----
As of Date      Authorized      Actual Today      Difference      %
06011995              540.00              840.00              300.00      155.5

-----
F3=Exit  F10=Access

```

Figure 13-15: Workforce Levels Inquiry screen

8 Use the following information to work with this screen:

Depending on the budget type you specified on the preceding screen, in the Authorized column the system displays the total of the authorized workforce levels, authorized FTE units or authorized hours associated with the selected positions as of the specified date.

The *Actual Today* field indicates the total number of active employees currently assigned to the selected positions as of the date you are using the *Display Workforce Levels* function.

The system subtracts the value in the Actual Today column from the value in the Authorized column to obtain the result shown in the Difference column. Similarly, the % column represents the value in the Authorized column divided by the value in the Actual Today column.

For example, if on the selection screen you specify **060195** as the as of date and **2** as the budget type, in the Authorized column the system displays the total of the authorized hours for all positions that were active as of December 31, 1995. The Actual Today column reflects the hours of currently assigned employees, including the hours of employees assigned to this position after December 31, 1995.

Projecting Future Workforce Levels

- You can compare differences between the workforce levels for the specified as of date and another date by entering the additional date in the blank line at the lower right-hand side of the screen. The date can be before or after the as of date. Press Enter. The system displays the screen shown in Figure 13-16.

```

6/30/05 09:40:06      Workforce Levels Inquiry      PEGDFL      PEDDFL

Employer . . . . : ZUS  SAMPLE US COMPANY
Budget Type . . . : 0 (0->2)
Area . . . . :
Division . . . . :
Department . . . . :
Cost Centr . . . . :
Job Code . . . . :
Location . . . . :
Position . . . . :
Reports to ER . . :
Reports to Postn:
Workforce
-----
As of Date      Authorized      Actual Today      Difference      %
01011995        502.00          225.00           277.00         44.8

1012006        660.00          244.00           416.00         36.9

Change Count . . : 158.00
Change % . . . . : 31.4

F3=Exit  F10=Access
    
```

Figure 13-16: Workforce Levels Inquiry screen

- Use the following information to work with the new information on this screen:

Adjacent to the new date, the system displays the corresponding authorized workforce levels using information from the Update Workforce Levels, Update Authorized/Budgeted FTE's or Update Authorized/Budget Hours screen associated with the selected position(s).

For example, on the Workforce Levels Inquiry prompt screen shown in Figure 13-14 you type **01012006** in the *As of Date* field. After you press Enter, the system displays **502** in the Authorized column as shown above in Figure 13-16.

You type **01012006** in the line at the bottom of the screen and press Enter. The system displays **660** in the Authorized column adjacent to the additional date because you defined a new budget period for one of the positions included in the display, or you defined a new position whose first budget period begins January 1, 2006. In either case, on January 1, 2006, the new

or changed position increases the total authorized headcount for your employer by the two employees.

The Actual Today column reflects assigned employees, FTE units or hours as of the system date on which you are using the option.

Change Count

At the bottom of the screen, the system fills in the *Change Count* field by subtracting the original authorized workforce level value from the authorized workforce level value for the additional date. Continuing the example in the previous paragraph, the system subtracts 502 from 660 and displays **158** in the *Change Count* field.

Change %

The system fills in the *Change %* field by dividing the value in the *Change Count* field into the value in the *Authorized* field adjacent to the first as of date on this screen. Continuing the example in the previous paragraph, the system divides 159 by 5 and displays **31.4** in the *Change %* field.

- 11 Press F3 to exit this screen. The system displays the screen shown in Figure 13-11. You can enter criteria to display additional information or press F3 to return to the Infinium HR main menu.

Displaying Turnover Analysis

You use this display to review key information for employees terminated during a specified period of time and to view the turnover percentage computed by the system.

Follow these steps to display turnover information for an employer:

- 1 From the Infinium HR main menu select *Master Files*.
 - 2 Select *Display Master Files*.
 - 3 Select *Display Turnover Analysis [ETA]*. Press Enter. The system displays the screen shown in Figure 13-17.
-

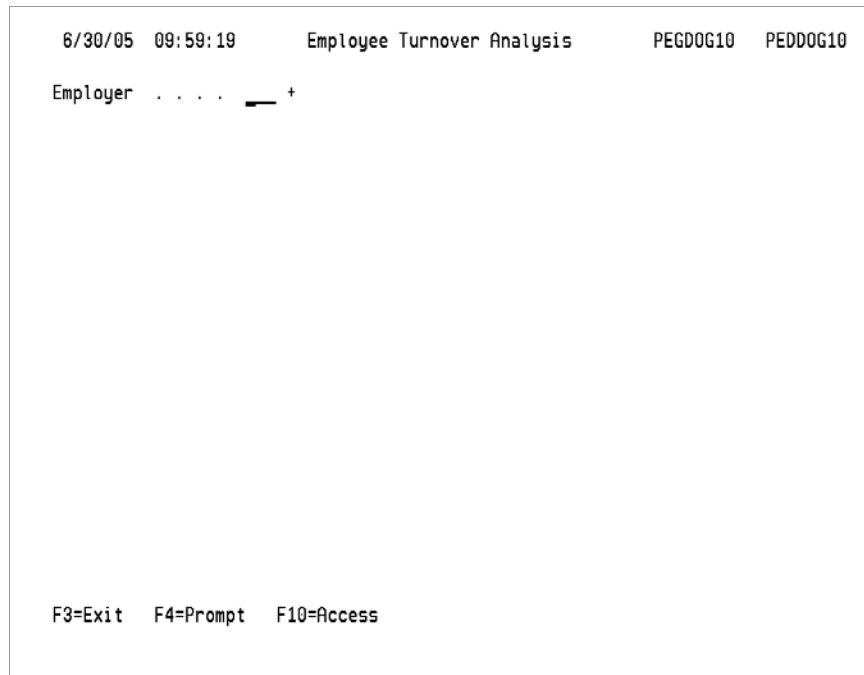


Figure 13-17: Employee Turnover Analysis prompt screen 1 of 2

- 4 Type the value that represents the employer for which you want to display turnover information. Press F4 to display a list of valid employers.
- 5 Press Enter. The system displays the screen shown in Figure 13-18.

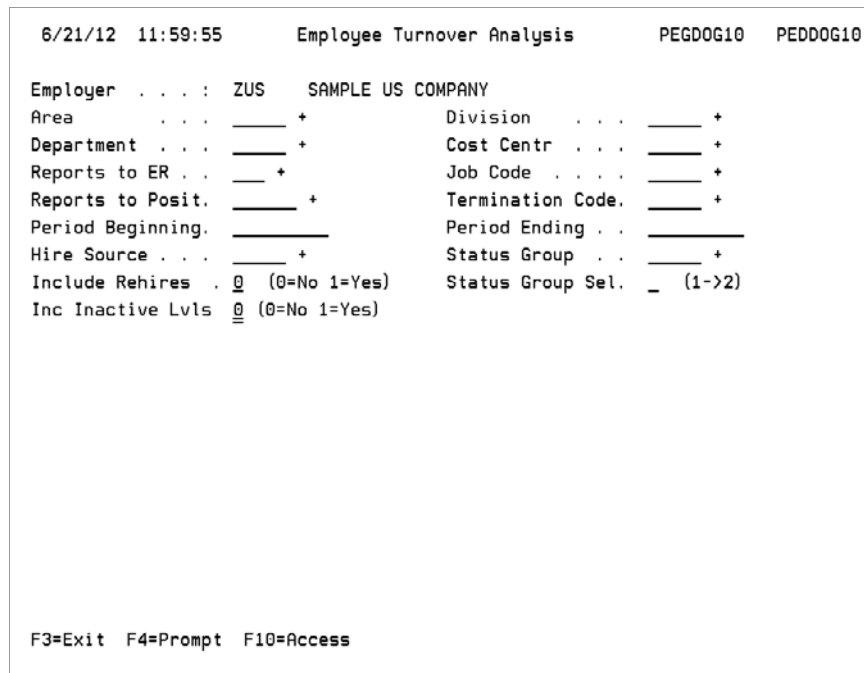


Figure 13-18: Employee Turnover Analysis prompt screen 2 of 2

- 6 Use the following information to fill in the fields on this screen. All of the fields are optional.

Level 1

To limit the display to employees assigned to a particular level 1, type the value that represents that level. Press F4 to display a list of valid level 1 choices.

Leave this field blank to include information for employees regardless of the level 1 with which they are associated.

Level 2

To limit the display to employees assigned to a particular level 2, type the value that represents that level. Press F4 to display a list of valid level 2 choices within the specified level 1.

Level 3

To limit the display to employees assigned to a particular level 3, type the value that represents that level. Press F4 to display a list of valid level 3 choices within the specified level 2.

Level 4

To limit the display to employees assigned to a particular level 4, type the value that represents that level. Press F4 to display a list of valid level 4 choices within the specified level 3.

Reports to ER

To limit the display to information of employees in positions that report to a particular employer, type the value that represents the reports to employer.

Leave this field blank to display information for all employees.

Reports to Posit

To limit the display to information of employees in positions that report to a particular position, type the code that represents the reports to position. Press F4 to display a list of valid positions.

Leave this field blank to display information for all employees.

Job Code

To limit the display to information for employees in positions associated with a particular job, type the value that represents that job. Press F4 to display a

list of valid job codes. Leave this field blank to display information for employees regardless of the job to which they are assigned.

Period Beginning

To limit the display to employees who were active, hired or terminated on or after a certain date, type that date in this field.

Period Ending

To limit the display to employees who were active, hired or terminated on or before a certain date, type that date in this field.

Hire Source

To limit the display to employees with the same recruitment source, type the code value that identifies that source in this field. You define code values for this field using code type **HIR**. Leave this field blank to include employees regardless of their recruitment source.

Termination Code

To limit the terminated employees included in the display to those who were terminated for a particular reason, type the code value that identifies that reason in this field. You define code values for this field using code type **TRM**. Leave this field blank to include terminated employees regardless of their termination reason.

Status Group

To use employee status code values to include or exclude employees from the display, type a status group code value in this field. You define status group code values using code type **STG**. You assign one more status code values to each status group. The system uses the value in each employee's *Status* field in his or her basic data record to determine if he or she should be included or excluded from the display.

For example, you use code type **STS** to define status code values of **PT20**, **PT25** and **PT30** to represent part time work schedules of 20, 25 and 30 hours per week. You then use code type **STG** to define a status group code value of **PT** to collect all three code values together for displays and reports. You assign the three part time status codes to this group. Depending on how you use the status group code value **PT** in reports or displays, employees assigned to any of the three status code values can be easily included or excluded from reports and displays.

Include Rehires

Specify if you want to include historic termination data of employees who were previously terminated during the selected date range and who have since been rehired and are currently active employees.

Valid values are:

- 0** Do not include.
- 1** Include.

If you select **1** to include, the system does not count these employees as active employees during the period between being terminated and being rehired. The employees are counted as active during their employment period. They are also included in the list of terminated employees if the termination date is within the selected period.

Status Group Sel

If you entered a value in the *Status Group* field, use this field to indicate if the system should use the specified status group code value to include or exclude employees from the display.

Valid values are:

- 1** Include employees in the display if they are assigned to status code values associated with the specified status group.
- 2** Exclude employees from the display if they are assigned to status code values associated with the specified status group.

Inc Inactive Lvl

Indicate whether the system should include employees associated with inactive levels in the display.

Valid values are:

- 0** No, do not include employees associated with inactive levels.
- 1** Yes, include employees associated with inactive levels.

7 Press Enter. The system displays the screen shown in Figure 13-19.

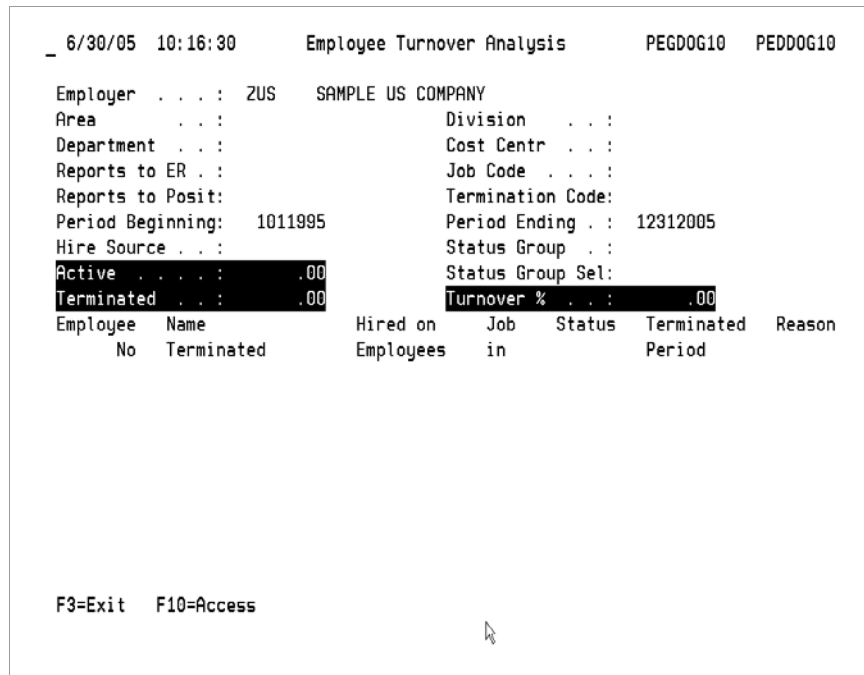


Figure 13-19: Employee Turnover Analysis screen

8 Use the following information to interpret the information on this screen:

Active

The system does the following to determine the average number of employees who were active during the specified period:

- Determines the number of employees active on each day within a specified date range specified in the *Period Beginning* and *Period Ending* fields, including the beginning and ending dates
- Calculates a total from the daily subtotal numbers of active employees
- Divides the total by the number of days within the specified date range, including the beginning and ending dates, to determine the mean average

The total number of days from the dates specified in the *Period Beginning* and *Period Ending* fields cannot exceed 9,999 days, which is equivalent to 27.4 years.

Terminated

Using selection criteria you entered on the Display Turnover Analysis prompt screen shown in Figure 13-19, the system displays the number of employees who terminated during the specified time period. The system displays the employee number, name, job code, status code, hire date, termination date

and termination reason code of the terminated employees in the bottom portion of the screen.

Turnover %

The system computes a value for this field by dividing the number of terminated employees (shown in the *Terminated* field) by the number of active employees (shown in the *Active* field) and then multiplies by 100.

- 9 Press Enter or F3 to exit from this screen. The system displays the screen shown in Figure 13-18. You can enter different selection criteria or press F3 to return to the Infinium HR main menu.
-

Printing Position Information

You can use eight different reports in Infinium HR to review position controls, employee position assignments and related information. The following table provides a brief synopsis of the information included on each report. Samples of each report are included at the end of this topic.

| List Function Name and Quick Access Code | Selection Criteria and Information Included in the Report |
|---|---|
| <i>List Open Positions</i> [LOP] | As of a specified date, you can select positions by job code or location code. By position, the system prints key information about positions whose authorized headcount, hours or FTE units exceed the current number of assigned employees, hours or FTE units. The report includes authorized budget levels for each position, current actual assigned employees, hours or FTE units and number of openings. |
| <i>List Current Positions</i> [LCP] | By organization ranking level and position code, the system prints information for positions whose most current budget period's ending date is blank or is after the as of date you specify. For positions with assigned employee(s), the report includes the name and number of the current incumbent(s). |
| <i>List Positions by Levels</i> [LPRL] | You can select by reporting level; the report sorts first by reporting level and then by position code. It lists information from the Update Organization screen for each position along with the number of assigned employees. It also lists the names of employees assigned to single positions and the occupational code associated with the position. |

| List Function Name and Quick Access Code | Selection Criteria and Information Included in the Report |
|---|--|
| <i>List Organization Structure</i> [LOS] | You can select by reports to position. The report is formatted as an organization chart with boxes and connecting lines sorted by organization ranking level, reports to employer, and reports to position. Each box includes position code and title, name and employee number of incumbent, authorized workforce level and current staffing level. The system prints a separate box for each employee. |
| <i>List Organization Chart</i> [LOC] | This report is similar to the report you generate using the <i>List Organization Structure</i> function except that the system prints only one box per position. For single positions, it prints the name of the incumbent. For multiple positions, the report indicates only the number of incumbents, not their names. |
| <i>List Positions with Salaries</i> [LPAS] | You can select positions by levels and you can sort the information by levels or position code. For each position, the system prints a line for each authorized headcount. The report includes the employee number and name of incumbents along with the employees' level 1 and 2 locations, base pay rate, annualized rate, ethnic, gender, class and salary range codes. |
| <i>List Turnover Analysis</i> [LTA] | You use the same selection criteria as for the <i>Display Turnover Analysis</i> function. This report sorts by levels; for each level, the system prints the number of active and terminated employees along with the turnover rate. |

| List Function Name and Quick Access Code | Selection Criteria and Information Included in the Report |
|--|---|
| <i>List Overstaffing Report</i> [OVR] | You can select positions by levels and position budget type. The report sorts by levels and then by position code. It includes only those positions whose actual staffing level exceeds the authorized level. The report prints the variance between authorized number of employees, FTE units or hours per position versus actual headcount, FTE units or hours. |

Follow these steps to access the reports listed in the preceding table:

- 1 From the Infinium HR main menu select *Master Files*.
- 2 Select *List Master Files*.
- 3 Select one of the reports listed in the preceding table. Enter the appropriate selection criteria.
- 4 Press Enter. The system generates the following message and returns you to the Infinium HR main menu:

Building submission request . . .

The system uses batch processing to generate the Position reports. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen. You can view or print the reports using options on these screens. Samples of each report listed in the preceding table begin on the following page.

6/30/05 14:01:37

EMPLOYER ZUS SAMPLE US COMPANY

SELECTIONS LEVEL 00 JOB LOCATION
 Lvl Position Position Title Type. Empl # Employee Name Job Location Training Group

| Lvl | Position | Position Title | Type. | Empl # | Employee Name | Job | Location | Training Group |
|-----|----------|-------------------------|-------|-----------|---------------------------|-------|----------|----------------|
| 00 | HRTST | SIG KC218 | M | MULTIPLE | FORCE | HRTST | ABAS | |
| | | | | 511 | KC218,KC10121040 | | | |
| 00 | 100100 | CHIEF OPERATING OFFICER | M | 000005616 | SPANISH,SAM | 100 | HQ | |
| | | | | MULTIPLE | FORCE | | | |
| | | | | 411 | CS153,CS05080928 | | | |
| | | | | 1147 | MEGABUCKS,MARVIN | | | |
| | | | | 3760 | LEADY,ROBYN | | | |
| 00 | 100140 | ACCOUNTING MANAGER | M | MULTIPLE | FORCE | 140 | HQ | MGMT |
| | | | | 2661 | BUNCH,HONEY | | | |
| | | | | 3104 | GRANSON,ELLEN | | | |
| | | | | 3106 | JONES,NELSON | | | |
| | | | | 3749 | MASS COPY ENROLL,MARGARET | | | |
| | | | | 4297 | ZEACCOUNTMANAGER,QATEST | | | |

EMPLOYER ZUS SAMPLE US COMPANY

| POSITION | TITLE | JOB CODE | LOCN | UNION | SEASON | FTE | UNITS | ASSIGNED | EMPLOYEE | REPORTS | CURRENT | # OF EMPLOYE |
|----------|--------------------------------|----------|------|-------|----------------------|-----------|-------|----------|----------|------------------|---------|--------------|
| 100400 | POSITION W/TRAINING GROUP | 300 | HQ | | | | .00 | MULTIPLE | | 100100 | | 6 |
| | Area | | 100 | | | | | | | | | |
| | Division | | | | LEVEL | 50 | | | | ENTRY LEVEL? | 0 | |
| | Department | | | | DATE | 1/01/2000 | | | | TYPE OF POSITION | M | |
| | Cost Centr | | | | SHIFT | | | | | ACTION CODE | | |
| | POSITION GROUP 1 | | | | POSITION GROUP 2 | | | | | LABOR CATEGORY | | |
| | WORKER'S COMP CODE | | | | BENEFIT GROUP | | | | | PY AUTH GROUP | | |
| | FTE HOURS | .00 | | | CURRENT ACTUAL HOURS | | 320.0 | | | BUDGET TYPE | 0 | |
| | STATISTICAL ACCOUNT | | | | | | | | | | | |
| | COMMENT | | | | | | | | | OCC CODE | | |
| | NAICS CODE | | | | | | | | | | | |
| KAF | FSE TEST-STEPINGRADE JOB ATTCH | KAF | ABAS | | | | .00 | MULTIPLE | | 100140 | | 2 |
| | Area | | 100 | | | | | | | | | |
| | Division | ADMIN | | | LEVEL | 70 | | | | ENTRY LEVEL? | 0 | |

EMPLOYER ZUS SAMPLE US COMPANY

| POSITION | TITLE | JOB CODE | LOCN | UNION | SEASON | FTE | UNITS | ASSIGNED | EMPLOYEE | REPORTS | CURRENT | # OF EMPLOYE |
|----------|----------------------------|----------|------|-------|----------------------|-----------|-------|----------|----------|------------------|---------------|--------------|
| 506400 | SALES PERSON - PUERTO RICO | 400 | PAC | | | | .00 | MULTIPLE | | 100140 | | 2 |
| | Area | | 500 | | | | | | | | | |
| | Division | SALES | | | LEVEL | 00 | | | | ENTRY LEVEL? | 0 | |
| | Department | SALES | | | DATE | 1/01/1990 | | | | TYPE OF POSITION | M | |
| | Cost Centr | 506 | | | SHIFT | | | | | ACTION CODE | | |
| | POSITION GROUP 1 | | | | POSITION GROUP 2 | | | | | LABOR CATEGORY | | |
| | WORKER'S COMP CODE | | | | BENEFIT GROUP | | | | | *BENSAL-B | PY AUTH GROUP | PR-SALARY |
| | FTE HOURS | .00 | | | CURRENT ACTUAL HOURS | | 210.0 | | | BUDGET TYPE | 0 | |
| | STATISTICAL ACCOUNT | | | | | | | | | | | |
| | COMMENT | | | | | | | | | OCC CODE | | |
| | NAICS CODE | | | | | | | | | | | |
| | TOTAL POSITIONS | | | 69 | TOTAL EMPLOYEES | | 289 | | | | | |

SAMPLE US COMPANY

* 00 101160 ZUS *
* * *
* ACCTS PAYABLE SUPERVISOR *

* 00 101540 MULTIPLE *
* O P E N *
* ACCTS PAYABLE CLERK *
* Auth.Workforce 15.00 *
* Act. Workforce 10.00 *
* Count today 10 *

* 00 101540 1461 *
* KANE,CANDY *
* ACCTS PAYABLE CLERK *
* Regular Hours 40.00 *
* * *
* 1 OF 10 *

* 00 101540 3150 *
* BIRD,SALLY *
* ACCTS PAYABLE CLERK *
* Regular Hours 5.00 *
* * *
* 5 OF 10 *

* 00 101540 80218 *
* SMITH,JACK R *
* ACCTS PAYABLE CLERK *
* Regular Hours 80.00 *

* 00 101540 2497 *
* POOL,GENE *
* ACCTS PAYABLE CLERK *
* Regular Hours 40.00 *
* * *
* 2 OF 10 *

* 00 101540 3600 *
* LAST,FIRST *
* ACCTS PAYABLE CLERK *
* Regular Hours 40.00 *
* * *
* 6 OF 10 *

* 00 101540 2498 *
* KNOTT,SHIRLEY *
* ACCTS PAYABLE CLERK *
* Regular Hours 40.00 *
* * *
* 3 OF 10 *

* 00 101540 3612 *
* SAMPLE-EXIT,SELMA *
* ACCTS PAYABLE CLERK *
* Regular Hours 40.00 *
* * *
* 7 OF 10 *

* 00 101540 2499 *
* WRENCH,ALLEN *
* ACCTS PAYABLE CLERK *
* Regular Hours 40.00 *
* * *
* 4 OF 10 *

* 00 101540 80109 *
* LEDGER,LINDA *
* ACCTS PAYABLE CLERK *
* Regular Hours 40.00 *
* * *
* 8 OF 10 *

STARTING FROM THE ACCTS PAYABLE SUPERVISOR

* 101160 MULTIPLE ZUS *
* ACCTS PAYABLE SUPE *
* MULTIPLE *
* Authorized 1.0 *
* Actual 2 *

***** END OF REPORT *****

□

2/28/96 18:56:32

EMPLOYER ZUS

SAMPLE US COMPANY

| POSITION | JOB | POSITION TITLE | LEVEL1 | LEVEL2 | EMPLOYEE# | EMPLOYEE NAME/INITIAL | BASE RATE | E S | | CLASS | RANGE | ANNUAL SAL |
|------------------------|-----|----------------------------|--------|------------------------|-----------|-----------------------|-------------|-----|---|-------|-------|------------|
| | | | | | | | | H | X | | | |
| 110140 | 140 | HUMAN RESOURCES MANAGER | 100 | ADMIN | 80038 | GREEN K | 47,160.0000 | 0 | F | | 100 | 47,160 |
| 111160 | 160 | COMP & BENEFITS SUPERVISOR | 100 | ADMIN | | OPEN | | | | | | |
| 111210 | 210 | COMP & BENEFITS ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 111210 | 210 | COMP & BENEFITS ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 111540 | 540 | COMP & BENEFITS CLERK | 100 | ADMIN | 80044 | ROAD S | 10.0000 | 0 | M | | 500 | 20,800 |
| 111540 | 540 | COMP & BENEFITS CLERK | 100 | ADMIN | 80182 | DUDE S | 10.0000 | 0 | M | | 500 | 20,800 |
| 112160 | 160 | RECRUITING SUPERVISOR | 100 | ADMIN | 80041 | WONDER W | 29,120.0000 | 3 | F | | 100 | 29,120 |
| 112210 | 210 | RECRUITER | 100 | ADMIN | 80103 | BEACH S | 31,200.0000 | 0 | F | | 200 | 31,200 |
| 112210 | 210 | RECRUITER | 100 | ADMIN | 80110 | TURNER P | 35,000.0000 | 4 | F | STAFF | 200 | 35,000 |
| 112210 | 210 | RECRUITER | 100 | ADMIN | 80116 | CLUELESS C | 31,200.0000 | 0 | M | | 200 | 31,200 |
| 112210 | 210 | RECRUITER | 100 | ADMIN | 80154 | GLAMOUR G | 50,000.0000 | 1 | F | | 200 | 50,000 |
| 112210 | 210 | RECRUITER | 100 | ADMIN | | OPEN | | | | | | |
| 112540 | 540 | RECRUITING CLERK | 100 | ADMIN | | OPEN | | | | | | |
| 112540 | 540 | RECRUITING CLERK | 100 | ADMIN | | OPEN | | | | | | |
| 113160 | 160 | EMPL RELATIONS SUPERVISOR | 100 | ADMIN | | OPEN | | | | | | |
| 113210 | 210 | EMPL RELATIONS ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 113210 | 210 | EMPL RELATIONS ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 113210 | 210 | EMPL RELATIONS ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 113210 | 210 | EMPL RELATIONS ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 113210 | 210 | EMPL RELATIONS ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 113540 | 540 | EMPL RELATIONS CLERK | 100 | ADMIN | | OPEN | | | | | | |
| 113540 | 540 | EMPL RELATIONS CLERK | 100 | ADMIN | | OPEN | | | | | | |
| 113540 | 540 | EMPL RELATIONS CLERK | 100 | ADMIN | | OPEN | | | | | | |
| 114160 | 160 | SAFETY & HEALTH SUPERVISOR | 100 | ADMIN | 30015 | COLLINS T | 50,000.0000 | 0 | M | | 100 | 50,000 |
| 114210 | 210 | SAFETY & HEALTH ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 114210 | 210 | SAFETY & HEALTH ANALYST | 100 | ADMIN | | OPEN | | | | | | |
| 114220 | 220 | SAFETY ENGINEER | 100 | ADMIN | | OPEN | | | | | | |
| 114220 | 220 | SAFETY ENGINEER | 100 | ADMIN | | OPEN | | | | | | |
| 114220 | 220 | SAFETY ENGINEER | 100 | ADMIN | | OPEN | | | | | | |
| 114300 | 300 | SAFETY & HEALTH TECHNICIAN | 100 | ADMIN | | OPEN | | | | | | |
| 114300 | 300 | SAFETY & HEALTH TECHNICIAN | 100 | ADMIN | | OPEN | | | | | | |
| 114300 | 300 | SAFETY & HEALTH TECHNICIAN | 100 | ADMIN | | OPEN | | | | | | |
| 114300 | 300 | SAFETY & HEALTH TECHNICIAN | 100 | ADMIN | | OPEN | | | | | | |
| 114300 | 300 | SAFETY & HEALTH TECHNICIAN | 100 | ADMIN | | OPEN | | | | | | |
| 114540 | 540 | SAFETY & HEALTH CLERK | 100 | ADMIN | | OPEN | | | | | | |
| 114540 | 540 | SAFETY & HEALTH CLERK | 100 | ADMIN | | OPEN | | | | | | |
| 114540 | 540 | SAFETY & HEALTH CLERK | 100 | ADMIN | | OPEN | | | | | | |
| TOTAL NO. OF POSITIONS | | | 38 | TOTAL NO. OF VACANCIES | | | 27 | | | | | |

□

```

PEGPOG10  PETPOG10          EMPLOYEE TURNOVER ANALYSIS
6/30/05
EMPLOYER    ZUS    SAMPLE US COMPANY
PERIOD BEGINNING    1/01/2005          HIRE SOURCE          STATUS GROUP
PERIOD ENDING      12/31/2005        REPORTS TO POSITION    STATUS GROUP SELECTION
REPORTS TO EMPLOYER
TERMINATION CODE    JOB CODE
ACTIVE              TERMINATED          TERMINATED EMPLOYEE
Area  Division  Department Cost Centr EMPLOYEES  EMPLOYEES  TURNOVER %  NUMBER & NAME  DATE  TER
-----
100    ADMIN    ACCT      100          34.00      .00        .00
100    ADMIN    ACCT      101          26.00      .00        .00
100    ADMIN    ACCT      102          12.00      .00        .00
100    ADMIN    ACCT      103           6.00      .00        .00
100    ADMIN    ACCT      104           6.00      .00        .00
100    ADMIN    ACCT          86.00      .00        .00
100    ADMIN    HR        110           8.00      .00        .00
100    ADMIN    HR        111          18.00      .00        .00
100    ADMIN    HR        112          10.00      .00        .00
***** E N D   O F   R E P O R T *****

```

□

2/28/96

EMPLOYER . . . : ZUS

SAMPLE US COMPANY

FORCE LEVEL AS OF 1/01/1996

| POSITION | POSITION TITLE | JOB | JOB DESCRIPTION | BUDGET TYPE | FORCE LEVEL AS OF 1/01/1996 | | | AUTHORIZED | VARIANCE |
|----------|--------------------------|-----------------|-----------------|---------------------|-----------------------------|------|-------|------------|----------|
| | | | | | EMPLOYEES | FTES | HOURS | | |
| Area 100 | Division ADMIN | Department ACCT | Cost Centr 100 | DESCRIPTION | | | | | |
| | | | | ACCOUNTING ADMIN. | | | | | |
| ----- | | | | | | | | | |
| | | | | Cost Centr TOTALS: | 0 | .00 | .0 | .00 | .00 |
| Area 100 | Division ADMIN | Department ACCT | Cost Centr 101 | DESCRIPTION | | | | | |
| | | | | ACCOUNTS PAYABLE | | | | | |
| ----- | | | | | | | | | |
| 101200 | ACCTS PAYABLE ACCOUNTANT | | 200 | ACCOUNTANT | 0 | 3 | .00 | 240.0 | 2.00 |
| | | | | Cost Centr TOTALS: | | 3 | .00 | 240.0 | 2.00 |
| | | | | | | | | | 1.00- |
| Area 100 | Division ADMIN | Department ACCT | Cost Centr 102 | DESCRIPTION | | | | | |
| | | | | ACCOUNTS RECEIVABLE | | | | | |
| ----- | | | | | | | | | |
| 102540 | ACCTS RECEIVABLE CLERK | | 540 | GENERAL CLERK | 0 | 6 | .00 | 400.0 | 5.00 |
| | | | | Cost Centr TOTALS: | | 6 | .00 | 400.0 | 5.00 |
| | | | | | | | | | 1.00- |
| Area 100 | Division ADMIN | Department ACCT | Cost Centr 103 | DESCRIPTION | | | | | |
| | | | | GENERAL LEDGER | | | | | |
| ----- | | | | | | | | | |
| | | | | Cost Centr TOTALS: | 0 | | .00 | .0 | .00 |
| Area 100 | Division ADMIN | Department ACCT | Cost Centr 104 | DESCRIPTION | | | | | |
| | | | | PAYROLL | | | | | |
| ----- | | | | | | | | | |
| | | | | Cost Centr TOTALS: | 0 | | .00 | .0 | .00 |
| | | | | Department TOTALS: | 9 | | .00 | 640.0 | 7.00 |
| | | | | | | | | | 2.00- |

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Summary of Position Displays and Reports

In summary, you have become familiar with the following about displaying and printing position information:

- How to display open positions
 - How to display current positions
 - How to display organization information
 - How to display workforce levels
 - How to display turnover information
 - How to print position information
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